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Ministry of Water Resources  
Water Resources Planning Organization (WARPO)**

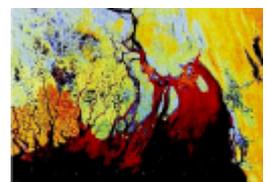
**Role of the Private Sector**

**An assessment of the status in the coastal zone of Bangladesh**

Working Paper  
WP028

Dhaka  
February 2004

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**PDO-ICZMP**





**Program Development Office  
for  
Integrated Coastal Zone Management Plan  
(PDO-ICZMP)**

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**LIST OF ABBREVIATIONS AND ACRONYMS**

ADAB	:	Association of Development Agencies in Bangladesh
ADB	:	Asian Development Bank
ADP	:	Annual Development Program
BBS	:	Bangladesh Bureau of Statistics
Ctg	:	Chittagong
CUS	:	Center for Urban Studies
ECGD	:	Export Credits Guarantee Department
GoB	:	Government of Bangladesh
Govt.	:	Government
Hartal	:	Strike
Mastan	:	Hooligan
NGO	:	Non-Governmental Organization
SAARC	:	South Asian Association for Regional Cooperation
SRO	:	Statutory Regulation Order
UN	:	United Nations
Char	:	Mud flat
Dweep	:	Island



## 1 INTRODUCTION

### 1.1 Background

The overall goal of integrated coastal zone management (ICZM) is “to create conditions in which the reduction of poverty, development of sustainable livelihoods and the integration of the coastal zone into the national processes can take place.” The aim of the ICZMP project is to “identify strategies and activities to enhance livelihoods development and reduce vulnerabilities in the coastal zone.”

Integration of the private sector is often considered as one of the critical means to enhance sustainable livelihoods. As a result, an assessment of the present and potential role of private sector enterprises in the coastal zone of Bangladesh is critical in the context of sustainable coastal livelihoods. To have a basis for recommendations about “models” and “best practices” for harmonization and coordination, more information on the current situation, as well as the views from the parties involved in future developments is required.

### 1.2 Objectives of the study

The primary objective of the study is to assess the present situation of the private sector activities in the coastal zone. More specifically the study:

- ◇ describes and analyzes the current pattern of relations between the private sector and government, in particular about coastal issues;
- ◇ identifies issues related to coastal zone that in particular requires more coordination and consultation between the government and the private sector;
- ◇ recommends transfer of activities (in line with the government policy) from the government to the private sector through identification of coastal zone related activities that are presently being carried out by the government and that could possibly be transferred to the private sector; and
- ◇ recommends the way in which future consultations between government and private sector should be structured.

### 1.3 Scope of the study

The study has looked into the private sector and government engagements for the livelihoods of the coastal people. While describing and analyzing the current pattern of relations between the private sector and the government, the time frame and level of effort made it extremely challenging to include all the private sector activities. As a result, the study tried to shortlist few important private sector activities. In the coastal conditions of Bangladesh, private sector emphasis on salt, dried fish, shrimp, marine fisheries, marine transportation, shipping, ship breaking, tourism, export processing zones, ports, etc. are important for obvious reasons.

The words “private sector”, “corporate”, “company”, “organization”, “enterprises”, “business house” and businesspersons are used interchangeably throughout this report.

Private Sector generally means the part of a nation's economy, which is not controlled by the government, and may include a wide array of privately owned and operated firms including micro or cottage industries. From this point of view, the private sector includes all actors outside the government, such as for-profit, nonprofit, formal and non-formal entities. This broad definition includes service providers, non-governmental organizations, individuals and companies, producers and suppliers, shopkeepers, and traders, etc.

## 1.4 Methodology

The primary means for assessing the current and potential role of private sector was considered both field survey and desk research. Various experts, organizations, agencies and institutions were contacted & consulted for first hand information (Annex-A). Both primary and secondary information were used to examine the status. The primary information served as the critical framework for judgment while the secondary information provided important input for understanding the context and rationality and the various interventions designed and implemented by the key stakeholders.

The following tools were applied for the information search:

- ◇ studying the relevant existing research/studies and resource materials;
- ◇ conducting a field reconnaissance;
- ◇ structured and non-structured interviews with key informants; and
- ◇ consultation with various organizations, and associations.

While designing the field investigation, it was felt that a simple instrument to collect information through interview would reveal neither the current constraints nor the potential opportunities. As a result, one-to-one interview and group discussion was felt important. However, generally companies and the government agencies in the coastal area only have operational or implementation units and the decision-making bodies are mostly located in Dhaka. As a result, information collected during the field visit was limited and was not sufficient for drawing conclusion.

## 1.5 Limitation

The main limitation faced is the difficulties in extracting reliable data from the concerned people and organizations particularly relating to private sector operational constraints and opportunities in the coastal zone. Determining the underlying factors influencing private sector growth, and the effectiveness of various program initiatives, particularly relating to policies and the external factors such as local social and cultural context was difficult. Despite the constraints, effort has been taken to make the entire exercise as objective and as possible.

