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► Skills Demand and Supply Assessment in the Chattogram- Cox's Bazar Region

Summary Report

May – December 2023

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▶ **Skills Demand and Supply
Assessment in the Chattogram-
Cox's Bazar Region**

Summary Report

May – December 2023

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► List of Acronyms

CNC	computerized numerical control
ESS	Employer Skills Survey
FGD	focus group discussion
HSC	Higher Secondary Certificate
KII	key informant interview
NSC	National Skill Certificate
NTVQF	National Technical and Vocational Qualifications Framework
SSC	Secondary School Certificate
STED	Skills for Trade and Economic Diversification
SWOT	strengths, weaknesses, opportunities and threats
TVET	technical and vocational education and training
Voc	vocational

1. Assessment overview

This is a summary of the skills demand and supply assessment conducted in the districts of Bandarban, Khagrachari, Rangamati, Chattogram, and Cox's Bazar (referred to in this study as the "Chattogram-Cox's Bazar region") between May and December 2023. This assessment was commissioned by the ILO under the programme "Leaving No One Behind: Improving Skills and Economic Opportunities for the Women and Youth in Cox's Bazar, Bangladesh". This programme is implemented by the ILO and supported by the Global Affairs Canada with its tripartite constituents Ministry of Youth and Sports, Employers' Federation and Workers' Organization.

The assessment focused on five sectors with high growth and employment creation potential in the Chattogram-Cox's Bazar region:

- i. construction;
- ii. tourism and hospitality;
- iii. transport;
- iv. manufacturing; and
- v. agro-food processing.

The consulting firm DM Watch Limited was responsible for conducting the study on skills needs assessment and anticipation, while Inspira Advisory and Consulting Limited undertook the skills supply assessment. The overall assessment consequently identifies both systemic and sector-specific skills needs and gaps in the five sectors covered, as well

as identifying 49 hard-to-fill occupations that will be prioritized in future development interventions.

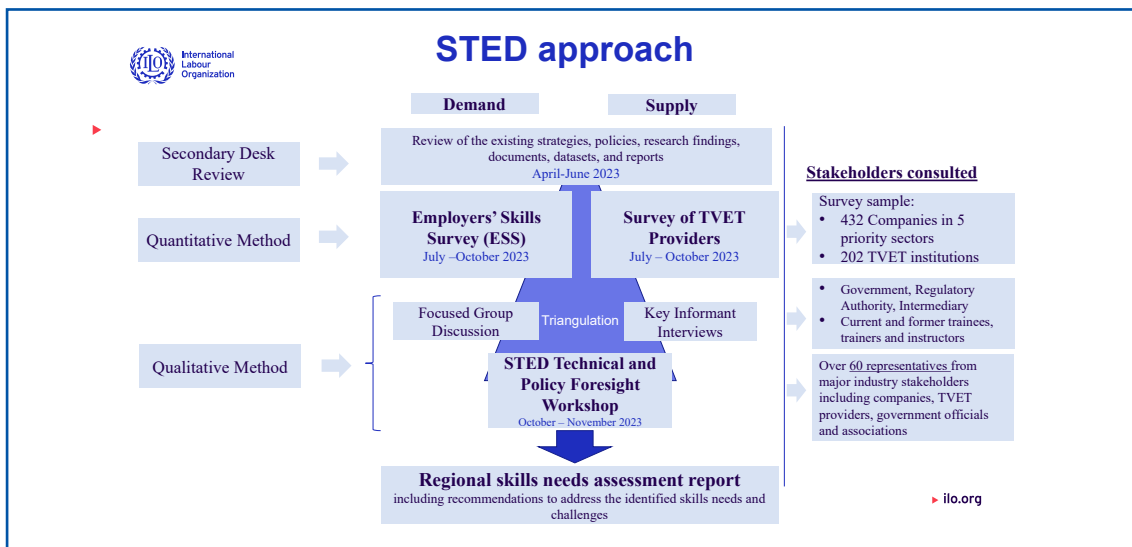
This assessment hints at the fact that the lack of skilled labour is a key obstacle to generating sustainable economic growth in Chattogram-Cox's Bazaar region. The identified gaps in demand-driven training underscore the necessity for a coordinated skills development system that bridges the divide between skill supply and demand to promote employment and social justice for all.

This summary report first presents in this overview section a look at the methodology for the study followed by the general conclusions of the assessment in regard to systemic constraints in the Chattogram-Cox's Bazaar region, before providing key overall recommendations for improving skills development in the region. In section 2, this summary report provides a brief overview of the priority occupations identified by the assessment as well as enterprises' capability gaps, both across and within the five priority sectors. Sections 3-7 offer a summary of the sectoral analyses for each of the five target sectors noted above. Each sectoral analysis provides a brief overview of the business environment in the sector, identifies skills demand and supply, and indicates occupation-specific skills needs and gaps, before providing sector-specific recommendations related to skills development.

► 1.1. Methodology

The ILO Skills for Trade and Economic Diversification (STED) methodology was used for this assessment. It combines qualitative and quantitative methods to identify the growth prospects and job creation opportunities at the sector level and to provide guidance on the integration of skills development into sectoral policies. Primary and secondary data was gathered from key stakeholders and relevant sources through surveys, key informant interviews (KIIs), focus group discussions (FGDs) and desk research. The objectives were to assess current and future skill needs and gaps in the five priority sectors in the region, as well as to identify the gaps in regard to developing and delivering quality training programmes, accessing skills development, and supporting school-to-work transitions.

► **Figure 1. Overview and timeline of the skills demand and supply assessment in the Chattogram–Cox’s Bazar region**



To assess local skills demand, an Employers Skills Survey (ESS) was conducted with 432 employers to understand current and future skills demand in the five target sectors. The survey was complemented by 13 FGDs with employers and business owners, as well as 39 KIIs with major government officials, chambers of commerce, Export Processing Zone (EPZ) officials, and non-governmental organization (NGO) officials.

To assess skills supply, 202 technical and vocational education and training (TVET) providers accredited by the Bangladesh Technical Education Board (BTEB) were surveyed: 36 in Cox’s Bazar district and 166 in the Chattogram, Rangamati, Khagrachari, and Bandarban districts.

This survey was complemented by 25 KIIs with major stakeholders and labour market intermediaries. Finally, 18 FGDs were conducted with current trainees/students, graduate trainers, and instructors.

The findings of the assessment were presented to the programme's partners during Technical Foresight Workshops at the end of 2023. This enabled the validation of the findings and the engagement of the partners in the process of strategic analysis, visioning, and the development of conclusions and recommendations to promote and address the identified skills needs and gaps in the Chattogram–Cox's Bazar region.

