

# Assessing select Bangladeshi Economic Sectors for potential EU-Bangladesh Talent Partnership

**Final Report**

**May 2024**

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Funded by the  
European Union

## ABOUT

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This study analyses the demand and supply side situation of relevant vocational occupations in terms of quantity and quality and the policy and regulatory regime underpinning the governance and management of the migration process in Bangladesh. This study also identifies and analyses data gaps, draws attention to areas where further research may be required, and suggests pathways for forging a sustainable partnership between participating states for a managed migration cycle.

The Migration Partnership Facility (MPF) is an EU-funded initiative supporting the external dimension of EU migration policy. The MPF aims to strengthen dialogue and cooperation on migration and mobility between Member States and priority partner countries outside the EU. The project is implemented by the International Centre for Migration Policy Development (ICMPD).

<https://mobilitypartnershipfacility.eu/>

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Commissioned by the Migration Partnership Facility.

This publication was funded by the European Union. Its contents are the sole responsibility of the authors and do not necessarily reflect the views of the European Union nor ICMPD.

MPF (2024). Assessing select Bangladeshi Economic Sectors for potential EU-Bangladesh Talent Partnership. Brussels: ICMPD.

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# ABBREVIATIONS AND ACRONYMS

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<b>ADB</b>	Asian Development Bank
<b>AG</b>	Assessment Guide
<b>AI</b>	Artificial Intelligence
<b>ASEAN</b>	Association of Southeast Asian Nations
<b>BACI</b>	Bangladesh Association of Construction Industry
<b>BAIRA</b>	Bangladesh Association of International Recruiting Agents
<b>BANBEIS</b>	Bangladesh Bureau of Educational Information and Statistics
<b>BBS</b>	Bangladesh Bureau of Statistics
<b>BCSM</b>	Bangladesh Civil Society for Migrants
<b>BIDS</b>	Bangladesh Institute of Development Studies
<b>BMET</b>	Bureau of Manpower, Employment, and Training
<b>BNQF</b>	Bangladesh National Quality Framework
<b>BOESL</b>	Bangladesh Overseas Employment and Services Limited
<b>BRAC</b>	Bangladesh Rural Advancement Committee
<b>CEDEFOP</b>	European Centre for Development of Vocational Training
<b>CMR</b>	Central Mediterranean Route
<b>CMW</b>	International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families
<b>CoC</b>	Code of Conduct
<b>COVID-19</b>	Coronavirus disease 2019
<b>CS</b>	Competency Standard
<b>CSO</b>	Civil Society Organisation
<b>DEMO</b>	District Employment and Manpower Office
<b>DG HOME</b>	Directorate-General for Migration and Home Affairs of the European Commission
<b>EBA</b>	Everything But Arms
<b>EC</b>	European Commission
<b>EMR</b>	Eastern Mediterranean Route
<b>EPS</b>	Employment Permit System

<b>EU</b>	European Union
<b>EUD</b>	European Union Delegation
<b>Eurofound</b>	European Foundation for the Improvement of Living and Working Condition
<b>EWOEP</b>	Expatriate Welfare and Overseas Employment Policy
<b>Frontex</b>	European Agency for the Management of Operational Cooperation at the External Borders
<b>GCM</b>	Global Compact for Migration
<b>GDP</b>	Gross Domestic Product
<b>GFMD</b>	Global Forum for Migration and Development
<b>GoB</b>	Government of Bangladesh
<b>G2G</b>	Government to Government
<b>HSC</b>	Higher Secondary Certificate
<b>ICMPD</b>	International Centre for Migration Policy and Development
<b>ICT</b>	Information and Communications Technology
<b>ILO</b>	International Labour Organization
<b>IM Japan</b>	International Manpower Development Organisation of Japan
<b>INGO</b>	International Non-Governmental Organisation
<b>IOM</b>	International Organization for Migration
<b>ISC</b>	Industry Skills Council
<b>ISSC</b>	International Standard Skills Code
<b>JRC</b>	Joint Research Centre
<b>KI</b>	Key Informant
<b>KII</b>	Key Informant Interview
<b>LDC</b>	Least Developed Country
<b>LFT</b>	Labour Forecasting Tool
<b>LMIS</b>	Labour Market Information System
<b>MIP</b>	Multi-Annual Indicative Programme
<b>MoE</b>	Ministry of Education
<b>MoEWOE</b>	Ministry of Expatriates Welfare and Overseas Employment
<b>MoF</b>	Ministry of Finance
<b>MoLE</b>	Ministry of Labour and Employment
<b>MoU</b>	Memorandum of Understanding

<b>MPF</b>	Migration Partnership Facility
<b>MRC</b>	Migration Resource Centre
<b>MRA</b>	Mutual Recognition Agreement
<b>MS</b>	Member State
<b>NAP</b>	National Action Plan
<b>NEP</b>	National Education Policy
<b>NGO</b>	Non-Governmental Organisation
<b>NSDA</b>	National Skills Development Authority
<b>NSDP</b>	National Skills Development Policy
<b>NTVQF</b>	National Training and Vocational Qualifications Framework
<b>OECD</b>	Organisation for Economic Cooperation and Development
<b>OEMA</b>	Overseas Employment and Migrants Act
<b>PKB</b>	Probashi Kalyan Bank
<b>PSHTA</b>	Prevention and Suppression of Human Trafficking Act
<b>RAISE</b>	Recovery and Advancement of Informal Sector Employment
<b>RMG</b>	Ready-Made Garment
<b>RPL</b>	Recognition of Prior Learning
<b>SAARC</b>	South Asian Association for Regional Cooperation
<b>SDG</b>	Sustainable Development Goal
<b>SEIP</b>	Skills for Employment Investment Programme
<b>SOP</b>	Standard Operating Procedure
<b>SSC</b>	Secondary School Certificate
<b>THB</b>	Trafficking in Human Beings
<b>ToR</b>	Terms of Reference
<b>ToT</b>	Training of Trainers
<b>TP</b>	Talent Partnership
<b>TPC</b>	Talent Partnership Cell
<b>TTC</b>	Technical Training Centre
<b>TVET</b>	Technical Vocational Education and Training
<b>UK</b>	United Kingdom



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<b>UN</b>	United Nations
<b>UNDESA</b>	United Nations Department of Economic and Social Affairs
<b>UN Women</b>	United Nations Entity for Gender Equality and the Empowerment of Women
<b>US</b>	United States
<b>WTO</b>	World Trade Organization
<b>WEWB</b>	Wage Earners' Welfare Board

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# EXECUTIVE SUMMARY

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The Migration Partnership Facility (MPF) is implemented by the International Centre for Migration Policy and Development (ICMPD) through funding from the Directorate-General for Migration and Home Affairs (DG HOME) of the European Commission (EC). Since 2016, the MPF has supported the external dimension of EU migration policy through dialogue and cooperation initiatives on migration and mobility between European Union Member States (EU MSs) and priority partner countries from outside of the EU. In the Pact on Migration and Asylum, the EC stated that it would launch a Talent Partnership (TP) in the form of enhanced commitment to support legal migration and mobility with key partners. The present comprehensive background study on Bangladesh, commissioned by the MPF, explores potential avenues for labour mobility and migration pathways between the EU and Bangladesh in the context of the EU Talent Partnership framework.

The Government of Bangladesh (GoB) and the EU have expressed interest in initiating a TP to increase international labour mobility through regular and documented pathways, and achieve talent development in a mutually beneficial way, agreeing to intensify preparations to this end. The EU Talent Partnerships framework offers a tool that can be well adapted and aligned to the specificities of the skills demand and supply capacity of the target labour markets, and TP success will depend on the effectiveness of the cooperation between EU MSs and partner countries.

The present study “Assessing select Bangladeshi Economic Sectors for potential EU-Bangladesh Talent Partnership” report document has **two main focuses**: the **demand and supply side situation** of relevant vocational occupations in terms of quantity and quality; and the **policy and regulatory regime** underpinning the governance and management of the migration process in Bangladesh. This study also identifies and analyses data gaps (and highlights interventions to redress these gaps), draws attention to areas where further research may be required, and suggests pathways for forging a sustainable partnership between participating states for a managed migration cycle.

The **Introduction** of this report document describes the **background and purpose** of the report, explains the **methodological approach** followed, and touches upon the **limitations** of the study.

**Chapter 1 elaborates the country context of Bangladesh** as a prospective partner country for the EU Talent Partnership, in terms of economy, education, employment, governance, and migration practices. Migration flows and various other dimensions and **areas of interaction and cooperation** are then treated, focusing on cooperation in areas of economy, trade, politics, governance, and development between Bangladesh and the EU and its Member States (MSs). This chapter’s major finding is that there exists a *prevailing perception among the stakeholders interviewed that a legal pathway to the EU from Bangladesh for migrant workers is likely to reduce undocumented and irregular migration.*

**An overview of the major national laws, policies, and targets guiding migration activities in Bangladesh is provided in Chapter 2** on migration governance. This chapter also elaborates the **roles and responsibilities of the key stakeholders** (government, private sector, development partners, civil society organisations (CSOs), and non-governmental organisations (NGOs)) involved in the migration management process (and

its improvement) in Bangladesh. The **historical ties between Bangladesh and the EU and its MSs, and the agreements for cooperation and support** are also covered. This chapter highlights that *Bangladesh has thus far ratified two major international migration-related conventions, and that as a signatory of Global Compact for Migration (GCM) has in recent years shown strong commitment to promoting decent work and fair migration.*

**Chapter 3 treats the demand side of key occupational sectors**, in the present and future contexts, based on information provided by country fiches developed by the Bureau of Manpower, Employment, and Training (BMET) of Bangladesh; views expressed by the EU MS representatives interviewed for this study; and data published by EU-based organisations.

**Chapter 4 focuses on the supply side of skills supply, education system, technical vocational education and training (TVET) institutions, and quality parameters** of TVET education. **Quantitative information on the TVET landscape in Bangladesh**, reflecting a significant number of TVET institutions and including enrolment rates, are presented in this chapter. This data appears alongside **qualitative information on the Bangladesh National Quality Framework (BNQF)**, a scheme for recognition of prior learning in jobs, and an outline of the challenges related to language training, skills certification, recognition and accreditation. **Challenges and opportunities** in this regard, such as required improvement of vocational education and potential institutional partnerships in collaboration with EU counterparts in various areas (curricula development and harmonisation, joint certification programmes, etc.), are also treated.

**Chapter 5 provides sector-specific briefings on the occupational demand and supply sides** of select sectors, namely, **Information and Communications Technology (ICT), caregiving, and construction** – sectors which are expected to experience steady growth through 2031 and beyond, and which in the EU context exhibit significant skills gaps and a shortage of workers. The number of vacancies and growth forecast for these occupational areas in the EU context is highlighted. Four other sectors, **hospitality and food preparation, transport and logistics, electro-mechanical installation, repair and maintenance**, are also briefly treated (as suggestions for the medium to long term). This chapter portrays *the significant supply capacity of Bangladesh in terms of numbers*. Areas of further research and investment which may be conducive to TP success are also treated.

**Chapter 6 puts forward multiple recommendations**, i.e. (i) **Initiate a systematic collection of labour market information** on skills demand and job vacancies in the EU MSs and **engage the Labour Wings** of Bangladeshi missions in target states for periodical collection of such data; (ii) **Forge institutional partnerships** between Bangladeshi and EU institutions in the areas of curricula development and harmonisation, conducting Trainings of Trainers (ToTs), and joint assessment and certification for skills training leading to mutual recognition agreements (MRAs); (iii) **Carry out further research on skills demand and supply** at the specific occupational level, based on the 4-digit International Standard Skills Code (ISSC-04); (iv) **Pilot a ‘Government to Government (G2G) Plus System’** for managing the migration of workers from Bangladesh to Europe; (iv) **Introduce a separate Talent Partnership Cell (TPC)** within the BMET for managing migration to the EU, once the TP initiative is in place; and (v) **Rationalise the cost of migration** from Bangladesh, with illustrative examples from the public sector recruitment agency. This chapter also outlines steps toward forming a special unit or cell for overseeing and managing the dispersal of migrant workers, and identifies stakeholders for potential partnerships and collaboration with EU counterparts.

The present study “Assessing select Bangladeshi Economic Sectors for potential EU-Bangladesh Talent Partnership” ends with the **Conclusion**, which highlights that *Bangladesh is ideally situated for engagement in the EU Talent Partnership initiative*, owing to the state’s ability to provide skills in various occupations of key relevance to the EU market (ICT; construction; food preparation; electro-mechanical installation, repair and maintenance; caregiving professions), with minimal intervention, given the education and vocational system, language training capacity, and recruitment structures in place.





# INTRODUCTION

The European Commission has issued a set of 'Skills and Talent' proposals to address current demographic and migration challenges in the EU and prepare for future needs. These proposals form part of the EU comprehensive approach under the Pact on Migration and Asylum. An ambitious and sustainable EU legal migration policy will help to attract the talent which EU MS economies require, and provide safe channels for migration to Europe, supporting the EU's green and digital transformation and promoting more cohesive and resilient European societies.

During the past decade, migrant workers have played a significant role in filling jobs in the EU, helping to alleviate labour market shortages. Such shortages put pressure on the labour market, undermining competitiveness, and economic growth. With the Pact and the subsequent Communication on Attracting Skills and Talent to the EU, the EC launched the Talent Partnerships initiative. These TPs aim to provide enhanced legal migration pathways to the EU, while facilitating close cooperation with partner countries on migration management.

*[...] Talent Partnerships should combine direct support for mobility schemes for work or training with capacity building and investment in human capital, including skills development, vocational education and training and operationalisation of work-based exchange schemes. In doing so, they aim to ensure an equal win for partner countries, Member States, business communities on both sides and individuals benefitting from the partnerships. In line with the EU bilateral cooperation with partner countries, they should benefit the economic development of communities of origin, advance key partner countries' broader development goals and strengthen opportunities for their citizens.*

*At the same time, they should help address shortages in certain sectors of Member States' labour markets and help the business community on both sides to build the skills in demand. They should transform the risk of brain drain from partner countries into brain gain for all partners, benefiting those involved as they access renewed training opportunities, professional experiences and additional study or vocational education and training developed either in the EU or in their countries of origin.*

*Talent Partnerships will be open to all skill levels and could concern various economic sectors such as ICT, science, engineering, health and long-term care, agriculture, transport, horticulture, food processing and tourism, construction and harbour work, transport, and logistics, depending on the interests of both sides that are shaping the Talent Partnerships whilst remaining mindful of the risks of brain drain. They will provide for various types of mobility: temporary, long-term or circular in nature, as agreed by both sides. [...]*

*-- Communication from the Commission on Attracting skills and talent to the EU, 27 April 2022*

The Talent Partnerships aim to **combine direct support for mobility schemes for work or training with capacity building and investment** in human capital, including skills development, vocational education and training, and operationalisation of work-based exchange schemes. The aim of these actions is to ensure a proportionate win for partner countries, EU MSs, business communities on both sides, and those individuals who benefit from the partnerships. In line with bilateral cooperation between the EU and partner countries,

TP initiatives should benefit the economic development of communities of origin and advance key partner countries' broader development goals, while providing increased opportunities for citizens of these countries.<sup>1</sup> The TPs should also help to **address labour shortages in specific sectors of EU MS economies** and help the business communities on both sides to build capacity on the skills in demand. They should transform the risk of 'brain drain' from partner countries into 'brain gain' for all partners, with those involved accessing renewed training opportunities, professional experiences, and additional study or vocational education and training, developed either in the EU or the countries of origin.<sup>2</sup>

Talent Partnerships will be **open to workers of all skill levels** and encompass various economic sectors, such as ICT, science, engineering, health and long-term care,<sup>3</sup> agriculture, transport, horticulture, food processing, tourism, construction and harbour work, transport, and logistics – according to the interests of both sides of the TP, while remaining mindful of the potential risk of brain drain. TPs will provide for various types of mobility: temporary, long-term or circular in nature, as agreed by the respective TP parties.

Talent Partnerships are to be conceptualised and operationalised based on an **exchange of views among EU MSs and high-level dialogues with partner countries**. Bangladesh and the EU held their first Political Dialogue on 24 November 2022, in the Bangladeshi capital, Dhaka. During this dialogue, the two parties agreed to expand the EU-Bangladesh bilateral engagement beyond the current priority areas of trade, migration, governance, humanitarian action, and development cooperation.

The success of a Talent Partnership initiative between Bangladesh and the EU necessitates the **matching of real labour market needs and skills** on both sides. This requires identification of priority occupational sectors and sub-sectors (in the EU) and their respective supply capacities, i.e. recruiters, professional associations, TVET and learning institutions, etc. (in Bangladesh), for potential cooperation with the EU MS counterparts, as well as mapping of the key actors for potential engagement.

The present study thus examined, in the Bangladeshi context, prevailing and potential opportunities, gaps, and challenges in this regard, with the help of a team of research experts whom have worked with ICMPD to carry out the study, identifying the supply capacity of Bangladesh in specific skills, sectors and trades which are in demand in EU MSs, and assessing the potential for potential partnerships at the state and institutional levels. The study also analyses the gaps which exist in this regard, highlights interventions to redress these gaps, recommends areas where further research may be required, and suggests pathways for forging a sustainable partnership between participating states for a managed migration cycle. The findings offer insight on areas to further explore, during a technical roundtable of relevant EU and Bangladeshi stakeholders.

1 These schemes will need to take account of international obligations stemming from EU trade agreements.

2 There could be cases of Talent Partnerships without a mobility component, or conversely with only a mobility component, if this is agreed by both the EU and partner country.

3 In full compliance with Article 5.1 of the *WHO Code of Practice on International Recruitment of Health Personnel*; World Health Organization, WHO Code of Practice on International Recruitment of Health Personnel, Sixty-third World Health Assembly - WHA63.16, 2010. Available at: [https://cdn.who.int/media/docs/default-source/health-workforce/migration-code/code\\_en.pdf](https://cdn.who.int/media/docs/default-source/health-workforce/migration-code/code_en.pdf).

# METHODOLOGY

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The present study “Assessing select Bangladeshi Economic Sectors for potential EU-Bangladesh Talent Partnership” was produced using qualitative methodology that included a literature and document review, key informant interviews (KIIs) with select stakeholders in the migration and skills development area, locally and in the EU, and analysis and reporting of the findings.

The consultant team conducted a desk review to identify and understand the current scenario and trends, prospects, and opportunities regarding talent partnership between Bangladesh and the EU. To do so, the team gathered relevant documents and literature from national and international sources. These documents comprise research documents, policies, strategies, action plans, and secondary data on recent global and regional initiatives and commitments related to migration and skills development, including data from the [Labour Mobility Partner Country Dashboard](#) and Partner Country Factsheets, developed by the MPF with funding from DG HOME.

The consultants followed a systematic process of literature review, which included selecting topics based on the Terms of Reference (ToR), generating a primary level of understanding concerning the issues, forming an outline based on the documents and the ToR, and conducting a comprehensive review of selected literature and documents. After thorough review, the consultants evaluated the documents, analysed their essence, and drafted the report.

Interviews were conducted with selected stakeholders in the migration and skills development areas. Key informants (KIs) were selected from the government/public sector, private sector, development partners, United Nations (UN) agencies, CSOs/NGOs, international non-governmental organisations (INGOs), and diaspora organisations; more specifically, the Office of the Delegation of the European Union to Bangladesh (EUD) and embassies of five EU MSs in Bangladesh were covered by the KIIs. Some KIIs were also selected from the informal sector, to understand current practices in this area. **The list of the 37 organisations which completed KIIs is provided as Annex I attached to this report document.**

Relevant tools and instruments were developed by the consultants to conduct the KIIs. Preliminary findings from analysis of the secondary literature, and the scope of the assignment stipulated in the ToR of the study, informed the development of guidelines, containing three separate sections, each targeting a specific group of respondents (policymakers; training providers; curriculum development bodies), with some core questions common to each. **The KII instrument is provided in Annex II attached to this report document.**

The KII instrument comprised three separate sections. The first section primarily focused on the respondents from government regulatory and policy-making bodies and development partners. The second section focused on those representing training institutions and private sector employers’ bodies. The third section focused on the representatives from EU MSs. The respondents were broadly grouped based on their roles in migration governance and skills development. The interviews were carried out through a combination of physical and online meetings, and in some cases, written responses were received.

# LIMITATIONS OF THE STUDY

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Only aggregate data on skills from both the demand and supply sides were available. Occupational level data was not available, and thus the supply side strength of Bangladesh for specific skills demand in EU MSs could not be assessed.

The respective levels of interest among individual EU MSs in sourcing migrant workers from Bangladesh could not be accurately gauged, due to a lack of prior assessment of these levels. Those EU MS representatives interviewed for the present report document indicated that there has been general interest and favourable impression in their respective states regarding Bangladeshi migrant workers, but that they were not yet in a position to provide assurances concerning labour mobility from Bangladesh.

The respondents unanimously expressed the opinion that opening up legal pathways under the Talent Partnership initiative would likely reduce undocumented or irregular migration to a substantial degree. However, in the absence of any existing bilateral arrangements for exchange programmes, or any other labour mobility schemes with Bangladesh, such a potential reduction in irregular migration remains, at this point in time, only an assumption.

The scope of the study as stipulated in the ToR and the time allocated did not offer sufficient opportunity to carry out assessment of the capacity building needs of the respective government agencies responsible for migration management in Bangladesh.



# CHAPTER 1: ECONOMIC, GOVERNANCE, AND MIGRATION CONTEXT OF BANGLADESH VIS-À-VIS THE EU

## 1.1 SUMMARY OF NATIONAL POLICY OBJECTIVES ON SKILLS, EMPLOYMENT, AND EDUCATION

Bangladesh's current (eighth) **Five-Year Plan (2021-2025)** sets out targets to create a total of 11.33 million new jobs – 3.25 million overseas jobs, and 8.08 million domestic jobs, and stipulates that at least 50% of outgoing migrant workers receive skills training prior to migration. The Plan also sets a target gross domestic product (GDP) growth rate of over 8%, but a rate of employment generation of only 3.32%. If Bangladesh is to achieve the Sustainable Development Goal (SDG) on decent employment for all by 2030, an additional 1.84 million people will need to be employed within the country each year, alongside another 0.5 million outside of the country<sup>4</sup>. According to a 2019 report published by the Bangladesh Bank, 62% of Bangladeshi expatriates working were unskilled, 36% were semi-skilled, and only 2% were skilled.<sup>5</sup>

**The 2010 National Education Policy (NEP)** sets out ensuring quality education for all children in Bangladesh as a fundamental issue for national development. One of the stated objectives of the NEP is to ensure a high standard of skills in different areas and at different levels of education, so that learners can successfully compete globally. Apart from 100% coverage of free primary education (up to grade 8) by 2018, the NEP proposed free education for females up to Bachelor's level.

A minimum of grade 8 education is required to enroll in the TVET stream of the Bangladeshi education system. Upon completion of grade 8, students are eligible to pursue a vocational training programme of up to six months in duration, qualifying for acquiring the National Standard of Skills Level 1 certificate (preparing learners of any age to become basic-skilled workers). Graduates from this level possess basic competencies geared toward entry-level work, and/or further learning. By completing grade 9, grade 10, and grade 11 in vocational and technical education, pupils can attain, respectively, the National Standard of Skills certificates at Level 2, Level 3, and Level 4.<sup>6</sup> Quality tertiary education will focus on employability and producing globally competent human capital.

4 Page 254 of the 8th 5-year Plan, Bangladesh

5 Bangladesh Bank, *A Survey Report on Loans for Expatriates- Its Uses and Impact*, Special Research Work 1902, Research Department, 2019, p. 2. Available at: [https://www.bb.org.bd/pub/research/sp\\_research\\_work/srw1902.pdf](https://www.bb.org.bd/pub/research/sp_research_work/srw1902.pdf).

