



SERVICES POLICY REVIEW



BANGLADESH

(I)



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FOREWORD

Bangladesh is best known as a textile export powerhouse. This powerhouse is built on a foundation of a wide array of key services, including transport, energy, and information and communications technology (ICT). In fact, the manufacturing sector uses as inputs 26 per cent of Bangladesh's total supply of services domestically. Industry absorbs 72 per cent of the country's land transport services, 69 and 66 per cent, respectively, of its wholesale and retail trade services, 59 per cent of rail transport, 27 per cent of professional services and 20 per cent of communication services. This could squeeze the available supply of quality services elsewhere in the economy. In terms of services most used by industry as a percentage of total services costs, land transport and retail trade services each account for 33 per cent and wholesale trade 19 per cent. Therefore, 85 per cent of industry expenditures on services are spent on these three sectors. Efficiency improvements in these key areas could translate into enhanced competitiveness of industry and also enhanced access to key services for Bangladesh's 160 million-strong and growing population.

The Government of Bangladesh wishes to reduce risks inherent in exports being too dominated by one sector and to diversify its exports and economy. With this in mind, the Government approached the UNCTAD secretariat to assess the country's services sector with a particular focus on the following five subsectors: (a) ICT and ICT-related services; (b) tourism; (c) accounting and auditing; (d) architecture and engineering; (e) nurses and midwives.

A services policy review (SPR) is a snapshot and deep analysis of a country's services sector and policies at a given moment in time. National experts, the Government and UNCTAD join forces to review strengths and weaknesses of the national services sector and the focus subsectors, consult widely with national public and private sector actors and stakeholders, and make clear evidence-based recommendations for policy, regulatory and institutional frameworks to improve the supply capacity and export of services. These provide a sound foundation for a well-informed reform process.

This SPR of Bangladesh concludes that, currently, ICT is the most promising of the five subsectors analysed. The Government should invest and encourage private sector investment in high-speed, high-quality information technology (IT) infrastructure, particularly broadband Internet, and remove policies and taxes that are holding in check this fast-developing area. A strong broadband network with affordable access for the people of Bangladesh will in turn unleash the ICT-related sectors and IT-enabled services (ITES), such as providing architectural, engineering, accounting and auditing services to a foreign customer over the Internet. This will brighten the country's already good prospects for exports of these two professional services subsectors, examined in depth in this SPR, as well as a host of other ITES and business services. Bangladesh can also strategically import ITES where domestic demand supply gaps exist, such as is the case for telemedicine services.

The best export opportunities for accounting and auditing services lie in transactional-intensive processes such as payroll. The quality of accounting and business education needs to be improved and curricula should be developed in consultation with business representatives to ensure that domestic market needs are met and exports can continue.

In the areas of nursing and midwifery, architecture and engineering, and tourism, more groundwork is needed before the provision of these services is optimal. Bangladesh faces a critical shortage of qualified nurses and midwives to meet the needs of its population. Meeting these needs is a priority and imports must fill the gap if the domestic supply is not sufficient. This is a critical service for the entire population. Joint ventures formed now in private hospitals and clinics and in educational and training facilities would lead to a future crop of highly trained nurses with well-paid jobs awaiting them in the new clinics.

The country also needs more and better architects and engineers. Bangladesh has the lowest number of architects per capita in the region. Domestic supply needs to be built up, continuous education for professionals to keep on top of rapidly changing technology should be introduced, and a system for evaluation, standardization and upgrading of engineering and technical education should be put in place to maintain international standards.

International tourism is in its nascent stages. Domestic tourists account for 97 per cent of tourism expenditures. Improving tourist facilities as well as the sector's access to high-quality, reliable, affordable and safe land transport, energy and ICT services are needed.

We at the UNCTAD secretariat have greatly enjoyed working hand in hand with the Government of Bangladesh and the excellent participating experts and institutions. We hope this SPR will be conducive to the strengthening of the services sector in Bangladesh.



Mukhisa Kituyi
Secretary-General of UNCTAD

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Volume I contains the UNCTAD desk study – an overview of the economy and its services sectors, particularly those considered to be priority; volume II contains strategies for advancing development of key priority services sectors in Bangladesh.

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ACRONYMS AND ABBREVIATIONS

FDI	foreign direct investment
FOSS	free and open software
GATS	General Agreement on Trade in Services
GDP	gross domestic product
HPNSDP	Health, Population and Nutrition Sector Development Programme
ICAB	Institute of Chartered Accountants of Bangladesh
ICMAB	Institute of Chartered Cost and Management Accounts of Bangladesh
ICT	information and communications technology
IFAC	International Federation of Accounts
IFRS	International Financial Reporting Standards
IT	information technology
ITC	International Trade Centre
ITES	IT-enabled services
LDC	least developed country
NGO	non-governmental organization
OECD	Organization for Economic Cooperation and Development
SME	small and medium-sized enterprise
SPR	services policy review
SWOT analysis	strengths, weaknesses, opportunities and threats analysis
WHO	World Health Organization
WTO	World Trade Organization

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