▶ 1.2. Overall conclusions: Systemic constraints

The assessment identified the following key systemic challenges:

- ▶ **Lack of skills strategies that are specific to the Chattogram–Cox's Bazar region:** Although the National Skills Development Policy 2022 and the National Action Plan 2022–2027 for Skills Development are in place, these frameworks lack specific strategies for the region.
- ▶ **A lack of sector-specific data** – such as information on priority occupations and annual labour requirements, and numbers/rates of enrolment/graduation and drop out by programme/qualification – leaves TVET providers without clear insights on the relevance of the training offered and on industry needs.
- ▶ **Inadequate monitoring and evaluation:** The absence of robust monitoring and evaluation mechanisms limits the ability to measure the impact and effectiveness of skills development interventions.
- ▶ **Lack of coordination between TVET and industry:** TVET providers struggle to provide demand-led training programmes that meet local business needs. Most of the Industry Skills Councils responsible for industry–TVET coordination are only moderately active and do not have significant regional activity.
- ▶ **Lack of work-based learning:** TVET providers face challenges in securing placements or facilitating workplace-based learning for graduates. There is a noticeable reluctance among enterprises to accommodate trainees for on-the-job training, leading to a gap in real-world experience among aspiring workers, which is crucial for their gaining entry into the job market and adapting to evolving technologies.
- ▶ **Employer reluctance to hire TVET graduates:** Misconceptions about the relevance of TVET training to real-world work environments hinder employers' willingness to recruit and retain TVET graduates.
- ▶ **Difficulty in the recruitment of certified trainers and suitable assessors:** TVET providers highlighted significant challenges related to the recruitment of certified trainers and suitable assessors. This difficulty is more pronounced in remote regions like Chattogram Hill Tracts and Cox's Bazar.
- ▶ **Lack of female trainers:** There is some evidence that this has led to lower enrolment and higher dropout rates among female trainees, although precise data on these outcomes is lacking.
- ▶ **Limited access to refresher training and skill upgrading programmes** to keep trainers up to date with industry needs and modern teaching methods.
- ▶ **Limited access to TVET providers:** This is due to a shortage of registered training organizations offering advanced-level courses, especially in rural areas, as well as the high opportunity cost of training and the lack of awareness about courses being offered.
- ▶ **Gender inequality:** In some areas, women who want to participate in TVET face social constraints that may prevent them from doing so.

▶ 1.3. Key recommendations

Increasing access to inclusive skills development

- ▶ More female trainers should be trained and hired by TVET providers, as stakeholders identified a lack of female trainers as a key obstacle to increasing female enrolment in TVET.
- ▶ Advocate for TVET providers to upgrade career counselling initiatives and job placement programmes to enhance trainees' motivation and commitment to completing their training programmes.
- ▶ Encourage existing TVET providers to develop outreach programmes in distant upazilas like the Chittagong Hill Tracts.
- ▶ Develop inclusive training programmes that consider the unique needs and capabilities of individuals with disabilities, thereby fostering an inclusive and accessible learning environment.
- ▶ Emphasize the use of online education platforms to make skills development accessible to a broader audience, including remote or part-time workers.

TVET capacity-building

- ▶ The BTEB should coordinate with TVET providers to increase the number of certified trainers and to align training programmes with national standards.
- ▶ Enhance the capacity of existing trainers through comprehensive training-of-trainers programmes to promote learner-centred training methodologies and to update their subject matter expertise.
- ▶ Identify reputable TVET providers in different upazilas and facilitate their affiliation as registered training organizations under the BTEB.
- ▶ Conduct training programmes and workshops for registered training providers to equip them with the knowledge and tools required for effective Recognition of Prior Learning (RPL).

Curricula development

- ▶ Include core skills training in all TVET courses. Problem-solving, critical thinking and adaptability were identified by respondents as key in the workplace.
- ▶ Offer digital literacy training in TVET providers and in enterprises.
- ▶ Include occupational safety and health (OSH) and environmental awareness modules in all training curricula.

Increased collaboration between TVET providers & social partners

- ▶ Organize job fairs and campus recruitment events to connect graduates with potential employers.
- ▶ In consultation with social partners, clearly outline the terms for apprenticeships, internships and workplace-based learning to ensure structured and mutually beneficial engagement.
- ▶ Collaborate with social partners to develop industry-recognized certifications.
- ▶ Conduct regular reviews of the curriculum to keep it aligned with the dynamic needs of industry.
- ▶ Invite industry professionals to conduct guest lectures and workshops within TVET providers.

Wider systemic changes

- ▶ Implement Labour Market Information Systems (LMISs) to gather, analyse and disseminate information about the demand for specific occupations and changing skill needs in the job market.
- ▶ Encourage employers to provide underrepresented groups with equal opportunities for training and career advancement, thereby fostering diversity and inclusivity in the workforce.

2. Priority occupations

The priority occupations listed in table 1 were identified based on the surveys, the FGDs and the STED Foresight Workshops.

► Table 1. Priority occupations by target sector

Sector				
Construction	Tourism and Hospitality	Transport	Manufacturing	Agri-food
Mason	Front Office Executive	Body/Coach Building Technician	Machine Operator	Food Safety and Hygiene Technician
Tile Fitter	Tour Guide	Driver	Mechanical/ Repairing Technician	Baker
Plumber	Housekeeping	Motor Mechanic	Welder	Food Preservation Technician
Carpenter	Hotel Manager	Diesel Engine Mechanic	Packaging Technician	Food Packaging Technician
Construction Electrician	Food and Beverage Service	Heating and Ventilation Technician	Quality Controller	Meat and Poultry Processing Worker
Painter	Catering Service	Auto Mobile Electrician	Electrical Technician	Fish and Seafood Processing Worker
Interior Designer	Reservation Executive	Repair Service Technician	Assembler	Dairy Processing Worker
Foundation Worker	Chef/Cook	Mechanical Fitter	Junior Mechanic	Refrigeration Technician
Demolition Worker		Auto AC Technician	Consumer Electronic Technician	Waste Management
Heavy Equipment Operator		Machinist	Sales and Marketing Executive	
Aluminium Fabricator			Marine Engine Technician	

► 2.1. Enterprises' capability gaps

The assessment also identified key capabilities gaps that are preventing business growth in the Chattogram–Cox's Bazar region (table 2). Most of the gaps are common across all five target sectors, but the sector specific gaps have been flagged.

► Table 2. Major capability gaps in the Chattogram–Cox's Bazar region

Capability gap area	Skills implications	Related occupations
Conducting businesses	<ul style="list-style-type: none"> ► Networking ► Negotiation and bargaining ► Team management, leadership, communication ► Marketing and branding (including digital) ► Monitoring and progress tracking ► Budgeting ► Communication and client management ► Conflict management ► Innovation and business development 	Managers and supervisors
Quality assurance and quality control	<ul style="list-style-type: none"> ► Skills and knowledge on quality standards and compliance requirements ► record keeping 	Quality controllers, managers, supervisors,
Human resource management	<ul style="list-style-type: none"> ► Skills on human resource planning ► Skills on recruitment ► Skills on career counselling 	Managers and supervisors
Environmental management and compliance	<ul style="list-style-type: none"> ► Waste management ► OSH ► First Aid ► knowledge of norms ► energy efficiency ► record keeping 	All
By sector		
Construction	<ul style="list-style-type: none"> ► Zoning guidelines, legal documentation ► Architectural design and interior design ► 3D modelling ► Geotechnical engineering 	Managers, supervisors, architectural designers, civil engineers
Tourism and Hospitality	<ul style="list-style-type: none"> ► Ecotourism ► Guest handling and etiquette ► Tourist behaviour analysis ► Website and mobile application development ► E-payment operation and management 	Managers, supervisors, drivers, tour guides, front desk, housekeepers
Transport	<ul style="list-style-type: none"> ► Distribution design and management ► Machine operation and maintenance 	Technicians, managers, supervisors, drivers
Manufacturing	<ul style="list-style-type: none"> ► Machine operation and maintenance ► Market research ► E-payment operation and management 	Managers, supervisors, technicians
Agriculture	<ul style="list-style-type: none"> ► Utilizing modern agriculture technologies and equipment ► Cold chain and product preservation 	Managers, technicians, farmers

3. Sectoral analysis: Construction

▶ 3.1. Analysis of business environment: SWOT and drivers of change

▶ **Strengths:**

The construction enterprises in the region benefit from a comparatively cheap labour force. Furthermore, the ease of access to essential building supplies like cement and iron in Chattogram facilitates the procurement of construction materials. The industry is also bolstered by development projects implemented by the Government of Bangladesh, such as fast-track programmes that generate growth and investment prospects in the region.