6 Levels 2 to 4 recognise increasing levels of competencies for skilled workers:

- NSC Level 2 prepares learners to work as semi-skilled workers. Graduates of this level will have the necessary competencies to perform primarily routine work and use this level as a pathway to further learning.
- NSC Level 3 prepares learners to work as skilled workers.
- NSC Level 4 prepares learners to work as highly skilled workers and to acquire further learning. The graduates at this level will have a broad range of competencies for specialised skills and full craftsmanship/ workmanship, and use this level as a pathway for further learning.

**The 2015 National Skills Development Policy (NSDP)**, and **the 2020 draft NSDP**, aim to achieve employability and competitiveness in the national and international labour markets. This is to be achieved by establishing demand-driven, flexible, and responsive skills training systems, with provisions for quality accreditation, and MRAs.

## 1.2 MILESTONES IN EDUCATION, TVET REFORM, AND SKILLS DEVELOPMENT

Since 2008-2009, Bangladesh has been successfully executing a substantial expansion of its skills ecosystem, with major milestones reached in this regard, including:

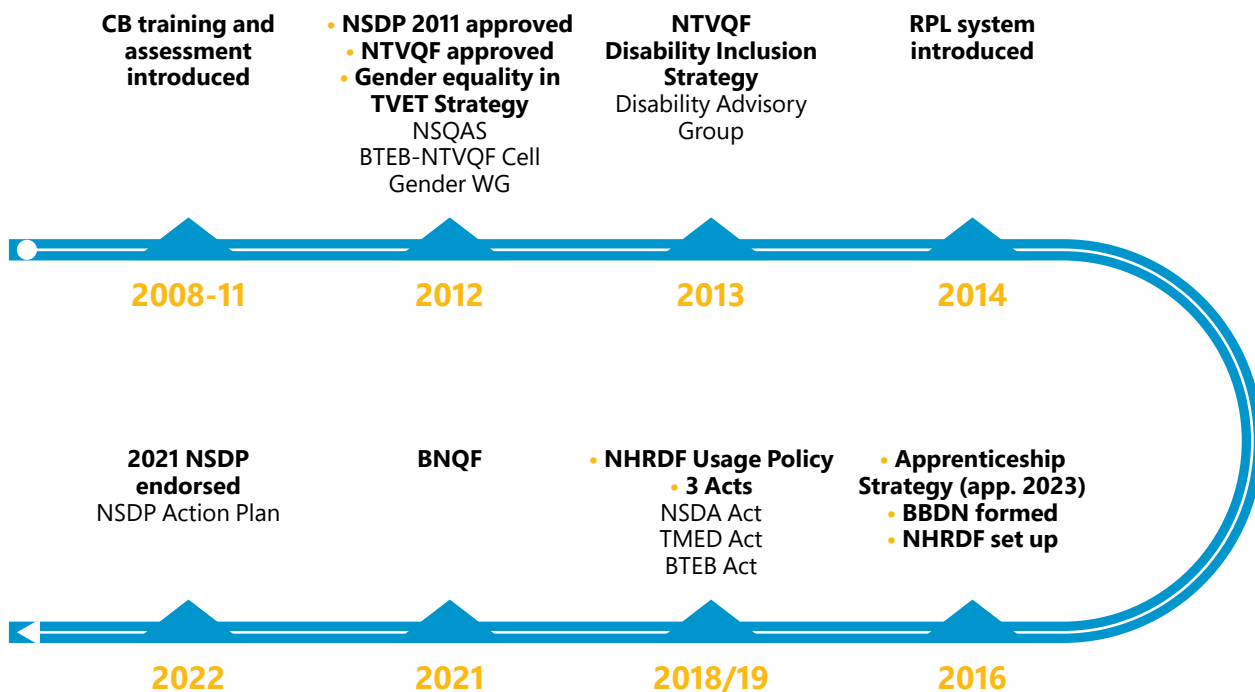
- Expansion of TVET and skills-based programmes and a shift toward a competency focused and more inclusive skills development system.
- Development and publication of the 2011 *NSDP* and endorsement of the new NSDP in 2022, and the *TVET Action Plan* supporting implementation.
- Launch of the National Training and Vocational Qualifications Framework (NTVQF), and development of the National Skills Quality Assurance System and system for registration of training organisations to run NTVQF courses, to improve the quality framework for technical and vocational training.
- The setting up of a Recognition of Prior Learning (RPL) system, boosting access to continuous learning for workers without formal qualifications.
- Increased student enrolment rate in formal TVET streams,<sup>7</sup> from 1% in 2009 to 15% in 2018 (with a target of 30% by 2030, and 41% by 2041). This represents a total projected increase of 50%, with a particular focus on achieving a 60% increase in enrolment of women, according to the Technical and Madrasah Education Division of the Ministry of Education (MoE).
- The 2022 National Skills Development Authority (NSDA) *Action Plan* projects that the most frequently offered training will be in the following sectors: ICT (20% of the total trainings offered), agriculture (18%), livestock (6%), fisheries (6%), food processing (14%), construction (9%), light engineering (9%); while training in ready-made garments (RMGs), leather, and tourism will remain rather low (accounting for 2% each).
- Establishment and incorporation of 13 Industry Skills Councils (ISCs), to establish much-needed linkages between industry demand and Technical Training Centre (TTC) supply, and to oversee the standards of curricula and delivery. ISCs have been established for: agro-food, leather, light engineering, construction, RMGs, transport, ICT, tourism and hospitality, furniture, ceramics, pharmaceuticals, the informal sector and creative media.<sup>8</sup>

7 Aziz, S. A., 'Reframing Governance for Improving Quality of Technical Vocational Education and Training (TVET) in Bangladesh', *TVET@Asia*, No. 20, 31 January 2023. Available at: <https://tvet-online.asia/20/reframing-governance-for-improving-quality-of-technical-vocational-education-and-training-tvet-in-bangladesh>.

8 More details on ISCs can be found on the NSDA website: [NSDA.gov.bd](https://www.nsda.gov.bd).

Milestones reached by Bangladesh in the expansion of its skills ecosystem are depicted in Figure 1 below.

**Figure 1: Milestones in the TVET reform process, 2008-2022**



Source: Gender Gap Assessment for Skills and TVET Systems in Bangladesh, ILO PROGRESS Project, 2023, p. 10.

### 1.3 KEY PRODUCTIVE SECTORS AND SECTORS EARMARKED FOR GROWTH AND INVESTMENT

Agriculture (crops, vegetables, and horticulture; freshwater and coastal aquaculture) and poultry and cattle-rearing comprise significant sectors of the Bangladeshi economy, and account for a significant portion of rural employment and public and private investment.

Manufacturing is dominated by the production of ready-made apparel and primary textiles, with limited heavy industry production (of cement and other construction materials); pharmaceuticals, plastics, and consumer electronics are among the emerging sectors in manufacturing and assembling; transportation, and retail and wholesale trade comprise the major service sectors, while ICT and mobile communications-related services continue to emerge. There is significant foreign direct investment in the mobile communications sector.

**Table 1: Percentage share of Bangladeshi total GDP by sector, 2017-2021**

Year	Agriculture	Industry	Services
2017	12.96%	31.25%	51.38%
2018	12.48%	31.98%	50.89%
2019	11.98%	32.85%	50.85%
2020	12%	32.91%	51.51%
2021	11.63%	33.32%	51.30%

Source: Ministry of Finance of Bangladesh, *Bangladesh Economic Review 2022, 2022*.

According to the *Labour Force Survey 2022*, the breakdown of total employment by sector was: 46.96% employed in agriculture, 16.94% in industry, and 36.10% in services.

## 1.4 POLITICAL-ECONOMIC ANALYSIS OF BANGLADESH

Since achieving its independence in 1971, Bangladesh has traversed a long distance socially and economically. Bangladesh is currently on course to no longer be considered a Least Developed Country (LDC), according to the World Trade Organization (WTO) classification (by 2026), propelled by vibrant economic activity, and visible improvements in human development and reduced vulnerability.

During the mid-1970s, Bangladesh began to open up its economy to global trade, including in regard to labour mobility, and continues to navigate an economic landscape where the export of services remains concentrated in a small number of areas in the Global North, and the export of manpower is focused toward the Global North, parts of the Middle East, particularly the Gulf Cooperation Council states, and a small number of Southeast Asian and East Asian states.

As a net importer,<sup>9</sup> Bangladesh needs to maintain a considerable foreign currency surplus, and export revenue and inbound remittances from migrant workers abroad are the country's two main sources of foreign exchange. The foreign currency balance and reserves are used to meet import payments, maintain a healthy money supply in the internal economy, service external debt, and cover infrastructure development requiring imported materials and services. Bangladesh's internal revenue collection capacity is poor, reflected in the country having one of the lowest tax:GDP ratios (standing at 1:7.944 in 2022) among developing countries.<sup>10</sup> Gross National Product in Bangladesh increased to BDT 33,479.74 billion in 2023, from BDT 31,520.93 billion in 2022, according to the Bangladesh Bureau of Statistics (BBS).<sup>11</sup>

9 Notably for fuel and petroleum, cotton and other natural and man-made staple fibres and fabrics (mostly as raw materials for the country's high-growth textile and apparel industry), food grains and edible oils, capital machinery and parts.

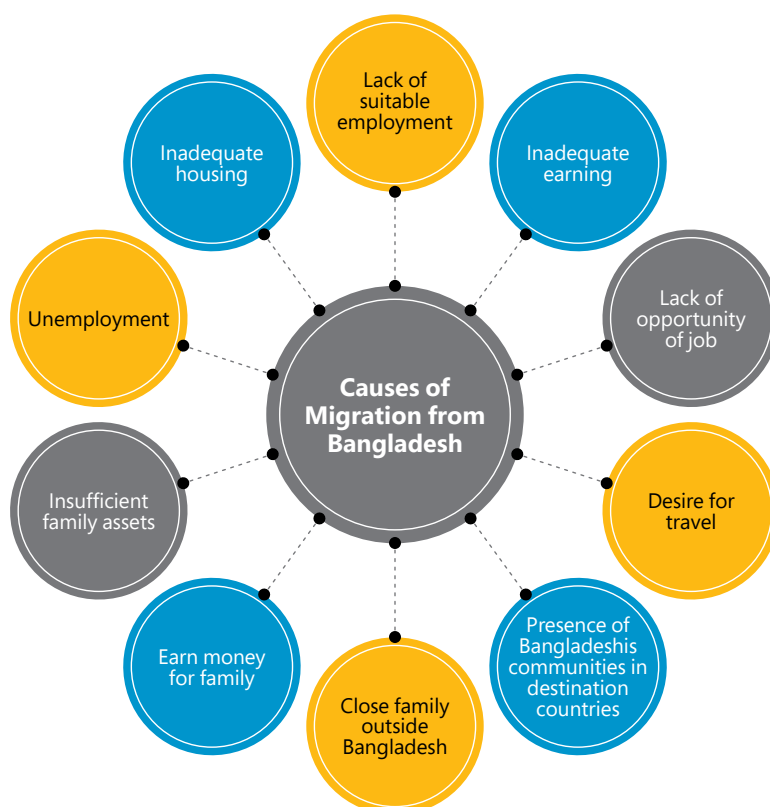
10 CEIC, Bangladesh Tax Revenue: % of GDP. Available at: <https://www.ceicdata.com/en/indicator/bangladesh/tax-revenue--of-gdp>.

11 Trading Economics, Bangladesh Gross National Product. Available at: <https://tradingeconomics.com/bangladesh/gross-national-product>.

As such, successive governments have underscored the importance of migration of workers from Bangladesh and established a standalone ministry – the Ministry of Expatriates Welfare and Overseas Employment (MoEWOE) and various related agencies – to facilitate overseas employment, welfare, and capacity building of migrant workers. Several recent initiatives have sought to incentivise<sup>12</sup> inward remittances through official channels and introduce a policy framework for reintegration of returning workers. The major drivers of worker migration from Bangladesh are shown in Figure 2 below (for more information on outward mobility, see section 1.6.8 of this report).

The impact of climate change is a major reason for internal migration in Bangladesh, particularly from the coastal belt to crowded urban areas. The internal migration from coastal regions is a well-recognised phenomenon.<sup>13</sup> The *Perspective Plan of Bangladesh 2021-2041* also considers climate change as a driver of future migration. However, comprehensive data on how many persons displaced by climate-related factors ultimately go abroad as migrant workers are yet to be produced. It can be mentioned that the Bangladesh Parliamentarians’ Caucus on Migration and Development made a policy recommendation in 2022 to include the need for research to prepare a database of climate migrants.<sup>14</sup>

**Figure 2: Main drivers of migration from Bangladesh<sup>15</sup>**



Source: MRC, *What are the main Causes of Migration from Bangladesh?*

- 12 WorldRemit, Bangladesh Cash Incentive. Available at: <https://www.worldremit.com/en/bangladesh-cash-incentive>.
- 13 Rigaud, K. K., *Groundswell: Preparing for Internal Climate Migration*, World Bank, Washington, DC 2018. Available at: <https://openknowledge.worldbank.org/entities/publication/2be91c76-d023-5809-9c94-d41b71c25635>.
- 14 [public/---asia/---ro-bangkok/---ilo-dhaka/documents/briefingnote/wcms\\_882280.pdf](https://www.mrc-bangladesh.org/en/public/---asia/---ro-bangkok/---ilo-dhaka/documents/briefingnote/wcms_882280.pdf).
- 15 MRC, *What are the main Causes of Migration from Bangladesh?*. Available at: <https://www.mrc-bangladesh.org/en/faq/general-concept-of-migration-in-bangladesh/what-are-the-main-causes-of-migration-from-bangladesh>.

## 1.5 SOCIO-ECONOMIC/CULTURAL AND FOREIGN POLICY IMPACT OF MIGRATION AND THE DIASPORA

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Several KIs interviewed for this study expressed the view that the social and cultural influence of migration to EU under a TP will be a positive development, arising from engagement with the EU values of secularity, tolerance, and a rights-based social structure. Bangladesh maintains amicable foreign policy toward the EU MSs, and the presence of a large Bangladeshi diaspora on the European continent is expected to further strengthen these ties.

## 1.6 ENGAGEMENT BETWEEN BANGLADESH AND THE EU

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### 1.6.1 Historical ties between Bangladesh and EU Member States

The EU has been broadly supportive of the Bangladeshi Government's reform agenda and emphasises the need for Bangladesh to deliver on its stated promises and to ensure compliance with its human rights obligations. Moreover, the historical ties between individual member states of the EU and Bangladesh go back more than a century, and entered a new phase following Bangladeshi independence in 1971. Emigration of Bangladeshi students and professionals has traditionally been oriented toward the United Kingdom (UK), Germany, and France. Italy and Sweden have been popular destinations for work-related migration since the mid-1980s, while recent years have seen Greece and Portugal gain in popularity as destinations for Bangladeshi labour migration (for more information, see section 1.6.8).

### 1.6.2 Major areas of cooperation

Cooperation between the EU and Bangladesh is largely determined by the framework of the EU-Bangladesh Cooperation Agreement<sup>16</sup> signed in 2001. This agreement provides the scope for cooperation, covering the broad areas of trade and economic development, human rights, good governance, and the environment.

The EU has committed to providing Bangladesh with developmental aid of up to EUR 690 million (without considering Thematic and Regional funds)<sup>17</sup> under its Multi-Annual Indicative Programme (MIP) for Bangladesh 2014-2020.<sup>18</sup> Under the EU enhanced engagement, with Bangladesh as a beneficiary of the Generalised System of Preference and the Everything but Arms (EBA) schemes granting preferential market access to the developing countries and LDCs, the Government of Bangladesh put into implementation the **National Action Plan (NAP)** on the labour sector for the five-year period 2021-2026. The purpose of the NAP is to bring the Bangladesh Labour Act, 2006 and its subsequent amendments, and Export Processing Zone Labour Law, up to international standards.

16 Read the full text of the EU-Bangladesh Cooperation Agreement at: <https://eur-lex.europa.eu/EN/legal-content/summary/agreement-with-bangladesh-on-partnership-and-development.html>.

17 European Commission, The European Union and Bangladesh: Relations between the EU and Bangladesh, European External Action Service (EEAS), Press and information team of the Delegation to Bangladesh, 21 July 2021. Available at: [https://www.eeas.europa.eu/bangladesh/european-union-and-bangladesh\\_en?s=164](https://www.eeas.europa.eu/bangladesh/european-union-and-bangladesh_en?s=164).

18 Read the full text of the MIP at: [https://www.eeas.europa.eu/delegations/bangladesh/2014-2020-multiannual-indicative-programme-bangladesh\\_en?s=164](https://www.eeas.europa.eu/delegations/bangladesh/2014-2020-multiannual-indicative-programme-bangladesh_en?s=164).

The EU MIP for Bangladesh for the 2021-2027 period prioritises the following three areas:

- **Human capital development** – covering areas such as education, skills development, access to employment and social protection.
- **Green inclusive development** – focusing on the energy sector and the overall environmental footprint.
- **Inclusive governance** – covering governmental and financial institutions, and inclusion of girls and women.

In addition, the MIP covers cross-cutting issues of migration and forced displacement, security, and human rights.

### 1.6.3 Robust trade ties between Bangladesh and the EU

Bangladesh has been a member of the WTO since 1995 and, as an LDC, has benefitted from the EU's EBA arrangement since 2001, which grants duty-free, quota-free access for all exports, except arms and ammunitions.

- The EU is Bangladesh's main trading partner, accounting for approx. 19.5% of Bangladesh's total trade in 2020.
- In 2020, Bangladesh was the EU's 34th largest trading partner in goods.
- EU imports from Bangladesh are dominated by clothing, which accounts for over 90% of total EU imports from Bangladesh.
- EU exports to Bangladesh are dominated by machinery and transport equipment.
- Between 2017 and 2020, EU-28 imports from Bangladesh had an average annual value of EUR 14.8 billion, accounting for approximately half of Bangladesh's total export value.<sup>19</sup>

According to the United Nations Commodity Trade Statistics Database, the total value of EU exports to Bangladesh in 2022 was EUR 3.6 billion, with exports from Bangladesh to the EU-27 standing at EUR 23.9 billion. Bangladesh thus enjoys a significant trade surplus with the EU.<sup>20</sup>

### 1.6.4 Key agreements between Bangladesh and the EU

- **EU-Bangladesh Cooperation Agreement:** Covers trade, economic development, human rights, good governance and the environment.
- **Agreement on Trade in Textiles Products:** Regulates the distribution of export licences from Bangladesh; although, today (due to the EBA scheme), Bangladesh no longer has any quota restrictions on its exports to the EU, since the end of the Multi Fibre Arrangement in 2005.

### 1.6.5 General bilateral arrangements between Bangladesh and the EU/EU Member States

Bangladesh has struggled to develop **bilateral mobility agreements** with EU MSs, as readmission of undocumented Bangladeshi citizens residing in the EU is often proposed as a precondition for forging legal

19 European Commission, Bangladesh: EU trade relations with Bangladesh. Facts, figures and latest developments, Directorate-General for Trade. Available at: [https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/bangladesh\\_en](https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/bangladesh_en).

20 Explore the data on Bangladesh-EU trade at: <https://comtradeplus.un.org>.

pathways (nevertheless, Standard Operating Procedures for the Identification and Return do exist since 2017). This precondition tends to create a stumbling block in any talks on bilateral agreements between Bangladesh and EU MSs. An example in this regard is that of Italy, which required Bangladesh to support the return from Italian territory of all Bangladeshi undocumented workers before Italy would agree to accept 3,000-4,000 documented workers annually – a very small quantity in comparison to the number of undocumented workers from Bangladesh thought to currently reside in Italy. The Bangladeshi Government – considering the contribution of undocumented migrants – did not respond to the Italian Government’s proposition. Such setbacks may also make trafficking in human beings (THB) more likely to occur.

To date, no broad bilateral agreements facilitating mobility between Bangladesh and an EU MS have been finalised, but negotiations are ongoing with Romania and Poland, and developments with further states are at various stages of progress; for example, a Memorandum of Understanding (MoU) on migration and mobility has been signed with Greece for the purpose of temporary employment, respecting the implementation of the 2017 EU-Bangladesh Agreement mentioned above. This MoU sets out “*the conditions of entry and temporary residence of Bangladeshi nationals for the Bangladesh Agreement*” and, as a result, Greece took the initiative to regularise the situation of the undocumented Bangladeshi citizens residing on its national territory.

A future Talent Partnership between Bangladesh and the EU/EU Member States would be highly effective in regularising migration pathways, at the functional level. Such a partnership initiative would also be conducive to developing a common approach on skills recognition in those occupational sectors characterised by high demand in the EU MSs and sufficient supply capacity in Bangladesh. Sending workers to individual EU MSs according to their respective skills and language requirements, and also to comply with the respective regulatory requirements for overseas recruitment (work visas, etc.), for each state, would also be easier, notwithstanding the reality that the concluding of separate bilateral agreements might be more effective and expedite the recruitment process.

## 1.6.6 Ratification status of migration-related international legal instruments

Bangladesh has ratified the legally binding United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families (CMW), 1990, and the International Labour Organization (ILO) Forced Labour Convention, 1930 (No. 29), of significance in relation to combatting forced labour and THB. Bangladesh has yet to ratify ILO agreements No. 89 and No. 189, which are crucial for the protection of domestic workers and female migration. Bangladesh has signed the GCM and participated in the Global Forum for Migration and Development (GFMD).

## 1.6.7 Participation in international/regional migration dialogues and processes

Bangladesh participates in the Bali Process, the Abu Dhabi Dialogue, the Colombo Process, the Budapest Process, and the GFMD.

Every two years, the **Bali Process**<sup>21</sup> Ministerial Conference brings together ministers from each of the Bali Process Member States. Bangladesh regularly participated in the process and echoed the Co-Chairs’ Statement in 2023. The ministers acknowledged the increase in dangerous irregular migration movements, by land, water,

21 Visit the Bali Process homepage at: [baliprocess.net](http://baliprocess.net).



and air, undertaken by displaced populations, and the challenges faced by Member States in addressing these issues. The ministers also recognised the need to prevent, disrupt, and prosecute criminal syndicates involved in THB in this context.

As a member of the **Abu Dhabi Dialogue**,<sup>22</sup> Bangladesh participants in the multilateral processes undertaken within the frame of this initiative, along with other countries of origin and seven countries of destination. The Abu Dhabi Dialogue focuses on advancement in four key areas: developing and sharing knowledge on labour market trends; skills profiling; worker and remittance policy and flow, and the migration-development nexus.

As a member of the **Colombo Process**,<sup>23</sup> Bangladesh has in the past acted as Chair of this dialogue. Engagement in the Colombo Process has been beneficial for Bangladesh, creating impetus in a number of areas relevant for improved migration management; for example, the establishment of a more effective and more structured pre-departure orientation programme, promotion of women workers' rights, etc.

The **Budapest Process**<sup>24</sup> is recognised by participating states across Europe and Asia, as well as various non-state stakeholders, as an excellent tool for identifying and addressing evolving migration challenges. Bangladesh participates in the Budapest Process as an observer. In February 2019, the Budapest Process entered its latest phase of evolution, following the adoption of the Istanbul Commitments on the Silk Routes Partnership for Migration and its accompanying Call for Action – a five-year plan. Bangladesh chairs the Budapest Process Thematic Working Group on Return and Reintegration, an important entity for alignment with labour mobility and talent partnerships.

Bangladesh hosted the 9th GFMD, held in 2016, primarily focused on the theme of improving migration governance. The United Nations Sustainable Development Agenda 2030 was also of central importance throughout the Bangladesh-hosted GFMD – in response to Member States' strong wish for the GFMD to play an important role in the follow-up for the migration-specific and migration-related targets of the 2030 Agenda, and in the lead-up to the signing of the GCM.