## 2 PRIVATE SECTOR IN BANGLADESH

Historically the private sector in Bangladesh developed from a very vulnerable base after the independence in 1971. Along with large infusions of external aid and a growing middle class, the country slowly began to turn its attention to developing new industrial capacity and rehabilitating its economy. Since 1975, the government started to give greater scope to private sector participation in the economy, a pattern that is still continuing. Since then, many state-owned enterprises have been privatized, with more under consideration. The economic policies aimed at encouraging private enterprise and investment, denationalizing public industries, reinstating budgetary discipline, and liberalizing the import regime were accelerated from 1990-1993. During this period, the government also implemented an Enhanced Structural Adjustment Facility (ESAF) with the International Monetary Fund to boost the private sector investment. Despite the various pro-market reforms, including tax reform and allowing increased foreign direct investment in the gas and power sectors, the achievements were extremely slow due to inadequate policy enforcement, bureaucracy and lack of infrastructure support. Economic growth has been further slowed down by a largely dysfunctional banking system, which has impeded access to capital of state-owned banks, which control about three-fourths of deposits and loans, and carry significant amount of classified loan.

### 2.1 The need for private sector development

The need for private sector development is critically felt to reduce poverty and improve the living conditions and the quality of life of the people. It is believed that private sector is integral to this process in achieving a pro-poor and sustainable economic growth. This is particularly critical when the government is faced with an increasingly complex development agenda, and when available resources are becoming increasingly constrained. The private sector, as the primary engine of economic growth, can play a direct role in poverty reduction. It is believed that greater levels of private sector participation especially in the development of physical infrastructure can release scarce resources from national budgets for critical public investments in employment creation, income generation as well as providing basic social services such as education, health care and water and sanitation.

The private sector has a critical role of in the development process for enhancement of coastal livelihoods. This can be achieved through three strategic thrusts, (i) in creating an enabling environment for business and investment in the coastal zone, (ii) creating business opportunities, especially through innovative public-private partnerships, and (iii) stimulating privatization.

Areas of private sector involvement with high poverty reduction impact, such as development of small and medium-scale enterprises (SMEs) and business development to generate employment, income and production can be identified and prioritized, specifically, support for deepening and expanding the private sector in the coastal zone, and developing market access and export capacity for products from these areas. To improve the enabling environment for private sector development, development of physical infrastructure and strengthening of professionally managed regulatory authorities are important and necessary.

The focus of the private sector can be geared towards economically viable and financially rewarding projects in the coastal areas that has significant potential to impact livelihoods of the coastal people, such as power generation and transmission, transportation, telecommunication, fisheries, tourism, etc.

Table 1 below summarizes the role and contribution of the private sector in the economy. However, this is not exhaustive.

**Table 1: Contribution of selected private sectors in the economy**

Sector	Employment	Contribution to GDP
Ship Breaking	Around 100,000 people are directly involved in this industry for their livelihood	About US \$ 52 million to the national economy annually
Coastal Fisheries	There are about 600,000 people employed in the shrimp sector in Bangladesh	The sector is generating about US\$ 301 million annually
Dehydrated Fish	Around 12,000 people are involved directly	Figure not available
Salt Processing	38,328 salt farmers are directly involved in Cox's Bazar district	Meet almost the entire demand for raw salt in the country, about 0.9 million M.T.
Tourism	It is estimated that about 500,000 people engaged in tourism sector in Bangladesh	Last year the country earned 60 million US Dollar from this sector

Source: Field Survey; BSCIC

## 2.2 Public and private coordination and cooperation

The key gaps between the public and the private sector are primarily in coordination and cooperation. Both the private and public sector actors are acknowledging this. They feel that public sector services are more supply led, and are generally formulated without consultation with the private sector or the consumers of the services. It was also felt that the policies are generally made at higher level based on information from certain area. However, they are being implemented across the board. As a result, some of the policies such as taxation, import duties, licensing, approval, etc., which were supposed to encourage the private sector, actually discourage them. The recent price hike for diesel has severely affected the entire coastal area particularly the transportation, energy generation, and factory operation.

Government departments or agencies at the local level do not have sufficient power and authority to make concessions based on the local experience. Taking approval from higher authorities in district and divisional towns often takes long time.

Allocation for public resources is generally politicized and is done based on the power and lobby of the local influential persons rather than needs of the community. As a result, the community suffers. This is particularly true for infrastructure development.

Absence of clear policy guidelines and frequent change in the policy often pose serious problem for the private sector to take initiative and operate.

The large scale private enterprises, because of their power and influence, often dominate the small enterprises and put them into disadvantaged position.

## 2.3 Potential means to improve cooperation

For better cooperation between the public and the private sector, the insiders in these sectors have suggested the following:

- ◇ creating a common platform so that the private and public sector actors can discuss and resolve or highlight the problems to the policy makers;
- ◇ developing the chambers and private sector associations more effective and proactive especially in policy advocacy; and
- ◇ improving knowledge and understanding of formulation and implementation of policy guidelines to the private sector.