▶ **Weaknesses:**

The region's labour force is significantly underqualified, which may impact the effectiveness and quality of construction projects. The employment of trained workers is hampered by the poor cooperation between firms and training institutions. Furthermore, there appears to be a lack of adherence to construction regulations, norms and workplace safety, which may have an impact on the safety and quality of projects. Finally, there is a lack of public confidence in regional construction companies, which could harm the industry's standing and dependability.

▶ **Opportunities:**

After Dhaka, Cox's Bazar is now the second priority location for the Government of Bangladesh's infrastructure development funds. This creates opportunities for a range of development projects, such as construction linked to the blue economy, tourism-supported construction, and offshore wind generation. In addition, several policy plans – such as the Bangladesh Regional Connectivity Project, the Bangladesh Delta Plan 2100, and the Bangladesh Vision 2021 – are expected to create more labour demand in the construction sector.

▶ **Threats:**

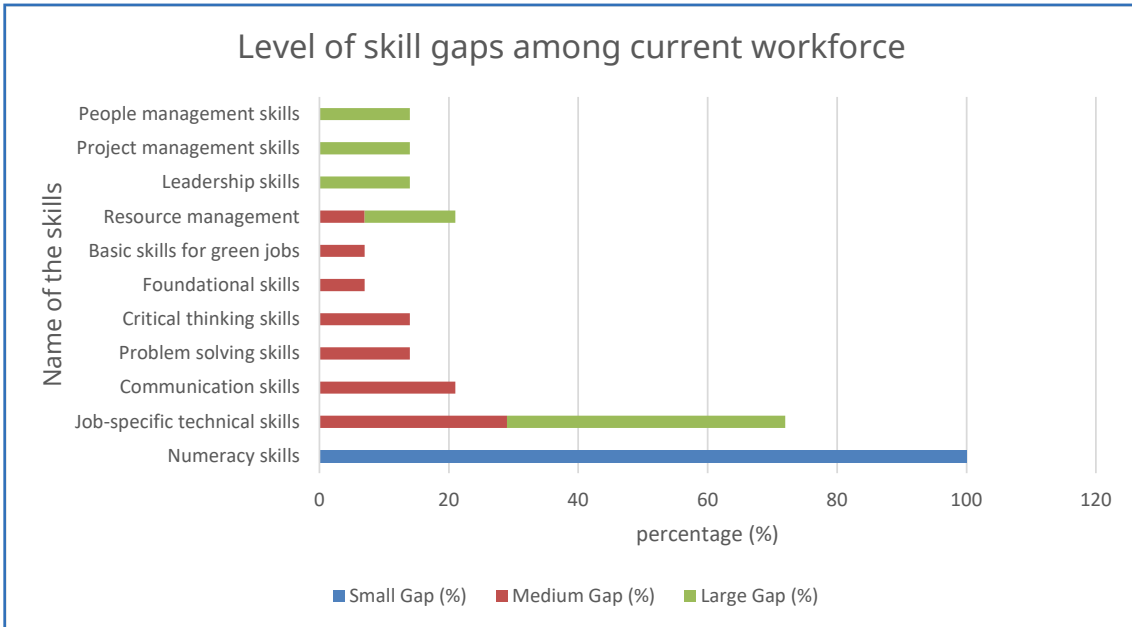
Construction costs are 20–30 per cent higher in the region, which affects project feasibility and budgets. Political instability also hinders major development initiatives and result in delays and uncertainty. The entry of foreign competitors into the local market, especially competitors from China, is taking market share from local companies. Jobs in the construction sector are often seen as hazardous and laborious, which deters prospective workers.

▶ 3.2. Skills demand and supply in the construction sector

For the ESS survey of the construction sector, 14 construction companies were contacted: 3 were micro enterprises (fewer than 10 employees); 8 were small (10–99 employees); 1 was medium (100–249 employees); and 2 were large (more than 250 employees).

A lack of necessary skills, work experience, or qualifications among workers were identified as key obstacles for hiring for many positions. The findings of the ESS reflect a broader trend wherein technical positions in the construction sector are not being filled due to gaps in technical skills, on-the-job experience, and formal qualifications. This points to the need for more targeted educational programmes or apprenticeships that can provide both the theoretical and practical experience required in the field.

► **Figure 2. Workers' skills gaps in the construction sector (% of respondents, N=14)**



Note: Multiple responses possible. Source: ILO Establishment Skills Survey, 2023.

The assessment identified large gaps in regard to people and project management, resource management, and leadership skills, as well as widespread small gaps in numeracy skills. Workers' lack of job-specific technical skills was also an issue. This was further corroborated during FGDs and KIIs and identified as a key obstacle to improving the quality of construction projects and to adopting new technologies or advanced construction methods.

The study also looked at the supply of training in the construction sector in the Chattogram-Cox's Bazar region and identified a large disparity between districts in terms of access to training programmes. For instance, "Construction Technology" and "Environmental Technology" diplomas are not offered in the Cox's Bazar region. Moreover, at the vocational Higher Secondary Certificate (HSC) level, no courses are being offered for the construction sector in Cox's Bazar. At the vocational Secondary School Certificate (SSC) level, only "Welding and Fabrication" and "Electrical Maintenance" are offered. It is important to note that most courses in the Chattogram region are only available in Chattogram district itself. Under the National Skill Certificate (NSC) programme, more trades are being covered in Chattogram than in Cox's Bazar. Available courses are only being offered up to NSC Level 2 in Cox's Bazar, and no NSC Level 5 courses are offered in either of the regions. A list of all construction-related trainings offered in the Chattogram-Cox's Bazar region is presented in Annex A below.

► 3.3. Occupation-specific training gaps

Based on the information gathered from the foresight workshop and primary survey, table 3 presents findings of the skills needs and gaps analysis for priority occupations in the construction sector. For each occupation, availability frequency was derived from the frequency of a specific course/training reported by TVET providers and the degree to which the skill training relates to the occupation.