Bangladesh participates in various other dialogues held regionally on migration, such as the South Asian Association for Regional Cooperation (SAARC)<sup>25</sup> and the Association of South East Asian Nations (ASEAN).<sup>26</sup>

According to KIIs interviewed for this study, such active participation by Bangladesh in the various international fora related to migration process has helped to substantially improve the country's migration governance performance, and allowed it to gradually achieve a sound understanding of cross-border migration and labour mobility and its impact on the economy and human capital development initiatives.

22 Visit the Abu Dhabi Dialogue homepage at: [abudhabidialogue.org.ae](http://abudhabidialogue.org.ae).

23 Visit the Colombo Process homepage at: [colomboprocess.org](http://colomboprocess.org).

24 Visit the Budapest Process homepage at: [budapestprocess.org](http://budapestprocess.org).

25 Visit the SAARC homepage at: [saarc-sec.org](http://saarc-sec.org).

26 Bangladesh is not a member of ASEAN, but occasionally participates in selected dialogues on trade and migration issues.

### 1.6.8 Current migration flows to Europe and traditional routes/settlement profile

Traditionally, the UK, being the former colonial authority, has been the most favoured destination for Bangladeshi migrants. Germany and France have been the main destinations for Bangladeshi students and professionals since the 1950s. In addition to these traditionally preferred destinations, Italy, Spain, and Greece have in recent decades, as mentioned, become major destinations for Bangladeshis seeking work abroad; as of 2022, there were an estimated 28,000 Bangladeshis living in Greece.<sup>27</sup>

In more recent years, Portugal, Romania, and Poland have also emerged as popular destinations. Easier terms of entry, and subsequent economic opportunities and relaxed enforcement of laws for undocumented aliens are cited as major reasons for the increase in popularity of these countries as destinations for Bangladeshi migrant workers, and/or tourists, business travellers, students. The existence of sizeable Bangladeshi diaspora populations in country, ready to provide immediate support in finding employment and other forms of assistance, is another reason for the emergence of these countries as popular destinations.

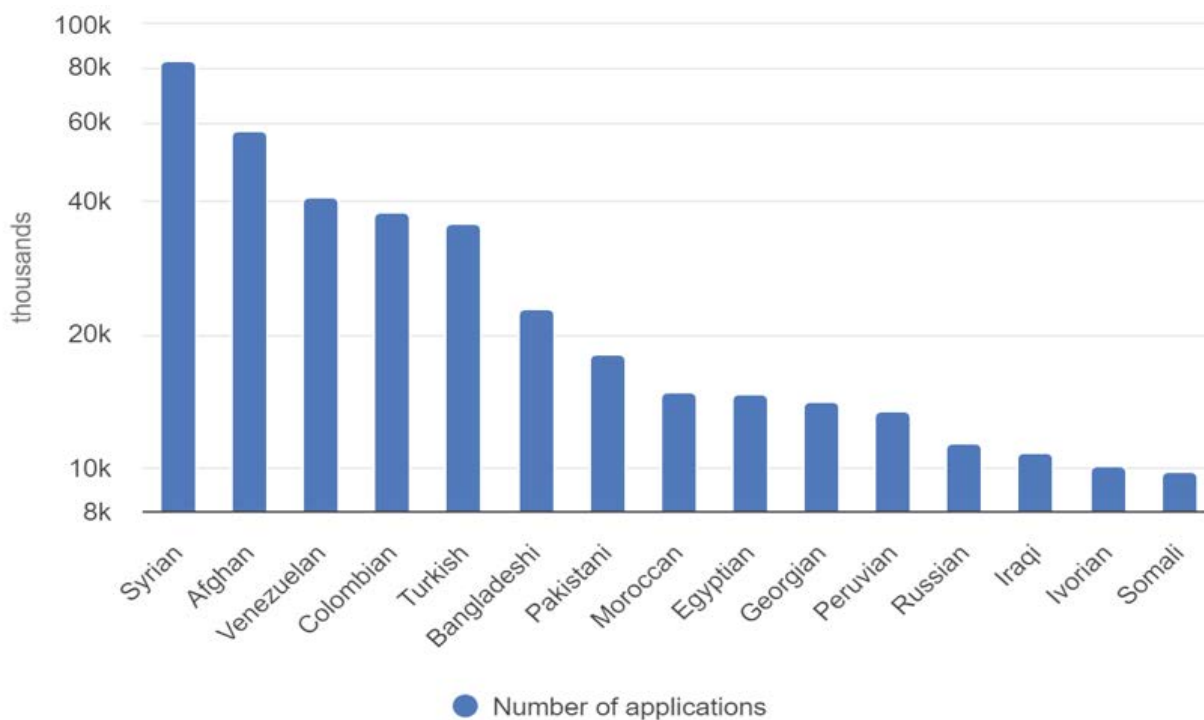
According to the 2020 International Migrant Stock<sup>28</sup> compiled by the United Nations Department of Economic and Social Affairs (UNDESA), the total number of Bangladeshis residing in Europe stood at 456,516. This gives us a sense of the 'stock' of Bangladeshis within the European Union. The gender breakdown for this group was 60% male and 40% female. Additionally, to get a sense of the most recent entries and 'flows', Eurostat estimates that 20,000 Bangladeshi citizens sought asylum within the EU in 2020, making them the sixth most represented nationals in this regard, as shown in Figure 3 below.

Furthermore, the total number of people originating from Bangladesh who in 2021 were first-time applicants for residence permit in the EU stood at 35,534, as shown in Table 2. While these data do not indicate employment status, information gathered, analysed, and presented in various sections of the present report, when taken together, provide sufficient grounds to infer the mixed nature of Bangladeshi arrivals to the EU and the growth in the numbers of individuals originating from Bangladesh. In this regard, more information can be found in Chapter 3 of this report on labour demand in the EU MSs, the treatment of the labour supply situation of the TVET landscape in Bangladesh provided in Chapter 4, and the Sectoral Brief on high-demand occupational sectors in the EU presented in Chapter 5.

27 Mahmud, J., 'A year since deal inked, Greece yet to hire Bangladeshis', *The Daily Star*, Migration, News, 16 March 2023. Available at: <https://www.thedailystar.net/nrb/migration/news/year-deal-inked-greece-yet-hire-bangladeshis-3272306>.

28 IOM Bangladesh, *Bangladeshi Migrants in Europe 2021 – A Multiple Source Snapshot*. Available at: <https://bangladesh.iom.int/sites/g/files/tmzbd1006/files/documents/bangladeshi-migrants-in-europe-2021.pdf>.

**Figure 3: First resident applications in the EU by nationality, 2020<sup>29</sup>**



Source: European Commission, Eurostat, Annual asylum statistics 2020.

The majority of Bangladeshi migrants in the EU are either students, who travel to the bloc on a valid student visa or by irregular means. Since there is currently very high demand for workers in the EU, some MSs also offer assistance to undocumented migrants seeking shelter and regularisation into the workforce. Some Member States also extend visas for immigrants to stay in the country if they pay monthly taxes.

While undocumented workers make up the bulk of Bangladeshi travellers to the EU, some of these travellers, including students, tourists, and others, initially enter the EU territory through the formal, documented channels, but then cross into another country, becoming undocumented and taking up informal work. The Central Mediterranean Route (CMR) and the Eastern Mediterranean Route (EMR), via Libya and other Middle-Eastern and North African states respectively, are the preferred routes for undocumented entry of Bangladeshis to the EU.

<sup>29</sup> European Commission, Eurostat, Citizenship of first-time applicants – mainly Syrian, Afghan, Venezuelan and Turkish, Annual asylum statistics 2022. Available at: [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Asylum\\_statistics&oldid=558844#Citizenship\\_of\\_first-time\\_applicants\\_.E2.80.93\\_mainly\\_Syrian.2C\\_Afghan.2C\\_Venezuelan\\_and\\_Turkish](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Asylum_statistics&oldid=558844#Citizenship_of_first-time_applicants_.E2.80.93_mainly_Syrian.2C_Afghan.2C_Venezuelan_and_Turkish).

**Table 2: First-time residence permits received by Bangladeshi migrants in 2021<sup>30</sup>**

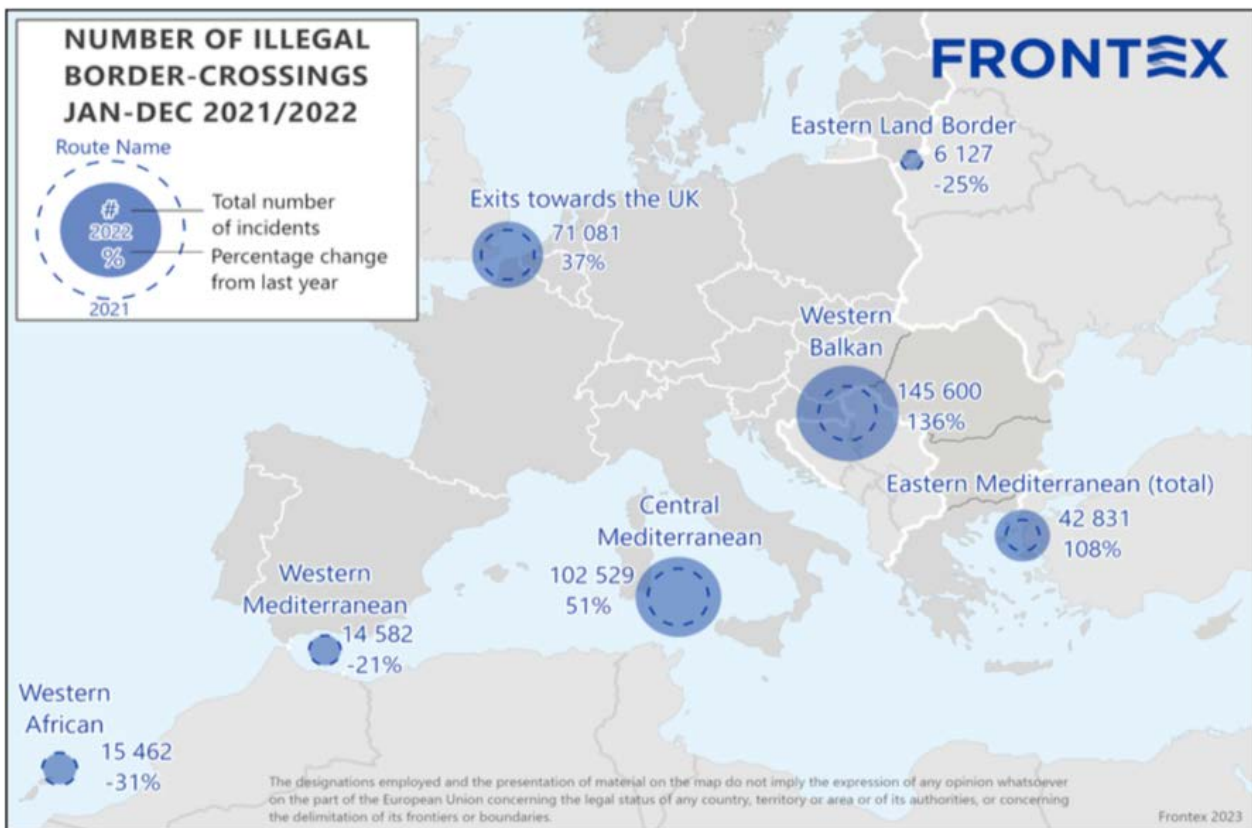
State	No. of residence permits
Austria	206
Belgium	167
Bulgaria	21
Croatia	1,751
Cyprus	421
Czech Republic	228
Denmark	450
Estonia	86
Finland	687
France	3,393
Germany	768
Greece	593
Hungary	203
Ireland	257
Italy	17,987
Latvia	2
Liechtenstein	1
Lithuania	5
Luxembourg	12
Malta	118
Netherlands	836
Poland	1,046
Portugal	2,132

30 European Commission, Eurostat, First permits by reason, length of validity and citizenship 2021, Data Browser. Available at: [https://ec.europa.eu/eurostat/databrowser/view/MIGR\\_RESFIRST\\_custom\\_3157937/bookmark/table?lang=en&bookmarkId=123a54b1-89b1-478e-b39a-990f7377dab3&page=time:2021](https://ec.europa.eu/eurostat/databrowser/view/MIGR_RESFIRST_custom_3157937/bookmark/table?lang=en&bookmarkId=123a54b1-89b1-478e-b39a-990f7377dab3&page=time:2021).

State	No. of residence permits
Romania	931
Slovakia	11
Slovenia	64
Spain	1,911
Sweden	1,247
<b>Total</b>	<b>35,534</b>

Source: European Commission, Eurostat, Data Browser.

Figure 4: Major Routes of Undocumented Migration to the EU, 2021-2022



Source: Frontex, Number of Illegal Crossings Jan-Dec 2021/22, 2023.

Statistics for 2021 from the European Agency for the Management of Operational Cooperation at the External Borders (Frontex) show that at least 8,667 Bangladeshi citizens entered the EU irregularly during that year,<sup>31</sup> of which 7,574 were attempting to gain entry via the CMR, 604 via the EMR, and 437 via the Western Balkans Route. Frontex statistics also show that the majority of Bangladeshi migrants who enter the EU irregularly end up in Italy, considered the most favourable destination for irregular migrants from Bangladesh during

31 Islam, A., 'Why do Bangladeshi migrants take irregular routes to Italy?', Migration, Bangladesh. Available at: <https://www.dw.com/en/why-do-bangladeshi-migrants-take-irregular-routes-to-italy/a-60683932>.

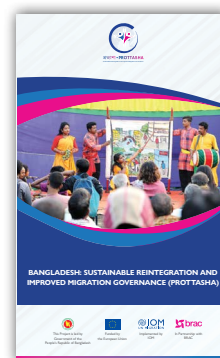
recent decades. Figure 4 shows the major routes to the EU for irregular migration during the period 2021-2022. Groups and individuals involved in THB and smuggling of migrants in Bangladesh, and in the Middle East and North Africa and Balkans regions, are engaged in sending labourers to the EU through unofficial channels.

### 1.6.9 EU/EU MS development and investment programmes in Bangladesh

The Office of the European Union Delegation to Bangladesh actively supports various programmes and projects implemented by the Government of Bangladesh and major development partners, such as the ILO, to improve the migration management cycle, skills development, and technical education. Several EU MSs also actively support similar programmes and projects in the areas of skills development, technical and professional education. The Netherlands, Germany, and Denmark are particularly supportive of such programmes in capacity building. The UK and Switzerland are among the non-EU MSs in Europe that support similar programmes and projects.

Four major EU-funded projects supporting safe migration and skills development in Bangladesh are highlighted below:

- i) **Prottasha (Bangladesh Sustainable Reintegration and Improved Migration Governance)** was, during its first phase, a multi-million euro, multi-stakeholder, and multi-year (2017-2022) project centring on providing immediate assistance to returnees at airports, and economic reintegration assistance, medical treatment support and needs-based psychosocial counselling, including trauma counselling to returnees and their family members. Among other activities, the project further focused on capacity development of CSOs, NGOs, and government agencies on various issues related to reintegration and migration. The Bangladesh Rural Advancement Committee (BRAC), a large national NGO, and the International Organization for Migration (IOM) were the implementing partners for the Prottasha project.<sup>32</sup>



A series of interventions with the objective of improving access to safe migration opportunities for Bangladeshi men and women were implemented through institutional strengthening and policy support targeting relevant Bangladeshi ministries, including the MoEWOE, the Ministry of Home Affairs and the Ministry of Law, Justice and Parliamentary Affairs, the Ministry of Foreign Affairs, and the Ministry of Local Government, Rural Development and Cooperatives, as well as private sector organisations, such as the Bangladesh Association of International Recruiting Agents (BAIRA).<sup>33</sup> **Prottasha Phase II**, with a budget of EUR 20 million<sup>34</sup> kicked off in 2023, with the main target area aligning with SDG 10.7 (to facilitate orderly, safe, regular and responsible migration and mobility of people, including through the implementation of planned and well-managed policies).

32 Migration Network Hub, Bangladesh Sustainable Reintegration and Improved Migration Governance (Prottasha), Repository of Practices. Available at: <https://migrationnetwork.un.org/practice/bangladesh-sustainable-reintegration-and-improved-migration-governance-prottasha>.

33 IOM Bangladesh, *Bangladesh: Sustainable Reintegration And Improved Migration Governance (Prottasha)*. Available at: <https://bangladesh.iom.int/sites/g/files/tmzbd11006/files/documents/Prottasha%20Brochure.pdf>.

34 Daily Observer, 'EU commits 20m euro for migration management', Business, 31 July 2023. Available at: <https://www.observerbd.com/details.php?id=430444>.

ii) The **Skills 21**<sup>35</sup> project is a joint initiative of the GoB and the ILO with the objective of improving productivity and employment opportunities for young people, through an inclusive technical and vocational training system, responsive to the needs of the labour market. This multi-year project ran from 2017 through 2023, with 5,950 youths trained at NTVQF Level 1 and Level 2 in different occupations (80% certified, 39% employed, 34% women, including 2% persons with disabilities); 3,321 trainers and assessors graduated (16% of whom are women), and 51 master trainers developed; 170 online training materials developed; 3,498 youths provided with entrepreneurship development training; 3,474 returnee migrants and their family members provided with skills training; and 3,905 workers (15% women) assessed under the RPL system, resulting in 80% of them obtaining skills certificates in various occupations,<sup>36</sup> at NTVQF Level 1 or Level 2; all these trainings and assessments were carried out under the NTVQF.



iii) The **TVET Reform** project<sup>37</sup> implemented by the ILO and the GoB, between 2007 and 2015, brought about major TVET improvements in Bangladesh at the policy and functional levels. The project resulted in multiple reforms to the formal TVET system, set the foundation for the nascent National Skills Development System, and the adaptation of several major policies and frameworks, including the NSDP 2011.



iv) **Human Capital Development Programme for Bangladesh 2021**<sup>38</sup> has a budget of EUR 205 million and sees the Ministry of Primary and Mass Education and the TMED of the Ministry of Education cooperate to unlock the economic potential of Bangladesh and its youth population through quality education reform, from basic education to TVET and skills development.



35 ILO, Skills 21 - Empowering citizens for inclusive and sustainable growth, ILO in Bangladesh, What we do, Projects. Available at: [https://www.ilo.org/dhaka/Whatwedo/Projects/WCMS\\_543629/lang--en/index.htm](https://www.ilo.org/dhaka/Whatwedo/Projects/WCMS_543629/lang--en/index.htm).

36 ILO, Skills 21 – Empowering citizens for inclusive and sustainable growth. Available at: [https://www.ilo.org/dhaka/Whatwedo/Projects/WCMS\\_543629/lang--en/index.htm](https://www.ilo.org/dhaka/Whatwedo/Projects/WCMS_543629/lang--en/index.htm).

37 Ibid., Technical and Vocational Education and Training (TVET) Reform in Bangladesh, ILO in Bangladesh, What we do, Projects. Available at: [https://www.ilo.org/dhaka/Whatwedo/Projects/WCMS\\_106485/lang--en/index.htm](https://www.ilo.org/dhaka/Whatwedo/Projects/WCMS_106485/lang--en/index.htm).

38 European Commission, Human Capital Development Programme for Bangladesh 2021 (HCDP-21), EEAS, 20 September 2020. Available at: [https://www.eeas.europa.eu/delegations/bangladesh/human-capital-development-programme-bangladesh-2021-hcdp-21\\_en?s=164](https://www.eeas.europa.eu/delegations/bangladesh/human-capital-development-programme-bangladesh-2021-hcdp-21_en?s=164).



# CHAPTER 2: MIGRATION GOVERNANCE PROFILE

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## 2.1 MIGRATION-RELATED POLICIES AND LEGISLATION

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This chapter briefly summarises the major laws and policies forming the basis of migration governance and administration in Bangladesh. As such, this governance profile defines the broad parameters within which Bangladesh positions itself to deal with the opportunities and challenges of any prospective partnership with foreign governments on migration-related matters.

### 2.1.1 Introduction to key migration policy stakeholders in Bangladesh

The Ministry of Expatriates' Welfare and Overseas Employment of Bangladesh was established on 20 December 2001. The main objective of the Ministry is to ensure the welfare of Bangladeshi expatriate workers and enhance overseas employment on the principle of equal opportunity for the people of (all areas of) Bangladesh. To this end, the Ministry is responsible, in its area of competencies, for formulating policies and plans; enacting laws, rules and regulations; and developing projects, programmes, and monitoring relating to the management of overseas employment, as well as for the overall welfare of expatriate workers.

Several directorates and bureaus work directly under the MoEWOE to implement the policies and laws developed: the BMET, the Wage Earners' Welfare Board (WEWB), Bangladesh Overseas Employment Service Limited (BOESL), and Probashi Kallyan Bank (PKB). All District Manpower Employment Offices (DEMOs) and TTCs operate under the BMET, supporting and implementing policy directives at the grassroots level. Coordinated participation among these entities is likely to contribute to the success of any future Talent Partnership scheme between Bangladesh and the EU.

Besides the governmental institutions involved in the migration area, various private sector entities, NGOs and UN agencies also assist the GoB in policy implementation. The BAIRA directly recruits migrant workers, under the supervision of the MoEWOE and the BMET, and in line with the policy directions prescribed. UN agencies such as IOM, the ILO and the United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) support the MoEWOE in the development and formulation of policies related to migration. NGOs and CSOs also play a critical role in the development and formulation of policies and directives.

### 2.1.2 Expatriate Welfare and Overseas Employment Policy

To encourage and ensure safe labour migration, the 2016 Expatriate Welfare and Overseas Employment Policy (EWOEP) outlines key principles and guidelines on emigration and proposes a number of initiatives. Some of the major initiatives proposed under the EWOEP are:



- A survey assessing the employment potential for Bangladeshi migrant workers in selected Western European and emerging economies.
- A well-planned skills development programme in line with the NSDP, focusing on the skill level of those undertaking overseas migration and creating overseas employment opportunities.
- An initiative for 'Labour Migration Diplomacy', to be established and maintained by the MoEWOE with destination countries, ensuring greater protection and benefits for Bangladeshi workers in those countries.
- Setting up a research, analysis and monitoring unit on labour migration with two main functions: (1) formulation of a labour migration information system and (2) operation of a market research unit.

It should be noted that, to date, none of these initiatives have been completed, reflecting substantial gaps in implementation of the EWOEP. The reasons why these initiatives have not been realised could not be discerned during the production of the present study.

### 2.1.3 Overseas Employment and Migrants Act, 2013

The Overseas Employment and Migrants Act (OEMA) applies to those migrating from Bangladesh for the purpose of employment in a trade or profession to any foreign country, and those who are managing this process, from recruitment through to embarkation at Bangladeshi ports. The term "migrant" is defined under the Act as any citizen of Bangladesh whom has migrated to a foreign country for the purpose of overseas employment, in any work or profession, and whom is staying in that country; persons who migrate for study purposes are not considered migrants under the Act.

Although there are no restrictions on emigration from a specific sector, the Act indicates that migration to certain countries requires prior approval, i.e. there are certain restrictions on migration. The Act also states that should the GoB deem the migration of Bangladeshi citizens to a particular country to be against the public or state interest, or that their health and safety may be jeopardised in that country, the GoB may, by order, restrict migration to that country. These restrictions are generally temporary and geared toward ensuring appropriate protection during times of crisis (e.g. during conflict in Ukraine or Libya, or, more broadly, during the Coronavirus disease 2019 (COVID-19) pandemic).

Regarding registration of migrants, the OEMA articulates that a person planning to migrate under the provisions of this act, or all migrant workers, should be registered with the BMET, but that if a migrant is not registered, they should be allowed to register and have their trade or profession noted at any time, in Bangladesh or at the Bangladeshi mission abroad serving the country where the worker is employed. This registration data can be accessed by researchers and competent authorities of foreign origin with due permission from the BMET.