The private sector and civil society organizations need to advocate policy reforms through:

- ◇ representation and participation in infrastructure-specific regulatory boards and management institutions;
- ◇ public-private inter-agency committees within government line ministries; and
- ◇ joint government and private sector seminars.

Policy improvements are needed on three broad areas:

- ◇ efficiency issues in the management and reform of the public sector;
- ◇ governance issues of institutional transparency, reliability and accountability; and
- ◇ private sector willingness and unity of purpose in public-private partnerships.

The contributory role of the private sector in the community should be highlighted. The private sector is more perceived as moneymaker rather than provider of services. Though business houses are important stakeholders in society and major contributors to the development of the country, they should be able to develop a positive image towards their clientele. For this, the following are necessary:

- ◇ establishment of a sound framework for business, involving good governance on the part of the state and self-regulation on the part of the private sector on the basis of publicized codes and the elaboration of best practices;
- ◇ provision of support by the government to encourage the private sector's participation in wealth creation and development; and
- ◇ effective communication strategies to project private sector as a role model in development.

Steps have already been taken towards implementation of these suggestions.

To mobilize the private sector to contribute to human capacity building in coastal areas, there is a need to institutionalize the partnership between the public and private sectors. Governments should facilitate the activities of private investors, domestic as well as foreign. In the area of management education and vocational training, the private sector can be involved in funding and supporting centers of excellence, which would yield direct benefits to business. The involvement of the private sector in formulating training strategies and designing curriculum can ensure that human resources development meets the demand of companies and labor markets. This would also facilitate capacity building in the application of new technologies through programs that support the development of micro, small and medium-sized enterprises, and encourage linkages between them and foreign enterprises. In this regard, foreign investors should also be integrated in the local community, establish corporate citizenship and engage in human resources development.

Steps for successfully attracting private investment in infrastructure projects should be initiated through simplification of regulatory and institutional framework. The policies should facilitate free entry to infrastructure development as per the market need to make the projects financially viable. Sufficient room for competition from the private sector should be encouraged to avoid the replacement of public monopoly by private monopoly.

## 2.4 Government's role

Much of the role of government can be viewed as establishing infrastructure in its broadest sense — the educational, technological, financial, physical, environmental, and social infrastructure of the economy. Since markets cannot operate in a vacuum, this infrastructure is necessary if markets are to fulfill their central role in increasing wealth and living standards. Because constructing the broad

infrastructure maybe beyond the capacity or interest of any single firm and hence, it should be primarily the responsibility of the government.

There is also the question whether that the private sector should take over the duties of the public sector or if there is scope for making public sector more efficient in terms of professionalism, continuity in management, technology, and so on. Both are important. They are not alternatives, and should not choose one or the other. In fact, the appropriate scope of government depends on how effectively it ensures efficiency in the public sector. There are a number of ways that that can be done, and many of them involve emulating practices in the private sector.

The Industrial Policy 1991 (Revised in 1992) is drawn on the philosophy of more private sector involvement and market economy. Registration and support activities have been simplified.

#### 2.4.1 Sanctioning/registration authorities

In order to encourage private sector participation, the government has simplified the sanctioning/registration requirements to only a few agencies depending on the size and location of investment (see Table 2).

**Table 2: Sanctioning/registration authorities**

Sanctioning / registration authorities	Sanctioning / registration power
Board of Investment	Registration of all industrial projects in the private sector outside the authorities of BSCIC and BEPZA  For institutional facility purposes, registration of industrial projects financed by Commercial Banks or by different financing institutions outside the authorities of BSCIC & BEPZA.
Bangladesh Small and Cottage Industries Corporation (BSCIC)	Registration of industrial projects having capital investment not exceeding Tk. 30 million (for BMRE maximum Tk. 45 million)
Bangladesh Export Processing Zones Authority (BEPZA)	Approval of all projects to be located in the EPZs
Financing Institutions (FI) and Commercial Banks (CB) including Development Financing Institutions (DFI) and Nationalized Commercial Banks (NCB)	Approval and financing of projects having investment of any amount

#### 2.4.2 Sponsoring agencies and their areas of responsibilities

The term 'Sponsoring Agency' is used by the government to mean agencies engaged in promoting, assisting, supervising and administering as well as offering pre and post-registration assistance to private sector industries. The list of sponsoring agencies responsible for private sector industrial development and their respective areas of responsibilities are as follows (see Table 3).

**Table 3: Sponsoring agencies and their responsibilities**

Name of the sponsoring agencies	Areas of responsibilities
Board of Investment (BOI)	All industries under private sector other than mentioned at serial nos. 2 and 3 below.
Bangladesh Export Processing Zones Authority (BEPZA)	Industries located in Export Processing Zones (EPZs).
Bangladesh Small and Cottage Industries Corporation (BSCIC)	Small and cottage industries

#### *Board of Investment (BOI)*

The primary objective of the Board of Investment (BOI) is to work for accelerating private investment in Bangladesh. The board is vested with necessary powers to take decisions for speedy implementation of new industrial projects and provide operational support services to the existing

ones. The BOI is a high-powered government apex body for promotion and development of foreign and local private investment in the country. The major functions of the Board are as follows:

- ◇ promotion of investment;
- ◇ providing all kinds of facilities for capital investment and rapid industrialization;
- ◇ registration of industrial projects;
- ◇ creation of infrastructure facilities for industries;
- ◇ issuance of work permit to expatriate personnel;
- ◇ providing import facilities to industrial units;
- ◇ approval of the terms and conditions for foreign private loans and supplier credits beyond the prescribed limit;
- ◇ approval of payment of technology transfer fees (royalty, technical know-how and technical assistance fee) beyond the prescribed limits to foreign nationals/organizations; and
- ◇ recommendation for allotment of land in the industrial areas/estates for industrial purpose.

