

Draft report  
on  
**MARKET DEMAND ANALYSIS FOR  
COX'S BAZAR DISTRICT**

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## Market demand analysis for Cox's Bazar district

For  
Skill Development Programme, Brac



From



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## Executive Summary

Cox's Bazar is expanding in terms of residential and business landscape, whose evidence is in the expansion of Cox's Bazar airport (which is in its second phase), railway tracks (120 km long CTG-Cox's Bazar), and road development plan (one such example is the construction of Marine Drive from Cox's Bazar to Teknaf in 2017) as per the Local Government Engineering Department (**LGED**).

Such infrastructure development is an economic indicator of job creation, increase in market demand and supply of new goods and services, and the requirement of skilled labor force.

At current, Skill Development Programs, as mentioned by the survey respondents, are being run in Cox's Bazar by BRAC, GUK (Gana Unnayan Kendra), Young Power in Social Action (YPSA), Resource Integration Center (RIC), and BASIS (Bangladesh Association of Software and Information Services).

This executive summary aims to summarize the field findings as per the study objectives, which has been the guiding principle throughout this survey.

From the study, the major findings can be divided into 2 parts:

### **1. Demanding skills in Cox's Bazar for the host community: the growth potential in the next 5 years, gender visibility, the impact of climate change and influx of Rohingya population, and employment opportunities based on rural-urban divide.**

#### **DRY FISH PROCESSING**

- **Market growth potential:** The salt extraction industry has little employment opportunity. Most of the farmers are traditionally involved in salt extraction. New entries are difficult due to shortage of land. However, introduction of salt extraction machineries can introduce new employment opportunities and can increase the production and profitability in the salt extraction industry.
- **Effects of Climate Change:** The traditional drying practice is highly dependent on sunlight. As such, untimely rain delays the processing of the fish causing less profitability while excessive heat during the summer accelerates the drying process.
- **Rohingya influx:** This sector didn't experience much visible impact due to the Rohingya influx.
- **Impact of Covid-19:** There was not much impact of COVID pandemic in the dry fish sector.
- **Employment opportunities based on rural-urban divide:** The dry fish processing farms are mostly concentrated in the rural areas of Cox's Bazar district. Especially, Moheshkhali, Teknaf and Pekua Upazilas have strong presence of the dry fish processing farms. Marketing and commercial selling of the dry fish, on the other hand, is mostly concentrated in the urban areas.
- **Opportunities for skills development:** In case of skill development opportunities, there is an opportunity to develop skills on hygienic processing of the fish.  
If the project is willing to work on the demand side, the fish drier machines can be introduced in the dry fish processing business that can reduce weather dependency on the dry fish industry.

- **Gender visibility:** The sector is wholly located in rural areas and has a relatively high rate of female participation. In case of the women processors, the traffic congestion and increased number of passengers led to harassment incidents that resulted in decreased interest of the women to continue with the dry fish processing.

## CONSTRUCTION

- **Growth in the next 5 years:** The construction industry is showing great promise of growth in Cox's Bazar in the next 5 years, as evidenced by Marine Drive construction, the Cox's Bazar airport extension wing, and development of new roads and highways as per LGED.
- **Impact of climate change:** The construction sector is not much impacted due to climate change. However, the small construction projects are being impacted by water clogging in some areas, causing a delay in construction activities.
- **Impact of Covid-19:** During the country-wise lockdown in 2020, the construction works were halted and the labours faced income loss. The major impact in this industry was caused by closing of the private projects due to economic hit by the pandemic.
- **Rohingya influx:** The Rohingya influx have multi-dimensional impact on the construction sector. The increased NGO activities in Cox's Bazar district have increased the demand of residential and office buildings, raising demand of construction workers while many Rohingyas working as construction workers causing less opportunities for the Bangladeshis.
- **Employment opportunities based on rural-urban divide:** The construction works is mostly concentrated on the urban areas and most of the construction workers are from the rural areas of Cox's Bazar district.
- **Training to become local contractors:** Supporting youths to take-up construction agent business through training can engage more locals into the industry. the construction jobs available for the locals.
- **Training for Low/ mid-level jobs:** Construction of new industries, hotels, motels, and apartments are taking place in full force in Cox's Bazar. This requires the engagement of: masons, plumbers, painters, electricians, carpenter, glazier, concrete finisher, pipefitter, heavy equipment operator, contractor, roofer.
- **Gender visibility:** Gender visibility is relatively negligible across all skill levels in the construction sector in Cox's Bazar.

## TOURISM

- **Expansion in the next 5 years:** The sector is expanding, both in the rural and urban areas, with evidence of new motels, hotels, eco-resorts and beach activities being set up across Cox's Bazar (eg. Marine Drive).
- **Impact of climate change:** Untimely and excessive rains, excessive heat during summer has decreased the number of tourists, causing a slight decrease in revenue of the tourism operations in Cox's Bazar.
- **Major hurdles to increase tourism in Cox's Bazar:** Many consider the cost of travel to Cox's Bazar to be relatively as expensive as traveling to foreign countries (eg. Thailand). Broken roads, a dirty city, poor trash disposal habits, dirty beaches, and poor hospitality by local servers serve as negative externalities which deem unattractive to many tourists.

- **Impact of Covid-19:** The hotels and restaurants were shut down during the pandemic by Government order. Due to restriction in tourism activities and in public transportation, the pandemic caused a sharp drop in tourism related business operations in the district.
- **Rohingya influx:** The Rohingya influx have a positive impact on the tourism sector. Professionals travelling to Cox's Bazar have increased the business demand of hotels, restaurants, and transportation activities. Rohingya influx has attracted a lot of professionals into the district, causing an increase in the tourism related activities.
- **Employment opportunities based on rural-urban divide:** The tourism sector is heavily concentrated in the urban areas. However, many people from the rural areas move to the urban areas for availing service jobs in the sector. The ongoing Government projects that are being implemented in the rural areas created an increased opportunity for rural development in the district.
- **Skills development opportunity:** Tourist operators, souvenir product developers, hotel and restaurant workers, underwater diving, snorkeling activities etc. are the types of skills development and entrepreneurship opportunities that may increase in Cox's Bazar.
- Under hotel management, the recruiting party (3 star and above hotels) prefer developed skills in relation to hotel management for low skills workers (such as guard), middle skill workers (such as receptionists, waiters etc.).

#### DRIVING AND VEHICLE REPAIR

- **Expansion in the next 5 years:** With the increase in population and infrastructure expansion, more tourists and urban/ rural settlers are expected to increase in Cox's Bazar. With this, the demand for driving/ drivers/ vehicle repair shops will also be on a rise.
- **Climate Change impact:** The driving and vehicle repairing sector is slightly impacted by climate change. While road transportation is mostly unaffected by climate change, waterway transportation is highly impacted due to the climate change.
- **Rohingya influx:** The increased NGO activities in Cox's Bazar district have increased the demand of transportation while many Rohingyas are working as auto (electrical rickshaw) drivers and in repairing activities in the district creating less opportunities for the Bangladeshis.
- **Covid-19 influx:** Due to decreasing number of tourists in the district, this sector was also affected by the pandemic.
- **Employment opportunities based on rural-urban divide:** The driving and repairing is mostly concentrated in the urban areas. However, many of the rural residents earn their living through driving auto rickshaw, CNG etc.
- **Skills development opportunity:** Cox's Bazar already has a good demand of drivers.
  - a. Rental car business related training
  - b. Drivers and driving schools (heavy vehicles such as lorries, and local vehicles such as private vans, 3-wheeler scooters etc).
  - c. Repairing shops (heavy vehicles, light vehicles, 3-wheel drive, 4-wheel drive etc.)

#### SHRIMP HATCHERIES

- **Expansion in the next 5 years:** This is a technical field. The market size is relatively small and is not expanded to undergo a boom in the market in the next 5 years.

- **Climate Change impact:** During heavy rain, it gets difficult for them to supply sea water maintaining the optimum salinity level. As such, there is a slight impact of climate change observed in the shrimp hatcheries.
- **Rohingya influx:** The hatcheries mostly supply the PL in the south-western districts of Bangladesh. As such, the Rohingya influx did not have much impact on this sector.
- **Covid-19 influx:** As production and marketing of the agricultural products was operational during the country-wise lockdown, the hatcheries were not much affected due to the pandemic.
- **Employment opportunities based on rural-urban divide:** While the shrimp hatcheries are mostly situated around the urban and semi-urban areas, the workers mostly come from the rural areas to work in the hatcheries. The marketing and sales operations are highly concentrated in the urban areas of the district.
- **Skills development opportunity:** The skills required in this segment is the technical training on brood management, disease identification and disease prevention of fish fry/ fingerlings.

## 2. Demanding skills in the Rohingya camps as per the Rohingya respondents, gender and social norms, education level and type of skills acquired by the Rohingya population in the camps

25th of August 2017 marks a tragic anniversary, when hundreds of thousands of Rohingya refugees entered the Bangladesh borders from neighboring Myanmar to protect their lives from the mass execution that was taking place in their homeland.

Today, there are around 1 million Rohingya refugees living in Bangladesh. Nearly 90 per cent of them are living in a network of 30-plus camps in Cox's Bazar District, where crowding and sanitation conditions leave them vulnerable to the COVID-9 pandemic.

In this study, a total of 169 quantitative surveys and 11 in- depth interviews were conducted among men, women, girls and boys in Camps 1, 7, 16 and 22 to collect data on their current education, skill level and the type of skills that they want to engage in.

- **Types of skills desired by Rohingya population in the camps:** To summarize, the Rohingya population desires the following skill set inside the camps: Repairing skills (solar panel, mobile), construction work, skills to work with NGO assignments, computer photocopy, internet browsing, handicrafts, carpentry skills, teaching, pharmacy/ medicine dispensing, and agricultural knowledge.

Types of skills acquired by Rohingya population in the camps: To summarize, the skills already possessed by many Rohingya population are cementing skills (to build homes), driving, fruit picking, agricultural farming, cattle rearing, teaching, running small shops, handicrafts, tailoring and cooking.

- **Education level:** The education level was observed to very low among all men and women studied in the study. Not a single person had studied to complete their secondary education. Most persons have only completed till class 5.
- **Gender dynamics:** The Rohingya population was observed to be heavily influenced by the Islamic extremist views, where women were not expected to step outside their homes for

any work. Women's education was stopped when adolescent girls begin their menstrual cycle.

This heavily influences a woman's social conditioning and is reflected in the study where they do not prefer working outside their homes. Some changes are seen among girls who are getting inspired by teachers and NGO workers within the communities.

The report discusses the study objectives in greater detail and looks forward to explain the study findings in greater detail.