Regarding the cost of migration, the OEMA states that the GoB may, by order, set a price ceiling for migration-related costs charged for the purpose of recruitment and overseas employment. Regarding recruitment contracts, the recruitment agent is deemed responsible for stipulations concerning the worker's wages, accommodation facilities, duration of employment, compensation amount, etc., and the recruitment agent shall submit a copy of the contract to the BMET and the Bangladeshi mission in the country concerned.

The OEMA also empowers the Government of Bangladesh to negotiate bilateral agreements on migration, such as MoUs, with the intention of increasing emigration opportunities for Bangladeshis, improving management of labour migration, repatriation and reintegration of returnees in the home country, and ensuring the welfare and rights of Bangladeshi migrant workers, and their family members.

The OEMA articulates migrant rights issues very specifically, and its provisions can provide the legal basis for future EU Talent Partnership schemes on the part of Bangladesh.

#### **2.1.4 Wage Earners' Welfare Board Act, 2018**

Under the Wage Earners' Welfare Board Act, the WEWB must provide necessary support to potential migrants, current migrants, and return migrants, depending on the nature of their vulnerability (e.g. war, natural calamities, lay-offs, financial distress, or any other emergency) and, in special cases, provide repatriation assistance. Migrants receive assistance only if they have migrated (or intend to migrate) via a regular channel. For current migrant workers, especially female migrant workers, the WEWB is legally bound to provide necessary assistance and has a duty to repatriate (and, if necessary, provide legal and medical assistance to) any migrant worker working abroad who falls victim to abuse, is injured in an accident, falls ill, or is placed in danger for any other reason. Moreover, the WEWB must operate online and offline help desks and safe houses, at home and abroad, for this purpose.

To facilitate the migration of Bangladeshis from their home country, the WEWB shall also establish and operate pre-departure briefing centres. The Act also states that the WEWB must establish and manage migrant welfare desks at airports or, as necessary, at exit and departure points at the airport, for the purpose of aiding migrant workers.<sup>39</sup>

#### **2.1.5 Prevention and Suppression of Human Trafficking Act, 2012**

The Prevention and Suppression of Human Trafficking Act (PSHTA) specifically addresses the prevention, protection of victims, and prosecution of trafficking offences in Bangladesh, and is aligned with the UN Trafficking in Persons Protocol. The PSHTA also provides a framework of liability which allows the State to prosecute violation of the legislation by individuals or corporate entities, including companies.

In the case that an offence listed under the PSHTA is committed by a company, the violation is considered to also have been committed by the respective proprietors, directors, managers, secretaries or agents, unless culpability cannot be established. These provisions are of particular importance for the investigation and prosecution of labour migrant recruitment agencies associated with trafficking. Enforcement of the PSHTA provisions should provide a sound legal basis for Bangladesh to cooperate with Frontex in identifying Bangladeshi victims of trafficking who end up in the EU, once the Talent Partnership scheme is in place.

#### **2.1.6 Reintegration Policy for Migrants, 2022**

The Government of Bangladesh has also highlighted the significance of the reintegration of migrant workers, to guarantee the full benefits of employment abroad. The aforementioned Wage Earners' Welfare Board Act, 2018 ensures the State's commitment to the reintegration of migrant workers. Additionally, the Government has published its pledge to intensify its efforts on reintegration, in the '10 Points Agenda on Overseas Employment' contained in the Five-Year Plan (2020-2025). The 2022 Reintegration Policy for Migrants has been drafted by the Government as part of this process, although, at the time of writing, this document has yet to be finalised. The GoB recognises reintegration as a critical issue in managing the migration cycle, and as such, holds the view that it should constitute a part of any prospective EU Talent Partnership scheme.

<sup>39</sup> Details of activities of the WEWB can be found on its website: [wewb.gov.bd](http://wewb.gov.bd).

## 2.1.7 Sustainable Development Goals Action Plan

Among the various migration-related SDG targets, Target 8.8, on protecting labour rights and promoting safe and secure working environments for all workers, including migrant workers, particularly women migrants, is directly linked with migration. Alongside this stand Target 10.7 and Target 10.c on facilitating orderly, safe, regular and responsible migration and mobility of people, including through the implementation of planned and well-managed migration policies and reducing the transaction cost of migrant remittances. To reach the latter Targets, states need to develop and implement migration-related policies in line with Target 10.7.

A prospective Talent Partnership between Bangladesh and EU Member States, if and when in place, is expected to pave the way for legal migration of Bangladeshi workers to the EU, and hence the current practice of unsafe, undocumented, and often perilous journey is likely to be minimised, according to the respective stakeholders interviewed during the KIIs. Thus, it would be reasonable to assume that having a Talent Partnership initiative in place would support achievement of the SDG Targets 8.8 and 10.7, among others.

## 2.2 INSTITUTIONAL ACTORS AND MIGRATION STAKEHOLDERS (STATE AND NON-STATE ACTORS)

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### 2.2.1 Role of government/public sector actors in migration and labour mobility

The Government of Bangladesh is eager to put migration-related legislation and policies into effect. As noted above, to implement particular policies and legislation, the MoEWOE was established and works with four



important departments and organisations within its mandate. These organisations, particularly the PKB, can provide financial assistance to aspiring migrants, for skills training and accredited certificates and to help meet the cost of migration on more flexible terms, and BOESL could offer its services to migrants wishing to go to the EU under a prospective EU Talent Partnership scheme.

The GoB is currently taking initiatives to deploy workers to EU MSs and non-EU states in Europe through official channels. So far, BOESL has successfully sent construction workers to Croatia. The TTCs are also a major part of the Government's infrastructure-building efforts for migrants. However, the quality of training, certification, and accreditation continues to be a major concern in this regard. More details on the various roles played by the TTCs are provided in Chapters 4 and 5 of this report.

Although the **migration system** in Bangladesh is subject to government regulation, the Government does not have complete control over it, and the regulations and instructions issued are in practice not always followed by the national recruitment agencies, which ultimately hurts migrant workers and drives up the cost of moving abroad. The migration system in Bangladesh will not advance without significant collaboration and coordination with the BAIRA and the individual recruitment agencies operating in the country, alongside appropriate enforcement of legal provisions and accountability. The migration stakeholders in Bangladesh take the view that the recruitment process should be improved and that an employee-payee model should be put in place to **lower the cost of migration**. Recommendations to this effect are made in Chapters 5 and 6 of this report.

### 2.2.2 Role of private sector actors in migration and labour mobility

There are roughly 1,400 registered employment agencies in Bangladesh; of which 200 to 300 were operational at the time of analysis, with the remaining agencies not operational, due to high market competition. The national association of recruiting agencies, the Bangladesh Association of International Recruiting Agencies, focuses mostly on the interests of recruitment agencies. Private recruiting companies play a major role in the recruitment process, providing potential migrants with a variety of information, guidance, and logistical support while bridging the gap between foreign employers and potential migrant employees.

The activities of private recruitment agencies in Bangladesh centre on receiving information about job openings and "demand letters" from foreign employers, either directly or through overseas recruitment agencies, arranging for the issuance of passports, police clearances, and birth certificates, and the certification of qualifications and skills, and assisting migrants with the visa application process. These unregistered intermediaries aid the employment agencies in fulfilling these procedures, in an informal manner.

The BAIRA is the main collective body of licenced overseas recruitment agencies. Established in 1984, it is one of the largest trade bodies in Bangladesh affiliated with the Federation of Bangladesh Chambers of Commerce and Industry, the apex body for trade and industry. BAIRA functions involve collecting demand letters from employers; negotiating formal arrangements between Bangladesh and destination countries; and managing the recruitment process for the welfare of prospective migrant workers. Should an EU Talent Partnership scheme with Bangladesh be embarked upon, the BAIRA would be in an ideal position to carry out market research on job vacancies and present and future skills needs in EU MSs at the occupational level.

The majority of recruitment agencies are located in Dhaka, and rely on informal intermediaries to assist with field-level operations.

### 2.2.3 Role of NGOs/CSOs, INGOs in migration and labour mobility

In Bangladesh, there are no more than 15 NGOs working in the migration field, and few of them undertake donor-funded migration initiatives. These national NGOs tend to be active in pre-departure and pre-decision training and awareness programmes, with a small number of them also involved in pre-decision training activities. At present, funding for reintegration programmes comprises a significant share of the funding provided to these NGOs. The NGOs and CSOs operating in Bangladesh provide tangible support for the Government in its migration-related endeavours, while also providing constructive criticism of its actions where appropriate.

The Bangladesh Civil Society for Migrants (BCSM), currently the sole migration network in the country, frequently plays a crucial role in the migration sector. Recently, NGOs began providing reintegration support as part of the Recovery and Advancement of Informal Sector Employment (RAISE) project, representing the first time that NGOs and the GoB have cooperated in the migration field. IOM is serving as the project lead. The reintegration programme run by the BRAC and IOM, under the second phase of the Prottasha project, detailed above, is due to commence in late 2023. The only INGO currently working in the migration field in Bangladesh is Helvetas Bangladesh, which operates the SIMS project. CARE Bangladesh and Winrock International are working on THB and migration. NGOs and CSOs also play a strong role in providing reintegration services, or general services which are beneficial to returnees or the reintegration process (see Table 8).

### 2.2.4 Role of development partners in migration and labour mobility

International organisations currently operate in Bangladesh in migration management: ICMPD and the three UN agencies, the ILO, IOM, and UN Women. The ILO primarily works at the policy level and also supports the GoB, the private sector, workers, and NGOs on project implementation, while IOM, through partnerships with NGOs, works both at the policy and implementation levels. Both the ILO and IOM are particularly interested in enhancing the capacity of the GoB and other national migration stakeholders. UN Women also works at the policy level, to ensure that gender issues relevant to migration are properly reflected in the policy documents of the government.

Within this context, ICMPD has operationalised the Migrant Resource Centres (MRCs) currently functioning, in cooperation with the MoEWOE. The Prottasha project receives critical support from the EU for reintegration and awareness building, while IOM and the BRAC receive the highest level of EU funding. The World Bank ran a pre-departure migration programme in cooperation with the BRAC, and, in collaboration with NGOs and CSOs, is currently assisting the Government-led RAISE project, in cooperation with the WEWB and IOM.

The two MRCs established by ICMPD in Bangladesh<sup>40</sup> serve as one-stop information and referral hubs for the promotion of safe, regular, orderly and responsible migration in Bangladeshi context, from national to worker union level. Among other activities, the MRCs conduct pre-migration, pre-departure and post-arrival orientation sessions, coordinate with recruitment agencies, verify visa and employment contracts, and screen the qualification of potential female migrants. The MRCs are integrated with DEMOs in Dhaka and Cumilla. ICMPD has also supported the BMET in its efforts to understand the labour market needs of selected European states, through labour migration fiches and strategies which the GoB are advised to adopt in response to prevailing demand and negotiations with countries of destination.

40 MRC Bangladesh, About Us. Available at: <https://www.mrc-bangladesh.org/en/about-us>.



### 2.2.5 Role of informal sector actors in migration and labour mobility

Although their involvement is widely known but not officially recognised, intermediary persons are often employed by recruitment agencies. Many of these individuals support multiple recruitment companies, working as freelancers. Most intermediaries are current or returning migrants, operating in both countries of origin and countries of destination targeted. There are different levels of intermediaries, with some working at the local level, others at the national level, and some at both levels. Intermediaries typically wield considerable power in the migration facilitation process, or operate under a strong informal structure. Formalisation of the role(s) of these intermediaries is thus advised.

A critical concern in the Bangladeshi migration environment is the presence of numerous similar entities facilitating the work of recruitment agencies. Although it is likely impossible to completely avoid intermediaries, migrants should learn how to interact with them in a profession setting. Communities need to be made more aware of this issue, and the GoB should use the media to achieve this heightened awareness, and provide additional funding for various forms of awareness raising.

The contrarian viewpoint holds that if the proper framework is put in place, people will naturally learn from others within the migrant community that there is a proper way to migrate to EU MSs. A Code of Conduct (CoC) developed<sup>41</sup> for recruitment agents, aimed at maintaining a performance ranking, could be useful in formalising the role of these intermediaries (in a future Talent Partnership).

## 2.3 COMMITMENT TO AND IMPLEMENTATION OF MIGRATION-RELATED LEGISLATION

The Bangladeshi regulatory framework incorporates provisions for the protection of the fundamental rights of migrants. Bangladesh has ratified the key international instrument on migrants' rights, the CMW, and has enacted the OEMA, to regulate migration and ensure migrants' rights. In line with the Palermo Convention, Bangladesh has enacted the Human Trafficking Deterrence and Suppression Act, 2012. As mentioned above, Bangladesh has also taken steps toward achieving SDG Target 10.7 and has partnered with various development partners and UN agencies to implement the national-level Migration Governance Framework.<sup>42</sup>

The GoB has also launched the Migration Compact Taskforce, aimed at facilitating the implementation, follow-up, and review of the GCM. The Taskforce provides a platform to ensure full support and cooperation from all relevant stakeholders through a 'whole-of-government' approach.<sup>43</sup>

41 Pending inclusion in the Bangladesh Labour Rules, 2015.

42 United Nations, Contribution of Government of Bangladesh to UN Secretary General's report under General Assembly Resolution A/RES/74/148 on the Protection of migrants. Available at: <https://www.ohchr.org/sites/default/files/Documents/Issues/Migration/GA76thSession/States/Bangladesh.pdf>.

43 IOM Bangladesh, 'Bangladesh Migration Compact Taskforce to ensure safe, orderly, and regular migration', News, Local, 5 July 2022. Available at: <https://bangladesh.iom.int/news/bangladesh-migration-compact-taskforce-ensure-safe-orderly-and-regular-migration>.

Bangladesh ratified the CMW, without any reservations, on 11 April 2011.<sup>44</sup> However, the GoB is yet to enact the necessary enabling legislation to support implementation of the CMW, and, in turn, introduce adequate protection mechanisms for Bangladeshi migrant workers against exploitation and abuse during all stages of the migration process. Bangladesh has also yet to ratify other key international instruments, indicated in Table 3 below.

**Table 3: Ratification status of key international instruments on international migration**

International Instrument	Entry Into Force	Status
ILO connection concerning Migration for Employment (rev 1949) (N°. 97)	22 January 1952	-
ILO connection concerning Migrations in Abusive Conditions and the Promotion of Equality of Opportunity and Treatment of Migrant Workers (Supplementary Provisions) (N°. 143)	09 December 1978	-
International Convention on the Protection of the Rights of all Migrant Workers and Members of their Families	01 July 2003	Ratified 2011
Protocol to Prevent, Suppress and Punish Trafficking in Persons, Especially Women and Children	25 December 2003	-
Protocol Against the Smuggling of Migrants by Land, Air and sea	28 January 2004	-
1951 Convention relating to the Status of Refugees	22 April 1954	-
1967 Protocol relating to the Status of Refugees	04 October 1967	-

Source: ILO (no date), United Nations (no date).

## 2.4 TRENDS AND CHALLENGES ASSOCIATED WITH IRREGULAR MIGRATION

The adverse consequences of irregular migration to the EU are known to migrants from Bangladesh. In the absence of sufficient opportunity for legal migration to an EU MS, many aspiring migrants undertake risky migration, at any cost. Although the costs of irregular migration are significant, many Bangladeshis nonetheless find a way to reach EU destination countries and take up undocumented, low-paid work in the informal sector.

Observing this dynamic, the EU MS representatives interviewed indicated that if legal pathways were to be introduced, Bangladeshis would be more likely to follow the official process to migrate to EU MSs, presumably leading to a reduction in irregular flows and in the risks posed to migrants and, indeed, the broader public,

44 United Nations Economic and Social Commission for Asia and the Pacific, Status of ratification of key international instruments and legal framework, Bangladesh. Available at: <https://sitreport.unescapsdd.org/bangladesh/status-ratification-key-international-instruments-and-legal-framework>.

in both the country of origin and the country of destination. All stakeholders interviewed for this report expressed the opinion that irregular migration, and regular migration which turns into irregular migration, would substantially decrease once a regular pathway for Bangladeshi workers to move to the EU is put in place.

## 2.5 POTENTIAL BRAIN DRAIN/GAIN FOR BANGLADESH

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Considerable resources are spent to develop skilled workers, and if the recipient's expertise are used in another economy, the source country is thus deprived of a return on the resources invested in their development. The impact of this 'brain drain' phenomenon tends to be offset somewhat by the inward remittances sent by those skilled workers who take up employment abroad, but domestic industries and employers suffer in the medium and long term, due to the resultant lack of skilled workers in the home country. Should a Talent Partnership scheme between the EU and Bangladesh come into effect, Bangladesh would likely gradually see a steady outflow of skilled workers, at least in certain occupations.

Thus, while the establishment of a TP scheme is likely to spur brain drain, the scale and implications of this phenomenon for local industries cannot be known beforehand. If there is a simultaneous steady output of skilled graduates from institutes providing relevant training, which have substantial supply capacity, then the impact of brain drain would likely remain tolerable.

Indeed, Bangladesh could also stand to benefit from increased 'brain gain', whereby skilled workers return from EU MSs having gained work experience, expertise and exposure to EU business practices and sociocultural ideals, boosting local industries and allowing employers to benefit without incurring upfront cost for training or capacity building. Should a TP with the EU be established and pursued accordingly, Bangladesh is likely to, eventually, benefit from the brain gain phenomenon.

However, if each of these phenomena is to offset the impact of the other, a functional reintegration scheme, reintegration services, suitable employment opportunities, and an attractive quality of life in Bangladesh will be required. This applies particularly in the case at hand, as, in comparison to those available in Bangladesh, most areas of the EU currently offer superior levels of social and civic amenities, such as education and health care.



# CHAPTER 3: EU 'DEMAND SIDE' PRIORITY OCCUPATIONAL SECTORS

## 3.1 PRIORITY OCCUPATIONAL SECTORS IDENTIFIED

**Priority skills sectors and occupations identified among the EU MSs** include: ICT; caregiving;<sup>45</sup> construction and related occupations; hospitality; transportation; machine operations, repair and maintenance; and farming-related jobs. Demand for foreign labour in many EU MSs continues to rise for each of these occupational sectors,<sup>46</sup> despite favourable migrant inflows seen during the period following the subsiding of the COVID-19 pandemic.

These broad skills sectors contain many tiers, and not all EU MSs are experiencing the same levels of demand in each. However, it is possible to identify the levels of demand within the specific occupations that make up these broad sectors, based on several published reports and data sources, including those country fiches prepared by the BMET, the European Centre for Development of Vocational Training (CEDEFOP) database, and information gathered from EU MS representatives during the KIIs. (It should be noted that only vocational jobs have been addressed.)

The CEDEFOP<sup>47</sup> report for the EU-27 for the period 2022-2035 forecasts 14.6% overall employment growth in ICT services; 11.6% growth in hospitality (accommodation and food); and 11.6% growth in caregiving (health and social care). Specific national economies within the EU are expected to experience considerable employment growth in the construction sector, with Italy forecast to benefit from the creation of an additional 80,300 jobs during this period, Spain experiencing the creation of an additional 42,900 jobs, and Greece seeing 30,800 jobs added.

Job growth rate is forecast to range from 15% to 45% for various occupations<sup>48</sup> within the construction sector and related jobs. The demand for food preparation assistants<sup>49</sup> is expected to remain very high, and reach levels of over 90% in the EU-27 during the 2022-2035 period.<sup>50</sup> The demand for bus and truck drivers will

45 The terms 'caregiving' and 'caregiver' are used throughout this report to refer to a number of occupations related to various forms of medical, personal, and childcare, provided within households and institutions

46 European Labour Authority, 'Five in-demand vocational jobs for 2023', Directorate-General for Employment, Social Affairs and Inclusion, News Article, 9 February 2023. Available at: [https://eures.ec.europa.eu/five-demand-vocational-jobs-2023-2023-02-09\\_en](https://eures.ec.europa.eu/five-demand-vocational-jobs-2023-2023-02-09_en).

47 CEDEFOP, Future employment growth (% change) across countries in 2022-2035, Skills intelligence, Future Jobs. Available at: <https://www.cedefop.europa.eu/en/tools/skills-intelligence/future-jobs?country=EU27&year=2022-2035#5>.

48 CEDEFOP, Construction workers. Available at: <https://www.cedefop.europa.eu/en/tools/skills-intelligence/occupations?occupation=7.71#2>.

49 ILO, *Updating the International Standard Classification of Occupations (ISCO) Draft ISCO-08 Group Definitions: Occupations in Food*, Policy Integration Department, Bureau of Statistics. Available at: <https://www.ilo.org/public/english/bureau/stat/isco/docs/d8a.pdf>.

50 CEDEFOP, Food preparation helpers, Skills intelligence. Available at: <https://www.cedefop.europa.eu/en/tools/skills-intelligence/occupations?occupation=9.94#2>.



remain stable at around 40%, and that for car, van, and motorcycle drivers is also expected to remain stable, at around 20%, until the end of the forecast period.<sup>51</sup>

Demand in the agricultural sector is expected to remain stable across the EU-27 region, within a range of 15% to 35% for different occupations<sup>52</sup> within this sector. In this regard, it is worth noting that while there have been recent attempts to send Bangladeshi seasonal farm workers to Greece, these initiatives have faced various challenges. Successfully training employees in the agricultural sector involves navigating certain difficulties, and undertaking seasonal employment as farm workers is not considered lucrative by many workers, and so some workers who travel for this stated purpose switch jobs and/or cross the border into other EU MSs in search of other economic opportunities.

Demand for electrical and electronic technicians, installation professionals, and maintenance workers in the EU-27 is expected to remain within the 20%-70% range over the period 2022-2035, depending on the specific occupation within this sector.<sup>53</sup>

Only broad-based sectoral demand data, i.e. for ICT, caregiving, transportation and logistics, hospitality, etc., are available for the EU MSs, and specific demand at occupation and competency levels were not accessible to the researchers of this report. Thus, matching this data with the supply side data remains challenging.

51 CEDEFOP, Drivers & vehicle operators, Skills intelligence. Available at: <https://www.cedefop.europa.eu/en/tools/skills-intelligence/occupations?occupation=8.83#2>.

52 CEDEFOP, Farmworkers and gardeners, Skills intelligence. Available at: <https://www.cedefop.europa.eu/en/tools/skills-intelligence/occupations?occupation=6.61#2>.

53 CEDEFOP, Electroengineering workers, Skills intelligence. Available at: <https://www.cedefop.europa.eu/en/tools/skills-intelligence/occupations?occupation=7.74#2>.

The broad occupational sectors in high demand in Europe as a whole and selected European countries are summarised in Table 4 below.

**Table 4: Occupational sectors with high European demand and high Bangladesh supply capacity**

State	Overall demand for migrant workers	Priority sectors where Bangladesh can potentially respond	Source
<b>Denmark</b>	In 2021, new recruitment of workers from abroad accounted for 5.3% of total inflows to employment	ICT, Transportation, Construction	CEDEFOP
<b>France</b>	Migrant workers constitute approx. 10% of total workforce, as of 2021	Caregiving, Construction, Hospitality, ICT	CEDEFOP
<b>Germany</b>	About 400,000 additional migrant workers will be needed annually	Construction, Transportation & Logistics, ICT	“Fachkräfteengpassanalyse”
<b>Greece</b>	Migrant workers constitute approx. 10% of total workforce, as of 2021	Farming, Construction	CEDEFOP
<b>Italy</b>	Migrant workers constitute 11.7% of total workforce, as of 2019 (approx. 68% of whom are from outside the EU)	Farming, Caregiving, Transportation & Logistics	CEDEFOP
<b>Netherlands</b>	By 2030, will host approx. 1.2 million migrant workers	ICT, Hospitality, Transportation	CEDEFOP
<b>Norway</b>	Migrant workers constitute approx. 9% of total workforce, as of 2021	Construction, Caregiving	CEDEFOP
<b>Spain</b>	Hosts 2.59 million migrant workers, as of 2022	Construction, Hospitality, Transportation	CEDEFOP
<b>Sweden</b>	In 2021, 74,000 out of 94,000 new jobs were taken up by migrant workers	ICT, Caregiving, Transportation	CEDEFOP

As can be seen from the information provided in Table 4 above, in selected EU MSs, the majority of high-demand occupations are in “low-skilled” service sectors, a point which is echoed in the Eurofound report titled *Wage and task profiles of employment in Europe in 2030*,<sup>54</sup> which forecasts that there will be high growth in demand for both high-skilled, white collar jobs and low-skilled, blue collar jobs in the EU during the period 2015-2030, as shown in Figure 5 below.