In addition, the BOI assists investors in obtaining the following services expeditiously:

- ◇ electricity, gas, water, sewerage and telecommunication connections, custom clearance for imported machinery, spare parts and raw materials;
- ◇ clearance regarding environment pollution; and
- ◇ all other facilities and services that may be required for speedy setting up of an enterprise.

BOI does not have any especial mandate or focus for the promotion of private sector enterprises in the coastal zone in particular. However, the board encourages private investment in “less developed areas”.

#### *Bangladesh Export Processing Zones Authority (BEPZA)*

The Bangladesh Export Processing Zones Authority (BEPZA) was established to setup and operate export-processing zones in Bangladesh under the Bangladesh Export Processing Zones Authority Act, 1980. BEPZA develops and services special areas where potential investors would find a congenial investment climate free from procedural complications. Many of the EPZs are located in the coastal zone.

#### *Bangladesh Small and Cottage Industries Corporation (BSCIC)*

BSCIC was created through an Act of Parliament in 1957, which was later amended in 1992. It provides a package of services to private sector entrepreneurs in the small and cottage industries sector. Small industries are defined as those engaged in manufacturing or processing or service activities whose total fixed investment is limited to Tk 30 million (US\$ 0.52 million approx), while cottage industries are those engaged in manufacturing or servicing and generally run by family members with a total investment not exceeding Tk 0.5 million only.

BSCIC generally provides assistance in development and expansion of small and cottage industries (SCI). Its major functions are as follows:

- ◇ promotion and registration of small and cottage industries;
- ◇ conducting advisory and industrial promotion services including training of entrepreneurs, skill development of artisans and craft workers, creation of jobs for SCIs etc.;

- ◇ construction and development of industrial estates with necessary infrastructure facilities for SCIs; and
- ◇ development of linkages between SCIs and large and medium sized industries.

The enterprises in Cox's Bazaar and Khulna reported that the services are inadequate and often supply led, i.e., not as per the needs and demands of the entrepreneurs, such as business feasibility, marketing linkage, raw material sourcing, policy advocacy for protecting the interest of the small and cottage industries, etc.

Apart from the above, the following agencies, cells, and initiatives are also facilitating the private investment in the coastal areas.

*Chittagong and Mongla Port Authority:*

The primary functions of the port authority are:

- ◇ to manage, maintain, improve and develop the port;
- ◇ to provide and maintain adequate and efficient port services and facilities in the port or in the approaches to the port;
- ◇ to regulate and control berthing and movement of vessels and navigation within the port; and
- ◇ to do such acts and things as may be necessary or convenient to be done in connection with, or incidental or conducive to, the performance of its functions under this Ordinance.

Chittagong and Mongla ports provide the following facilities to its users:

- ◇ pilot age & tug service;
- ◇ radio communication service;
- ◇ medical facilities;
- ◇ banker age facilities;
- ◇ fresh water supply;
- ◇ electricity and telephone line (at berth);
- ◇ all sorts of provisional supply;
- ◇ repair facilities;
- ◇ watchman service
- ◇ ship owners and shipping agents
- ◇ stevedoring agents, handling & lighting contractors
- ◇ clearing & forwarding agents
- ◇ airport within 10 km in Chittagong

*Ministry of Energy (Remote Area Power Supply Systems-RAPSS)*

In 1999, the Power Cell of the Ministry of Power issued a Policy Guideline for Small Power Plant (SPP) in Private Sector. This envisaged that private sector investors/sponsors would come forward to establish SPPs of 1-10 MW size, on a fast track basis. The enterprises would directly get into contracts with customers for sale of power on terms mutually agreed upon. The private sector enterprises would also build local distribution systems for supply of electricity to contracted

customers. A good number of potential entrepreneurs showed interest in such an idea but substantial progress has not been made so far.

Apart from the power sector, gas exploration in the offshore has also started. Commercial production of gas at the Sangu offshore gas field near Chittagong in the Bay of Bengal started. A joint venture of the state owned Petrobangla with Cairn Energy, Halliburton Co. of the United States, and SBED, was launched in late 1990s. The initial production of the enterprise was about 51,000 cubic meters per day ( $m^3/d$ ) of gas and currently the output has reached about 136,000  $m^3/d$ .