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# Chapter 1: Introduction

## 1.1 Background

Cox's Bazar is one of Bangladesh's 20 (out of 64) designated "lagging districts" (BBS, 2017). The district is in Bangladesh's southernmost part, which is renowned for having the world's longest sea beach. It is divided into eight Upazilas and shares boundaries with Myanmar to the south and east, as well as the districts of Chittagong and Bandarban of Bangladesh. According to the Bangladesh Bureau of Statistics' "District Statistics 2011," Cox's Bazar has a population of 2.3 million people, with an equal number of men and women. Household Income and Expenditure Survey (HIES) 2016, the poverty headcount ratio showed that 17% of the population lived below the upper bound poverty rate and 8% below the lower bound poverty rate.

Despite the geographical advantage and the districts' close proximity with Chattogram, the business capital of the country, Cox's Bazar is yet to become one of the business hubs of the country. Tourism industry is one of the highlighting economic features of the district. Being the tourism capital of the country, Cox's Bazar has developed employment opportunities at a larger scale compared to other districts of the country. Despite the advantage, Cox's Bazar locals are yet to benefit in terms of their employment opportunities.

The situation of the districts worsened in 2017 when the violence took place in Rakhine State. According to the Inter-Sector Coordination Group, unrest in Myanmar's Rakhine State drove an estimated 688,000 Rohingya across the border into Cox's Bazar in 2017. The influx's pace and size have created a crucial humanitarian crisis that has primarily impacted the host communities of Cox's Bazar district.

The covid-19 outbreak also has an effect on the economically disadvantaged host population. Income production was interrupted for several months during the lockdown; as a result, many people lost their jobs and businesses, and were forced to move from professional to low-skilled employment.

The BRAC skills development program (SDP) began in 2015 with the aim of transforming our country's human capital into professional jobs. SDP commissioned this research to learn more about Cox's Bazar's work sectors and to establish new skill development initiatives so as to empower Cox's Bazar locals to prepare them for the existing and future employment opportunities that are to flourish in the district in the coming years.

## 1.2 Objectives of the assignment

The broad objectives of this analysis are to examine Cox's Bazar's existing economic and labour market outcomes. The study's specific goals are as follows:

- Mapping the current economy to understand the structure of current production (Manufacturing, salt-extraction (mining), fisheries (dry fish), construction, light industry, food and beverage, informal sector) processes to identify which sectors have potential for growth and could be further promoted.
- Sector-specific quantitative and qualitative analysis outcomes, including inclusive growth considerations such as low-skilled employment potential, female participation, the rural–urban divide and employment by skill level and wage

- Identification of sectors based on discussions with key stakeholders in Cox’s Bazar
- Mapped out the potential skills required for emerging sectors for entry level workers to mitigate the skills gap
- Explore value chain analysis and market linkage of emerging sectors
- Mapped out potential entrepreneurship opportunities, and enterprise development needs (existing CMSMEs) for the sector mentioned above.
- Impacts of the Rohingya Refugee influx on sector specific market demand
- Climate change impact of the selected industries will also be assessed

### 1.3 Methodology

**Method:** A mixed-method approach was applied for the study where both qualitative and quantitative data was used as evidence for the results. The study was conducted in four stages. The stages of the assignment is illustrated in the following figure:

Stages	Literature review	Pre-assessment	Detailed assessment	Analysis and reporting
Instruments	Secondary literature review	Primary qualitative data	Primary qualitative data and Quantitative survey	Data analysis and report drafting
Objectives/ points of inquiry	Current and future economic and employment status/potential of the industries	Expectations of the employers, job opportunities in future and critical barriers for the employers and employees, skill gaps of the employees that needs to be addressed	Socio-cultural and socio economic barriers, deep-rooted issues that restricts skill development, barriers of the employees and means to overcome the barriers/skill gaps, institutional support for skill development, and entrepreneurship and enterprise development opportunities and barriers.	Analysis of the qualitative and quantitative data collected and drafting the report

Figure 1: Stages of the assignment

**Literature review:** The literature review was conducted by reviewing available and relevant research articles, available journal articles, and published reports by the relevant agencies, media reports and other relevant documents to understand the overall labour market scenario of Cox’s Bazar district. This literature review informed the study team on critical aspects of the market dimension of Cox’s Bazar district. It also informed the study on the economic and market information that guided towards selection of industries that have the current or future employment potential.

**Pre-assessment:** During the pre-assessment, the study team conducted key-informant interviews (KIIs) with sector experts in Cox’s Bazar. The structure, process and market dimensions in the complex socio-economic backdrop of Cox’s Bazar, identified through the

literature review was validated and further investigated through the primary interviews. The strategic KIs informed the study on detailed functioning of the value chains within the selected sectors and market dimension of each of the sectors along with the critical demand-supply gap and employability of the target population. The outcome of this exercise was twofold. First, the exercise generated detailed understanding of the market dimension of the selected sectors and critical challenges and bottlenecks within the labour market dynamics. Second, it guided the study towards detailed sectorial assessment. The key challenges, opportunities and demand-supply gap were identified in this stage and was further evaluated in the subsequent stages. The sample size for the pre-assessment is detailed in the following table:

*Table 1: Sample size for the pre-assessment*

SECTOR	SAMPLE	DETAILS
Rubber	2 1	BRAC Cox's Bazar SDP team Assistant manager, Ramu Rubber garden
Tourism	2	Manager, Hotel Long Beach General Manager, Uni resort
Salt Extraction	2	Salt Mohajons
Fishing	3	General manager, Shrimp hatchery Boat owner Dry fish farm owner
Rohingya refugees	2	Rohingya NGO worker Refugee camp-based NGO worker
Construction	2	Contractors

\*\* Total samples 14

**Detailed assessment:** The third stage of the assignment included a detailed sectorial assessment of the selected sectors and a quantitative survey of the target population. The detailed assessment was guided by the findings from the first stage. The quantitative survey with the target population- women, youth and adolescents, from both the host and the Rohingya communities was also conducted in order to understand the skill-gaps, critical needs, social and cultural barriers and opportunities for need-based interventions. The detailed assessment was comprised of both the qualitative and quantitative methods.

**Qualitative assessment:** The detailed assessment was conducted to further validate the key findings from the first two stages of the assessment. The detailed assessment was conducted in order to find out the potential employment and skill development opportunities

in each of the selected sectors along with the critical challenges and barriers for both the host and Rohingya population in terms of employment in the labour market of Cox's Bazar district.

In order to answer to the research questions, a rapid qualitative assessment with the market actors was conducted. The primary data collection included key-informant interviews, in-depth interviews and focus group discussions with producers and market actors from each of the selected sectors. The sample size for the qualitative assessment is detailed in the table below:

SECTOR	SAMPLE	DETAILS
KII/IDI Rubber Garden	2	Rubber garden workers
SECTOR Tourism	9	Hotel/restaurant workers, tourist operators, souvenir shop owners and workers
SECTOR Salt Extraction	5	Salt farmers and land leasers
SECTOR Fishing	7	Boat owners and fishermen
SECTOR Rohingya refugees	2	Rohingya NGO worker Refugee camp-based NGO worker
SECTOR Construction	13	Construction workers and contractors
SECTOR Shrimp	4	Shrimp hatchery workers and shrimp labours
SECTOR Dry Fish	4	Dry fish farm workers
FGD FGDs with host community adolescents and youth	54(5 FGDs)	FGDs were conducted in Pekua, Moheshkhali, Chakaria, Sadar and Kutubdia upazilas
IDI with the Rohingya refugees	11	From Camp-22

*Table 2: Sample size for the detailed qualitative assessment*

\*\* Total Sample 109

**Quantitative survey with the target population:** A quantitative survey with women, adolescents and youths was conducted both in the host communities and in the Rohingya camps. The objective of the survey was to find out the barriers for each of the target group population in the selected sectors. In addition, their critical needs, societal and cultural challenges, skill gaps, aspirations, impact of the influx and COVID-19 outbreak was measured in order find a strategic solution for increasing employment opportunities. The sample survey also informed the study on strategic interventions that need to be undertaken in order to ensure inclusiveness in the intervention strategies for further development.

*Table 3: Sample size for the quantitative survey*

Sample from the host community	200
Sample from the Rohingya population	169

<b>Sample distribution for the host communities</b>	
<b>Upazila</b>	<b>Sample</b>
Cox's Bazar Sadar	30
Chakaria	28
Moheshkhali	27
Ramu	28
Pekua	27
Kutubdia	25
Ukhiya	27
Teknaf	26
<b>Sub-total</b>	<b>218</b>
<b>Sample distribution for the refugee population</b>	
<b>Camp sites</b>	<b>Sample</b>
Camp 1	34
Camp 7	47
Camp 16	70
Camp 22	18
<b>Sub-total</b>	<b>169</b>
<b>Total sample</b>	<b>387</b>

#### 1.4 Framework of analysis

The framework of analysis was based on the study objectives. Broad areas of assessment were identified against each of the study objectives. The following table illustrates the identified broad assessments:

*Table 4: Analytical framework of the study*

<b>Study objectives</b>	<b>Broad areas of assessment</b>
Mapping the current economy to understand the structure of current production processes to identify which sectors have potential for growth and could be further promoted.	<i>Literature review and KII with sector experts</i>
Identification of sectors based on discussions with key stakeholders in Cox's Bazar	
Sector-specific quantitative and qualitative analysis outcomes, including inclusive growth considerations such as low-skilled employment potential, female participation, the rural–urban divide and employment by skill level and wage	Employment mapping of the selected industries
	Preparedness of women, adolescents and youth to enter into the job market
	Assessment with the Rohingya refugees
Explore value chain analysis and market linkage of emerging sectors	Value chain mapping of the industries
Mapped out the potential skills required for emerging sectors for entry level workers to mitigate the skills gap	Current and future employment opportunities

	Skill requirement of the employees
	Current skill gaps within the selected industries
	Opportunities of locals
	Level of skills required
Impact of climate change, influx and COVID on the selected industries	Impact of climate change/influx and COVID on the industry and employment
Impacts of the Rohingya Refugee influx on sector specific market demand	

The broad areas of assessment were further divided into specific areas of assessment. Furthermore, each specific areas of assessment was assigned with data collection method and data sources for systemic data collection. The detailed framework of analysis is presented in Annex-1.

## 1.5 Limitations and challenges

The study was conducted within a short period of time. Due to the time constraints, the pre-assessment and detailed assessment stages of the study were merged together.

The sample survey with the Rohingya refugees was affected due to the ongoing lockdown in the camp sites due to COVID outbreak. The proposed sample size needed to be revised due to the ongoing restriction. The study team conducted the survey in one day from 4 camp sites with support from the Cox's Bazar BRAC SDP team.