► **Table 3. Training gap analysis for priority occupations in the construction sector**

Priority occupation	Available skills supply for the occupation	Availability frequency	Remarks
Mason	Brick-fitting, ingredient mixing, flooring, roofing	Inadequately available	Mainly available at the informal level
Tile fitter	Tile cutting and fitting	Inadequately available	Mainly available at the informal level
Plumber	Installing plumbing fixtures, troubleshooting plumbing problems, repairing pipes and tubes, installing and maintaining drainage systems	Adequately available	
Carpenter	Window and door fitting, repairing wooden structures	Adequately available	
Construction electrician	Electrical house wiring and maintenance, general electrical works, electrical and electronic equipment installation and maintenance	Adequately available	
Painter	Repairing cracks and holes in wall, applying paint, varnishing	Not available	
Interior designer	Drawing interior design plans, 3D modelling	Not available	
Foundation worker	n/a	Not available	
Demolition worker	n/a	Not available	
Heavy equipment operator (crane operator, excavator)	Forklift operation and maintenance	Not available	Only available in Chattogram for port-related operations
Aluminium fabricator	Welding and fabrication	Inadequately available	

► 3.4. Key recommendations: Construction sector

- To meet the increased industry demand for semi-skilled and skilled workers, TVET providers should introduce advanced modules (NSC Levels 3 and 4) for existing basic courses.
- Form partnerships with equipment manufacturers to design and implement specialized training programmes.
- Foster collaboration between local TVET providers and foreign agencies involved in construction projects. Leverage this collaboration for advanced technology-based training, knowledge transfer and employment opportunities.
- Implement training for sustainable practices and integrate green building standards.

4. Sectoral analysis: Tourism and Hospitality

► 4.1. Analysis of business environment: SWOT and drivers of change

► **Strengths:**

The region is home to the world's longest sea beach, offering unique natural resources. Its rich archaeological and historical sites, along with the natural beauty and lush greenery, provide a solid foundation for cultural and eco-tourism. The area is known for its hospitality and rich cultural heritage. Good connectivity through international air travel and the availability of accommodation, including reputed international hotel chains, further add to its appeal as a tourist destination.

► **Weaknesses:**

Many tourist sites are underexplored and mismanaged. Insufficient investment in the sector, low-quality services, and concerns about safety, security and hygiene could dissuade potential visitors. Inadequate infrastructure, complex visa procedures, limited marketing and promotional activities, a lack of private sector initiatives, high prices for certain tourism and hospitality components, and a shortage of professional guides are all areas that require immediate attention to improve the sector's appeal and functionality.

► **Opportunities:**

Globalization and improved communication technologies can facilitate the dissemination of information, making it easier to market and promote the region's attractions. Investing in research and development can help attract a diverse tourist demographic. Hosting international events can increase the region's visibility on the global stage. Furthermore, the development of favourable tourism and hospitality policies can provide a conducive environment for growth and investment in the sector.

► **Threats:**

Issues such as airport harassment, police-related problems, language barriers, and a conservative social and religious system could negatively impact the tourism and hospitality experience. The region also faces strong competition from neighboring areas with already developed tourism and hospitality sectors. A negative image and misconceptions about Bangladesh, lack of awareness about the benefits of tourism and hospitality, illegal hunting and fishing affecting wildlife, shortages of accommodation and services, inadequate safety measures, and the absence of a comprehensive tourism and hospitality policy could all impede the growth of tourism and hospitality in the region.

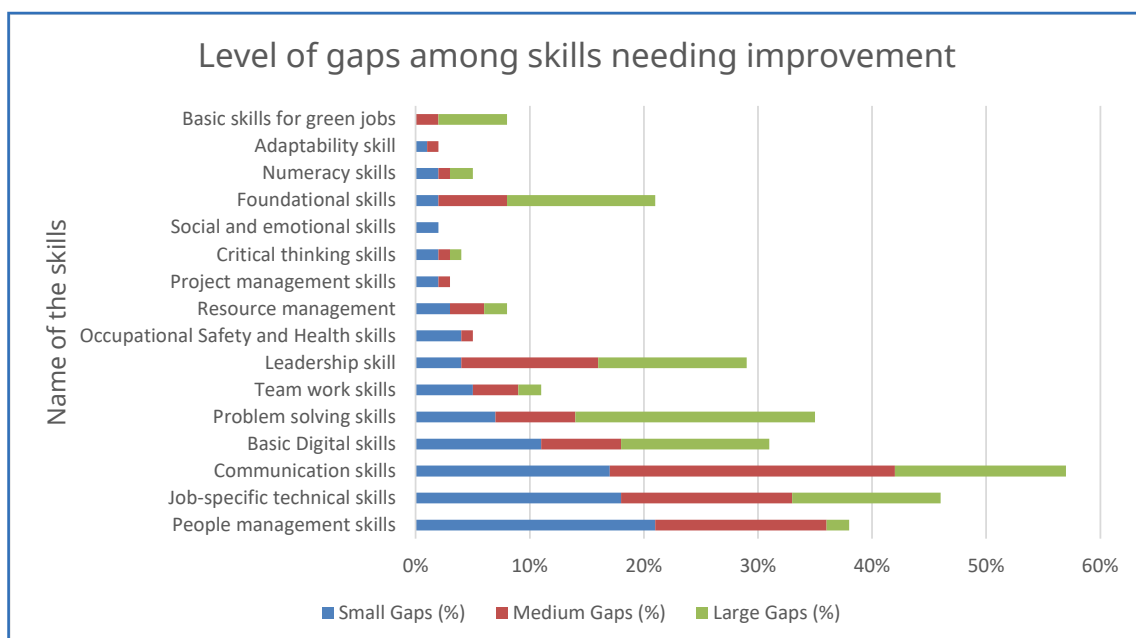
► 4.2. Skills demand and supply in the tourism and hospitality sector

As part of the ESS, 126 tourism and hospitality sector enterprises were surveyed: 20 per cent were micro (fewer than 10 employees); 38 per cent were small (10–99 employees); 28 per cent were medium (100–249 employees); and 14 per cent were large enterprises (250 employees or more).

The survey indicated the need for an increasingly specialized and skilled workforce as well as current difficulties in finding skilled workers across the various subsectors covered (namely, accommodation and catering, food and beverage, and entertainment). Increasing competition within the industry was identified as the most prevalent reason for hard-to-fill vacancies. This suggests that there is a high level of competition for talent within the tourism and hospitality sector itself, making it challenging to

attract and retain employees. The second-most common reason cited is increasing competition from other industries, implying that the tourism and hospitality sector is also competing with other industries for potential employees, which may offer better opportunities or conditions. In addition, applicants lacking the necessary skills and applicants lacking the necessary work experience were also identified as key reasons behind certain vacancies being hard to fill. This points to a skills gap wherein applicants do not meet the qualifications needed for the jobs available. The employers surveyed were also asked about the various skills gaps of the workers they employ and to grade how important these gaps were. Figure 3 summarizes these findings.

► Figure 3. Workers’ skills gaps in the tourism and hospitality sector (% of respondents, N=126)



Note: Multiple responses possible. Source: ILO Establishment Skills Survey, 2023.

The survey identified sizeable gaps in technical and core skills in the tourism and hospitality sector. In particular, communication skills have the highest prevalence of “medium gaps”.; while problem-solving skills have the highest prevalence of “large gaps”. Large gaps were also identified for foundational skills, leadership skills and basic digital skills. Almost half the employers surveyed also reported gaps in job-specific skills, which tends to indicate a significant technical skills mismatch as well.