#### *Hazard Analysis Critical Control Point (HACCP) for the Shrimp Industries*

Due to inadequate infrastructure facilities, sub-standard health and sanitary condition of the shrimp industries, inadequate control over the enterprises by the authority and insufficient facilities in quality control laboratories, EU imposed a ban on export of fishery products from Bangladesh to EC countries in July 1997. It was felt that the Fish Inspection and Quality Control Rules, 1989 was not sufficient to ensure the health and sanitation of the plants and its jurisdiction was primarily confined in the plants only. As a result, the regulations were amended and updated by the government with the assistance of "HACCP Based Fish Quality Assurance Program" project in December 1997 following the EU directives and USFDA-HACCP regulations. Currently these rules are being enforced in aquaculture, transportation, processing, shipment and related areas.

#### *Fourth Fisheries Project:*

The Fourth Fisheries Project was launched to support sustainable growth in, and equitable distribution of the benefits generated from increased fish and shrimp production for domestic consumption and exports. The project was also expected to contribute to poverty alleviation in Bangladesh by improving the livelihoods of poor people dependant on fisheries resources. A number of interventions in the aquatic resources sector were designed to achieve the following purposes:

- ◇ improve the access of poor people to aquatic resources for food and income;
- ◇ improve the capacity of local users to manage aquatic resources in a sustainable and equitable fashion;
- ◇ sustain and, where possible, enhance the production of fish and shrimp by small-scale producers;
- ◇ improve employment opportunities and incomes for small-scale producers; and
- ◇ improve the capacity of the Department of Fisheries and other concerned public sector agencies to effectively support private sector fisheries



### 3 PRIVATE SECTOR ACTIVITIES IN THE COASTAL ZONE

Private sector activities in the coastal zone are numerous. Type and size of private sector enterprises are also diverse ranging from micro (one-person operation) to large (employing several hundred workers). In this chapter, only a few activities that are unique to the coastal zone have been described to understand the present scenario of the private sector enterprises.

#### 3.1 Coastal fishing enterprises

The shrimp sector is considered as the second largest export industry in Bangladesh. These enterprises are generally located in Khulna and Cox's Bazar. Currently the processing capacity of 127 plants is about 256,000 metric tons per year. There are now approximately 37,397 farms of various sizes cultivating bagda with an average farm size of 4.5 hectares. Twenty-five thousand tons of bagda was produced in 2001. Bagda production has increased by 20% per annum in last fifteen years. There are around 60 hatcheries in operation, mostly located in Cox's Bazar. There are also 30,000 hectares of land under Golda production, which produced 11,942 tons of Golda in 2001. Because Golda farms are generally smaller than bagda farms (averaging 0.28 hectares compared to 4.5 hectares), golda cultivation supports a greater proportion of poor and marginal farmers. There are 105,000 Golda farms mostly located in the Khulna, although this method of cultivation is spreading rapidly to other parts of Bangladesh. Unlike brackish water cultivation of bagda, freshwater Golda cultivation is not restricted to the coastal districts and is expanding at a rate of 10-20% per annum.

##### 3.1.1 Contribution to the economy

- There are about 840,000 (Frankenberger, 2002) people employed in the shrimp sector in Bangladesh.
- The sector is generating about US\$ 301 million annually (2001), from Bagda and Golda farms (US\$ 243 million from Bagda alone).

##### 3.1.2 Key constraints

- The present production level of shrimp is the lowest in the world and can be increased several fold, if adequate infrastructure and technological support such as electricity, preservation, ice-factory, packaging, communication, etc are provided
- Unplanned and unregulated shrimp production has caused severe damage to the mangrove and coastal forest plantations and has triggered environmental movement.
- Poor quality-control mechanism is considered as one important factor for not achieving desired success in the global trade.
- Lack of appropriate management of the processing plant increases cost and thereby makes it uncompetitive in the global market.
- Marine fish resources are declining due to over-fishing, pollution and changes in the environment.
- Law and order situation is unsatisfactory.
- Piracy in the sea and in the rivers is a major constraint for both fishers and traders.
- Storage and cooling facilities are inadequate.
- Institutional training and international exposure are lacking.

- Appropriate cooperation and support from the government in terms of extension services, law & order, compassionate policy for importation of modern technology, international marketing, etc. is lacking.

### 3.1.3 Key opportunities

- The development of fisheries sector is one of the top priorities of the Government and hence is included in the 'thrust sector' of export policy.
- The sector has excellent opportunity for marine processed fish (canning) and fish preservation.
- There are opportunities for crab and other shell-fish farming and processing.
- Fish oil processing has a great potential.
- There are opportunities in brown shrimp of demersal stock and pelagic fisheries to tap.

### 3.1.4 Response of the Government

- Government Fish Inspecting and Quality Control (FIQC) Department has recently been equipped with modern laboratory facilities to provide support to the enterprises.
- The Fish and Fishery Product Inspection and Quality Control rules relating to fish collection, storage and processing have been enforced by the Government.
- Department of Fisheries (DoF) has been provided with legal authority to inspect firms dealing with fish business.
- Private sector initiative of establishing quality control means for shrimp. "Shrimp Seal of Quality (SSOQ) has been endorsed by the GoB.