54 Storrie, D. and J. I. Antón, *Labour market change: Wage and task profiles of employment in Europe in 2030*, Eurofound, 2018. Available at: <http://eurofound.link/ef18085>.

**Figure 5: EU employment change by job-wage quintile and occupation, 2015-2030 (% per year)**



Source: Labour market change: Wage and task profiles of employment in Europe in 2030, Eurofound, 2018. Available at: <http://eurofound.link/ef18085>

### 3.2 CHANGING POLICY AND REGULATORY FRAMEWORKS IN THE EU FAVOURING MIGRANT WORKERS

Recent years have seen many major EU MS economies adopt policy and regulatory frameworks that are more favourable to migrant workers from abroad. The most recent example is that of Germany's adoption of an updated immigration bill, passed in June 2023 and due to enter into force by March 2024.<sup>55</sup> This legislation will provide for, among other elements, easier terms for obtaining the EU Blue Card, a work permit which facilitates the migration of educated third-country nationals to the EU to continue their career, even for professionals who do not hold a recognised degree. There are similar examples from other EU MSs, such as France offering a visa for tech workers and entrepreneurs which allows four years of temporary residency and sets out a clear path toward permanent residency.<sup>56</sup>

55 Fragomen, *The German Immigration Reform of 2023/2024*. Available at: [https://www.fragomen.com/a/web/rkwXYdCvvo73iZQWYEwvo/7ZArVv/fragomen-policy-paper\\_german-immigration-reform-2023-2024.pdf](https://www.fragomen.com/a/web/rkwXYdCvvo73iZQWYEwvo/7ZArVv/fragomen-policy-paper_german-immigration-reform-2023-2024.pdf).

56 OECD, *What are the risks and rewards of start-up visas?*, Migration Policy Debates, No. 28, July 2020. Available at: <https://www.oecd.org/migration/mig/MPD-28-What-are-the-risks-and-rewards-of-start-up-visas.pdf>.

## CHAPTER 4:

# BANGLADESHI 'SUPPLY SIDE' LABOUR AND SKILLS PROFILE

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This chapter covers the supply side capacity of Bangladesh in terms of the size of the labour force and the employment/unemployment situation, and the landscape of enrolment in and graduation from technical and vocation education in particular. National data and other published data from the respective ministries and public institutions have been used to accurately portray the supply side landscape of Bangladesh, for key occupational sectors exhibiting high demand and growth in the EU MSs. The migratory outflow of Bangladeshi workers to the EU is also covered in this chapter.

### 4.1 LABOUR FORCE STATISTICS

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As of 2022, the size of the labour force in Bangladesh (persons aged 15 years and above) stood at 74,459,362 persons, according to World Bank data<sup>57</sup> obtained from the ILO and the Population Division of UNDESA (drawing on official data from the GoB). A World Bank report<sup>58</sup> published in 2018 (the latest available data) indicated that while approx. 46% of the working age population had attained secondary education, only approx. 4% had tertiary education, and only 2.1% had any vocational training outside of the formal schooling system.

The *Quarterly Report on the National Labour Force Survey 2022*<sup>59</sup> published in April 2023 indicates the size of the labour force as 72.89 million persons (as of the last quarter of 2022), with a labour participation rate of 60.91% for people aged 15 and over, and an unemployment rate of 3.2%. Of the total number of persons in employment, 46.96% were employed in the agricultural sector, 16.94% worked in the industrial sector, and the remaining 36.10% were engaged in the services sector.

### 4.2 TVET SUPPLY SIDE IN NUMBERS

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The numbers of TVET institutions, enrolment, and graduates in Bangladesh are quite substantial. It is expected that this rather large supply side capacity might be considered by actors engaged in any potential EU Talent Partnership initiative as a basis for leveraging sourcing of migrant workers. Data from the Bangladesh Bureau of Educational Information and Statistics (BANBEIS)<sup>60</sup> provides an accurate picture of the following supply-side capacity of TVETs in Bangladesh:

57 World Bank, Labour force, total – Bangladesh, Data. Available at: <https://data.worldbank.org/indicator/SL.TLF.TOTL.IN?locations=BD>.

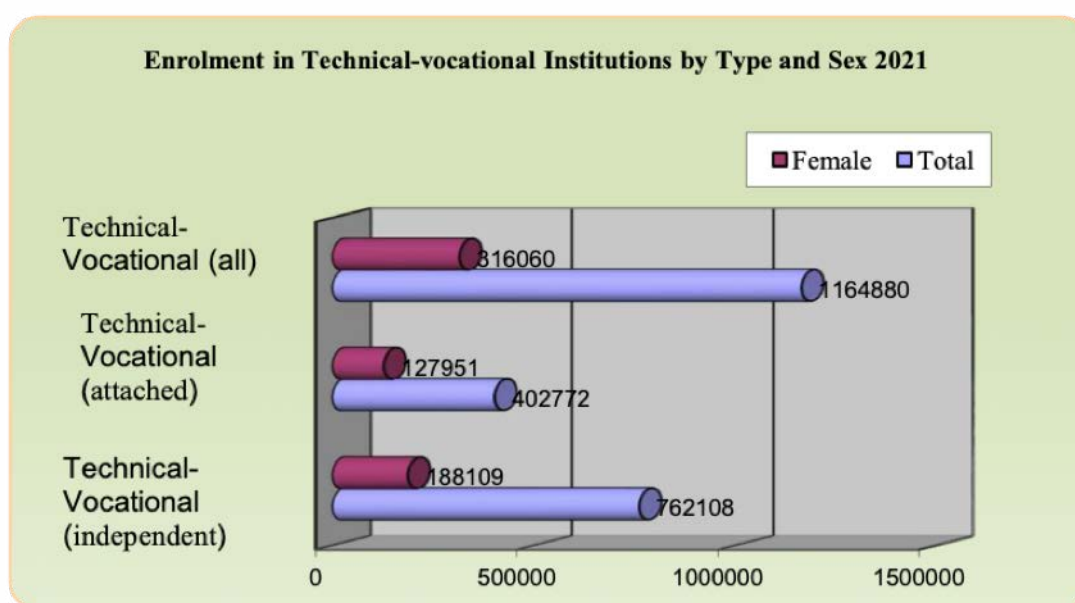
58 World Bank, *Bangladesh Skills for Tomorrow's Jobs: Preparing Youths for a Fast-changing Economy*, 2018.

59 Bangladesh Bureau of Statistics, *Bangladesh Quarterly Labour Force Survey 2022: Provisional Report*, 2023. Available at: <https://reliefweb.int/report/bangladesh/bangladesh-quarterly-labour-force-survey-2022-provisional-report>.

60 Visit the BANBEIS homepage at: [banbeis.gov.bd](http://banbeis.gov.bd).

- As of 2019-2020, there were 13,163 TVET and skills development providers in the country (7,776 of which were affiliated with the Bangladesh Technical Education Board (BTEB)), with the capacity to produce 1.7 million graduates annually. The most recent *NSDP Action Plan* projects an annual target of around 2.0 million for the period 2022-2026, for a cumulative 10.7 million trainees by the end of the forecast period.
- According to a survey by the NSDA, conducted during the period 2019-2020, 16 agencies accounted for 90% of the training provided. These institutions, both public and private, offer a wide variety of formal, informal, and non-formal training courses to different groups, employing diverse approaches, modes of delivery, assessment processes, and certification standards.
- BANBEIS data for 2021 shows total enrolment of 171,248 students at TVET institutions in grade 9, 159,459 enrolments in grade 10, 253,245 enrolments in grade 11, and 249,149 enrolments in grade 12.

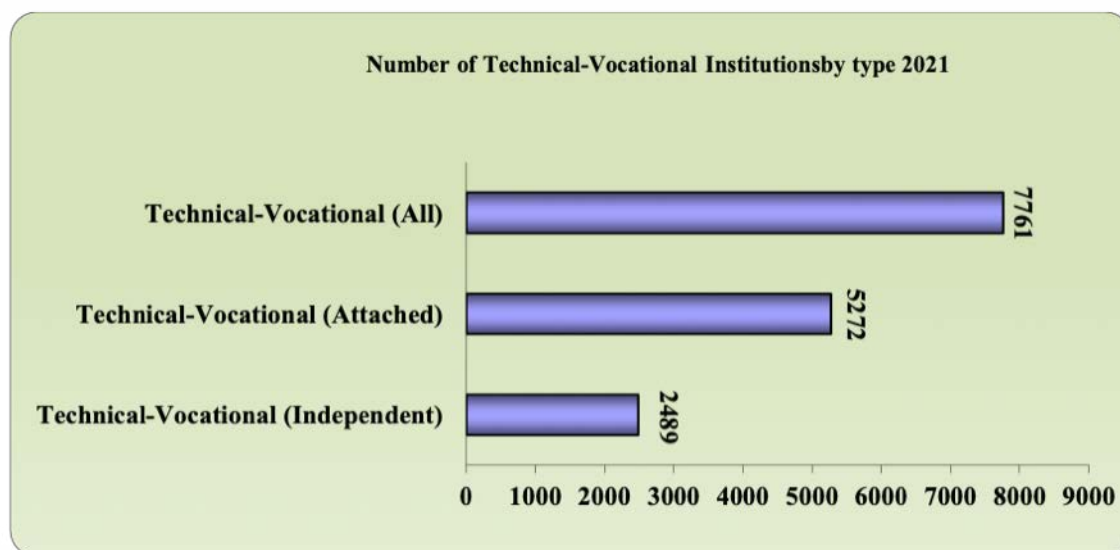
**Figure 6: Enrolment in technical-vocational institutions by type and sex, 2021**



Source: Bangladesh Bureau of Educational Information and Statistics (BANBEIS). Available at: <https://banbeis.gov.bd/>

- In 2021, the number of polytechnic institutions in Bangladesh stood at 439, employing 120,98 teachers; the number of Technical Schools and Colleges stood at 225, with 4,570 teachers; and the number of TTCs stood at 166, with 2,117 teachers. Additional types of sector-specific technical training institutes also operate in the country, e.g. for leather, textiles, ceramics, graphic design, etc. The total number of these various types of technical training institutes stood at 7,761 in 2021, employing 54,942 teachers.

**Figure 7: Number of technical-vocational institutions by type, 2021**



Source: Bangladesh Bureau of Educational Information and Statistics (BANBEIS). Available at: <https://banbeis.gov.bd/>

- The majority of these institutions are private sector entities, and the number of girls participating in the training provided is on the rise. (More details on the feminisation of outward migration is available in section 4.9 of this report.)

### 4.3 SKILLS SUPPLY CAPACITY

The skills supply capacity from Bangladesh in selected broad occupational sectors is briefly discussed below.

**(i) ICT:** Significant supply capacity exists in specific trades, e.g. graphic design, animation, 3-D animation, coding in several major languages, etc.; leaders in Bangladesh’s ICT sector have expressed their confidence in the sector’s supply capacity, complying with the required competence level or standards.

**(ii) Construction:** Considerable supply capacity exists in various trades falling under this sector, e.g. heavy equipment operators, crane operators, glass-fitters, concrete mixer operators, etc. RPL systems will be useful to certify the experienced and skilled manpower already existing in this sector, while provisions for new training are also available.

**(iii) Caregiving:** Supply capacity in quantitative terms is significant in the occupations of medical assistant, nursing assistant, midwife, and medical technologist. However, the (relatively lower) quality of skills training could be an issue for some graduates, and language barriers could potentially pose a challenge. Experience in sending caregivers under the scheme with the International Manpower Development Organisation of Japan (IM Japan) can be replicated and scaled up for the EU context.



**(iv) Food preparation:** Significant supply capacity exists in specific trades, e.g. baking, continental and Chinese cuisine, catering, etc. Leaders in Bangladesh's agro-food sector have expressed confidence in the supply capacity, but certification might have to be arranged in cooperation with EU bodies.

**(v) Transportation and logistics:** Competency standards have been developed for driving and maintenance of heavy and regular motor vehicles, and there is significant supply capacity for drivers, forklift operators, and automobile mechanics.

**(vi) Electro-mechanical installation, repair, and maintenance:** Almost all TTCs in Bangladesh offer training courses on residential electrical wiring, and mechanical repair and maintenance, and competency standards and assessment guidelines have been developed for several trade courses in these areas.

**Language and soft skills training** should be combined with skills training for specific opportunities in targeted EU MSs.

## 4.4 POLITICAL WILL OF BANGLADESH TO SUPPORT AN EU TALENT PARTNERSHIP

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Keen interest and willingness for preparation has been expressed by government agencies, private sector actors, and CSOs in regard to carrying out the necessary preparatory work and providing cooperation aimed toward successful implementation of a future Talent Partnership programme with EU MSs. The strong political will of the GoB in this regard is evidenced not only by its undertaking since 2008 of various TVET and skills projects with the support of its development partners, but also by the standalone activities it has undertaken. One apt example of efforts in this regard is the 2017 launch of the National Human Resource Development Fund<sup>61</sup> by the Ministry of Finance (MoF), aimed at financing skills development in Bangladesh. The Fund is being used to support public and private training providers to deliver market-responsive skills training, in line with the demands of the domestic and international markets.

## 4.5 DATA ON LABOUR MIGRATION FLOWS AND STOCKS

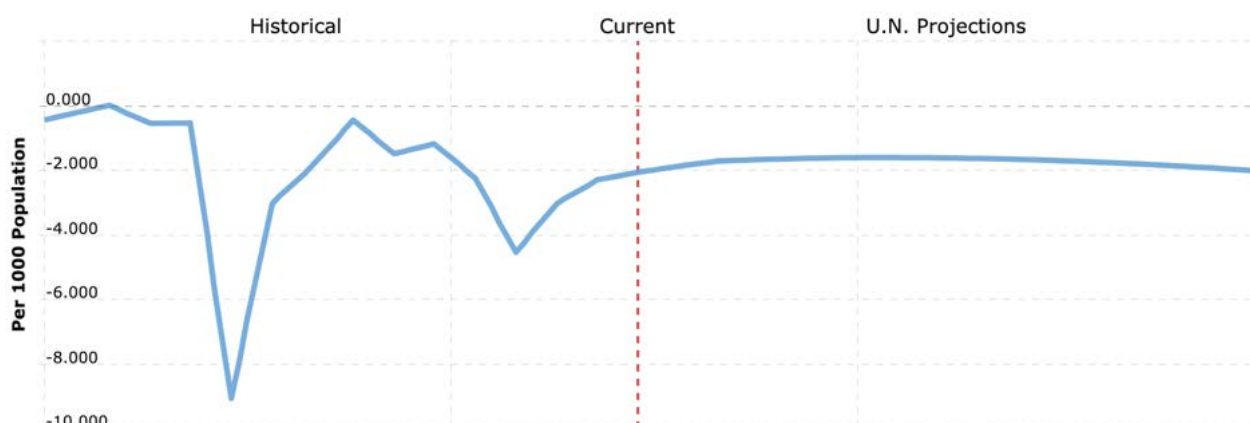
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Data on migration from Bangladesh<sup>62</sup> indicate that the net migration rate for Bangladesh in 2023 stood at **2.065** persons per 1,000 of population, a **2.27% decline** from 2022 (**2.113** persons per 1,000). In 2021, the net migration rate was **2.160** per 1,000, a **2.17% decline** from 2020 (**2.208** persons per 1,000). Historical data in this regard, and the projections until 2102, are provided in Figure 8 below.

61 Information on the Fund is available at: [nhrdf.gov.bd](http://nhrdf.gov.bd).

62 Microtrends, Bangladesh Net Migration Rate 1950-2023, Countries, Bangladesh. Available at: <https://www.macrotrends.net/countries/BGD/bangladesh/net-migration>.

**Figure 8: Bangladesh's net migration rate in Bangladesh, 1950-2102<sup>63</sup>**



The BMET keeps data on outward labour mobility. As they pertain to the EU MS level, the BMET data show that 7,594 and 9,703 migrant workers travelled to Italy in 2022 and 2023, respectively,<sup>64</sup> with the total cumulative number of outgoing migrant workers in the Italian context standing at 73,470 (0.47% of the total migration as workers) by 2022. However, the BMET data only show the records of outgoing migrant workers, and do not record numbers for individuals travelling as students, tourists, or visitors for other purposes. For this reason, a total number for Bangladeshis travelling to EU MSs is mostly absent in the BMET data.

## 4.6 LABOUR MARKET INFORMATION SYSTEMS AND DATA COLLECTION METHODS

The BBS initiated and hosts a Labour Market Information System (LMIS) web portal for Bangladesh. However, it only provides some basic and aggregate data and does not provide any information on employment opportunities, demand for labour by skill type, wage structure in various industries, or training opportunities for workers, etc. Moreover, the existing system in Bangladesh does not offer any interactive platforms to match jobseekers with employers. Information on overseas labour market opportunities is also not included in the data.<sup>65</sup> It is recommended to link this LMIS with the CEDEFOP database (or relevant national portals), the EU agency for TVET-related information, so that information on skills gaps is readily available to/shared among interested recruitment agencies and TVET institutions in Bangladesh.

Bangladesh has no regulatory provision in place for employers to submit an annual return on employment and labour data to the concerned authorities. In the absence of such a regulatory requirement, no data generation system required for the LMIS is in place. To facilitate the success of a prospective Talent Partnership programme with the EU, data on skills requirement and job vacancies need to be collected from the targeted destination countries and reported in Bangladesh, and disseminated among the various stakeholders – in a periodic and regular manner.

<sup>63</sup> Ibid.

<sup>64</sup> BMET, Overseas Employment & Remittances (1976 to 2023). Available at: <http://www.old.bmet.gov.bd/BMET/viewStatReport.action?reportnumber=24>.

<sup>65</sup> Razzaque, M. A, Kondkher, B. H. and J Rahman, *Towards an Effective and Integrated Labour Market Information System for Bangladesh*, 2018, ILO, IOM, Swiss Agency for Development and Cooperation.



## 4.7 BANGLADESH'S EDUCATION SYSTEM

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The school education system in Bangladesh has three separate tracks: General Education, Madrasah Education (religious education), and Technical/Vocational Education. Each track requires the student to go through preschool, primary school, and secondary school, and in some cases, there are also colleges available. In attending primary and secondary education, most students attend the school that is most accessible and closest to their place of residence. Primary education up to grade 8 is compulsory and provided free of cost at public institutions, and girls can obtain free education up to grade 12.<sup>66</sup>

## 4.8 CURRICULA AND MODULES OF THE BANGLADESHI EDUCATION SYSTEM

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Regardless of the education track pursued, some subjects are compulsory in all grades, such as Bangla language, mathematics, and combined social sciences courses consisting of history and geography. English language, while not compulsory, is available as a subject from grade 3 onwards in the general track. Under the religious track, Arabic language is compulsory in all grades from primary level onwards. The TVET track starts from grade 9, and ends upon completion of grade 12.

66 Salahuddin, M., Khatun, R. and S. Bilkis. 'Present Situation of Female Education in Bangladesh: An Overview of Last Decade', *BPDM Journal of Research*, Vol. 1, No. 2. Available at: [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=3372022](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3372022).

In the TVET stream, there are 31 trade courses at the Secondary School Certificate (SSC) level (grades 9 and 10). At the Higher Secondary Certificate (HSC) level, covering grades 11 and 12, there are 14 trade courses available.<sup>67</sup>

Additionally, various certification and diploma courses are available following completion of grade 8, at the SSC and HSC levels; for example, 10 trade courses are offered under the Certificate in Health Technology, after completion of the SSC level in any of the three streams. Similarly, 14 trade courses are offered in other economic sectors, for students who complete grade 8. There are also shorter courses (approx. 60 hours in duration) available in many other occupations, under the BNQF.

## 4.9 GENDER DIMENSION OF EDUCATION AND MIGRATION IN BANGLADESH

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An increasing number of female students are enrolling in technical and vocational education. BANBEIS data for 2021 shows that total enrolment in the 7,761 TVET institutions across Bangladesh was 1,164,880, with an average of 150 students per institution, while the total number of female students was 316,060 (27.13% of total enrolment). The gender parity index was 0.37 (37%), falling behind the national target of equality (100%). Both the percentage of girls enrolled and the gender parity index were found to vary over a longer range among types of institutions. The total number of teachers employed at TVET institutions was 54,942, including 11,269 (20.51%) female teachers. The average number of teachers per institution was 7. The gender parity index was 0.25 (female to male). The teacher-student ratio was approx. 1:21 for all types of institutions.

Female labour migrants from Bangladesh are currently concentrated in the selected occupations of domestic worker, tailoring, and a minimal number of caregivers, migrating to destination countries with which Bangladesh has concluded agreements. There is thus ample scope for exploring other occupational sectors for women, with the appropriate skills and language training. Occupations in broad sectors, such as caregiving, food preparation, ICT, and even construction, are likely to encourage migration of women workers to the EU and elsewhere, when opportunities for legal migration open up. Male nurses are also in demand, given the existence of situations where a male nurse may be more optimally suited to a given task.

Spouses of workers currently residing and working in EU MSs, who are regularised and documented, can also work legally, once they enter the EU under a valid spouse visa, regulated by the EU Family Reunification Directive. Suitable skills programmes, and language training can benefit members of this group by facilitating their entry into the workforce in destination countries.

## 4.10 SKILLS DEVELOPMENT AND INSTITUTIONAL CAPACITY

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The field of skills development in Bangladesh is gradually growing, and donor organisations have made significant financial investments in its development. Bangladesh can therefore produce and supply human

67 BTEB, *A Report on Enrollment of Analysis in TVET Under Bangladesh Technical Education Board*, 2016. Available at: [https://bteb.portal.gov.bd/sites/default/files/files/bteb.portal.gov.bd/page/0a6d25ca\\_552d\\_462f\\_9059\\_891da3ad04d6/EnrollmentAnalysis%20Corect%20ffff%20.pdf](https://bteb.portal.gov.bd/sites/default/files/files/bteb.portal.gov.bd/page/0a6d25ca_552d_462f_9059_891da3ad04d6/EnrollmentAnalysis%20Corect%20ffff%20.pdf).

resources for any industry. Many initiatives, such as the Skills for Employment Investment Programme (SEIP), STEP, and Skills 21, are supported and funded by donor organisations. The EU is one of the most significant donors in terms of investment in Bangladesh's skills sector, and it is through this assistance that the TVET reform initiative has been launched. The NTVQF is another prominent example of EU endeavour to this end.

One of the main issues hampering further development in this area is the lack of skilled teachers in the field of skills development. The fact that the BTEB is the only organisation authorised for skills certification, and that the certifications issued are not recognised in any foreign destination is another major issue, the addressing of which is a complex process and will require many layers of harmonisation and agreements between the BTEB and the competent destination country authorities.