The data collection was also affected by the weather. Incessant rain during the data collection made the interviews difficult to conduct. Sample survey in Kutubdia upazila was affected due to risky transportation during rain. The data collection in Kutubdia was hence, a bit delayed. However, the study team was able to complete the data collection within due time with support from the SDP team.





Current economy, labor  
market scenario and  
emerging industries of  
Cox's Bazar district  
(Secondary Literature  
Review)

## Chapter 2: Current economy, labor market scenario and emerging industries of Cox's Bazar district (Secondary Literature Review)

### 2.1 Current economy and labor market scenario in Cox's Bazar

Cox's Bazar district is situated in Bangladesh's Chittagong division. It is the southernmost region in Bangladesh. Cox's Bazar is constituted of 8 upazilas, namely- Cox's Bazar Sadar, Ukhia, Teknaf, Ramu, Kutubdia, Chakaria, Moheshkhali, Ramu and Pekua. The district is home to 3.2 million people including 2.3 million host population and 0.9 million Rohingya refugees (District Development plan for Cox's Bazar- phase-1, 2019).

**Socio-economic condition:** Cox's Bazar is one of the poorest 20 of the 64 districts of Bangladesh. Poor land quality and risk of natural disasters have been impacting the development indicators of the district. Compounding this, Ukhia and Teknaf Upazilas of the district are the main hosts to the refugees, whose arrival has corresponded with worsening the development indicators of the host community. The scale of the influx of Rohingya refugees resulted in an extreme humanitarian crisis creating a severe strain on the host community and service providers. It directly affected the host communities' food security, economic vulnerability, market access, labor opportunities and environment. The dramatic increase in population has strained resources, infrastructure, public services and the local economy. Increased pressures include rising food, firewood and transport prices, pressure on water, basic services and the environment and competition for jobs.

Estimates from the 2016/17 Household Income and Expenditure Survey (HIES) place adult illiteracy rates at 47%. Primary school attendance is at 91%; this figure drops to 57% for secondary school. For 2016, the poverty headcount ratio showed that 17% of the population lived below the upper bound poverty rate and 8% below the lower bound poverty rate (Lemma, Quattri, Hagen-Zanker, Wake, & Eusuf, 2018).

**Current economic structure and labour market scenario:** Up to date sectorial composition data of Cox's Bazar's GDP is not available. A study conducted jointly by the Asia foundation and UK AID in 2018, provided a synopsis adopted from a 2008 study:

Table 5: Cox's Bazar GDP and sectorial breakdown

	Cox's Bazar 2005/06, US\$ million, nominal	As percentage of Cox's Bazar GDP (%)	As percentage of Bangladesh's GDP (%)
<b>GDP</b>	819	100	1.4
<b>Agriculture</b>	233	28.4	2.1
<b>Industry</b>	203	24.8	1.2
<b>Services</b>	383	46.8	1.2

Although the data is more than a decade old, it helps to understand the broad composition of the region. Preliminary Cox's Bazar labor force survey indicates that agriculture is still employing the highest percentage of labors in Cox's Bazar.

According to the Asia Foundation study, in Bangladesh growth in industry is encouraging, as industrial sectors have shown significant productivity improvements at the national level. Between 1991 and 2005, productivity across the industrial sectors in Bangladesh increased by 117%. On the other hand, services productivity decreased by 9.7% in the same period. Given the relative importance of services for Cox’s Bazar, the concern is that there was growth in a less productive sector, hence with potentially lower quality of growth in employment and income outcomes (Lemma, Quattri, Hagen-Zanker, Wake, & Eusuf, 2018).

The following table illustrates the labor productivity in Bangladesh:

*Table 6: Sector-wise labor productivity in Bangladesh*

Economic activity	Labor productivity (US\$ per worker)				
	1991	2000	2005	2010	2013
Agriculture	280	315	396	481	535
Industry: Mining and utilities	2,212	2,603	9,760	8,555	10,073
Industry: Manufacturing	758	1,763	1,400	1,696	2,163
Industry: Construction	3,089	2,341	1,974	1,716	1,773
Services: Wholesale, retail and hotels	670	799	843	1,166	1,249
Services: Transport, storage and communication	2,227	1,804	1,248	1,841	1,982
Services: Other	2,118	2,284	2,440	2,888	2,911

Source: Bangladesh Economic Dialogue on inclusive growth- EDIG research report-4

There are variations in employment opportunities in different sectors. The following table shows employment scenario across sectors in Cox’s Bazar (by percentage of workers):

*Table 7: Percentage of workers employed in different sectors in Cox's Bazar district*

Sectors	% of workers
Crops	22.6
Retail trade	16.38
Livestock	9.4
Manufacturing	8.97
Fisheries	8.72
Transport	6.85
Construction	6.79
Mining	5.11
Other services	4.3
Hotel and restaurant	3.42
Education	2.43
Utility	1.74
Public administration	1.12
Forestry	1.06
Housing and real estate	0.62
Health	0.5

Source: Preliminary Cox’s Bazar labor force survey (2018)

The Economic Census of 2013 of Cox’s Bazar carried out by the Bangladesh Bureau of Statistics provides data on employment by working status in non-agricultural sectors. This data shows that most workers in the region are male (91%), and nearly two thirds (60.6%) are

classified as full-time workers (BBS, 2013). Number of establishments and total persons engaged in non-agricultural economic activities is presented in the table below:

*Table 8: Number of establishments and total persons engaged in different sectors in Cox's Bazar*

Economic activities	Establishments	Total persons engaged		
		Total	Male	Female
Mining and Quarrying	5,161	10,126	9,747	379
Manufacturing	13,441	31,714	21,547	10,140
Electricity, Gas, Steam and Air Conditioning Supply	61	519	494	25
Water Supply, Sewerage, Waste Management and Remediation Activities	63	219	203	16
Construction	24	189	189	0
Wholesale and Retail Trade, Repair of Motor Vehicles and Motorcycles	45,395	132,379	130,110	2,269
Transportation and Storage	6,728	8,271	8,220	51
Accommodation and Food Service Activities (Hotel and Restaurants)	7,183	20,168	19,046	1,122
Information and Communication	214	915	810	105
Financial and Insurance Activities	411	4,102	3,254	848
Real Estate Activities	120	428	413	15
Professional, Scientific and Technical Activities	347	1,169	1,155	14
Administrative and Support Service Activities	554	1,947	1,900	47
Public Administration and Defense, Compulsory Social Security	337	3,580	3,153	427
Education	2,503	14,956	12,002	2,954
Human Health and Social Work Activities	772	3,614	2,939	675
Art, Entertainment and Recreation	99	292	279	13
Other Service Activities	12,201	25,490	21,283	4,207
<b>Total</b>	<b>95,614</b>	<b>260,078</b>	<b>236,771</b>	<b>23,307</b>

Source: Economic census 2013, District report Cox's Bazar

## 2.2 Emerging industries for employment of the host community dwellers

Given the current economic and labor market scenario and economic development plans, several industries have significant growth potential in Cox's Bazar district. As per the objectives of the study it is important to identify employment and skill development opportunities within each of the sectors so the demand for employment matches the supply of labor. In addition, how women, youth and adolescents can benefit from the industrial growth opportunities also need to be further investigated in order to ensure inclusive growth. Cross-cutting issues; impact of the influx, COVID and climate change in the businesses will also be

further investigated through the primary interviews. The selected industries for further investigation is as follows:

- Manufacturing- Rubber products
- Fisheries- Shrimp farming and dry fish processing
- Construction
- Tourism- Food and beverage supply, low-skilled jobs, service sector and marine tourism
- Salt extraction
- Mid-level job sector- across the selected industries

In the context of the project, we consider these sectors as most prospective in Cox's Bazar district. These sectors have strong presence in the current local economy and have significant growth potential as well. Consequently, these sectors will require skilled employees at present and in future and the project interventions can work on making locals more prepared and competitive.

### **Manufacturing**

Government of Bangladesh has initiated establishment of multiple economic zones in Cox's Bazar district. Cox's Bazar economic zone, Moheshkhali, Moheshkhali economic zone-1, Cox's Bazar and Moheshkhali economic zone-2, Kalarmarchara are the three economic zone project being carried out by BEZA in the Cox's Bazar district (BEZA, 2021). In addition to the construction sector at present, the economic zones will also create employment opportunities in the manufacturing sector once the economic zones are operational.

Rubber industry has potential growth opportunities in Cox's Bazar district. The district has one of the largest rubber gardens of Bangladesh (Ramu Rubber garden). Chattogram region is one of the prominent rubber production hubs in Bangladesh. Upon completion of the economic zones, the rubber industry has the potential to flourish which consequently will lead to more employment opportunities. At present, the rubber industry of the country is import-oriented. The locally produced rubber is less costly than the imported ones, posing a significant opportunity to reduce rubber goods production cost (Rahman, 2008).

### **Construction**

The construction sector seems to meet a few important criteria. The sector seems to generate substantial employment, is concentrated in rural areas, could promote female employment participation and has low skill requirements (Lemma, Quattri, Hagen-Zanker, Wake, & Eusuf, 2018). The ongoing Government projects and private initiatives holds a significant growth opportunity of the selected sectors. Apart from the Government economic zones, being a prominent tourist spot, hotels, restaurants and rest houses will have construction worker demand.

Agricultural day laborers are losing their jobs in Ukhiya and Teknaf upazilas and there is a significant wage rate disruption due to the recent Rohingya influx. According to a survey<sup>1</sup> conducted in March-April 2019 in Ukhiya and Teknaf, it was reported that majority of the ultra-poor population is engaged in either farm or non-farm day labor work. According to an UNDP survey, the wages in Ukhiya and Teknaf have fallen by on average 20% while the wage rate has

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<sup>1</sup> The survey was conducted for the "Market Assessment and Value Chain Analysis study For Gender-inclusive Pathways out of Poverty for Vulnerable Households in Cox's Bazar, Bangladesh" (April, 2019) by Innovision Consulting Private Limited.

risen by 6.7% in the rest of Cox's Bazar district. The wages have also declined from BDT 417 pre-influx to BDT 357 post influx (UNDP, 2018). To this context, construction sector holds both an immediate and urgent importance for the affected host community dwellers and future opportunities as well.

## **Fisheries**

A large amount of shrimp is cultivated on the coastal land of Cox's Bazar district. Both bagda and golda-type shrimp are exported and also consumed locally. As a result, growth of the local production chain (hatcheries) and the food industry based on shrimp cultivation has intensified in recent times, with enormous potential for employment creation in this area.