### 3.1.5 Role of the Government

- ◇ providing access and linkage to international markets;
- ◇ encouraging importation and usage of modern technologies for fish catching, processing and packaging;
- ◇ developing adequate infrastructure (electricity, communication, etc);
- ◇ strict control of deep sea pollution;
- ◇ control of sea piracy; and
- ◇ adequate measures against destructive fishing (e.g. ESBN, fry collection etc.).
- ◇ Research findings be taken up by department and provide extension service.

## 3.2 Dehydrated fish

Part of the catch from the Bay of Bengal, particularly from September through April, is generally dried in various coastal areas and islands – St. Martins, Moheshkhali, Sonadia, Dublar Char, Aftabiya char, Rangabali, Korushkool, etc. During this period, the availability of marine fish and the weather for sun drying is ideal. It is estimated that during this period, about 20% to 40% of the total catch is used for drying. The fish are first sorted and then processed (cutting and cleaning) for drying in the open. About 600 small enterprises are engaged in this process. In 2002, the total production of dehydrated fish was about 400,000 metric ton.

### **3.2.1 Contribution to the economy**

- ◇ employment for coastal community;
- ◇ foreign exchange earning; and
- ◇ other supporting business may evolve.

### **3.2.2 Key constraints**

- ◇ every year 30-40% fish are destroyed because of inadequate drying;
- ◇ inadequate storing facilities;
- ◇ insect infestation severely affects and use of DDT etc. makes dry fish dangerous;
- ◇ the major cluster of dehydrated fish business conducted on government khas land and often being displaced!
- ◇ poor transportation and communication facilities;
- ◇ inadequate financial support to the small enterprises;
- ◇ lack of processing (package etc.) for marketing;
- ◇ lack of power/electricity; and
- ◇ lack of ice-factory (fish needs to be preserved before processing).

### **3.2.3 Key opportunities**

- ◇ large domestic market and good prospects for exports to the developed markets;
- ◇ creation of public and private sector partnership in infrastructure support services;
- ◇ skill development on fish processing, drying, packaging and quality control; and
- ◇ solar drying methods (cheaper version available) be spread through extension service.

### **3.2.4 Role of Government**

- ◇ adequate credit facilities for small enterprises;
- ◇ BSCIC type facilities;
- ◇ storage facilities;
- ◇ technical support for skills development;
- ◇ security;
- ◇ infrastructure support (electricity, road, market shed, etc); and
- ◇ research findings in these regards be fielded through extension.

## **3.3 Salt processing**

There are about 310 salt mills located in various parts of the country - Dhaka (20), Narayanganj (55), Khulna (25), Jhalkathi (20), Potia (25), Chittagong (80), and Chittagong-Cox's Bazar coastal belt i.e. Bashkhali, Islampur, Bodorkhali, Moheshkhali, Chokoria (65). Total salt cultivation area in Cox's Bazar district is about 60,000 acres. Salt is cultivated in the dry season from February through May (90 to 100 days).

The production of salt in last year was about 0.9 million metric tons. The current demand of the country is about 1.2 million metric tons. Large quantity of salt comes from India and Myanmar every year to meet the domestic demand.

Among the mill owners, only few have their own land in the coastal area, the rest are primarily leased. Salt farmers cultivate salt in the coastal area and then sell it to the salt mill owners. A large number of women are employed in this sector. They are mostly engaged in iodine mixing, packaging, etc.

### **3.3.1 Contribution to the economy**

- ◇ employment for the coastal community; and
- ◇ other supporting business may evolve.

### **3.3.2 Key constraints**

- ◇ lack of adequate storage facility resulting in significant loss;
- ◇ lack of adequate transportation facilities;
- ◇ increasing cost of engine boats and trucks for transportation;
- ◇ lack of access to timely transportation due to poor infrastructure;
- ◇ extortion by local hooligans;
- ◇ lack of financial services in the local market;
- ◇ lack of skilled workforce;
- ◇ lack of security;
- ◇ lack of adequate credit facilities; and
- ◇ smuggling of salt from neighboring countries imposing uneven competition.

### **3.3.3 Key opportunities**

- ◇ technological improvement;
- ◇ investment in storage space; and
- ◇ quality control.

### **3.3.4 Role of Government**

- ◇ security and law and order;
- ◇ restricting illegal entry of salt from neighboring countries;
- ◇ adequate financial support;
- ◇ developing infrastructure (storage, roads, power);
- ◇ quality control; and
- ◇ improvement in licensing procedures and approval.