A partnership between Bangladesh and EU MSs should thus be established so that the EU can offer technical assistance for skills development. Such assistance and cooperation could focus on areas of joint development, harmonisation, and implementation of training curricula, collaborative skills testing and certification, or funding for infrastructure development and ToT. Along with developing work-related skills, skills development training should emphasise cultural and linguistic development. Building partnerships within the public and private sectors is crucial for EU MSs, with public and private sector training institutes combining to help to overcome the labour shortfalls besetting many EU MSs.

In Bangladesh, the Government has very carefully planned out its technical and vocational education structure. There are 66 TTCs operational as of 2023, and the GoB has set up polytechnic institutions at the lower *upazila* (sub-district) level. The Government intends to establish TTCs in all sub-districts<sup>68</sup> and is currently doing so in 40 sub-districts. Bangladesh therefore has a good technical training facility infrastructure already in place. However, the Government needs to allocate more resources to developing curricula based on the needs of the local and overseas labour markets, train greater numbers of teachers, and provide funding for a sufficient number of positions for instructors at all levels. The prospective EU Talent Partnership scheme could use this leverage of expanding TVET strength to meet EU demand for specific skills by sourcing skilled workers from Bangladesh.

## 4.11 BANGLADESH NATIONAL TECHNICAL AND VOCATIONAL QUALIFICATION FRAMEWORK

The BNQF<sup>69</sup> was developed by the GoB with support from the ILO and the EU in 2008, undergoing further development in 2011. It now comprises 10 levels of qualifications, 8 from the TVET stream, and 2 from the higher education stream. The BNQF is an evolving document, and the details of the curricula, requirements for delivering specific training, qualification of teachers, infrastructure requirements, testing and certification procedures, etc., can undergo further review to ensure alignment with those of the EU MSs for future recognition and accreditation, should an EU Talent Partnership be put in place.

68 There are 495 sub-districts in Bangladesh.

69 Ministry of Education of Bangladesh, *Bangladesh National Qualifications Framework (BNQF)*, 2021. Available at: [https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms\\_872937.pdf](https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms_872937.pdf).



#### 4.11.1 Private and Voluntary Standards

A number of international and EU-based private standards bodies, such as the City Guilds, are in active partnership in Bangladesh with TTCs and schools for specific trade courses, e.g. culinary arts, food processing, and horticultural production (Global GAP). However, enrolment in such courses is expensive and, as a result, students tend to enrol in cheaper alternatives. This paves the way for possible interventions that make courses with acceptable certification schemes more affordable. Easier access to finance via PKB would be one example of such an intervention.

### 4.12 EDUCATIONAL INSTITUTIONS AND FACILITIES IN RELEVANT SECTORS

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As mentioned in section 4.2 above, there are thousands of educational institutions and facilities in Bangladesh, with substantial capacity to produce a large number of graduates in many trade courses. This report sheds further light on the supply capacity of specific relevant sectors in the Sectoral Brief in Chapter 5. If there is the option to forge institutional partnership, national organisations such as the NSDA, the BMET, and BTEB could be approached in this regard.

### 4.13 PREPAREDNESS FOR FUTURE SKILLS DEMAND, PARTICULARLY IN EU MEMBER STATES

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There are ongoing preparations to introduce infrastructure, and develop curricula and ToT courses for Industry 4.0 which would be applicable to major industrial sectors at eight polytechnic institutions in eight administrative divisions of Bangladesh, with support from the Asian Development Bank (ADB). Preliminary research has been carried out<sup>70</sup> by the ADB to identify areas where Industry 4.0 can be applied in the major industrial sectors, e.g. RMGs, textiles, agro-food, etc.

### 4.14 RECOGNITION AND ACCREDITATION OF QUALIFICATIONS

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No bilateral MRAs currently exist between Bangladesh and any EU MSs on accreditation and quality of certificates issued for skills training. Confirming the quality of TVET education and ensuring the authenticity of certificates issued are both concerns that need to be addressed for the effective functioning of any future Talent Partnership with the EU. In this regard, there are international examples of dual certification approaches that see immediate recognition in both the country of origin and the destination country, as well as of skills validation mechanisms, which may be considered in the Bangladesh context.

70 At the time of writing the present report, this research had not been published.

The issues of recognition and accreditation of skills and related certifications are complex, especially in the diverse EU MS setting, as there is no singular standard or conformity assessment procedures across the EU MSs for assessing the quality and/or level of an individual's skills, competencies, or learning. Assessing the individual country's curricula, quality standards, or other benchmarks is also challenging, due to language barriers; for example, the curricula for skills training, and assessment process for a specific trade (e.g. welding) in Germany is written in German, which poses a challenge for non-German speakers when assessing whether a very similar training curricula and assessment procedure practiced in a third country would be sufficient to pursue mutual recognition of graduate certificates issued. This is an ongoing challenge faced by many countries of origin when their nationals at vocational or mid-skill levels seek to access EU labour markets, and it remains an area of much fervid reflection and ongoing policy debate. To assess the talents of potential migrants, an assessment process which includes an assessor authorised or accredited by the EU counterparts is needed. This is possible at both public and private training facilities.

Considering the above factors, there is scope for institutional partnership between the EU counterparts and local Bangladeshi TVET institutions in the areas of curricula development, training, exposure visits and exchange programmes for the TTCs, etc., and possible joint supervision in executing the specific assessments, and training and language courses. Sector-, skill-, and country-specific collaboration is also possible.

#### 4.14.1 Recognition of Prior Learning system

The RPL has successfully commenced in Bangladesh, and since 2014 has offered testing and assessment of skills learned at work for the purpose of issuing skills certificates, for a nominal fee. Designated TTCs offer such services under the RPL system, which is the result of the TVET Reform Project (2007-2015) funded by the EU, and implemented by the ILO.

A total of 411 RPL centres have been accredited, and, by 2020, these facilities had assessed and provided certificates to 41,560 workers, including 15,000 migrant workers,<sup>71</sup> according to a report published by the ILO in that year. The same report mentions that the MoEWOE had shown keen interest in setting up RPL centres in selected major destination countries (e.g. Saudi Arabia).<sup>72</sup> Similar initiatives could be undertaken in EU MSs, under joint collaboration with the respective authorities, to assess the skills of hitherto undocumented migrant workers from Bangladesh living there, assessing their skills and prospects for employment in the EU MSs.

## 4.15 LIFE SKILLS, CULTURAL AMBIENCE, AND COMMUNICATIONS SKILLS

Language barriers have been perceived as a major challenge to successful labour mobility from Bangladesh to the EU; while no substantial information could be obtained about the effects of life skills and cultural ambience in this regard. However, in recent times, many European countries have gained popularity among Bachelor's-level students from Bangladesh; the UK, Germany, France, Italy, Sweden, Portugal, and Finland in Western Europe, and some Balkan and Eastern European countries (e.g. North Macedonia, Lithuania, Estonia) are popular destinations.

71 ILO, *Recognition of Prior Learning (RPL) for Migrant Workers in Asia*. Webinar Report, ILO Dhaka, 2020. Available at: [https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms\\_757257.pdf](https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms_757257.pdf).

72 Ibid.



In many cases, students are required to receive language training during the first semesters following enrolment, commencing their studies proper once they have fulfilled the language requirements. To date, the information available on this matter does not report any case where a Bangladeshi student returned home from their educational pursuit abroad due to language barriers. However, it is likely that the case for migrant workers will not replicate this dynamic, and basic language training would be required (in addition to skills training), for any potential EU Talent Partnership to prove successful.

#### **4.16 MOBILITY AND STUDENT EXCHANGE SCHEMES WITH EU MEMBER STATES**

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Based on the findings of the KIIs conducted for the report, there are no formal exchange agreements between Bangladesh and EU MSs for students and/or professionals in place at the institutional level. However, there are some instances of successful participation of Bangladeshi students in global scholarship programmes involving EU-based universities, such as the Erasmus Mundus programme. Similar exchange programmes for TVET courses could be launched among EU and Bangladeshi TVET institutions, for successful progression of the future EU Talent Partnership scheme.

#### **4.17 LANGUAGES TAUGHT IN THE PUBLIC AND PRIVATE EDUCATION SYSTEMS**

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In Bangladesh, English is taught as a second language in both the public and private education systems. Selected languages (Arabic, Cantonese, Japanese, Korean, etc.) are also taught at specific TTCs, for targeted labour migration (apart from English, no courses in any other European language are available at TTCs). This practice can be replicated for specific EU MSs, in line with increased opportunities for documented migration as workers in those EU destinations. Orientation on basic European cultural norms, food and clothing habits, social customs, and festivities could be provided alongside the language courses, as part of the career-based skills training programmes.

Language training should be combined with skills training for specific opportunities in target EU MSs. Bangladesh may seek support from the EU MSs in regard to curricula and teachers for language training, while both public and private sector TTCs stand ready to provide the necessary training infrastructure.

## CHAPTER 5: SECTORAL BRIEF

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Information provided in Chapter 3 on the high growth and high-demand occupational sectors in the EU MSs, and the supply side situation in Bangladesh for these sectors (provided in Chapter 4) form the basis of this chapter, which provides a sectoral brief on these occupations. Three broad occupational sectors, caregiving, construction and related jobs, and ICT, are covered in this chapter. It offers more nuanced insights into the demand and supply for those key occupations characterised by high demand in the EU MSs and sufficient supply capacity in Bangladesh (at present and in the future), in light of a potential Talent Partnership between the EU and Bangladesh.

### 5.1 CAREGIVERS

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Demand for caregivers will continue to be extremely high in EU MSs, due to the rapidly ageing populations seen in most European states. The term ‘caregiver’ as used in this report refers to several occupations, including personal care workers, home-based personal care workers, health care assistants, medical assistants, health laboratory technicians and nurses.<sup>73</sup> The European Commission estimates that the number of people needing long-term care in the EU will rise by 12 million (from 40 to 52 million) between 2013 and 2060, and that the old-age dependency ratio (the ratio of people aged 65 or above relative to those aged 15-64 years) is projected to grow from 27.8% to 50.1%.<sup>74</sup>

Another factor contributing to the increasing demand for caregivers in EU MSs is the increasing participation of women in the labour force seen in recent decades, which has reduced the pool of potential carers, especially of those who provide care on an informal and/or unpaid basis. This increased demand is seen across the care spectrum, whether in institutions, such as nursing homes, hospitals, and clinics, or at the household level, in both the public and private sectors. A report<sup>75</sup> published in 2020 by the European Foundation for the Improvement of Living and Working Condition (Eurofound) indicated that employment of caregivers tends to vary by duration, be carried out by self-employed persons with the relative skills and credentials, and/or be provided by live-in employees. The EU has developed several policies related to employment conditions and the rights of caregivers, and their training and capacity building.

The number of migrant care workers in the EU is high. Taking Austria as an example, the total number of migrant carers employed by households was approx. 70,000 in 2017, meaning that approx. 5% of beneficiaries receiving

73 ILO, *Options for the Classification of Health Occupations in the Updated International Standard Classification of Occupations (ISCO-08)*, Policy Integration Department Bureau of Statistics. Available at: <https://www.ilo.org/public/english/bureau/stat/isco/docs/healthocc.pdf>.

74 European Commission, *The 2015 Ageing Report: Economic and budgetary projections for the EU 28 Member States (2013-2060)*, European Economy 3/2015, Publications Office of the European Union, Luxembourg, 2015.

75 Eurofound, *Long-term care workforce: Employment and working conditions*, Public services, Publications Office of the European Union, Luxembourg, 2020.



a care allowance were cared for by carers with a migration background.<sup>76</sup> Estimates for other EU MSs are also available. In Germany, the figures range from between 100,000 to 200,000 carers with a migration background,<sup>77</sup> most of whom are from Poland. In Italy, the official number in 2017 stood at 393,000 carers.<sup>78</sup> However, this figure does not include those providing household chores only (i.e. exclude personal care), who officially number 471,000, nor the large number of those working on an undeclared basis, estimated to be some 1.2 million.

In regard to the supply capacity for caregivers from Bangladesh, there have been initiatives from the GoB and the private sectors to scale up the provision of training in occupations related to caregiving (e.g. for nurses, medical technologists, paramedics, medical attendants, etc.). In 2019, the Technical and Madrasah Education Division of the MoE identified demand for courses on caregiving with the support of the ILO Bangladesh skills programme. During the period 2019–2021, the Bangladesh Technical and Education Board developed qualification packages, which included learning materials and assessment tools for the caregiving courses provided. However, the actual number of individuals entering these courses is still minimal: in 2021, only 94 students enrolled in the NTVQF Level 2 caregiving course at various institutions across Bangladesh.<sup>79</sup> With a population of over 170 million, Bangladesh already offers significant domestic employment opportunities for caregivers.

76 Federal Ministry of Labour, Social Affairs and Consumer Protection of Austria, *Österreichischer Pflegevorsorgebericht 2016 [Austrian Long-term Care Report 2016]*, BMASK, Vienna, 2017.

77 Lutz, H., 'Who Cares? Migrantinnen in der Pflegearbeit in deutschen Privathaushalten' ['Who Cares? Migrant women in care work in German private households'], in Larsen, C., Joost, A., and S. Heid (eds.), *Illegale Beschäftigung in Europa. Die Situation in Privathaushalten älterer Personen [Illegal Employment in Europe. The Situation of Older People in Private Households]*, Rainer Hampp, Mering, Germany, 2009, pp. 41–50.

78 Bonizzoni, P., *Regimi migratori, di cura e di genere: attualità e tendenze del lavoro domestico straniero in Italia [Migratory, care and gender regimes: current events and trends in foreign domestic work in Italy]*, InnovaCare, 2019.

79 TBS News, 'Greater investment in care services could create almost 300 million jobs : ILO report', TBS Report, 7 March 2022. Available at: <https://www.tbsnews.net/bangladesh/greater-investment-care-services-could-create-almost-300-million-jobs-ilo-report-381229>.

In Table 5 below, BANBEIS data for 2021 shows a total of approx. 75,000 enrolments in various courses, including nursing, medical technology, and medical assistance, which is a significant number. Once more research is undertaken, based on disaggregated data on course duration, curricula, quality, etc., it will likely prove possible to assess the suitability of these graduates for prospective employment as caregivers in EU Member States.

**Table 5: Bangladeshi institutions and enrolment in caregiving-related training, 2021**

Name of Institute	Management	No. of Institutions		No. of Teachers			No. of Enrolments		
		Total	Girls' Ins.	Total	Female	Female %	Total	Girls	Girls %
<b>Nursing and Midwifery College &amp; Institution</b>	Private	360	0	2,160	1,670	77.31	44,117	36,617	83
	Public	68	0	990	770	77.78	16,422	14,779	90
	<b>Total</b>	<b>428</b>	<b>0</b>	<b>3,150</b>	<b>2,440</b>	<b>77.46</b>	<b>60,539</b>	<b>51,396</b>	<b>84.9</b>
<b>Medical Technology</b>	Public	15	0	35	15	42.86	9,212	3,536	38.38
	Private	97	0	206	36	17.48	18,668	6,908	37.00
	<b>Total</b>	<b>112</b>	<b>0</b>	<b>241</b>	<b>51</b>	<b>21.16</b>	<b>27,880</b>	<b>10,444</b>	<b>37.46</b>
<b>Medical Assistant Training School</b>	Public	11	0	28	9	32.14	2,254	942	41.79
	Private	200	0	478	152	31.80	28,788	12,352	42.91
	<b>Total</b>	<b>211</b>	<b>0</b>	<b>506</b>	<b>161</b>	<b>31.82</b>	<b>31,042</b>	<b>13,294</b>	<b>42.83</b>

Source: Bangladesh Bureau of Educational Information and Statistics (BANBEIS). Available at: <https://banbeis.gov.bd/>

Bangladesh has a recent history of sending caregivers and technical interns to Japan, in some 14 occupational sectors, representing successful fulfilment of an agreement between the MoEWOE and IM Japan. Under the procedures put in place, particular TTCs holding agreements with the BMET conduct pre-screening of applicants wishing to travel to Japan under this scheme. Pre-screening consists of assessing the candidate's physical fitness and verifying that they hold the minimum level of educational qualification (12 years of formal education and attainment of the Higher Secondary Certificate) during a primary interview. Selected candidates are provided with orientation, followed by six months of Japanese language training. Since the introduction of this scheme, the GoB has expanded<sup>80</sup> the scope of the Japanese language learning provided to 42 technical training centres, leading to a corresponding increase in the number of workers who ultimately travel to and take up roles in Japan.

Following on from the success of such schemes, and given the great need for caregivers in the EU, Bangladesh is ideally positioned to provide substantial numbers of proficiently trained caregivers to EU MSs, leading to outsized, sustainable gains for all parties involved. Building on the template followed for past success in this area would allow similar measures to be undertaken with EU MSs, while adapting agreements and delivery geared toward the specificities prevailing in each MS, anchored in the delivery of three main forms of support: childcare, care of the sick, and elderly care. To this end, the respective curricula should be developed accordingly,

80 Ara, A., 'Sending workers to Japan rises', *The Financial Express*, Economy, Bangladesh, 10 January 2023. Available at: <https://thefinancialexpress.com.bd/economy/bangladesh/sending-workers-to-japan-rises-1673319274>.

to provide basic training to the caregiver in Bangladesh. If the successful IM Japan model is followed, the caregiver should be provided with language training in Bangladesh and then receive further training in the respective country of destination.

The modalities of the agreement with Japan may be further examined in regard to sending caregivers and workers from other occupations to the EU. The Philippines currently has an arrangement with various EU MSs to provide medical personnel, including nurses, doctors, and caregivers. Under this scheme, students whom have completed higher secondary school can join the caregiving profession, receive training, and work in EU MSs. However, this has created a large outflow of health care professionals from the Philippines, and resulted in the recent placing of a cap on outflows by the Government of the Philippines.<sup>81</sup>

## 5.2 INFORMATION AND COMMUNICATIONS TECHNOLOGY

In 2019, a CEDEFOP report indicated a shortage of ICT professionals in 24 EU MSs. The scope of the definition of 'ICT professionals' employed by the CEDEFOP is quite broad, with the reported shortages spanning a range of roles, including those who conduct research, plan, design, and provide advice and improve information technology systems, hardware, software, and related concepts for specific applications; develop associated documentation including principles, policies, and procedures; and design, develop, control, maintain and/or support databases and other information systems to ensure optimal performance and data integrity and security. Typically, workers employed in these areas will have completed between three and six years of higher education.<sup>82</sup>

Official EU figures show that, despite 51% growth in the number of ICT specialists in the EU during the past ten years (nine times the average growth rate for other professions), 58% of EU firms still find it challenging to recruit ICT specialists, and demand continues to grow. These figures include firms in the ICT sector but also in other sectors that use digital technologies. In 2020, ICT skills, including in business ICT systems and applications, tools for software, web development and configuration, and data analysis, accounted for approximately half of the job growth recorded in the EU.<sup>83</sup> This trend has led the European Commission to estimate that, by 2030, the EU will have a shortage of some 8 million ICT specialists.

While occupation-level disaggregated data is scarce, international comparisons suggest that the EU lags behind other areas in terms of availability of workers qualified in the critical skills and technologies listed below.

**Computer programming:** Organisation for Economic Cooperation and Development (OECD) research from 2019 showed that the EU has, on average, a significantly smaller pool of people with basic coding skills than both the United States (US) and China.<sup>84</sup>

81 Reuters, 'Philippines raises cap on health professionals going abroad', Asia Pacific, 18 June 2021. Available at: <https://www.reuters.com/world/asia-pacific/philippines-raises-cap-health-professionals-going-abroad-2021-06-18>.

82 Lopez-Cobo, M. et al., *Academic offer and demand for advanced profiles in the EU: Artificial Intelligence, High Performance Computing and Cybersecurity*, European Commission Joint Research Centre, JRC Technical Reports, Publications Office of the European Union, Luxembourg, 2019.

83 CEDEFOP, 'Coronavirus and the European job market: how the pandemic is reshaping skills demand', News and events, News, 18 December 2020. Available at: <https://www.cedefop.europa.eu/en/news/coronavirus-and-european-job-market-how-pandemic-reshaping-skills-demand>.

84 The pool was estimated as being 46% smaller than that of the US and 29% smaller than that of China.





**Artificial intelligence (AI):** The EU's *White Paper on AI* highlights that EU companies are unable to meet their demand for workers with the skills to develop and deploy AI.<sup>85</sup> The report further mentions that 59% of all AI researchers are based in the US, compared to just 10% in Europe.<sup>86</sup> Furthermore, based on a comparative study of LinkedIn profiles, the UK has 1.8 times more individuals with AI skills than the EU average,<sup>87</sup> while the figure for the US stands at over three times the EU average.

**Cybersecurity:** Analysis undertaken at a European Commission Joint Research Centre (JRC)<sup>88</sup> found that the European cybersecurity research community lacks critical mass and coordination in synergic domains and is not always able to connect with the industry.

**Cloud and emerging technologies:** The EU lags behind the US in regard to the number of ICT professionals with skills related to cloud technologies, big data and micro-electronics.<sup>89</sup>

Flexible immigration policies and strengthening of local education in the ICT sector, providing increased access for locals, migrants, and refugees, have been recommended to reduce the ICT skills gap in the EU.<sup>90</sup>

85 European Commission, *White Paper on Artificial Intelligence: a European approach to excellence and trust*, COM(2020) 65 final, Publications Office of the European Union, Luxembourg, 2020.

86 MacroPolo, *The Global AI Talent Tracker*. Available at: <https://macropolo.org/digital-projects/the-global-ai-talent-tracker>.

87 LinkedIn Economic Graph, *AI Talent in the European Labour Market*, 2019. Available at: <https://economicgraph.linkedin.com/content/dam/me/economicgraph/en-us/reference-cards/research/2019/LinkedIn-AI-Talent-in-the-European-Labour-Market.pdf>.

88 Nai Fovino, I. et al., *European CS Centers of Expertise - Cybersecurity Competence Survey*, JRC Technical Reports, Publications Office of the European Union, Luxembourg, 2018.

89 European Commission, *Strategic dependencies and capabilities*, Commission Staff Working Document, Internal market, Industry, Entrepreneurship and SMEs, 2021.

90 Anderson, J., *Europe Needs High-Tech Talent*, Policy Brief, July 2022, Foundation for European Progressive Studies, 2022.

As mentioned, France, for example, now offers a visa scheme for tech workers and entrepreneurs.<sup>91</sup> However, participation in such schemes thus far is reportedly low, with countries that have set aside permit quotas for such purposes not seeing these quotas being used up<sup>92</sup> by incoming entrepreneurs. More research should be undertaken to explore the possible causes of low participation in such EU MS schemes, especially in regard to potential grantees from developing countries.

In the Bangladeshi context, several recent initiatives have been undertaken to improve the skills training situation in the ICT sector. The latest data for training delivery in 24 trades in the ICT sector is provided in Table 6 below, reflecting the courses provided through cooperation between the Bangladesh Association of Software and Information Services and the Bangladesh Association of Contact Center and Outsourcing, under the SEIP of the MoF and funded by the ADB.<sup>93</sup>

**Table 6: Number of ICT sector learners engaged under the SEIP, to August 2023**

Total Target	Enrolment	Female	Certified	Female	Job Placement	Female	Dropout	Female
65,305	64,130	17,279	60,098	15,932	38,762	9,529	1,088	300

Source: SEIP, Training Statistics. Available at: <https://seip-fd.gov.bd/statistics>

The 24 trades<sup>94</sup> for which competency standards (CSs) and assessment guides (AGs), where applicable, have been developed and training provided are:

1. CS for 2-D and 3-D Animation
2. CS for Finance and Accounting Outsourcing (ICT Sector)
3. CS for Professional Digital Content Management (ICT Sector)
4. CS for Big Data, Data Analytics, and Data Science
5. CS for IT Freelancing (ICT Sector)
6. CS & AG for Web Development – Dot Net
7. CS for Information System Security Management
8. CS for Medical Scribing (ICT Sector)
9. CS & AG for Web Development – PHP
10. CS for Network Administration using CISCO
11. CS & AG for Graphic Design
12. CS & AG for Web Design
13. CS for Professional Digital Marketing
14. CS for Mobile Phone Servicing (ICT Sector)
15. CS & AG for IT Support Services
16. CS for Server Administration, including Windows Server Management
17. CS for Professional Back Office Services (ICT Sector)
18. CS for Advanced Customer Service

91 Huang, T. and Z. Arnold, *Immigration Policy and the Global Competition for AI Talent*, Center for Security and Emerging Technology, 2020.