A large volume of dry fish is also produced every year in Cox's Bazar. Cox's Bazar Sadar subdistrict, Sonadia, Maheshkhali and St Martins' Island of the Cox's Bazar district are well known for dry fish production. In recent years, the solar tunnel drier method has been adopted in these areas for producing dry fish, resulting in higher production. Dry fish from Cox' Bazar is usually exported to South-East Asia and the Middle East. Notably, 25–30% of the fish collected from the Bay of Bengal is processed as dry fish (Lemma, Quattri, Hagen-Zanker, Wake, & Eusuf, 2018). The divisional city of Chattogram is the largest market of dry fish in Bangladesh. As such, Cox's Bazar holds a geographic advantage to leverage on.

The sector makes significant use of low-education labor, which means it could absorb a larger volume of low-skilled employees. In addition, preliminary results from the 2018 labor force survey suggest the sector makes use of a larger proportion of low-skilled female labor than do other sectors (Lemma, Quattri, Hagen-Zanker, Wake, & Eusuf, 2018). In terms of women employment, entrepreneurship and enterprise development opportunities, dry fish farming have significant potential in Cox's Bazar.

## **Tourism**

With the longest sandy sea beach in the world, the city of Cox's Bazar has the potential to become one of the world's greatest tourism centers. Government of Bangladesh has already initiated Dhaka-Cox's Bazar direct train services that is scheduled to start by December, 2022 (The Daily Star, 2021). In addition, the Civil Aviation Authority of Bangladesh has already signed a deal with two Chinese companies for expansion of the airport runway with an aim to upgrade the airport to international standard (The Daily Star, 2021).

In addition, the Sabrang exclusive tourist zone in Teknaf and Jalaria Island Exclusive NAF Tourism Park are two tourism centric economic zones being developed in Cox's Bazar district. Water Development Board, the Local Government and Engineering Department, the Roads and Highway Department and the Rural Electrification Board are collaboratively implementing the projects (Lemma, Quattri, Hagen-Zanker, Wake, & Eusuf, 2018).

## **Marine tourism**

Marine tourism is one of the growing tourism segments around the world attracting tourists to marine activities. The United Nations World Tourism Organization (UNWTO) addressed marine tourism related to SDG-14, which ensures benefits for host countries from tourism activities through sustainable use of marine resources. This tourism segment represents 5% of world GDP and contributes 6%–7% of global employment (UNWTO 2019).

Once completed, these tourism parks, railway station and airport will create significant employment opportunities in Cox's bazar.

An ADB study revealed that Marine tourism is one of the growing tourism segments around the world attracting tourists to marine activities. The United Nations World Tourism Organization (UNWTO) addressed marine tourism related to SDG-14, which ensures benefits for host countries from tourism activities through sustainable use of marine resources. This tourism segment represents 5% of world GDP and contributes 6%–7% of global employment (Anowar Hossain Bhuiyan, 2020). In this aspect, Cox’s Bazar holds immense potential of marine tourism in the coming years.

### **Salt extraction**

At the basic level, mining activities in Cox’s Bazar exhibit several desirable employment characteristics. Mining activities in Cox’s Bazar revolve specifically around salt extraction. Employees are all, essentially, low-skilled, hence the entry requirement into the labor force is low. The sector is wholly located in rural areas and has a relatively high rate of female participation. At the national level, domestic value addition of mining products is relatively high, which means that most of the value of the final goods is kept in country. According to stakeholder discussions, an estimated 43,500 people work on approximately 63,500 salt fields in the district. Results from the SAM suggest that promoting the use of Cox’s Bazar salt at either the national or the international level could have a significant growth impact on the sector. (Lemma, Quattri, Hagen-Zanker, Wake, & Eusuf, 2018).

### **Mid-level job sector in service and manufacturing industries**

In addition to the low-skilled jobs in the selected sectors, mid-level jobs will also be created in the selected sectors. Catering to the economic development plan in Cox’s Bazar, there are opportunities of creation of service sector jobs, especially in manufacturing and tourism sectors.

## **2.3 Skill development opportunities among the Rohingya population**

A repatriation agreement was signed between GoB and GoM on November 23, 2017 (Paul, 2017). However, the repatriation did not begin till date. On November 11, the Gambia filed a case against Myanmar under the Genocide Convention with the International Court of Justice (The Guardian, 2019). At present Bangladesh remained engaged with the world, especially with India, the US, the European Union and China to ensure safe repatriation of the Rohingyas.

While pressing for eventual repatriation, Bangladesh and external partners should move past short-term planning and work together to build safe housing, improve refugees’ educational and livelihood opportunities, and support refugee-hosting communities (International Crisis Group, 2019).

Since the recent large-scale influx, an estimated 117,000 Rohingya adolescents living in the world’s largest refugee camp are out of school for more than 18 months, desperately need learning opportunities. However, only 4% percent of these boys and girls have access to any form of education, life-skills or vocational training. Unemployed and not authorized to work, boys fill their days collecting firewood to earn pocket change. Others just hang out with friends on roadsides, growing bitter about their plight. Most girls remain confined to their sweltering plastic-walled shelters, their parents afraid their daughters will be harassed or assaulted if they allow them to venture outside (World Vision International, 2019).

UN Women works towards empowering Rohingya women and girls through life-skills training and supportive services. The services are being provided through the Multi-Purpose Women’s

Centers in Camp 18 in Balukhali since January 2018. Close to 70 women and girls visit the center daily to receive various services, or just to get away from their crowded living quarters and find peace and comfort. So far, the center has supported over 15,000 women and girls of all ages through various services. Women and girls receive information and referral services for health and psychosocial support, learn about nutrition, health and sanitation, and other essential life-saving matters (UN Women, 2019).

The Women's Centre also serves as a skills training center. Over 420 women and adolescent girls have completed the two-month tailoring training course taught by an experienced Rohingya instructor since February 2018. Although there are challenges in terms of finding steady customers, about half of the women and girls who learned tailoring at the Women's Centre have started to earn some money to support their families through orders from friends and neighbors. The Women's Centre has sewing machines available for women who have completed the training to come and use for free for their income-generation activities (UN Women, 2019).

The U.N. refugee agency calls a new training project in Cox's Bazar. The UNHCR has teamed up for the project with a local nongovernmental organization, the Ayesha Abed Foundation. The U.N. refugee agency says the goal is to train 500 women by the end of the year. Half that number will be Rohingya refugee women and the other half will be women chosen from among the Bangladesh communities hosting them (Schlein, 2019).

While the ultimate goal remains safe, voluntary, and dignified repatriation of the refugees back to Myanmar, realistic scenarios for repatriation show significant numbers of Rohingya will remain in Bangladesh for more than 10 years. There is growing interest in trying to move beyond the existing short-term aid-based solutions to inclusive, medium-term approaches that include economic, environmental, and human development in the region. This latter set of approaches can serve the interests of both host and refugee communities in Cox's Bazar, while also contributing to Bangladesh's long-term development agenda (Dempster, 2019).

- Upskill the host community under a Global Skill Partnership model
- Extend labor mobility agreements with Gulf Cooperation Council and East and Southeast Asian countries
- Promote limited labor migration opportunities for Rohingya refugees

To this context, the study will analyze the skill-set of the Rohingya refugees that is best-suited to the ongoing skill-development programs and can be utilized by them after repatriation.





Field Findings-  
Employment potential  
within the selected  
sectors in Cox's Bazar  
(host communities)

## Chapter 3: Field Findings- Employment potential within the selected sectors in Cox's Bazar (host communities)

The chapter will present the employment opportunities in the selected sectors for the Cox's Bazar locals. Among the selected industries, our assessment suggested an in-depth investigation in the following sectors to explore employment opportunities for the Cox's Bazar locals.

*Table 9: Industries and employment opportunities in Cox's Bazar*

<b>Industries</b>	<b>Employment opportunities as...</b>
Manufacturing	Rubber garden workers, contractors
Construction	Construction workers and contractors
Salt extraction	Salt farmers, field workers and leasers (Mohajon)
Fisheries	Fishermen, boat owners, labour/worker, shrimp farmers, workers, leasers, Dry fish farm owners, dry fish farm workers,
Tourism	Tourist operators, managers, low-skilled, mid-level skilled and high skilled hotel workers, drivers, automobile mechanics.

### 3.1 Employability potential in the selected sectors in the next 5 years

#### 1. RUBBER PRODUCTION

##### Brief overview

Ramu rubber garden is a Government-owned and Government-managed rubber garden situated in Ramu Upazila of Cox's Bazar district. The garden is operated by 'Bangladesh Forest Industries Development Corporation (BFIDC). The garden constitutes 2,682 Acres of land with around 86,000 productive and more than 150,000 unproductive/growing rubber trees. The garden produced 215 Metric Tons of rubber in FY 2020-2021. The total number of employees working in the rubber garden is 30; among them, 15 are employed under 'Pay commission', and the other 15 are under wage employment.

The additional employment scopes within this industry include day labourer for collecting latex from the rubber trees and in the rubber processing factory (adjacent to the rubber garden). The rubbers are sold through a rubber garden office situated in Mirpur, Dhaka. If an industry requires rubber produced from the garden, it will have to complete the purchase from the Dhaka office. Despite having a significant rubber production in Cox's Bazar district, rubber product industries are yet to develop in the district. As such, our assessment finds the entire employment opportunities in the rubber production in the garden.

##### Employment opportunities

The rubber garden management employs day labourers for rubber latex collection from the trees and factory work. It employs labourers through local contractors. Local contractors deploy around 300 labourers (daily wage-based) during the peak season (September-January) and around 200 labourers during the off-peak season (February-August). The labourers do not require any formal training for the work. They can learn through apprenticeship working with the regular labours.

Moreover, as suggested by the rubber garden management, labourers do not have much interest in working in the rubber garden. They are more prone to working in the brickfields as labourers. In the context of aspiration and future employment opportunities, rubber production does not hold much potential.

Sector	Potential employability in the next 5 years			Scope of women's employability		
	High	Medium	Low	Present	Somewhat present	Not present
<b>Rubber extraction</b>						
<b>Rubber garden manager, contractor, worker</b>						

## 2. FISHING

### Brief overview

The study assessed marine fishing, dry fish processing and shrimp sectors under the fishing industry of Cox's Bazar district.

### Marine fishing

The marine fisheries are dominated by small-scale operations including small-scale near shore fry fishing with push and drag nets and operations with motorized and non-motorized boats ranging from 6 to 12 m l.o.a. (length overall) deploying set bag nets, gill nets and longlines<sup>2</sup>. There is also semi-industrial gill net fishing with mechanized vessels up to 20 m l.o.a. and the industrial trawler (shrimp and finfish) fleet<sup>3</sup>.

In Bangladesh, there are approximately 900 000 fishers engaged in marine fishery (FAO 2014). A substantial portion of these fishers are women. Allied activities like processing and marketing, if properly developed, are likely to absorb many labour forces.