To complement the ESS, a TVET survey was also conducted. Overall, 29 BTEB-accredited TVET providers stated that they provide training courses in tourism and hospitality in the Chattogram-Cox's Bazaar region. At the diploma level, only one diploma in Tourism and Hospitality is accredited by the BTEB. Cox's Bazar Polytechnic was the only institution that offered this diploma programme in Cox's Bazar, but the programme has been discontinued due to a lack of students. No SSC and HSC programmes relevant to the tourism and hospitality sector are available in either Chattogram or Cox's Bazar. However, there are few NSC courses available, such as housekeeping, front office management, and tour guide. Based on interviews with stakeholders, the study also identified a few commercial training institutions running courses, but none were BTEB-accredited. A list of all tourism and hospitality-related training programmes offered in the Chattogram-Cox's Bazar region is presented in Annex B below.

► 4.3. Occupation-specific training gaps

Based on the information gathered from the STED foresight workshop and primary survey, table 4 presents findings of the skills needs and gaps analysis for priority occupations in the tourism and hospitality sector. For each occupation, the availability frequency was derived from the frequency of a specific course/training reported by TVET providers and the degree to which the skill training relates to the occupation.

► Table 4. Training gap analysis for priority occupations in the tourism and hospitality sector

Priority occupation	Available skills supply for the occupation	Availability frequency	Remarks
Front office executive	Reservation management, complaint management	Adequately available	
Tour guide	Tour planning, tour operation, eco-tour operation	Not available	There are no absolute eco-tour guide skills training available, but skills training related to guiding tours in general is adequately available
Housekeeping	Making beds, cleaning, washing and laundry	Adequately available	
Hotel manager	Reservation management, expense tracking, inventory tracking	Adequately available	
Food and beverage service	Serving food and beverages	Adequately available	
Catering service	Serving food and beverages, event management	Inadequately available	
Reservation executive	Ticketing, reservation management	Not available	One informal course is available only in Chattogram
Chef/cook	Preparing and decorating food	Adequately available	

▶ 4.4. Key recommendations: Tourism and Hospitality sector

- ▶ Introduce sector-specific courses tailored to the demands of the tourism and hospitality industry, such as tour guide, tour operation, housekeeping, and food and beverage services.
- ▶ Introduce courses related to reservation processes, covering booking and ticketing. Target front desk officers and tour operators to enhance their skills in managing reservations effectively within the tourism and hospitality sector through upskilling training and certifications.
- ▶ Extend the curriculum beyond technical skills to include essential core skills. Integrate components on navigation, effective communication, customer service, and complaint mechanisms to ensure a holistic skill set among trainees.
- ▶ Offer courses that cover online marketing strategies, e-payment systems, and social media management to equip individuals with skills relevant to the evolving landscape.
- ▶ Advocate for TVET providers to collaborate with the Bangladesh Technical Education Board (BTEB) to implement Recognition of Prior Learning (RPL) programmes in different occupations, such as chefs and tour operators. This collaboration aims to certify experienced industry workers, acknowledging their skills and expertise gained through practical experience.

5. Sectoral analysis: Transport

► 5.1. Analysis of business environment: SWOT and drivers of change

► Strengths:

The strengths of the transport sector are rooted in a skilled workforce that is proficient in practical aspects, such as vehicle maintenance. Additionally, the workforce is recognized for its communication, teamwork and problem-solving abilities, indicating a solid foundation of soft skills – a conclusion that was reinforced by both FGD and KII inputs. Apprenticeship training and a willingness to employ and train late entrants highlight the sector's openness to developing its workforce.

► Weaknesses:

However, the analysis also identifies significant weaknesses, such as the lack of formal certification for skilled workers, which could limit their job opportunities, as highlighted by KIIs in Cox's Bazar. There's a noted discrepancy between the education/training provided and the practical needs of the sector, coupled with an absence of soft skills training for specific roles. Furthermore, despite the technical skills of the workforce, there are insufficient quality job opportunities, as well as security concerns like extortion and robbery.

► Opportunities:

The region has an opportunity to benefit from ongoing and upcoming infrastructure projects, such as the SASEC Chattogram-Cox's Bazar Railway Project, the Chattogram-Cox's Bazar Highway Improvement Project, and the Matarbari Port Development Project, which are creating demand for employers and workers in the sector.

► Threats:

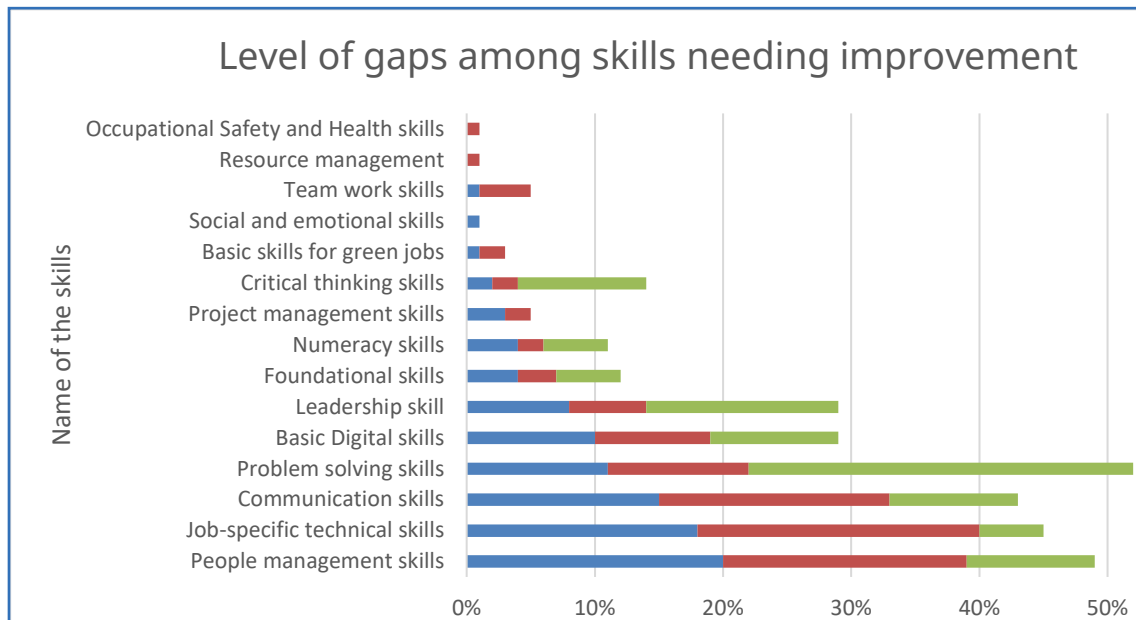
The lack of adequate and qualified human resources are a key threat to the transport sector. The sector may face challenges in maintaining and improving the quality, efficiency and safety of transport operations and infrastructure, as well as in attracting and retaining customers and investors.

► 5.2. Skills demand and supply in the transport sector

For the skills needs assessment a sample of seventy-five enterprises were surveyed: 13 per cent were micro enterprises (with fewer than ten employees); 35 per cent were small (10–99 employees); 31 per cent were medium (100–249 employees), and 21 per cent were large (250 or more employees).

Figure 4 presents an analysis of the skills needs and gaps in the current transport workforce within the Chattogram-Cox's Bazar region.