92 OECD, *Start-up visa, an overview*, Presentation, 2019.

93 SEIP, Training Statistics. Available at: <https://seip-fd.gov.bd/statistics>.

94 SEIP, Competency Standards. Available at: <https://seip-fd.gov.bd/competency>.



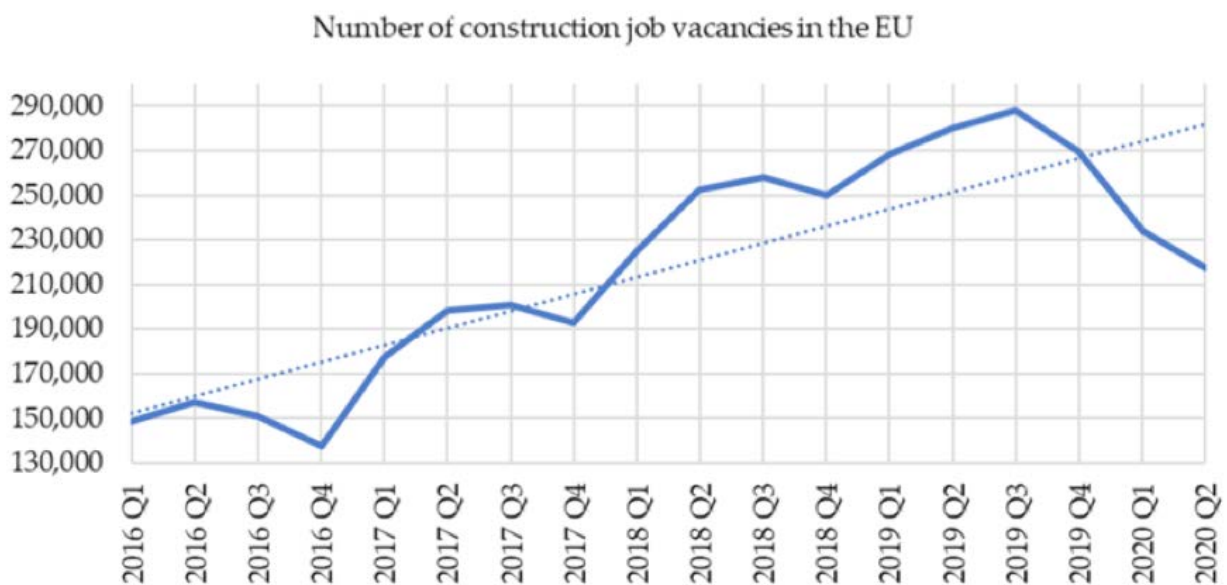
19. CS & AG for Affiliate Marketing
20. CS for Professional Customer Service (ICT Sector)
21. CS for BPO Operations Management (BPO stands for Business Process Outsourcing)
22. CS & AG for Mobile Application Development (Android)
23. CS for Software Design and Architecture

Although disaggregated data on the number of individuals who received training in these ICT occupational areas are not available from published sources, the data that are available allow for a fair idea of the supply capacity of skills in the ICT sector in Bangladesh to be conceived.

### 5.3 CONSTRUCTION AND RELATED OCCUPATIONS

With a total population of nearly 450 million and roughly 3 million construction sector workers, the EU faces a shortage of workers and skills in this area. Construction sector employers in the EU thus meet their needs and partially satisfy their workforce shortages through engaging migrant workforce, largely from EU MSs located in Southern Europe and Eastern Europe. This inward labour mobility creates shortages of construction workers in source countries, which, in turn, fill these shortages with migrant labour from non-EU states.<sup>95</sup> Figure 9 below shows quarterly data on construction job vacancies in the EU during the period 2016-2020.

**Figure 9: Construction job vacancies in the EU (in thousands) by quarter, Q1 2016 to Q2 2020**



Source: Buildings, Vol. 11, 2021, p. 13. Available at: <https://www.mdpi.com/journal/buildings>.

Migrant construction workers tend to be more adaptive than other workers in other sectors to uncertain working environments and typically expect to maintain their regular immigration status by exploiting the available opportunities. In Italy, migrant workers are granted regular stay permits through annual quota and,

95 European Commission, Eurostat, Construction of Buildings Statistics - NACE Rev. 2.

since 1998, bilateral agreements between Italy and third countries have defined the quota-based migration schemes in place.<sup>96</sup>

The case of the construction industry shows that supply and demand can develop in a dynamic interrelationship within the context of transnational mobility, as documented in a recent analysis of the Austrian experience in this regard.<sup>97</sup> The findings are specific to the construction sector, which is characterised by a high share of labour-intensive activities, project production processes, and longer subcontracting chains, but with high seasonality of workers.

Various states have developed tools to analyse construction labour needs, such as the labour forecasting tool (LFT) pioneered in the UK. This tool forecasts the labour needs of construction projects and the number of people employed, allowing forecasting of labour demand on a month-by-month and occupation-by-occupation basis. The LFT uses historical data to forecast the number of employees for each occupation for selected project types (both public and private), given no more than the project type, location, cost, and start and end date.<sup>98</sup>

Although the recent trend in construction job vacancies at the EU level shows almost linear growth, until the outbreak of the COVID-19 crisis pandemic in Q1 2020, there had been a decrease in job vacancies in high-tech construction works, due to the advent of fourth-generation technologies, such as robotics and 3-D printing. The methods of this phenomenon, popularly dubbed 'Construction 4.0', are already central to the construction industry in many economically advanced states (e.g. Denmark, Germany, Netherlands).<sup>99</sup>

The total value of the Bangladeshi construction market is expected to grow from USD 30.38 billion in 2023 to USD 41.47 billion by 2028, at a compound annual growth rate of 6.42%.<sup>100</sup> A survey by the Bangladesh Institute of Development Studies (BIDS) showed that the construction sector accounted for around eight percent of Bangladesh's GDP in 2021.<sup>101</sup> The BIDS report further indicated total construction sector employment as approx. 2.4 million in the period 2017-2018, accounting for 5.6% of the Bangladeshi workforce in employment. At present, only 37.5% of Bangladesh's construction workers are skilled, with 12.6% possessing advanced skills. Moreover, only 7.8% of Bangladesh's construction workforce are female, most of whom are engaged in low-skilled jobs, in a limited number of roles.

According to construction sector employers, represented by the Bangladesh Association of Construction Industry (BACI) and the relevant Industry Skills Council (ISC-Construction), the local construction industry suffers from a considerable skill shortage, mainly due to the high prevalence of seasonal workers in this sector. However, the construction industry has the need for a wide array of skills and occupations; for example, in

96 Dimitriadis, I., "Asking Around": Immigrants' counterstrategies to renew their residence permit in times of economic crisis in Italy', *Journal of Immigrant & Refugee Studies*, Vol. 3, No. 16, 2017, pp. 275-292.

97 Krings, T., 'Posted workers in Austria: Cross-border mobile labour between open markets and (supra-)national regulation', *Austrian Journal of Sociology*, Vol. 44, No. 1, 2019, pp. 21-41.

98 Davidson, C., Greenacre, S. and A. Barron, *Construction labour and skills analysis for the Coast to Capital LEP area*, Construction Industry Training Board, Whole Life Consultants Ltd, 2018. Available at: [https://www.citb.co.uk/media/hzjk4asw/coast\\_to\\_capital\\_lep\\_area\\_april2018.pdf](https://www.citb.co.uk/media/hzjk4asw/coast_to_capital_lep_area_april2018.pdf).

99 Forbes, D. et al. 'Forecasting the number of jobs created through construction', in *Proceedings of the 28th Annual ARCOM Conference, Edinburgh, UK, 3-5 September 2012*, 2012.

100 Mordor Intelligence, *Construction Industry in Bangladesh Size & Share Analysis - Growth Trends & Forecasts (2023 - 2028)*, 2023. Available at: <https://www.mordorintelligence.com/industry-reports/bangladesh-construction-market>.

101 Islam, R., 'Skills gap key challenge for construction sector', *The Business Post*, Front, 28 August 2022. Available at: <https://businesspostbd.com/front/skills-gap-key-challenge-for-construction-sector-2022-08-28>.

occupational areas such as electrical house wiring, plumbing, carpentry, air conditioning technicians, etc. Currently, skilled workers are in short supply in almost all occupational areas in the construction sector, especially masonry, rod binding, painting, tiling, electrical installation and maintenance, plumbing, aluminum fabrication, and finishing carpentry.

According to a recent BIDS analysis, the sector will require approximately 5 million workers by 2025-2026. The study also indicated that employers deemed a large percentage (33.3%) of employees working in steel fabrication to be competent, while 100% of workers in skilled occupations (such as project manager and site engineer) were deemed competent. Estimates revealed that only three semi-skilled vocations or trades – steel fabricator, plumber, and electrician – were undertaken by competent employees in the semi-skilled group. Surprisingly, competent employees were engaged in 8 of the 11 lower-skilled trades covered. Regardless of their skill level, most workers were classified as either less than competent or only semi-competent, across all occupations or trades. According to this evaluation, there are major skill gaps and/or shortages in numerous occupations/trades in the Bangladeshi construction sector.

In recent years, several initiatives have been undertaken to improve the skills training situation in the Bangladeshi construction sector. The latest data for training delivery in 14 trades, gathered and compiled by the BACI under the SEIP project are provided in the Table 7 below.<sup>102</sup>

**Table 7: Number of construction sector learners engaged under SEIP, to August 2023**

Total Target	Enrolment	Female	Certified	Female	Job Placement	Female	Dropout	Female
60,335	58,701	7,862	55,846	7,252	44,015	4,650	957	54

Source: Study Report on Labour Market and Skill Gap Analysis of Construction Sector in Bangladesh, SEIP, 2021. Available at: <https://seip-fd.gov.bd/labor/labour-market-and-skill-gap-analysis-for-the-construction-sector-in-bangladesh>

The 14 trades for which CSs and AGs, where applicable, have been developed and training provided are:<sup>103</sup>

1. CS for Duct Fitting for Air-Conditioning and Ventilation (Construction Sector)
2. CS & AG for Aluminum Fabrication and Installation
3. CS & AG for Tile and Marble Works
4. CS & AG for Civil Auto CAD (2-D & 3-D)
5. CS & AG for Painting
6. CS for Shuttering and Scaffolding
7. CS & AG for Steel Binding and Fabrication
8. CS & AG for Project Proposal Preparation
9. CS & AG for Plumbing
10. CS & AG for Welding
11. CS & AG for Masonry

<sup>102</sup> Zulfiqar Ali, S. M., Nessa Ahmed, B. and R. Islam, *Study Report on Labour Market and Skill Gap Analysis of Construction Sector in Bangladesh*, SEIP, 2021. Available at: <https://seip-fd.gov.bd/labor/labour-market-and-skill-gap-analysis-for-the-construction-sector-in-bangladesh>.

<sup>103</sup> SEIP, Competency Standards, op. cit.

Although disaggregated data on the number of individuals who received training in these areas are not available from published sources, the data that is available allows for a fair idea of the supply capacity of skills in the construction sector in Bangladesh to be conceived.

## 5.4 OTHER PROSPECTIVE OCCUPATIONAL SECTORS

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The supply for Bangladeshi workers in several occupational sectors can be aligned with the high demand for workers in these occupations in the EU MSs, both that which is currently prevailing across the bloc and that which is forecast to exist in coming decades. Indeed, much of this well-aligned supply of workers already exists in Bangladesh, or can be rapidly produced through minimal intervention in skills training, assessment, and certification, combined with basic language training.

Some examples of occupational sectors in which this Bangladeshi supply-EU demand alignment either is already highly correlated or can be induced within a short time frame are listed below.

- **Food preparation:** As mentioned in section 4.2 of this report, there is significant supply capacity in occupations related to food preparation. Large numbers of skilled Bangladeshi workers can be engaged as bakers, chefs, sou-chefs, line cooks, and prep cooks in the restaurant and hospitality industries, and also as workers in food production companies in Europe. CSs have been developed for several occupational skills in this sector: (i) baking technology, (ii) bakery and pastry production, (iii) food and beverage services, (iv) machine operations for [food] packaging, (v) food processing, and (vi) quality control.<sup>104</sup>
- **Transportation:** Course curricula and competency guidelines have been developed for motor driving and maintenance, for both regular and heavy vehicles.<sup>105</sup> State-of-the art driving instruction facilities operate at both public and private sector TTCs in Bangladesh. With basic language training and reorientation on European driving laws, Bangladeshi drivers can obtain the European driving licence and ply their trade on European roads.
- **Electro-mechanical installation, repair, and maintenance:** A wide range of occupations and skills competencies exist in this sector. Refrigeration and air conditioning technicians for residential and commercial facilities, electrical house wiring, and machine shop operators are in high demand in various parts of the EU. Bangladesh also has many TTCs offering these courses.

*Note: ISSC-04 level data will be required for matching labour supply and demand in the occupations listed above.*

104 Ibid.

105 Ibid.

## 5.5 REDUCING SKILLS MISMATCH THROUGH INTERNATIONAL COOPERATION

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Information on skills supply and demand is often limited, outdated, and scattered, and too aggregated to allow for accurate identification of specific skills lacking in the workforce, which in turn contributes to skills mismatch. This is particularly true in the global economy, where national skills supply strategies must be informed by updated information on regional and global skills supply and demand. Labour market analysis on both the demand and supply sides, at the national, regional, and global levels, is central to informing policymakers of employment trends in the global context, improving their understanding of the nature and extent of demand for skills, and helping them to make well-informed decisions on the devising of policies and mechanisms to equip individuals with skills needed in the present and the future.

However, governments must also provide the workforce and students with information on the types of training available from various training providers, and on their effectiveness in yielding labour market outcomes. Tracer study is a potentially useful means of assessing the relevance, impact, and cost-effectiveness of skills development interventions for both the formal and informal economy, and thus informing skills development strategies.

It is also possible to introduce sector-specific and trade-specific courses, with minimal interventions and investments, once the specific skills are identified using the 4-digit level ISSC.

## 5.6 COLLABORATION ON LABOUR MARKET INFORMATION AND ANALYSIS

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Understanding job creation and destruction driven by the key global trends treated in Chapter 2 of this report requires examination and interpretation of the dynamics of economies, industries, and demographics globally, including in Asia. Collaborative regional research can play a key role by (i) sharing knowledge, expertise, resources, and data; (ii) helping countries keep abreast of others' innovations and good practices; and (iii) promoting industrial cooperation, including developing complementary positions within a linked value chain and improving the region's collective competitiveness in global markets.

### 5.6.1 Joint certification programmes

Increasing in number, these programmes offer a relatively straightforward means of skills recognition. In addition to facilitating skills mobility and employability across borders, joint certification programmes offer the prospect of improved quality and governance through convergence between the participating education systems. A more comprehensive approach is the development of MRAs, mentioned elsewhere in this report, whereby the qualifications gained in the home country are recognised as such in the host country, with no need for recertification.

In addition to facilitating skills mobility to reduce skills mismatch across countries, MRAs allow skills acquired abroad to be recognised by the home country, which may increase the likelihood of migrants returning home, facilitating the home country to capitalise on the wealth of skills they bring with them. Mobility across

geographic areas is an effective way to tackle skills mismatch in one geographic location, by tapping excess resources of supply in another.

## 5.7 POTENTIAL LABOUR OR SKILLS MOBILITY SCHEMES

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Although the EU Talent Partnerships framework has yet to become fully operational, EU Pilot Projects on legal migration can already provide valuable insights and lessons learned. Since 2018, the MPF has accompanied the implementation of approx. 15 projects funded by DG HOME and led by EU MSs in cooperation with partner countries, most notably Nigeria, Morocco, Tunisia, and Senegal. These projects, which feature many different dimensions aimed at helping to create or strengthen an enabling environment and infrastructure for labour migration in the target countries, beyond simply mobility, can offer an interesting perspective to develop the potential for cooperation with Bangladesh.

There are also other relevant success stories from similar partnership agreements on labour mobility, such as the Employment Permit System (EPS) of the Republic of Korea, and the aforementioned IM Japan entity. In both schemes, G2G agreements were signed between the partner countries, and the whole process of selection, training, recruitment, departure, employment, and return is managed under the stringent terms and conditions of the agreements. In the case of the Korean EPS, the public BOESL remains responsible for skilling workers and sending them to Korea. In the IM Japan case, designated public and private sector TTCs remain responsible for language training and initial assessment of candidates, and their recruitment and departure is supervised directly by the competent authorities of both governments. G2G Plus arrangements for managing the skilling and migration process under both of these systems are in place.

An EU Talent Partnership programme with Bangladesh may explore the possibility of adapting this G2G Plus modality, with initial piloting done through BOESL, and gradually opening up to include private sector recruitment agencies, operating under standard operating procedures (SOPs) and a CoC for maintaining transparency and accountability.

### 5.7.1 Return and reintegration support

Both the Korean EPS and IM Japan models contain provisions for supporting the return of migrant workers following conclusion of their contracted employment period. However, the reintegration support provided comprises only minimal financial support (e.g. one month's salary), and does not provide high-impact services attuned to the individual returnee. In this regard, there are many services in Bangladesh, provided by government agencies, private sector actors, and NGOs or CSOs, which can be useful in successful reintegration of returnees. ICMPD has carried out a mapping of such services for returnees in Bangladesh, identifying over 50 services across 13 broad categories (e.g. counselling, training, financial, etc.), and has launched an online information hub<sup>106</sup> providing details of the respective services provided by some 50+ organisations.

106 Visit the BideshFerot platform at: <http://bideshferot.org>.

Other initiatives to provide the required services for returnees include the aforementioned RAISE project.<sup>107</sup> Moreover, the World Bank is supporting the development of a returnee database and has enacted provisions for providing financial support for specific assistance programmes designed for returnees.

In the development of any future TP between the EU and Bangladesh, it would likely be worth considering adapting such provisions for reintegration, and making use of existing services supporting reintegration of returnees.

## 5.8 AREAS RECOMMENDED FOR FURTHER RESEARCH AND INVESTMENT

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While all countries may not have an updated ISSC-04 list of skills demand, without at least data on specific occupations, it is very challenging to assess the labour supply capacity of Bangladesh. Research is needed to specify labour supply by occupation, preferably using the 4-digit ISSC to identify and match the skills needed in EU MSs with supply capacity in Bangladesh.

The potential replicability of the Korean EPS and IM Japan models for an EU Talent Partnership should be further studied, especially in regard to the possibility of offering training courses in European languages at Bangladeshi TTCs and language schools, as a prerequisite for migration to a given EU MS.

As capacity assessment falls beyond the scope of this study, the study team recommends that a comprehensive capacity needs assessment for the BMET, the WEWB, BOESL, and the MoEWOE be initiated to better understand the future needs of these actors in handling/implementing any future EU Talent Partnership initiative.

The reasons for low participation in the entry visa and residency schemes for ICT firms and start-ups offered by France and other countries should be examined, identifying how eligibility criteria, high tax rates, initial investment costs, low returns, or other economic and regulatory issues may be adversely affecting such schemes.

## 5.9 MAPPING OF LABOUR MARKET NEEDS/PRIORITIES

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Any initiative under a future EU Talent Partnership with Bangladesh will require support in mapping and developing material for the timely dissemination of labour market information (e.g. on employment opportunities, the human resource and skills needs of key industries, etc.) to skilled workers. Training institutes and trainees need to learn about employment prospects in key occupations,<sup>108</sup> on the basis of available information that is easily digestible and simple to use as a guiding model.

<sup>107</sup> Palli Karma-Sahayak Foundation, *Stakeholder Engagement Plan (SEP)*, RAISE, 2020. Available at: [https://wewb.portal.gov.bd/sites/default/files/files/wewb.portal.gov.bd/project/ecc951af\\_1207\\_4abf\\_a53f\\_4f576aa548c8/2020-11-04-16-28-1d6a347348def685d5446986af41ad9c.pdf](https://wewb.portal.gov.bd/sites/default/files/files/wewb.portal.gov.bd/project/ecc951af_1207_4abf_a53f_4f576aa548c8/2020-11-04-16-28-1d6a347348def685d5446986af41ad9c.pdf).

<sup>108</sup> The Strategic Plan for Higher Education in Bangladesh 2017-2030 urges the MOE/University Grants Commission to carry out labour market studies to identify human resource needs and review university curricula on a regular basis. The 2021 NSDP also places a strong emphasis on the needs of developing a robust skills database system for planning and monitoring.



ISCs and industry associations under the guidance of the NSDA can play a leading role in undertaking skills surveys, such as nationwide or industry-wide employer skills surveys, and formulating action plans to fill skills gaps in respective industries. It is crucial that each industry map out its current and anticipated skills demand and gaps (if any), to mitigate skills bottlenecks in that industry. ICT can play a major role in establishing an efficient labour market and skills information system and timely dissemination.

The job market can also be made more efficient through astute deployment of digital tools. Linkages between EU and Bangladeshi online job portals should be enhanced through public and private platforms (and migration dialogues), to enrich job market information and facilitate EU employer access to Bangladeshi workers and registered recruitment agents, thereby reducing job matching challenges and job search frictions.

# CHAPTER 6: RECOMMENDATIONS AND WAY FORWARD

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## 6.1 RECOMMENDATIONS

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### **(i) Effective resource planning and mobilisation**

The nationwide skills development initiatives need to be rationalised in regard to resource planning and allocation; sufficient resources should be spent on human capital development (i.e. recruitment and ToT, and critical infrastructure, such as workshops, equipment, etc.), rather than only on buildings. Similarly, for effective deployment of human resources in the Labour Wings of the respective Bangladeshi missions abroad, particularly in target EU MSs, the job descriptions of staff should be redefined to include exploration of job markets and skills gaps, and qualified persons assigned to those key positions.

### **(ii) Labour market information system**

Setting up a fully functional LMIS is a time-consuming process, and hence official data for skills demand and job vacancies need to be collected from selected sources in European countries on a regular basis. The Ministry of Labour and Employment (MoLE) of Bangladesh and government agencies in the respective EU MSs, and popular job portals, are genuine sources for such information. The CEDEFOP is the source of aggregate data on employment and skills for each EU MS and the EU as a whole. The MoLE should engage the Labour Wings of Bangladesh's missions abroad to carry out periodic collection of data from these sources, and the MoLE should disseminate this data through online platforms (e.g. the MoLE website, and the LMIS hosted by the BBS). The BAIRA is also ideally positioned to collect targeted job vacancy data from employers and online job portals in EU MSs.

### **(iii) RPL systems**

RPL systems for specific trades in demand in the EU MSs should be established. The assessment process should be jointly supervised with local test centres and the respective EU national authorities, much in the same way that Bangladesh carries out the Skills Verification Programme with Saudi Arabia's 'Takafol' entity. RPL centres can also be established in EU MSs to facilitate skills recognition for migrants already in country.

### **(iv) Capacity building of key public agencies**

To encourage regular, safe, and orderly migration to EU MSs, the MoEWOE should take the lead in capacity building aimed at this end. In the recent past, donor organisations have worked closely with UN organisations to strengthen the capacity of the MoEWOE, including that of the BMET, the WEWB, BOESL and other related organisations, such as DEMOs and TTCs. The ToR for the present study did not provide scope for assessing or identifying specific areas of capacity building needs within the MoEWOE and its agencies.