Presently, the government has been giving increasing attention to augment the production of marine fish in Bangladesh. However, marine fish production and marketing in Bangladesh face a number of problems like long supply chain, rough handling, improper cleaning and packaging, exploitation of fishermen by middlemen, insufficient and poor transportation facility, excessive cost, and inadequate storage facilities, shortage of capital, market limitation, etc. An appropriate marketing system can make the marine fish more available to the ultimate consumers.

Marine fisheries is regulated by two major instruments. These includes registration for fishing, ban on Jatka (juvenile Hilsa fish) catching in coastal Bangladesh, using net like current net and push net that harms biodiversity. Government provides food rations to fishers during fishing ban but that cannot include all the fishers' households needing support and the distribution system is not always transparent. Some of the fishers reported that they have to

<sup>2</sup> Fishery and Aquaculture Country Profiles; <http://www.fao.org/fishery/facp/BGD/en>

<sup>3</sup> Fishery and Aquaculture Country Profiles; <http://www.fao.org/fishery/facp/BGD/en>

give bribe for various reasons to coast guard to avoid harassment while fishing. The other side of the story is some fisher use net that are banned.

### **Employment opportunities**

Marketing infrastructure is virtually non-existent on the island. Raw fish is sold on the beach or on the roadside. There is not enough landing facilities that can be used for handling, sorting and grading of fish prior to sale. Simply by improving the landing facilities (better sorting and grading of raw fish by commercial category) the fishers or traders can increase the revenue of a fishing by 5 to 10%.

### **Dry fish processing**

Cox's Bazar is geographically blessed with the Bay of Bengal across the western and southern sides of the district. The Bay of Bengal is vastly enriched with various species of marine fishes. The Bay of Bengal, with all its natural resources, largely affects the livelihoods of the inhabitants. Although, a large number of people are engaged in fishing, both in the adjacent rivers/canals and in the sea, dry fish farming was found out to be a rather uncommon livelihood practice among the inhabitants of Ukhiya Upazila. In contrast, dry fish farming is a common livelihood option among the dwellers of Teknaf Upazila.

Round the year, plenty of fish is harvested from the Bay of Bengal and from the adjacent rivers/canals. Based on the supply of input, dominant clusters of dry fish processing has emerged in different villages across Teknaf Upazila. There are around 6/7 large dry fish processing farms and around 50 small processing farms in Teknaf Sadar union. Dry fish processing in a small scale (Household Level) was also observed to be a common practice in Teknaf. Inhabitants have long been traditionally engaged in dry fish processing, in a small scale, mostly for Household consumption. The practice was observed to be widespread among the fishermen families who dry the harvested fishes in the courtyards for household consumption. Scaling up of household level fish drying is restricted by several factors which are broadly discussed in the following chapters.

According to the dry fish traders, an average of 100-120 workers are engaged in dry fish farming in each of the processing firms. Majority of the workers were observed to be female who work there as laborers. They work from 8 AM to 6 PM with a one hour lunch break from 1 PM-2 PM. They are usually paid BDT 250-300 per day. Workers were reported to work 18-20 days a month.

The fish drying process is a routine work and workers who work in the processing farms are skilled enough to run a fish drying processing farm on their own. However, some constraining factors restrict them to run their own fish drying business, which are discussed in the subsequent sections.

The dry fish produced in Teknaf Upazila is traded to regional and national markets. The main market of dried fish is in Chittagong. Traders were reported to usually transport the dried fishes in the markets of Chittagong (80-85%). In addition, they also supply dried fishes in the markets of Ramu, Ukhiya and Teknaf Upazila (15-20%). Regional traders from Chittagong district source dried fishes from the processors which are then supplied across the country.

### **Employment opportunities**

The field investigation shows that the processors are seeing increase in dry fish trading over the year. The processors we interviewed opined that their trading volume is in the rise every

year. Dried fish market is expanding every year, especially in the southern region of the country (Chittagong, Cox's Bazar districts). The supply of raw fish is also concentrated on the markets of Cox's Bazar and Chittagong districts. According to our observation, processors import raw fishes from the large markets of Chittagong and Cox's Bazar and after processing, dried fishes are again transported to the very same markets. In addition to import raw fishes from markets of Chittagong and Cox's Bazar districts, processors also collect fishes from the local fishermen.

## Shrimp industry

### Overview

Along the Marine Drive road, in Cox's Bazar, there are multiple shrimp hatcheries producing shrimp PL (Post Larvae). However, shrimp cultivation is not so widespread in Cox's Bazar. There are some shrimp cultivation practice in Pekua upazila. However, PL production dominates the shrimp industry in Cox's Bazar district. Majority of the PLs are being supplied to the shrimp farmers of the south-western districts of Bangladesh (Shatkhira, Khulna etc.). The advantage of the shrimp hatcheries of Cox's Bazar is, they can produce the PL in natural salt water from the Bay of Bengal.

### Employment opportunities

The marine fishing industry employs people as boatman and fishermen. Each boat carries 5-10 people including the boatman and the fishermen. Majority of the fishermen are from the fishing villages who learned to fish through apprenticeship from their family members and/or neighbours. The fishing boats employ people without assessing any skills. However, if anyone can't perform well during their first journey, the boatman or the boat owner do not employ him in their next visit. The sub-industries supporting the fishing industry- fishing net industry, boat making industry, boat engine repairing industry, etc. have employment opportunities for the skilled labours.

Sector	Potential employability in the next 5 years			Scope of women's employability		
	High	Medium	Low	Present	Somewhat present	Not present
<b>Fishing</b>						
a. Fishermen (boats)						
a. Boat owner (majhi)						
Labor/ worker (jele)						
<b>Trawler fishermen</b>						
a. Trawler owner (majhi)						
b. Labor/ worker (jele)						
<b>Hatcheries</b>						
a. Technician						
b. Supervisor						
c. Worker/ helper						
<b>Shrimp farm</b>						
a. Mohajon (leaser)						
b. Worker						

Sector	Potential employability in the next 5 years			Scope of women's employability		
<b>c. Farmer</b>						
<b>Dry fish</b>						
<b>a. Farm owner</b>						
<b>b. Worker</b>						

It was observed that the dry fish industry employs a large number of people, especially women, as day labourers. Dry fish is being processed without maintaining proper hygiene. There is a scope of introducing hygienic processing of dry fishes. Workers' skill development is mostly dependent on apprenticeship modality. The farm owners do not require skilled employee as they usually dry fishes following the traditional method. However, there is a scope of introducing drying machines<sup>4</sup> to the industry. It will ensure hygienic processing of dry fishes, it will also increase dry fish production and require skilled employees.

In case of shrimp hatcheries, there are some employment opportunities as technicians and workers in the hatcheries. Workers and technicians are involved in PL production and they can learn through apprenticeship and/or on-the-job trainings. There is no skill requirement for the hatchery jobs, as mentioned by the hatchery management.

### 3. CONSTRUCTION

#### Brief overview

Construction is one of the most expanding industries in Cox's Bazar. Increasing Government and private sector investments are generating demand for skilled construction workers. The tendering for construction workers takes place in two broad ways- public tendering and single sourcing. During public tendering, public notice is published with the requirement for construction workers. Government agencies; LGED, PWD; publishes public bidding. Foreign construction companies working in different Government projects do not necessarily recruit construction workers through public tendering. Rather, our assessment suggests that they mostly hire through single sourcing. Contractors apply for the construction works and later hire construction workers themselves.

#### Employment opportunities

Due to ongoing Government projects and investments from the private sector, there is a significant employment opportunity in the construction sector in Cox's Bazar. Apart from the hotels and restaurants, the ongoing Government projects, such as infrastructure development projects in Moheshkhali, Cox's Bazar railway station, Cox's Bazar airport etc.

There is a significant opportunity for the Cox's Bazar locals to enter into the construction industry. There are lots of construction workers working in Cox's Bazar who came from other districts, including Barishal, Rangpur, Gaibandha, Chattogram etc. There are a number of contractors from the different communities working in the Cox's Bazar districts.

Government-owned projects had a provision to recruit 60% of the workers required in the projects will be recruited from the locals. In Moheshkhali, the locals were recruited at first.

<sup>4</sup>[https://www.hncrusher.com/product/dryer/fish.html?gclid=CjwKCAjw8cCGBhB6EiwAgORey4CqMu5YdrvDVZHqp\\_Snb9\\_gTEnj2lvUk1CN7zC7Oyd6\\_Fm8WSG0XhoC1MMQAvD\\_BwE](https://www.hncrusher.com/product/dryer/fish.html?gclid=CjwKCAjw8cCGBhB6EiwAgORey4CqMu5YdrvDVZHqp_Snb9_gTEnj2lvUk1CN7zC7Oyd6_Fm8WSG0XhoC1MMQAvD_BwE)

However, due to several issues<sup>5</sup> the locals were fired within a short period of time. The local workers who were recruited are now trained (in plumbing, mason work, electric works). However, due to the absence of local contractors in Moheshkhali, they are yet to access the projects as workers.

Sector	Potential employability in the next 5 years			Scope of women's employability		
	High	Medium	Low	Present	Somewhat present	Not present
<b>Construction</b>						
a. Contractor						
b. Mid Skilled Worker (carpenter, electrician, plumber, painter)						
c. Low skilled worker (mason-cementing, tiles, bricklayering)						
d. Machine operator of Construction vehicles (excavator)						

#### 4. TOURISM

##### Overview

Being the tourism capital of the country, Cox's Bazar tourism industry is a well-developed one. The district has a total of 69<sup>6</sup> (5 Government-owned and 62 private) registered hotels. In addition to the residential hotels, several restaurants are operating across the district. The tourism industry also operates ships to and from the Saint Martin's Island at Teknaf upazila. Several tourist operators are also operating in Cox's Bazar managing trips to Saint Martin's Island from Cox's Bazar. Souvenir shops in the beach markets, photographers in the beach sides are amongst the tourism centric activities in Cox's Bazar.

##### Employment opportunities

The tourism industry have many employment opportunities. The residential hotels and the restaurants employs low, mid and high-skilled labours. In addition, there are employment opportunities in the tourist operating agencies and in the souvenir shops across the beach markets.

Sector	Potential employability in the next 5 years			Scope of women's employability		
	High	Medium	Low	Present	Somewhat present	Not present

<sup>5</sup> It was alleged that contractors from the other districts (Barishal, Chattogram etc.) came in Moheshkhali and bribed the foreign companies to get the contract of supplying workers to the projects.

<sup>6</sup> Source: Cox's Bazar district statistics office.