## **3.4 Ship breaking**

The ship breaking is considered as one of the debatable industry in Bangladesh. Many feel that this industry is practically keeping the economy alive by supplying iron, steel and other machinery and

equipments. While at the same time, the industry is creating environment hazard, irregularities, and malpractices. The ship breaking industry started in 1961 without any appropriate formal guidelines. Chittagong is ideally known for scrapping of large ships over 200.000 dwt

#### **3.4.1 Contribution to the economy**

- Bangladesh does not have iron, as such, and has to depend on the scrapped iron to feed the rolling mills and steel factories. The main users of scrapped irons are the local steel re-rolling mills producing MS rods, MS bars, angles and steel sheets for domestic market.
- This sub sector is contributing about three billion Taka to the national economy annually.
- Around 100,000 people are directly involved in this industry for their livelihood.
- The generators are used by the garment manufacturing factories.
- The boilers are used mainly in rice mills, garments washing plants, knitting plants and other industries.
- The wooden planks/bars, furniture, electrical items, plumbing items, refrigerators, air-conditioners, navigation equipments, life-saving gears, etc are used by domestic users and small enterprises including domestic shipping industry.
- The cold storages are used in various small enterprises including ice-factory, chilling plants, etc.
- Oil and lubricants are used in various furnaces and other industries.

#### **3.4.2 Constraints**

- ◇ no specific guidelines for procurement of ships in terms of types (passenger, cargo, oil tanker, etc.), size (large, small measured on dead-weight);
- ◇ lack of adequate support from the bank;
- ◇ reliance on a very narrow market of recycled iron scrap;
- ◇ lack of skills and expertise of the enterprises on aspect of safety, health and the environment;
- ◇ lack of general safety (work procedure and protective measures);
- ◇ lack of knowledge on general waste management;
- ◇ lack of knowledge, skills, and facilities for hazardous waste management including procedures associated to extraction, removal, treatment and disposal.;
- ◇ lack of monitoring of health and the environment by government; and
- ◇ lack of appropriate accommodation and facilities; including general requirements covering sanitary as well as living conditions for the workers;

#### **3.4.3 Recommendations**

- Specific policies for ship breaking should be enforced.
- Information about the hazardous and toxic materials on the vessels should be declared by the seller and verified by the inspecting authorities.
- The authorities should ensure accountability and responsibility from the local enterprises engaged in scrapping of vessels.

- Level of technical capability of the ship breaking enterprises and their compliances regarding environmental and industrial regulations should be assessed and considered for approving ship breaking.
- Environmental and occupational health regulations should be strictly enforced.
- Policies should be made to maximize the benefit of ship breaking to the economy by either importing large ships for more iron, or smaller ships with more functional equipments.

If this sector is regularized appropriately to standardize import of scrap ships and enforce environment-friendly scrapping procedures and safety regulations, this sector can contribute immensely to the national economy. In India, purchase of small ships is encouraged to gear-up rural economy with generators to facilitate remote community power generation.

### 3.5 Tourism

Despite having great potentials in the tourism sector, Bangladesh is severely lagging behind compared to its neighboring countries in attracting tourists and earn desired benefits from this sector. Last year about 207,199 foreign tourists visited Bangladesh and the country earned 60 million US Dollar from this sector. In comparison, India earns one-third of its foreign currency from this sector while Nepal and Sri Lanka earns 40 percent and 14 percent respectively of their national income from tourism. In Bangladesh, there is recent growth in domestic tourism.

It is estimated that about 500,000 people are engaged in tourism sector in Bangladesh. Tourism industry has the capacity to create jobs (both unskilled and highly skilled) for the rural community, women young people and indigenous communities.

#### 3.5.1 *Contribution to the economy*

- ◇ employment for rural community;
- ◇ foreign exchange earning;
- ◇ other supporting business may evolve;

#### 3.5.2 *Key constraints*

- ◇ the sector works primarily in isolation;
- ◇ lack of clear policies;
- ◇ bureaucracy and “red tapism” of the government;
- ◇ inadequate infrastructure;
- ◇ inadequate facilities for recreation;
- ◇ lack of coast guard;
- ◇ pollution;
- ◇ lack of professionally sound and efficient manpower;
- ◇ poor communication and transportation system;
- ◇ inadequate marketing effort;
- ◇ poor promotional materials;
- ◇ political unrest, frequent strikes;

- ◇ lack of security; and
- ◇ inadequate facilities of food, accommodation, hygiene and health services, etc.

### 3.5.3 Key opportunities

- Protection & Relation: Protect the rights of the actual tourism service providers and develop overall trade relationship between the member organizations.
- Fair: Organize tourism fair at home and abroad to attract domestic and international tourists.
- Publicity: Grow public awareness by launching greater publicity, documentary films, videos, billboards and the like.
- Human Resource Development: Establish and efficiently run training institute to meet the greater shortage of skilled manpower.
- Investment: Investment generation for particular trade as well as prospective areas or zones and create new sources of investment.
- Recognition: Present award to personalities and organization for making greater contribution to tourism development.

### 3.5.4 Role of Government

- ◇ develop tourism infrastructure;
- ◇ public and private sector partnership;
- ◇ develop public awareness for favor of tourism industry;
- ◇ encouraging investors (both local and international);
- ◇ create an environment to ensure quality trade practice;
- ◇ registration system for all genuine tourism organizations;
- ◇ inclusion of private sector to the national tourism council and making it functional;
- ◇ promotion of tourism industry outside Bangladesh by establishing information cell in all diplomatic missions serving abroad;
- ◇ development of general infrastructure facilities;
- ◇ special program for upgrading the infrastructure facilities of prospective spots;
- ◇ introduction of tourist security guard or law enforcing agencies;
- ◇ exclusive tourist zone or tourist village;
- ◇ permanent reception and information desk at domestic and international airports of the country; and
- ◇ simplification of visa and immigration system.