However, it has been garnered from the KILs and the previous experience of the consultants that capacity building may be required to meet the specific needs of an EU Talent Partnership scheme. It should be noted in this regard, for example, and as covered in subsection 2.1.2 of the present report, that many of the ambitious targets proposed in the EWOEP remain unrealised, due to resource constraints and poor implementation capacity at the MoEWOE and its agencies.

#### **(v) Inter-agency cohesion and partnership**

If further legitimate migration routes for skilled worker mobility from Bangladesh to the EU are to be opened, inter-agency cooperation will be crucial. Continued cooperation between public agencies, private sector actors, CSOs, NGOs, and development partners will also be essential in this regard. Governmental organisations such as the BMET, BOESL, and TTCs have extensive infrastructure to facilitate migration from Bangladesh, and private recruitment agencies in Bangladesh possess rich and varied experience in successfully sending workers to a range of destinations, which should be leveraged in pursuing the activities of any future TP initiative with the EU.

#### **(vi) Areas earmarked for institutional collaboration**

Increased cooperation should occur in the areas of recruitment, language training, harmonisation of curricula and standards, joint assessment and certification schemes, accreditation of training programmes, etc., to deliver trade courses which are well-aligned with and highly targeted toward specific destination countries. Such institutional collaboration may include setting up an assessment centre, sending and receiving European technical experts to conduct ToT courses, arranging exposure visits for TTC representatives to TVET institutions in Europe, etc. In this regard, private sector bodies, such as employers' organisations, recruitment agencies, TVET institutions, trade guilds and certification bodies, along with public entities, such as the NSDA and the BMET in Bangladesh, should forge institutional partnerships in their respective areas of interest.

#### **(vii) Skills recognition**

Planned efforts and negotiations should be enacted to frame bilateral or multilateral MRAs on skills certificates for selected trades. However, forging such pathways is a long and challenging task, requiring multiple layers of harmonisation of skills standards, qualification frameworks, curricula, training delivery methods, and assessment procedures. Thus, to take first steps on this path, the GoB should strengthen the monitoring and inspection capacity of the regulatory authorities responsible for implementing the NTVQF, and allow periodic third-party evaluation of the services provided. Moreover, provisions for joint certification programmes and supervised testing and assessment for issuing skills certificates should be negotiated with interested EU MSs, and respective employers and TVET institutions. Such collaboration should commence for selected occupations once an EU-Bangladesh Talent Partnership is in place.

#### **(viii) Governance**

Both the public and commercial sector organisations in Bangladesh should become more transparent and accountable, to reduce the gaps in the migration sector. The system should be gradually opened up to the private sector, leading to an increase in organised actions to send workers to EU MSs, following the establishment of a model project for legal migration pathways (similar to the EPS and IM arrangements with Korea and Japan, respectively). This should be done to ensure optimal levels of governance for the EU Talent Partnership.

- **Collusive behaviour:** To minimise collusive behaviour among recruitment agents, the following changes should be enacted: (i) conclude a well-articulated agreement between the EU and Bangladesh, (ii) establish and undertake place robust monitoring of GoB actions in this regard, and (iii) adapt the CoC validated<sup>109</sup> by the BMET for incorporation in the Rules of Migration Act, 2013, currently pending final approval.
- **Counterfeit certificates:** Support investment in building capacity on use of simple technological interventions, such as machine-readable holograms or QR codes, allowing for their incorporation into skills certificates, for instant verification online.<sup>110</sup>

### (ix) Areas for further research and investment

- **Occupational level skills demand:** Undertake research to discern prevailing and future demand in specific occupations, preferably using the 4-digit ISSC. This research should successfully facilitate enhanced identification and matching of the skills needed in the EU MSs with the supply capacity for those skills in Bangladesh.
- **Scope of inter-institutional cooperation:** Broaden and enhance the level of cooperation between relevant institutions in the areas of curricula development and alignment, harmonisation of quality standards of skills, ToT, and development of physical infrastructure and human capital at TTCs.
- **Social and behavioural aspects of migration:** Undertake targeted research to understand the relationship between risky behaviour among migrants and trafficking and irregular migration, which stand as major obstacles to creating legal migration pathways to the EU.

## 6.2 WAY FORWARD

### 6.2.1 Prospective Talent Partnership platform, and its key activities and partners

Establishing a dedicated Talent Partnership platform will likely not be possible without the signing of an agreement or memorandum between Bangladesh and EU authorities. However, once such an agreement is in place, a dedicated and separate unit or cell can be set up, following in the footsteps of previous successes in this regard. After signing an agreement with the respective Malaysian authority, for example, the BMET opened up a Malaysian unit with dedicated desks officers and staff members, and defined a set of responsibilities to oversee the migration of workers from Bangladesh to Malaysia. Similarly, a separate Talent Partnership Cell could be introduced within the BMET. In gradual progression, and as the situation requires, this TPC may engage, in various roles, a range of relevant stakeholders, e.g. representatives of the EUD to Bangladesh and EU MSs, employers, recruitment agencies, and TTCs.

<sup>109</sup> ILO, *7<sup>th</sup> Meeting of the Technical Committee on a) setting up RA Classification System; and b) Development of a Code of Conduct*, 2014. Available at: <https://www.ilo.org/dyn/migpractice/docs/166/Code%20of%20conduct.pdf>.

<sup>110</sup> Similar online verification is possible for sanitary certificates issued by the Department of Agriculture to exporters of food and horticulture products, and verifiable by customs and border officials both in Bangladesh and importing countries.

## 6.2.2 Elements required to make the Talent Partnership Cell functional

Following analysis of the inputs received from the KIIs, and of the recent experience of ICMPD in introducing the Private Sector Engagement project for reintegration of the returnees, addressing the following key elements is deemed essential to make the proposed TPC functional.

### (i) Sound legal basis

An official understanding, in the form of either a legally binding agreement or (at least) an MoU between Bangladesh and the respective EU entities, is a prerequisite for initiating the TPC. The terms and conditions of such a document should be aligned with the respective laws and policies of Bangladesh, and those of the EU.

### (ii) G2G Plus system

A G2G arrangement is preferred by the majority of stakeholders, to manage selection, training, recruitment, and send workers to the EU. Bangladesh's publicly managed recruitment agency, BOESL, could potentially play a role in this regard, with support and supervision from the TPC within the BMET.

Again in this regard, the successful Korean EPS and IM Japan initiatives stand as two examples of how to deploy workers abroad in an ethical manner. Under the EPS system, worker selection and recruitment is monitored by the host country, while under the IM Japan scheme, migrants are recruited as interns and the quality of the whole migration process is monitored by IM Japan and a certain level of reintegration support is provided to returnee migrant workers.

- The EPS system stipulates completion of the skilling selection and recruitment process, under the close supervision of the respective authorities in the destination countries, and in partnership with the local TTCs and government authorities.
- The arrangements with Korea and Japan target specific destination countries for a limited number of occupations, and are run by government authorities.

However, any monopoly by a single agency on sending workers abroad may not prove effective in the long run, and scope for competition and transparency among recruitment agencies should be allowed. Private sector recruitment agencies may be engaged under supervision from the TPC, with strict adherence to the SOPs and transparency requirements in place. Developing such a G2G Plus system could help to ensure Talent Partnership success.

### (iii) Effective Labour Wings at Bangladeshi missions in EU MSs

The labour attaché at Bangladeshi representations in the respective EU MS should play a continuous role in gathering data on skills and employment demand in that state. The responsibilities of the labour attaché in regard to migrants is to promote demand of workers in countries of destination, ensure their welfare, and coordinate promotional activities. The labour attaché should frequently gather essential information in the regard, and they are required to provide this data to the GoB periodically (every six months).



#### **(iv) Demand-driven skills training**

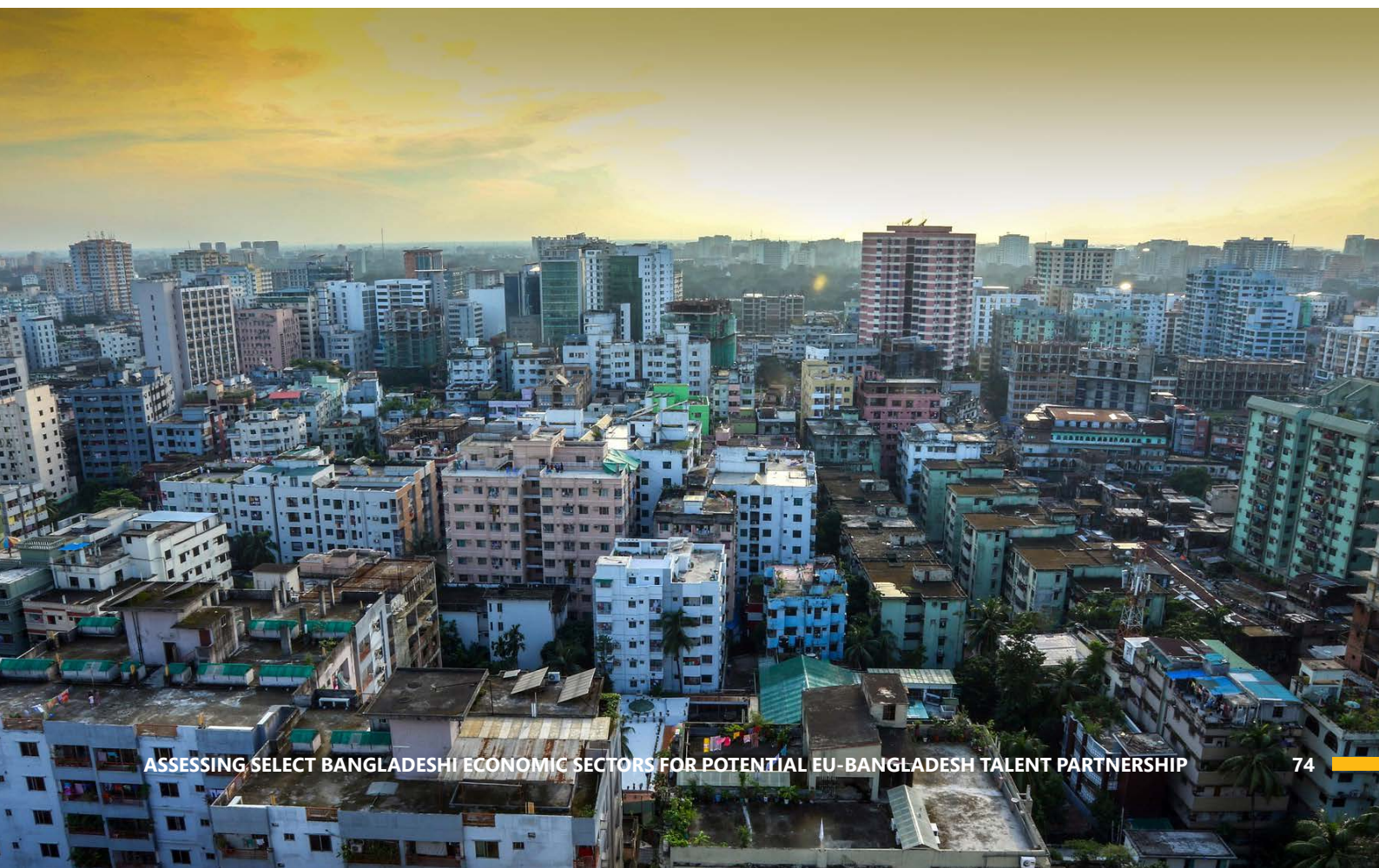
Information related to skills demand and job vacancy in specific EU MSs should be used in developing targeted skills training programmes. Harmonisation and adjustment of curricula, and capacity building of trainers via ToT courses should occur, undertaken through institutional collaboration among the relevant entities in the EU and Bangladesh.

#### **(v) Transparency and accountability**

SOPs and a Code of Conduct should be developed for all stakeholders involved in the migration management process (including recruitment agencies and training institutes), covering each step of selection, training, recruitment, departure, employment, return, and reintegration. These SOPs and CoC should be developed under effective supervision. However, periodic monitoring and supervision may be carried out by competent authorities, such as representatives from the EUD to Bangladesh and EU MSs, jointly with the MoEWOE. Provisions for neutral third-party monitoring should also be put in place.

#### **(vi) Cost rationalisation**

The existing (very high) cost of migration from Bangladesh needs to be rationalised. An individual migrant may spend more than BDT 1 million to migrate to the EU. The ceiling threshold for migration costs, as determined by the MoEWOE thus needs to be followed, similar to the threshold followed by BOESL for recruitments handled by this organisation; for example, BOESL charges a BDT 52,240 (approx. EUR 450) fee for sending qualified nurses to Kuwait, while their employers pay for their accommodation, food, air fares, insurance, transportation, and medical expenses, with these nurses earning a basic monthly salary of between approx. EUR 680 and EUR 770.





Data from the *BOESL Annual Report*<sup>111</sup> show that the cost of migration to Croatia was BDT 39,000 (approx. EUR 335) for construction workers sent during the period 2020-2021, while their basic monthly salary was approx. EUR 750, and the employer paid for their air fares, accommodation, food, insurance, and medical expenses. While this latter example is an exception to the costs typically seen, it could be followed under the prospective Talent Partnership scheme with the EU.

### 6.2.3 Prospective partners

The scope for various partnerships in the context under study is immense. The entities identified and indicated in Table 8, below, may facilitate bilateral Talent Partnerships between Bangladesh and EU Member States.

**Table 8: Prospective TP areas and Bangladeshi and EU partners**

Area(s)	Bangladeshi Partner(s)	EU Partner(s)
<b>Regulation</b>	Ministry of Foreign Affairs	European Union/DG Home
	Ministry of Expatriates' Welfare and Overseas Employment	Migration Partnership Facility/ICMPD
<b>Labour Market Information System</b>	Labour Wings of Bangladeshi missions abroad	CEDEFOP/MS labour authorities
<b>Skills Development, Assessment, Certification, Recognition, RPL, Accreditation</b>	National Skills Development Authority	National standards bodies/MS certification bodies
	TTCs, ISCs, NGOs, CSOs	TTCs, ISCs, INGOs
<b>Reintegration</b>	Wage Earners' Welfare Board, ministries, trade bodies, NGOs, CSOs	ICMPD, MPF

111 BOESL, *Annual Report 21-22*, p. 19.

# CONCLUSION

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Bangladesh has the potential to become a major talent source country for the EU and individual EU Member States. This viewpoint has been unanimously put forward by all involved in the process of migration management in the Bangladeshi context, and echoed by the logical expectation that, if a legal pathway for labour migration from Bangladesh to EU MSs is established, irregular migration of Bangladeshis to the EU will reduce substantially. However, some cases of irregularisation by crossing from one EU MS into another, overstay of visa period, etc., are likely to still occur. Appropriate orientation and awareness campaigns, along with skills and language training can be expected to further reduce the frequency of irregular migration.

As documented in this report, Bangladesh stands ready to successfully cater to existing and future labour demand in the EU for workers in the broad sectors of **construction and related jobs**, such as masons, plumbers, wiring technicians, welders, etc.; **hospitality services**, focused mainly on selected occupations related to food preparation; **ICT**, spanning occupations such as software programmer, web application developer, and network engineer; and **transportation**, readily supplying vehicle operators, such as drivers of cars, buses, and trucks. Bangladeshi workers who travel to EU MSs will need skills equivalence mechanisms and minimal or basic language training to allow them to successfully take up their roles.

In the short run, i.e. within two to three years, Bangladesh can also supply large numbers of able **caregivers**, if language training to a proficient level can be facilitated in Bangladesh.

Maintaining efficiency, accountability, and transparency at all stages of migration management and skills development, and enhanced cooperation between key public agencies and private sector players involved in skilling, selection, recruitment, migration, and reintegration will be key to the success of any potential Talent Partnership between Bangladesh and the EU/EU MSs. Hence, SOPs and a CoC need to be developed and implemented for each stream of activities pursued.

There is an urgent need to collect labour market intelligence on the present and future skills needs and job vacancies of major destination countries, and for regular updating and dissemination of this data. This labour market intelligence should be used in the employment search by jobseekers and recruitment agents, and by relevant government authorities and training institutes in the according alignment of Bangladesh's TVET system.

# ANNEX I:

## LIST OF KEY INFORMANTS

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1. Ministry of Expatriates' Welfare and Overseas Employment
2. Wage Earners' Welfare Board
3. Ministry of Foreign Affairs
4. Ministry of Education
5. Ministry of Labour and Employment
6. Representative of the Delegation of the European Union to Bangladesh
7. Swiss Development Cooperation/Swiss Embassy
8. German Embassy
9. Swedish Embassy
10. French Embassy
11. Dutch Embassy
12. Danish Embassy
13. Bureau of Manpower, Employment, and Training
14. Bangladesh Overseas Employment Services Limited
15. National Skills Development Authority
16. Construction Industry Skills Council
17. IT Industry Skills Council/Bangladesh Skills Development Institution
18. Agro-Food Processing Industry Skills Council
19. Technical Training Centre – BKTTC
20. Technical Training Centre – BGTTC
21. Technical Training Centre – Sheikh Fazilatunnesa Mahila TTC
22. UCEP Bangladesh
23. MAWTS
24. Bangladesh Association of International Recruitment Agencies
25. Bangladesh Employers' Federation
26. Bangladesh Institute of Labour Studies
27. IOM
28. ILO – 2 interviews
29. UN Women
30. Bangladesh Rural Advancement Committee
31. WARBE Development Foundation
32. BNSK
33. OKUP
34. Asian Development Bank
35. Bangladesh Association of Construction Industries
36. Former Director – BMET Training
37. Migration Resource Centres

# ANNEX II: TOOLS FOR KEY INFORMANT INTERVIEWS

**Respondent:**

**Name:**

**Designation:**

**Organisation**

**Contact:**

**E-mail:**

**Mobile: +8801**

**Type of Organisation:**  
(Please check all that apply)

**Government**  
**Private**  
**NGO/CSO**  
**Development Partner**

**Regulatory**  
**Employer**  
**Capacity Building/Skills**  
**Development**  
**Certification/Standards Body**

## 1. REGULATORY, GOVERNANCE, AND DEVELOPMENT GOALS RELATED TO MIGRATION, EDUCATION, AND SKILLS

**Key issues to learn about: Regulations/Policy/Governance/Demand-Supply Dynamics/Migration and Skills Development Landscape/Institutional Capacity Building/Partnership/Way Forward**

- 1.1. *What are the major destination countries for Bangladeshi migrant workers (the traditional and emerging destinations)? Are there any changes in the current trend? What could be the possible reasons for changes in preference?*
- 1.2. *What is the present situation of migration flow to the EU Member States from Bangladesh? (Issues – persons going to EU annually, recent trends, inter-government negotiations (if any), number of refugees, detainees, deportees, etc.)*
  - 1.2.1 *What are the routes for regular migration to EU Member States?*
  - 1.2.2 *What are the routes for irregular migration to EU Member States? Why do people migrate irregularly? What are the contextual and behavioral issues associated with irregular migration to EU and other states?*
- 1.3. *What are possible areas of reform needs in the existing policy and regulatory framework on migration to EU Member States, in the context of the recent negotiations and international dialogues and declarations?*
- 1.4. *What are the modalities of other kind of migratory flows (e.g. student visas, tourism, visits to relatives), later resulting in temporary or permanent stay as migrants?*

- 1.5 Do you have any initiative for gathering labour market intelligence on the present and future skills needs in the major destination countries for our migrant workforce? If yes, what are the challenges and critical issues?
- 1.6 Do you think the current initiative mentioned in Question 1.5 can be applied for EU Member States? (Such as assessing their trends in industries (e.g. shift from manufacturing to services, precision technology, automation; demographic parameters (e.g. aging population, lack of workers for menial labour; changing labour market demands).)
- 1.7 How effective is the c1.5? Do you have any initiative for gathering labour market intelligence on the present and future skills needs in the major destination countries for our migrant workforce?
- 1.8 What kind of support and interventions are needed for the issues mentioned in relation to Question 1.7, to align our TVET system with the current and future skills needs of the EU market? (For example, policy support, institutional partnership, technical expertise, etc.)
- 1.9 What role can government/private sector/development partners/NGOS and civil society organisations/diaspora play in improving labour mobility between Bangladesh and EU Member States?
- 1.10 What can be done to boost successful return and reintegration, so that returnees and the Bangladeshi economy can benefit from their skills, experience, and savings?
- 1.11 What do you think about the economic, social, and cultural impact of migration and return in the context of labour mobility between Bangladesh and EU Member States?
- 1.12 What areas require further research or investment to improve migration management and human capital development for the EU Member States?

## 2. SKILLS SUPPLY SIDE SITUATION AND SECTORAL INFORMATION

**Key issues to learn about: Standards/Certification/Training/Institutional Infrastructure/Skills Policy & Strategy/Way Forward/Sectoral Information/Supply Side Capacity/Curricula/Partnership**

2.1 Trade/Skills/Employment Sector: ICT/Long-Term Care/Logistics and Transport/Agro-Food Processing/Construction/Hospitality/Any other (please name the specific sector/area)

(Please mention the data source, if available for responses to Questions 2.2-2.5)

2.2 How many institutions are in your sector (approximately)? \_\_\_\_\_

2.3 How many of them belong to: the public sector \_\_\_\_\_, and the private sector \_\_\_\_\_?

2.4 Can you please give the number of successful graduates/certificates provided in the last 3 years? \_\_\_\_\_

Name of Course/ Certificate	Duration	BNQF Reference	Number of Graduates		
			2022	2021	2020

2.5 Please tell us more about the BNQF reference, if applicable, for the courses listed above.

2.5.1 *What are the RPL systems available in your sector?* (Please provide details. Number of institutions, trade courses, and certificates provided; benefit for the recipients, employers, and industry.)

2.5.2 *What are the gaps in achieving accreditation/recognition/mutual recognition (of the BNQF) by the EU Member States?* (For example, documentation, procedures, trainers' profile, standards, etc.)

2.5.3 *What kind of interventions are needed to achieve recognition of the BNQF/certificates/diplomas in the EU Member States?*

2.6 *Can you please provide some details about the standards of the course, curricula, certification, and recognition, where applicable?*

2.7 *Have you done any tracer study done on placement or employment?* (If yes, please provide some details.)

2.8 *What do you think about the prospects for people trained in this sector to migrate in the EU Member States as workers?*

2.9 *What are the challenges associated with successfully sending them as regular migrant workers?* (For example, qualification framework, skills matching, effective demand in host countries, migration cost, language barriers, etc.)

2.10 *What kind of interventions and support is needed to overcome the challenges mentioned for Question 2.9, and institutional capacity building of your sector?* (For example, in the areas of policy reforms, physical and soft Infrastructure, master trainers, research and development.)

2.11 *What can we do to improve our capacity to provide language and other soft skills training for migrants who aspire to go to the EU Member States?*

2.12 *What kind of institutional partnership and cooperation with the government, development partners, private sector (from Bangladesh and the EU) would be helpful in relation to your response to Question 2.10 and Question 2.11?*

2.13 *What role can the diaspora/government/development partners/private sector/NGOs and CSOs play in improving the skills development situation to promote regular migration to the EU?*



2.14 *Which areas require further research or investment in sectoral capacity building and quality improvement in general and technical education?*

**Specific questions to the EU Delegation to Bangladesh/EU Member States**

- a) What are the major EU/EU MS development and investment programmes of relevance to Bangladesh?
- b) What is the institutional mechanism in the EU Member States for assessing current and future skills demand?
- c) How can Bangladeshi partners/individual workers access the information referred to for Question b?
- d) How can we build institutional partnerships for regular exchange of information between EU employers/job portals and Bangladeshi training institutes/recruitments agents/jobseekers?