Sector	Potential employability in the next 5 years				Scope of women's employability	
<b>Tourism service provider</b>						
Tourist operator/ manager						
<b>Hotel (3 stars and above)</b>						
a. Low skilled labor (Security guard, resturant waiter, housekeeper)						
b. Middle skilled labor (Receptionist, Assistant Manager, Maintenance/ repairmen, Chef)						
c. High skilled labor (Hotel manager, accountants and administration)						
<b>Hotel (Below 3 stars)</b>						
a. Low skilled labor (Security guard, resturant waiter, waiter, housekeeper)						
b. Middle skilled labor (Receptionist, Assistant Manager, Maintenance/ repairmen, Chef)						
c. High skilled labor (Hotel manager, accountants and administration)						
<b>Driver</b>						
a. Speedboat						
b. Auto engine						
c. CNG						
d. Microbus/ car						
e. Bus/ truck						
<b>Automobile repairman</b>						
Mechanic- Car/ auto repair						

### SALT EXTRACTION

Salt extraction is one of the prominent industries in Cox's Bazar. The salt industry is developed based on the availability of salt water from the Bay of Bengal. Thousands of locals are



engaged in salt extraction in the district. Salt is produced maintaining the traditional sun-drying method. The produced salt is collected and supplied to the salt processing industries in Chattogram, Narayanganj etc. districts.

### Employment opportunities

The salt extraction industry has very little employment opportunity. Most of the farmers are traditionally involved in salt extraction. New entries are difficult due to shortage of land. However, introduction of salt extraction machineries can introduce new employment opportunities and can increase the production and profitability in the salt extraction industry.

Sector	Potential employability in the next 5 years			Scope of women's employability		
	High	Medium	Low	Present	Somewhat present	Not present
<b>Salt</b>						
a. Farmer			Same as before			
b. Worker						
c. Leaser (Mohajon)						

### 3.2 Employee's skills and enterprise development opportunities in the growing sectors for the host communities

In addition to the employment opportunities, the selected sectors for the assessment offers entrepreneurship and enterprise development opportunities for the Cox's Bazar locals. Our assessment suggests that there is entrepreneurship and enterprise development opportunities within some of the sectors that were assessed. The findings is summarized below:

#### 1. DRY FISH PROCESSING

Dry fish processing has the potential to create entrepreneurship opportunities. The infrastructure of Cox's Bazar is expanding which will create higher local demand for the product in the long run.

Dry fish processing farm workers has the expertise on drying processing. However, due to lack of confidence and capital the workers are unable to set-up their own farms. By providing **capital support and business knowledge**, the project has a significant opportunity to create entrepreneurship, especially women entrepreneurship (who are highly engaged in this sector).

**In case of skill development opportunities, there is an opportunity to develop skills on hygienic processing of the fish.**

**If the project is willing to work on the demand side, the fish drier machines can be introduced in the dry fish processing business that can reduce weather dependency on the dry fish industry.**

**Gender inclusivity:** Low/ mid-level workers who are involved in drying the fish are mostly women here.

**Climate change impact:** Dry fish sector is affected due to climate change impacts. Due to untimely rain and early monsoon, the dry fish processing is disrupted. Due to traditional drying

practices, the processors are highly dependent on sunlight. As such, untimely rain delays the processing of the fish causing less profitability. On the other hand, excessive heat during the summer due to the climate change impact, accelerates the drying process causing shorter cycle of dry fish processing.

**Impact of Rohingya influx:** As per our assessment, the sector doesn't experience any visible impact due to the Rohingya influx. The population increase in Cox's Bazar have increased the demand of the dry fish in the districts' market places. As such, the processors enjoyed an increase in revenue and profit. However, small scale farmers, who went to faraway marketplaces to procure raw fishes was affected due to increase in transportation cost due to the influx. In addition, in case of the women processors, the traffic congestion and increased number of passengers per vehicle has led to harassment incidents that resulted in decreased interest of the women to continue with the dry fish processing.

**Impact of COVID-19 pandemic:** There was not much impact of COVID pandemic in the dry fish sector. As marketing of the agricultural products was operational during the country-wise lockdown, the operations were not much affected due to the pandemic.

**Rural-urban divide:** Our assessment suggests that the dry fish processing farms are mostly concentrated in the rural areas of Cox's Bazar district. Especially, Moheshkhali, Teknaf and Pekua Upazilas have strong presence of the dry fish processing farms. Marketing and commercial selling of the dry fish, on the other hand, is mostly concentrated in the urban areas- Cox's Bazar sadar, Ukhiya, Teknaf market places etc. The large marketplace for the dry fish is Chattogram district and many of the farm owners export processed dry fish to Chattogram due to higher price.

## 2. CONSTRUCTION

**Training to become local contractors:** There is a lack of Cox's Bazar local contractors in Cox's Bazar district. As such, the Cox's Bazar locals are yet to enter the Cox's Bazar construction industry as construction workers. Supporting youths to take-up construction agent business through training can engage more locals into the industry.

**The case of Moheshkhali:** In Moheshkhali, there are trained construction workers, who worked in the Government projects. However, they lost their jobs within a very short span of time. It was reported that, in Matarbari, there is a lack of construction agents (AKA contractors) that poses a threat for the workers. Due to absence of local agents, contractors from outer districts engage workers of their own and lobbying with the foreign construction companies to avail the available construction jobs. As such, there is an opportunity to train and develop construction agents (contractors) to make the construction jobs available for the locals.

**Training for Low/ mid-level jobs:** Cox's Bazar is expanding in terms of residential and business landscape, whose evidence is in the expansion of Cox's Bazar airport (which is in its second phase), railway tracks (120 km long CTG-Cox's Bazar), and road development plan (one such example is the construction of Marine Drive from Cox's Bazar to Teknaf in 2017) as per the Local Government Engineering Department (LGED).

Construction of new industries, hotels, motels, and apartments are taking place in full force in Cox's Bazar. This requires the engagement of:

1. masons,
2. plumbers,
3. painters
4. electricians
5. carpenter
6. glazier
7. concrete finisher
8. pipefitter
9. heavy equipment operator
10. contractor
11. roofer

BRAC Skills Development Program is highly suggested to work towards building the skills in these construction areas for the labor force in Cox's Bazar.

**Gender inclusivity:** None. In the study, no women were found to be present in the construction industry (low/ mid/ high skilled labor).

**Climate change impact:** The construction sector is not much impacted due to climate change. The ongoing construction projects have taken adequate measures for excessive rains and other weather related issues. However, the small construction projects (residential buildings, office buildings), especially in Ukhiya and Teknaf upazilas are being impacted by water clogging in some areas.

**Impact of COVID-19 pandemic:** The construction sector was impacted by the COVID pandemic. During the country-wise lockdown in 2020, the construction works were halted and the labours faced income loss. However, the construction works were resumed during July-August and labours were engaged. However, the major impact in this industry was caused by closing of the private projects due to economic hit by the pandemic. Many projects that were scheduled to start in Cox's Bazar (especially hotels and restaurants) have been postponed due to the pandemic.

**Impact of Rohingya influx:** The Rohingya influx have multi-dimensional impact on the construction sector. On one hand, the increased NGO activities in Cox's Bazar district have increased the demand of residential and office buildings, especially in Ukhiya and Teknaf upazilas, raising demand of construction workers. On the other hand, many Rohingyas are working as construction workers in the construction sites creating less opportunities for the Bangladeshis.

**Rural-urban divide:** The construction works is mostly concentrated on the urban areas. However, the Government projects- Matarbari power plant, Sabrang Tourism Park is being constructed in the rural areas. Most of the construction workers are from the rural areas of Cox's Bazar district.

### 3. TOURISM

Tourism in Cox's Bazar is currently a dominant economic activity and has a significant growth potential in future. As such, there is an opportunity for the locals to enter the market as tourist operators, souvenir product developers etc.

#### a. **Training for low/ mid-level skilled workers**

The Sabrang tourism park that is currently under development will also require skilled hotel and restaurant workers and presents opportunities to introduce innovative instruments. For example, tourist bus along the marine drive road, underwater diving, snorkeling activities etc. It will require a significant skill development of the youths to get them prepared for these activities.

#### b. **Hotel Management**

Under hotel management, the recruiting party (3 star and above hotels) prefer developed skills in relation to hotel management for low skills workers (such as guard), middle skill workers (such as receptionists, waiters etc.). The BRAC SDP is already well established in this section in Cox's Bazar. The Program can consider expanding its training wing to more youth in this industry.

**Gender inclusivity:** Low- medium. Women are present as shopkeepers. Little to no women are present in restaurants. Low/ mid-level skilled jobs were held by few women in 3+ star hotels of Cox's Bazar. Overall, tourism is not considered a respectable job in the Cox's Bazar culture as it involves working with foreign visitors and many involve late working hours. Also, since most girls are of marrying age, parents prefer to avoid sending their daughters to work here in order to attract good marriage proposals.

**Climate change impact:** The tourism sector is not much impacted due to climate change. However, untimely and excessive rains, excessive heat during summer has decreased the number of tourists, causing a slight decrease in revenue. The Rohingya influx, on the other hand has attracted a lot of professionals into the district, causing an increase in the tourism related activities.

**Impact of COVID-19 pandemic:** Perhaps the most affected industry by the COVID pandemic is the tourism sector in Cox's Bazar district. The hotels and restaurants were shut down. Due to restriction in tourism activities and in public transportation, the pandemic caused a sharp drop in tourism related business operations in the district. The industry began to rise during the last winter (October-February, 2020), however, the recent increase in COVID cases have caused yet another restriction on tourism activities this year (2021).

**Impact of Rohingya influx:** The Rohingya influx have a positive impact on the tourism sector. Professionals travelling to Cox's Bazar have increased the business demand of hotels, restaurants and transportation activities. As such, the industry was benefited by the influx.

**Rural-urban divide:** The tourism sector is heavily concentrated in the urban areas. However, many people from the rural areas move to the urban areas for availing service jobs in the sector. The ongoing Government projects that are being implemented in the rural areas created an increased opportunity for rural development in the district.

## 4. **DRIVING AND VEHICLE REPAIR**

Cox's Bazar already has a good demand of drivers.

#### d. **Rental car business related training**

The rental car business have a significant growth potential. Youths can be nurtured and developed to prepare them enter into the rental car business. The skills required are- business

knowledge, communication, etc. However, the business will require a high amount of investment.

**e. Drivers and driving schools (heavy vehicles such as lorries, and local vehicles such as private vans, 3-wheeler scooters etc):**

Since it is a tourist-based area, teaching the drivers with communication skills and etiquette will serve as a positive externality for successfully growing the tourism sector here.

**f. Repairing shops (heavy vehicles, light vehicles, 3-wheel drive, 4-wheel drive etc.)**

As number of vehicles on the streets rise, there will be an increased demand for skills repairing shops across Cox's Bazar.