Figure 4. Workers’ skills gaps in the transport sector (% of respondents, N=75)



Note: Multiple responses possible. Source: ILO Establishment Skills Survey, 2023.

In terms of workforce skills, the largest gap lies in job-specific technical abilities, which are essential for operating new machinery and technologies. There is also a significant need for enhancing communication skills within the workforce, which is crucial as the sector increasingly engages in global supply chains. Leadership skills also present a gap that could affect organizational direction and strategy implementation. Foundational skills such as reading and writing, adaptability, and critical thinking are areas with smaller gaps, but are nonetheless critical for the evolving demands of the industry and for fostering a culture of continuous improvement and innovation.

The study also looked at the supply of transport sector-related training in the Chattogram–Cox’s Bazar region. The findings of the study indicate that the number of courses available for the

transport sector is low compared to other sectors, and this is true in both the Chattogram and Cox’s Bazar regions. This is low level of availability can be found at all levels, including for non-formal certificate courses, and there are no transport-related courses available at the diploma level in Cox’s Bazar. Furthermore, the assessment identified gaps between the training that is being offered and industry needs, which is impeding workers’ productivity. There was also a mention during a KII that the current curricula are not suitable for individuals with disabilities, especially for NTVQF and 360-hour courses. A list of all transport sector-related training programmes offered in the Chattogram–Cox’s Bazar region is presented in Annex C.

► 5.3. Occupation-specific training gaps

Based on the information gathered from the primary survey and KII validation, table 5 presents findings of the skills needs and gaps analysis for priority occupations in the transport sector. For each occupation, the availability frequency was derived from the frequency of a specific course/training reported by TVET providers and the degree to which the skill training relates to the occupation.

Table 5. Training gap analysis for priority occupations in the transport sector

Priority occupation	Available skills supply for the occupation	Availability frequency	Remarks
Body building technician	Iron sheet cutting and welding	Not available	
Driver	Manual transmission driving, automatic transmission driving, motorbike driving and maintenance	Adequately available	
Motor mechanic	Motor problem diagnosis and repairing	Adequately available	
Diesel engine mechanic	Engine coil binding, engine repairing	Adequately available	
Heating and ventilation technician	Repairing air conditioning system, engine heating and cooling system repairing	Not available	
Auto mobile electrician	Electric vehicle servicing	Inadequately available	Most of the related skills training is available in Chattogram region
Repair service technician	Software-based diagnosis, motorbike servicing	Inadequately available	Most of the related skills training is available in Chattogram region
Mechanical fitter	Spare parts fitting	Not available	
Auto AC technician	Air conditioning repairing and servicing	Inadequately available	
Machinist	Lathe works and CNC operations	Inadequately available	

► 5.4. Key recommendations: Transport sector

- Develop comprehensive courses on automotive electronics and computer systems to equip technicians with the skills needed for repairing and maintaining technologically advanced vehicles such as electric vehicles, energy-efficient vehicles, and hybrid vehicles.
- Emphasize training on safety protocols and compliance standards in the automotive industry, ensuring that technicians are well-versed in the latest safety measures and regulatory requirements.
- Cover essential driving skills, including road safety, traffic rules, vehicle control, navigation and emergency handling.
- Extend coverage of training programmes in various automobile repair and maintenance skills to encompass areas such as engines, transmissions, brakes, suspensions, electrical systems, electronics, fuel, cooling, and air conditioning.
- Equip technicians with effective communication and customer service skills to effectively interact with clients, clearly articulate technical issues, and build trust, thereby contributing to positive customer experiences.
- Given the sector's inclination towards on-the-job training, formalize experiential learning approaches to ensure comprehensive skill development.
- Create structured apprenticeships and internships that blend practical experience with theoretical knowledge.

6. Sectoral analysis: Manufacturing

▶ 6.1. Analysis of business environment: SWOT and drivers of change

▶ **Strengths:**

Manufacturing enterprises in the region benefit from comparatively cheap labour and a strategic location near the Port of Chattogram and the Port of Matarbari. There is a favourable business environment due to the presence of Special Economic Zones (SEZs) and Export Processing Zones (EPZs). There is an already well-established and competitive textile and garment industry in the region fuelled by strong domestic and international demand. Other manufacturing sectors, such as shipbuilding, pharmaceuticals, and leather and footwear have also seen significant growth.

▶ **Weaknesses:**

The region's manufacturing sector faces several challenges and constraints, such as low productivity and quality, inadequate infrastructure and utilities, lack of skilled and trained workers, high dependency on imported raw materials and intermediate goods, low-value addition and innovation, and poor compliance with labour and environmental standards. The region also suffers from political instability, social unrest, corruption, and bureaucratic hurdles, which hamper business confidence and the investment climate.

▶ **Opportunities:**

The region has several opportunities for enhancing skills development and employment creation in the manufacturing sector, such as leveraging regional and global market access and integration, especially to South Asian and South-East Asian countries, and diversifying the export basket and markets. The assessment also identified significant employment opportunities in the light engineering sector and the shipbuilding sector in Chattogram.

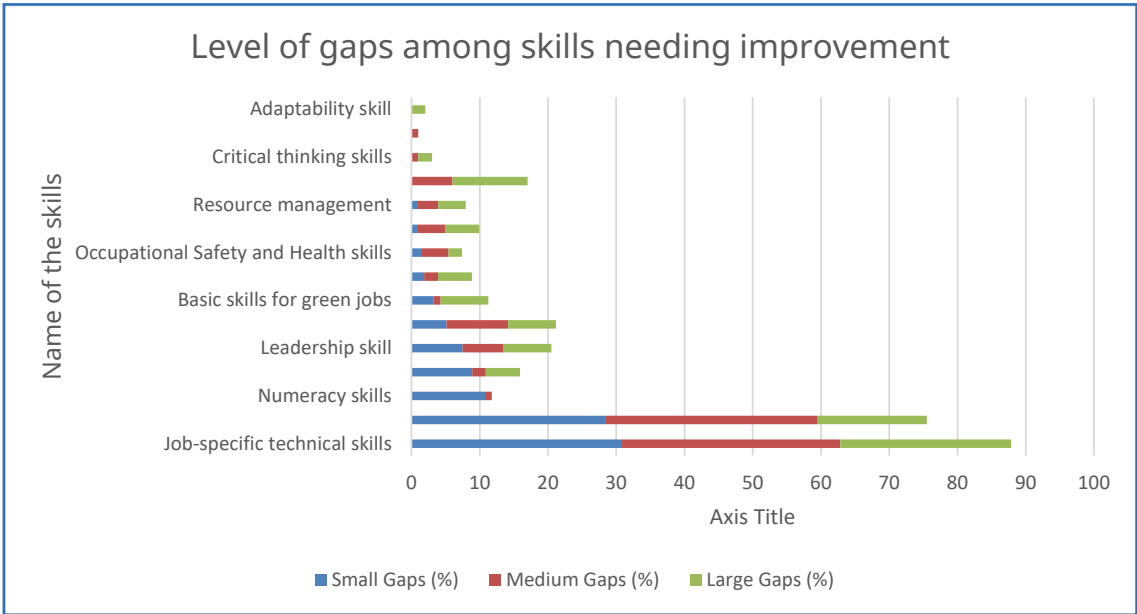
▶ **Threats:**

The region faces several threats and risks, such as competition and pressure from other low-cost producers, especially in the textile and garment industry, the volatility and uncertainty of the global market, and trade tensions between major economies. The environmental and social impacts of manufacturing activities – especially on biodiversity and the livelihoods of local communities – are also key issues.