**Climate change impact:** The driving and vehicle repairing sector is slightly impacted by climate change. While road transportation is mostly unaffected by climate change, waterway transportation is highly impacted. The boat and speedboat drivers have to halt their operation during excessive rain and during the natural disasters causing disruption in their business activities.

**Impact of Rohingya influx:** The Rohingya influx have multi-dimensional impact on this sector. On one hand, the increased NGO activities in Cox's Bazar district have increased the demand of transportation, especially in Ukhiya and Teknaf upazilas, and on the other hand, many Rohingyas are working as auto (electrical rickshaw) drivers and in repairing activities in the district creating less opportunities for the Bangladeshis.

**Impact of COVID-19 pandemic:** Due to decreasing number of tourists in the district, this sector was also affected by the pandemic.

**Rural-urban divide:** The driving and repairing is mostly concentrated in the urban areas. However, many of the rural residents earn their living through driving auto rickshaw, CNG etc.

## 5. HATCHERIES

This is a technical field. The market size is relatively small in comparison to the construction market. The skills required in this segment is the technical training on brood management, disease identification and disease prevention of fish fry/ fingerlings.

**Climate change impact:** The shrimp hatcheries are slightly impacted by climate change. During heavy rain, it gets difficult for them to supply sea water maintaining the optimum salinity level. As such, their operation is disrupted due to untimely and heavy rainfall.

**Impact of Rohingya influx:** The hatcheries mostly supply the PL in the south-western districts of Bangladesh. This sector is not much affected by the influx.

**Impact of COVID-19 pandemic:** Hatcheries were not impacted due to the pandemic. As production and marketing of the agricultural products was operational during the country-wide lockdown, the operations were not much affected due to the pandemic.

**Rural-urban divide:** The shrimp hatcheries are mostly situated around the marine drive road, adjacent to the Bay of Bengal in Ukhiya upazila. The workers mostly come from the rural areas to work in the hatcheries. The marketing and sales operations are highly concentrated in the urban areas of the district.

### 3.3 Challenges and barriers of the locals to employment

This section summarizes the findings from the quantitative survey with the host community dwellers with respect to challenges and barriers to enter into the job market.

#### 3.3.1 Respondent demography

##### Adolescents- Age between 14-17 Youths- Age between 18

**Age of the respondents:** The average age of the respondents from the host community is 21.3. In case of the adolescent boys and girls, the average age is 15.5 and 15.7 respectively and for the youth population the average age was reported to be 26.4 and 26.6 respectively for male and female participants.

*Table 10: Average age of the host community respondents*

Respondent group	Adolescent girls	Adolescent boys	Youth (male)	Youth (female)	Overall
Average age	15.5	15.7	26.4	26.6	21.3
N	52	53	59	54	218

**Education level of the respondents:** As can be seen in the following table, the education level varies among the respondents. In case of the adolescent group, majority of them are currently studying in class 5-10. In case of the youth respondents, majority of the respondents belong to the 'class 5-10' and 'primary' group. Over 50% of the overall respondents have primary-secondary (class 5-10) level of education.

*Table 11: Level of education of the host community respondents*

Level of education	Adolescent girls	Adolescent boys	Youth (male)	Youth (female)	Overall
Bachelor or equivalent	0%	0%	3%	4%	2%
Class 5-10	81%	77%	29%	26%	52%
Diploma	0%	0%	2%	0%	1%
Drop out	0%	0%	2%	0%	1%
Higher Secondary (HSC or equivalent)	0%	0%	14%	9%	6%
Masters or equivalent and above	0%	0%	5%	2%	2%
Never attended school or not passed a single level	0%	0%	7%	15%	6%
Primary (up to class 5)	4%	11%	34%	26%	19%
Secondary (SSC or equivalent)	15%	11%	5%	19%	12%
N	52	53	59	54	218

**Marital status of the respondents:** Majority of the adolescents who were interviewed were found to be unmarried. The marital status rate is slightly greater in case of the female respondents across both the categories (adolescents and youth). In aggregate, 60.1% of the total host community respondents were found to be unmarried while 39.9% was found to be married.

*Table 12: Marital status of the respondents*

Marital status	Adolescent girls	Adolescent boys	Youth (male)	Youth (female)	Overall
Married	2%	0%	64%	89%	40%
Unmarried	98%	100%	36%	11%	60%
N	52	53	59	54	218

Household members: Average number of household members for the host community respondents was found to be 5.8.

### 3.3.2 Challenges and barriers

**Challenges to acquire good jobs:** Respondents were asked about their challenges to get good jobs. As can be seen in the table, majority of the respondents across all the four categories mentioned education as the primary requirement to get good jobs. In addition, 42% and 57% of the youths, male and female respectively, reported that reference is required for getting a good job.

*Table 13: Challenges to acquire good jobs*

Challenges	Adolescent girls	Adolescent boys	Youth (male)	Youth (female)	Overall
Takes time	33%	21%	20%	22%	33%
There is no problem getting a good job	6%	8%	10%	0%	6%
Can't get good jobs without education	50%	57%	49%	33%	47%
Need references	33%	28%	42%	57%	40%
N	52	53	59	54	218

**Interest to work in future:** Respondents were asked about their interest to work in future. Majority of the respondents reported they have interest in working as a businessmen (agriculture, retail shops etc.), driving, teaching, tailoring and mechanics. **Our assessment suggest that being a proprietor or a business owner is a critical career aspiration of the Cox's Bazar youths.**

**Knowledge on income potential from the desired profession:** As can be seen in the following table, majority of the respondents are aware about the income potential of their desired jobs. Among the respondents, 36% reported that they do not know about the income potential of their desired profession. Respondents, who reported to have known about the income potential were asked about the income expectation from their desired jobs. As can be seen in the table, the average income expectation is higher in case of the male respondents. The monthly income expectation of the female youth respondents is BDT 9,692 while the amount

is BDT 22,222 in case of their male counterparts. The data revealed the lack of aspiration among the female inhabitants of Cox's Bazar district.

*Table 14: Knowledge on income potential from the desired profession*

Knowledge level	Adolescent girls	Adolescent boys	Youth (male)	Youth (female)	Overall
Knows about the income potential	59%	63%	73%	59%	64%
Doesn't know about the income potential	41%	37%	27%	41%	36%
N	37	38	33	32	140
Average monthly income expectation from the desired job (BDT)	21,467	30,857	22,222	9,692	21,176
N	22	24	24	19	90

**Motivation for working in the desired industry:** Respondents were asked about the motivating factors that drive them towards getting a good job. As can be seen in the following table, 38% of the respondents reported that good growth potential as their primary motivating factors towards getting jobs in their desired industries. Good payment is motivation for 19% and 3% of the adolescent girls and female youths respectively. The data further validates the fact that the female respondents have less monetary expectation from their jobs as compared to their male counterparts.

*Table 15: Motivation for working in the desired industry*

Motivation	Adolescent girls	Adolescent boys	Youth (male)	Youth (female)	Overall
Good payment	19%	37%	36%	3%	24%
Enjoys the work	24%	21%	42%	34%	30%
Good growth potential	49%	21%	45%	38%	38%
Good business prospect	14%	5%	33%	16%	16%
N	37	38	33	32	140

**Challenges to proceed with the career aspiration:** Respondents were asked about their challenges to proceed with their career aspirations. Education and lack of skills were identified as major challenges by the respondents.

*Table 16: Challenges to proceed with the career aspiration*

Challenges	Adolescent girls	Adolescent boys	Youth (male)	Youth (female)	Overall
Need education/degree to reach the desired position	60%	33%	0%	17%	29%
The management	0%	7%	20%	33%	12%



only give this position to their friends/ family					
Do not have the adequate skills to reach my desired position	40%	13%	20%	50%	27%
Do not know how to proceed	40%	7%	40%	50%	29%
<b>N</b>	<b>10</b>	<b>15</b>	<b>10</b>	<b>6</b>	<b>41</b>

**Entry barriers for the locals:** The study investigated on the critical entry barriers to the job markets of the youth and the adolescents. As can be seen in the following table, unavailability of skill development facilities in their localities, unaffordability of the training programs, distant training and education facilities and lack of knowledge were identified as major hindering factors for the locals.

*Table 17: Entry barriers for the locals*

<b>Barriers</b>	<b>Adolescent girls</b>	<b>Adolescent boys</b>	<b>Youth (male)</b>	<b>Youth (female)</b>	<b>Overall</b>
Unavailability of skills training facilities/ education institutes in their area	83%	33%	43%	25%	53%
Unaffordability of the training/ education	67%	67%	64%	50%	64%
Distant education/ training facilities	67%	33%	79%	25%	61%
Can't take help from family/ friends who are working in the same industry	83%	33%	36%	25%	50%
Don't know what benefits they will get if they work there	50%	17%	43%	0%	36%
There are not many such new companies/ offices in their area	75%	50%	57%	50%	61%
<b>N</b>	<b>12</b>	<b>6</b>	<b>14</b>	<b>4</b>	<b>36</b>

**Socio-cultural and socio-economic barriers:** As per our assessment, some socio-cultural and socio-economic barriers of the Cox's Bazar locals are summarized below. These barriers are

restricting the Cox's Bazar locals to enter and to excel into the job markets that are flourishing in the district.

- **Reluctance to work as workers/labourers:** Our FGDs with the Cox's Bazar youths revealed that they are, in general, reluctant to work as wage labourers. Majority of them aspire to set-up their own businesses. **Interviews with the hotel management also revealed that they are reluctant to hire Cox's Bazar locals as they perceive the job as a temporary earning solutions.** Retail business, agricultural business, government jobs, teaching, and entrepreneurship has been found as priorities for career choice of the youths.
- **Lack of knowledge about the service industry:** It was reported that the Cox's Bazar residents have very little knowledge on the available jobs within the industries assessed.
- **Social stigma regarding the hotel industry:** Many of the Cox's Bazar locals perceive hotel works negatively. As such, many of the locals are reluctant to undertake trainings for the hotel works (housekeeper, receptionist etc.)
- **Language barrier:** Our interviews with the 3-star and above hotels revealed that the local accents of the Cox's Bazar local residents acts as one of the challenges during recruitment for the hotel jobs. Lack of proper education might be one of the reasons behind this. However, **there is a scope of soft-skills development** to prepare the locals for the hotel industry jobs.
- **Lack of political empowerment:** It was revealed by the FGDs that Cox's Bazar locals are not efficient in lobbying and advocating to gather works from different Government projects. The issue is critical especially in the construction sector. Establishing effective linkages with the relevant authorities might cater to the issue.
- **Lack of skill development institutes:** There are a very few formal training institutes in Cox's Bazar that offers technical training to the Cox's Bazar locals. Despite being a tourism hub of the country, the district is yet to develop an institute for the hotel management trainings.
- **Lack of mobility of women:** Cox's Bazar is highly religious conservative area. Women have less mobility across the district. However, the situation is a bit severe in Moheshkhali, Kutubdia and Pekua upazilas. Lack of mobility restricts women from planning a career of their own.
- **Lack of business knowledge:** Cox's Bazar residents, in general, have very little business knowledge literacy. Most of the FGD participants were not able to tell their career growth plan. Although, they had mentioned business as their first career priority, they were unable to tell the business growth potential and about basic accountings that is required for a business.



Field Findings-  
Employment potential  
within the Rohingya  
population

## Chapter 4: Field Findings- Employment potential within the Rohingya population

A total of 11 In-Depth Interviews were conducted in Camp-22 with the Rohingya population of which 3 were women, 3 were adolescent girls, 3 were men and 2 were adolescent boys.

A total of 169 quantitative surveys were conducted in Camps 1, 7, 16 and 22 to collect data on their current education, skill level and the type of skills that they want to engage in.

Table: Education level of the surveyed population

	Rohinga Refugee				Rohinga Refugee Total
	14-17 (adolescent girls)	14-17 (adolescent boys)	18-35 (men)	18-35 (women)	
Class 5-10	11.1%	64.4%	62.5%	10.4%	37.3%
Drop out	11.1%	0.0%	0.0%	0.0%	2.4%
Never attended school or not passed a single level	5.6%	8.9%	20.0%	56.3%	24.3%
Primary (up to class 5)	72.2%	26.7%	15.0%	33.3%	35.5%
<b>N</b>	<b>36</b>	<b>45</b>	<b>40</b>	<b>48</b>	<b>169</b>

Table: The type of skills they wish to engage in within the camps

Type of skills desired	Men	Women
1. Repairing skills		
· Solar panel repair		
· Mobile repair		
2. Construction inside the Rohingya camps (cementing etc)		
3. NGO worker		
4. Computer photocopy, internet browsing		
5. Handicrafts:		
· Ceramic plating/ colouring/ designing		
· Nakhshi katha stitching/ jute		
· Embroidery work		
· Tailoring		
6. Carpentry		
7. Teacher		
8. Pharmacy dispenser		
9. Agriculture		
10. Driving		
11. Cook		

Here, blue represents the skills desired by men, pink represents the skills desired by women, and yellow represents the skills desired by both genders.

Table: Type of skills that the Rohingya population has learnt in Myanmar

Types of skills used in Myanmar	Men	Women
1. Cementing		
2. Driving		
3. Fruit picking		
4. Agricultural farming		
5. Cattle rearing		
6. Teaching		
7. Running small shops (tong er dokan)		
8. Handicraft work		
9. Tailoring		
10. Cooking		

**Education level:** The education level was observed to very low among all men and women studied in the study. Not a single person had studied to complete their secondary education.

**Gender dynamics:** The Rohingya population was observed to be heavily influenced by the Islamic extremist views, where women were not expected to step outside their homes for any work. Women’s education was stopped when adolescent girls begin their menstrual cycle. This heavily influences a woman’s social conditioning and is reflected in the study where they do not prefer working outside their homes.

Some changes are seen among girls who are getting inspired by teachers and NGO workers within the communities.



Conclusions and  
recommendations

## Chapter 5: Conclusions and recommendations

In this study, 9 major sectors/ industries were analyzed, which are the Salt, construction, driving (heavy duty machines and local vehicles), mechanics and repair, fisheries, dry fish, prawn hatcheries, rubber extraction, tourism (shops, hotels and tour operators).

Of these sectors, the need for the skills development was only found in 5 industries, which are: construction, driving, mechanics and repair, hatcheries, and hotel management.

Cox's Bazar is expanding in terms of residential and business landscape, whose evidence is in the expansion of Cox's Bazar airport (which is in its second phase), railway tracks (120 km long CTG-Cox's Bazar), and road development plan (one such example is the construction of Marine Drive from Cox's Bazar to Teknaf in 2017) as per the Local Government Engineering Department (**LGED**).

Such infrastructure development is an economic indicator of job creation, increase in market demand and supply of new goods and services, and the requirement of skilled labor force.

Since infrastructure development is based around construction, and since Cox's Bazar remains to be one of the top local tourist attractions in Bangladesh, the need for expert drivers is also quintessential to the market's demand.

Therefore, the top industries where skilled labor is expected to be demand in the market are:

Drivers and driving schools (heavy vehicles such as lorries, and local vehicles such as private vans, 3-wheeler scooters etc)

Since it is a tourist-based area, teaching the drivers with communication skills and etiquette will serve as a positive externality for successfully growing the tourism sector here.

Repairing shops (heavy vehicles, light vehicles, 3-wheel drive, 4-wheel drive etc.)

As number of vehicles on the streets rise, there will be an increased demand for skills repairing shops across Cox's Bazar.

Construction industry

This is a broad area. Construction of new industries, hotels, motels, and apartments are taking place in full force in Cox's Bazar. This requires the engagement of:

1. masons,
2. plumbers,
3. painters
4. electricians
5. carpenter
6. glazier
7. concrete finisher
8. pipefitter
9. heavy equipment operator
10. contractor
11. roofer

BRAC Skills Development Program is highly suggested to work towards building the skills in these construction areas for the labor force in Cox's Bazar.

#### Hatcheries

This is a technical field. The market size is relatively small in comparison to the construction market. The skills required in this segment is the technical training on brood management, disease identification and disease prevention of fish fry/ fingerlings.

#### Hotel Management

Under hotel management, the recruiting party (3 star and above hotels) prefer developed skills in relation to hotel management for low skills workers (such as guard), middle skill workers (such as receptionists, waiters etc.). The BRAC SDP is already well established in this section in Cox's Bazar. The Program can consider expanding its training wing to more youth in this industry.



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## Annex-1: Detailed framework of analysis

Broad area of assessment	Specific areas of assessment	Data collection method	Data source
Employment mapping of the selected industries	<ul style="list-style-type: none"> <li>Current number of employees, disaggregated by low, medium and high skilled employment, gender, age and locality</li> </ul>	Qualitative	KII with industry experts/industry management
Value chain mapping of the industries	<ul style="list-style-type: none"> <li>Value chain functioning of the industries, scopes of employment and entrepreneurship in each of the chain functions</li> <li>Comparative advantages/disadvantages of the Cox's Bazar locals with regards to employment and entrepreneurship</li> </ul>	Qualitative	KII with industry experts/industry management
Current and future employment opportunities	<ul style="list-style-type: none"> <li>Current scale of employment opportunities in each selected sectors disaggregated by low, medium and high skilled employment, gender, age and locality</li> <li>Future expansion plan and scopes of future employment disaggregated by low, medium and high skilled employment, gender, age and locality</li> </ul>	Qualitative	KII with industry experts/industry management
Skill requirement of the employees	<ul style="list-style-type: none"> <li>Required skills for low, medium and high skilled jobs within the selected industries</li> <li>Skill requirement in future endeavors of the industries</li> </ul>	Qualitative	KII with industry experts/industry management
Current skill gaps within the selected industries	<ul style="list-style-type: none"> <li>Skill gap of the current employees in terms of education, technical and vocational skills</li> <li>Skill development opportunities provided by the industries</li> <li>Skill gaps of the locals as compared to the employees from other districts</li> </ul>	Qualitative	KII with industry experts/industry management IDI with the current industry workers- low, mid and high-skill level

Broad area of assessment	Specific areas of assessment	Data collection method	Data source
Opportunities of locals	<ul style="list-style-type: none"> <li>Benefits/advantages and/or disadvantages of the employers in case of hiring locals in low, mid and high-skilled jobs</li> </ul>	Qualitative	KII with industry experts/industry management  IDI with the current industry workers- low, mid and high-skill level
Level of skills required	<ul style="list-style-type: none"> <li>Skills required in low, mid and high-skill level jobs</li> </ul>	Qualitative	KII with industry experts/industry management  IDI with the current industry workers- low, mid and high-skill level
Impact of climate change/influx and COVID on the industry and employment	<ul style="list-style-type: none"> <li>Impact on economy</li> <li>Impact on business</li> <li>Impact on workers' income and livelihood</li> <li>Instances of job switch/job loss</li> </ul>	Qualitative	KII with industry experts/industry management  IDI with the current industry workers- low, mid and high-skill level
Preparedness of women, adolescents and youth to enter into the job market	<ul style="list-style-type: none"> <li>Level of education</li> <li>Future career plan</li> <li>Aspirations towards wage employment</li> <li>Current level of technical skills (whether or not received any training till now)</li> <li>Current engagement with IGAs</li> <li>Socio-cultural barriers</li> <li>Interest to any specific works</li> <li>Barriers that restricts to get involved in any specific work</li> <li>Impact of the influx/COVID</li> <li>Specific demand of skills</li> <li>Is there any instance where the respondents applied for any training program and failed to enrol?</li> <li>If yes, where and why was he/she failed?</li> <li>Mobility status</li> <li>Level of confidence to receive skill development initiatives</li> </ul>	Quantitative and Qualitative	Sample survey with the host community dwellers (women, adolescents and youth)  IDI with community dwellers (women, adolescents and youth)

Broad area of assessment	Specific areas of assessment	Data collection method	Data source
	<p>and leverage upon his/her career</p> <ul style="list-style-type: none"> <li>• Attractive employment/entrepreneurship opportunities in their community/locality</li> <li>• Monthly required income</li> <li>• Knowledge on training providing institutions</li> <li>• Access to finance</li> <li>• Market linkage</li> <li>• What are the entry-level barriers of the respondents to enter into the job market?</li> <li>• Involvement with other development projects <ul style="list-style-type: none"> <li>○</li> </ul> </li> </ul>		
Assessment with the Rohingya refugees	<ul style="list-style-type: none"> <li>• What kind of IGAs they are currently involved in?</li> <li>• What kind of IGAs were they involved in Myanmar?</li> <li>• What trainings they received during their times in the refugee camp?</li> <li>• What skills do they inherit?</li> <li>• What skills will be most useful in Myanmar?</li> <li>• What skills can they utilize during their time in Bangladesh?</li> <li>• Level of education</li> <li>• Aspirations</li> <li>• Interests in any specific work</li> <li>• What the other refugees are doing in the respondents' and/or other camps? Among them what interests the respondent the most? Why?</li> <li>• How they can leverage the skills they are interested in after repatriation?</li> </ul>	Quantitative and Qualitative	<p>Sample survey with the Rohingya refugees (women, adolescents and youth)</p> <p>IDI with Rohingya refugees (women, adolescents and youth)</p>