▶ 6.2. Skills demand and supply in the manufacturing sector

For the skills needs assessment a sample of 217 manufacturing enterprises were surveyed. The assessment suggests a significant gap between the availability of skilled labour and the industry's need for machine operators, especially for certified machine operators, which are very scarce, according to FGD and KII respondents. The fact that managers, supervisors, and mechanical technicians have been reported as hard-to-fill vacancies also shows the current demand for leadership and management skills in the sector.

► **Figure 5. Workers' skills gaps in the manufacturing sector (% of respondents, N = 217)**



Note: Multiple responses possible. Source: ILO Establishment Skills Survey, 2023.

Findings from the survey suggest that job-specific technical skills are the most in-demand, indicating a strong current and future need for specialized technical knowledge tailored to specific roles in manufacturing. Communication skills are also highlighted, emphasizing the importance of clear and effective interpersonal communication within the industry. Leadership skills, project management, and problem-solving capabilities are reported as having medium-level gaps among the workforce, which indicates overall gaps in terms of core skills.

With regard to skills supply, four courses at the diploma level were found to be present in the Chattogram region, and one diploma-level course in food technology was found in Cox's Bazar. There are a few courses available at the HSC vocational level in the Chattogram region; while Cox's Bazar does not offer any manufacturing-related courses at the HSC level. However, two relevant courses under SSC vocational certification are offered in Cox's Bazar. Most of the manufacturing courses are available at the NSC level and non-formal certificate level. Notably, Cox's Bazar has only one course to offer under the NSC and at least four courses under non-formal certification. A list of all the manufacturing sector-related training programmes available Chattogram-Cox's Bazar region is presented in Annex D.

► 6.3. Occupation-specific training gaps

Based on the information gathered from the primary survey and KII validation, table 6 presents findings of the skills needs and gaps analysis for priority occupations in the manufacturing sector. For each occupation, the availability frequency was derived from the frequency of a specific course/ training reported by TVET providers and the degree to which the skill training relates to the occupation.

► **Table 6. Training gap analysis for priority occupations in the manufacturing sector**

Priority occupation	Available skills supply for the occupation	Availability frequency	Remarks
Machine operator	CNC machine operation, lathe machine operation, grinding machine operation	Not available	There are courses like sewing machine operation that can be attributed in a different sector, but not directly in the manufacturing sector.
Mechanical/ repairing technician	Electrical works, repairing of electrical and mechanical goods	Inadequately available	
Welder	Welding	Not available	
Packaging technician	Packaging and labelling	Not available	
Quality controller	Electronics technology, mechanical technology, food technology	Inadequately available	In diploma-level courses a quality control skill component is included, but there is no specific course only for quality control.
Electrical technician	Electrical and electronics	Adequately available	
Assembler	Assembling spare parts of machine	Not available	
Junior mechanic	Helping technician	Adequately available	
Consumer electronic technician	Electronics workshop and maintenance and electronic works	Adequately available	
Sales and marketing executive	Product promotion and marketing	Inadequately available	
Marine engine technician	Marine engine repair and servicing	Inadequately available	

For most of the in-demand occupations in the manufacturing sector, skills training is either not available or inadequately available.

► 6.4. Key recommendations: Manufacturing sector

- Expand training programmes for machine operators, particularly in CNC (computer numerical control) machine operation, lathe machine operation, and grinding machine operation to cater to the significant employment opportunities in the light engineering sector and shipbuilding sector in Chattogram.
- Provide training for both operational-level workers and managers on the proper management of hazardous and toxic materials. This includes guidelines on handling, storage, and disposal; ensuring compliance with safety regulations; and minimizing environmental impact.

7. Sectoral analysis: Agri-food

► 7.1. Analysis of business environment: SWOT and drivers of change

► Strengths:

Many areas of the Chattogram-Cox's Bazar region have a favourable climate, soil and water resources for the cultivation of various crops. One of the agri-food sector's notable strengths lies in the wealth of local expertise, with many workers possessing a deep understanding of traditional farming and harvesting techniques. Moreover, the sector excels in inclusive employment, actively involving a diverse workforce that includes men, women, youth and marginalized groups. Additionally, the sector's openness to self-employment and entrepreneurship – with relatively low capital requirements – encourages economic empowerment and employment generation, particularly in rural areas.

► Weaknesses:

A significant portion of the workforce lacks formal education, and the limited availability of skills training in modern agricultural technologies and machinery operation impedes productivity growth. Communication and marketing skills are often overlooked in training. Inadequate focus on quality and safety standards is a key challenge. It is unclear if the sector is adequately equipped to consistently meet regulatory requirements and ensure healthy farming practices.

► Opportunities:

The growth of the tourism and hospitality industry is also creating a high demand for agri-food products. Embracing modern agricultural technologies and machinery can enhance productivity, reduce reliance on manual labour, and lead to more sustainable practices. Market expansion, particularly into export opportunities, offers the potential for economic growth and reduced dependence on domestic markets. The assessment also found that many young entrepreneurs are showing interest in investing in the agri-business sector.

► Threats:

Increased automation and technology adoption may lead to job displacement, particularly in roles that can be automated. This poses a risk to the livelihoods of traditional agri-food workers. Moreover, unforeseen events such as the COVID-19 pandemic can create financial challenges for both entrepreneurs and workers, impacting their ability to invest and sustain operations. Land leasing practices that prioritize monetary gain over genuine farming can affect the availability of agricultural

► 7.2. Skills demand and supply in the agri-food sector

FGD and KII participants noted that the required skills in the agri-food sector have evolved due to the modernization of agricultural practices in the Chattogram–Cox’s Bazar region, especially as a result of the integration of digital machinery.

There are a limited number of courses available for the agri-food sector, with only two agriculture training institutes: one in Chattogram and one in Rangamati. Though there is no specialized agricultural training institution in Cox’s Bazar, a government polytechnic in Cox’s Bazar does offer one agri-food-related course: Refrigeration and Air-Conditioning Technology. No HSC (vocational) or NSC-level courses related to the agri-food sector are available in Cox’s Bazar. There are, however, some non-formal trainings available in both the Chattogram region and Cox’s Bazar. A list of all the agri-food sector-related training programmes available in the Chattogram–Cox’s Bazar region is presented in Annex E.

FGD insights indicate that the curriculum needs to be more oriented toward meeting industry needs and thus enabling more market-focused skill supply. To this end, trainers need to be oriented towards modern methods of teaching and new agri-food specific skills. At present, students face constraints in accessing jobs in the industry due to a lack of adequate skills required to meet the criteria mentioned in job descriptions. This issue is further compounded by a lack of continuous professional development opportunities in the sector. There is also a deficit of female instructors in TVET providers, with some FGD participants mentioning it was a key barrier to increasing female enrolment in agri-food sector-related training.

► 7.3. Occupation-specific training gaps

Based on the information gathered from the foresight workshop, table 7 presents findings of the skills needs and gaps analysis for priority occupations in the agri-food sector. For each occupation, availability frequency was derived from the frequency of a specific course/training reported by TVET providers and the degree to which the skill training relates to the occupation.

► **Table 7. Training gap analysis for priority occupations in the agri-food sector**

Priority occupation	Available skills supply for the occupation	Availability frequency	Remarks
Food safety and hygiene technician	Clean and sanitary foods, tools and equipment of the food industry, safe food handling, inspecting and sorting materials and products, managing wastage in the food industry, and monitoring and controlling pests	Not available	
Baker	Baking	Adequately available	
Food preservation technician	Food processing and preservation	Inadequately available	
Food packaging technician	Packaging	Not available	Only one informal skills training was found in Chattogram.
Meat and poultry processing worker	Poultry rearing, livestock rearing	Inadequately available	No formal skills training is available on poultry or livestock rearing.
Fish and seafood processing worker	Fish and seafood, fish cultivation, seaweed food and beverages, dried fish processing	Inadequately available	Few informal skills trainings are available. Those that are available are provided by particular government agencies.
Dairy processing worker	Pasteurizing, fermentation	Not available	
Refrigeration technician	Maintaining temperature in manufacturing unit and storage	Not available	
Waste management	Waste collection and segregation, recycling	Not available	

► 7.4. Key recommendations: Agri-food sector

- Integrate comprehensive modules on food safety standards, quality control measures, and regulatory compliance in vocational training curricula to ensure that workers are well-versed in maintaining high standards in agri-food production.
- Provide training on the latest processing technologies in agri-food manufacturing, including techniques for preserving nutritional value and extending shelf life.
- Develop marketing training in food packaging and labelling techniques to meet industry standards and enhance the marketability of agri-food products.
- Provide training on the integration of automation and technology in agri-food production processes, including the use of machinery for processing and packaging.
- Skill development programmes on food processing – such as pickle, dry fish and seaweed food processing – can be considered to promote entrepreneurship in the sector.

Annexes:

► Annex A. Training programmes offered in the Construction sector in the Chattogram–Cox’s Bazar region

Programme	Available trades/specializations in Chattogram	Available trades/specialization in Cox’s Bazar
Diploma	Architecture Technology Civil Technology Construction Technology Electrical Technology Environmental Technology	Architecture Technology Civil Technology Electrical Technology
HSC (Vocational)	Building Construction and Maintenance Electrical Works and Maintenance	
SSC (Voc.)	Building Maintenance Civil Construction Electrical Maintenance Electrical Maintenance Work General Electrical Works Welding and Fabrication	Building Maintenance Civil Construction Electrical Maintenance Work General Electrical Works
NSC (Levels 1–5)	Architecture Technology Civil Construction Electrical and Welding Electrical House Wiring Electrical Installation and Maintenance Electrical Technology Electrical Works and Maintenance General Electrician Masonry Plumbing Plumbing and Pipe Fittings Welding / Welding and Fabrication	Architecture Drafting Electrical House Wiring Electrical House Wiring and Maintenance Electrical Installation and Maintenance General Electrician Masonry Plumbing Tiles Fittings Welding
Non-formal	Carpentering Civil Technology Electrical House Wiring Electrical Installation and Maintenance Electrical Technology Electrical Works Electrical Works and Maintenance Forklift Operations and Maintenance Plumbing Plumbing and Pipe Fittings Tiles Fittings Welding	Block Building Electrical Technology Masonry Plumbing Rod Bending Tiles Fittings Welding

► Annex B. Training programmes offered in the Tourism and Hospitality sector in the Chattogram–Cox's Bazar region

Programme	Available trades/specializations in Chattogram	Available trades/specializations in Cox's Bazar
Diploma	Tourism and Hospitality	Tourism and Hospitality
NSC (Levels 1–5)	Baking and Cooking Food and Beverage Servicing Housekeeping Tour Operation	Food and Beverage Food and Beverage Servicing Front Office Management Housekeeping
Non-formal	Air Ticketing Professional Course Baking Baking and Cooking Cooking Cooking and Catering Food and Beverage Food and Beverage Production Food Preparation and Culinary Front Office Management Hotel Management Housekeeping Professional Chef Course Sugar Art	Food and Beverage Front Office Management Hotel Management and Hospitality Housekeeping Tour Guiding Tour Operation Youth Kitchen

► Annex C. Training programmes offered in the Transport sector in the Chattogram–Cox’s Bazar region

Programme	Available trades/specializations in Chattogram	Available trades/specializations in Cox’s Bazar
Diploma	Automobile Technology Marine Technology	
SSC (Voc.)	Automotive	Automotive
NSC (Levels 1–5)	Auto Mechanics Automotive Machine Auto Electricity Servicing Motorbike Servicing Driving Machine Tools Operation	Motor Driving and Maintenance
Non-formal	Automotive Mechanics Mechanist Driving Manual Driving Auto Driving Diesel Mechanics Cycling Motor Bike Driving Motor Driving and Maintenance Scooter Driving	Driving Motor Driving and Maintenance

► Annex D. Training programmes offered in the Manufacturing sector in the Chattogram–Cox's Bazar region

Programme	Available trades/specializations in Chattogram	Available trades/specializations in Cox's Bazar
Diploma	Civil (Wood) Technology Electronics Technology Mechanical Technology Power Technology	Food Technology
HSC (Voc.)	Argo Machinery Electronic Control and Communication Electrical Works	
SSC (Voc.)	Electronics Workshop and Maintenance Firm Machinery General Electronics General Mechanics Mechanical Drafting	General Electronics General Mechanics
NSC (Levels 1–5)	Consumer Electronics Electrical and Electronics Electronic Works Furniture and Cabinet Making General Electronics Machine Shop Practice Mechanical Engineering Mechanical Fitter Mechanical Technology	Electronic Works
Non-formal	Electrical and Electronics Electronic Works General Electronics Machine Shop Practice Mechanical Technology Wood Furniture Making	Electronic Works Handicraft Reusable Sanitary Wood Technology

► Annex E. Training programmes offered in the Agri-food sector in the Chattogram–Cox’s Bazar region

Programme	Available trades/specializations in Chattogram	Available trades/specializations in Cox’s Bazar
Diploma	Diploma in Agriculture	Refrigeration and Air-Conditioning Technology Food Technology
HSC (Voc.)	Refrigeration and Air Conditioning Argo Machinery	
SSC (Voc.)	Agri-based Food Food Processing and Preservation Refrigeration and Air Conditioning	Food Processing and Preservation
NSC (Levels 1–5)	Agricultural Livestock Food Processing Refrigeration and Air Conditioning	
Non-accredited course	Bakery and Pastry Fish and Seafood Fisheries Food Delivery Homestead Gardening and Nut Cultivation Livestock Rearing Packaging Refrigeration and Air Conditioning Food Delivery Packaging	Crabs Cultivation Dry Fish Processing Fish Cultivation Livestock Rearing Oyster Cultivation Poultry Rearing Salt Cultivation Seaweed Cultivation Seaweed Food and Beverage Vegetable Cultivation Refrigeration and Air Conditioning

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