Significant reforms have taken place in the civil aviation sector recently by allowing operation of private sector airlines in the domestic services.

## 3.6 Electricity/power

Bangladesh has amended its Industrial Policy and the power sector is now open to private investment. The government has approved a Private Sector Power Generation Policy to attract

private investment in power generation. Under the policy, the private power companies shall be exempt from corporate income tax for a period of 15 years and the investors will be allowed to import plant and equipment without payment of custom duties and VAT. In 1999, the Power Cell of the Ministry of Power issued a Policy Guideline for Small Power Plant (SPP) in the private sector enabling establishment of SPPs of 1-10 MW in size. Because of the favorable conditions for private investment, a large number of Independent Power Producers (IPPs) have shown interests for setting up power plants in Bangladesh. A Rural Power Company (RPC) has been created.

### **3.6.1 Contribution to the economy**

- ◇ industrialization in the coastal zone;
- ◇ employment creation through increased industrialization; and
- ◇ coverage of electricity.

### **3.6.2 Key constraints**

- ◇ lack of clear policies;
- ◇ bureaucracy of the government; and
- ◇ inadequate infrastructure to encourage private sector investment.

### **3.6.3 Key opportunities**

- ◇ private sector investment;
- ◇ wider coverage in the coastal area; and
- ◇ accelerated industrialization.

### **3.6.4 Role of Government**

- ◇ public and private sector partnership;
- ◇ encouraging investors (both local and international);
- ◇ create an environment to ensure quality partnership;
- ◇ involvement of private sector in developing policies;
- ◇ development of general and basic infrastructure facilities (roads, etc.);
- ◇ simplification of procedures for private sector partnership; and
- ◇ monitoring and evaluation of private sector performance.

## **3.7 Oil and gas**

The discovery of petroleum and gas reserve in the Bay of Bengal is an important prospect. It is estimated that about 20 trillion cubic feet of gas can be extracted from the Bay. The most recent World Bank estimates show that Bangladesh is expected to receive US\$ 1,049 million FDI by 2004, most of which would come from the oil and gas sector. Meanwhile, a \$700 million Western Region Integrated Project (WRIP) has started to develop Shahbazpur gas field in Bhola, as well as installation of a 93-mile pipeline to Khulna, and construction of several gas-based power plants (at Gopalganj, Bhola, Barisal, and Khulna) to serve western Bangladesh. Shahbazpur, discovered by Bapex (Bangladesh Petroleum Exploration Company) in 1995, contains an estimated 330-400 Bcf of recoverable gas. In September 1998, Unocal and Petrobangla agreed to a PSC for development of Shahbazpur. Unocal has proposed an integrated, \$250 million energy project centered around

Shahbazpur, and including a gas pipeline system to serve western Bangladesh, gas-based power plants to be built in Bhola, Barisal, and Khulna, and possibly fertilizer and cement plants. It is planned set-up power-generation plants in Bhola, Khulna and Chittagong to meet the energy demands in the area. A pilot activity of 'off-grid electrification' is going on in isolated coastal island of Char Montaz using the DC lamps. These cheap lamps are replacing kerosene lanterns.

### **3.7.1 Contribution to the economy**

- ◇ industrialization in coastal community;
- ◇ employment; and
- ◇ other supporting business may evolve.

### **3.7.2 Key constraints**

- ◇ lack of clear policies;
- ◇ bureaucracy and “red tapism”; and
- ◇ inadequate infrastructure.

### **3.7.3 Key opportunities**

- Currently, only 32% of Bangladesh’s population has access to electricity and 10% to natural gas. Power shortages and unstable supply remain a critical impediment to the country’s industrial and private sector development.
- Presently the annual demand of LPG in the country is 200,000-250,000 metric tons but the supply in public and private sectors is only 50,000 metric tons. Of the government supply, 8,000 tons come from Kailashtila and 15,000 tons from LP Gas Limited, Chittagong. It is estimated that by the year 2004, the annual demand of LPG will be 300,000 metric tons. By that time, the existing public and private sector capacity will be able to meet only 17 per cent. The government is encouraging private sector to fill this gap.

### **3.7.4 Role of Government**

- ◇ public and private sector partnership development;
- ◇ encouraging investors (both local and international);
- ◇ involvement of private sector in developing policies;
- ◇ simplification of systems for private sector involvement; and
- ◇ monitoring and evaluation of private sector performance.

## **3.8 Sea transportation**

The Bay of Bengal has great significance for Bangladesh and neighboring countries like Sri Lanka, India and Myanmar. Cargo and passenger services with the regional countries have immense potential. Bangladesh and Myanmar has recently agreed to launch shipping services between the two countries soon. The service would connect Bangladesh’s ports of Chittagong, Cox’s Bazar and Teknaf with Myanmar’s Yangon, Akiyab and Maungdaw. It is learnt that through this arrangement, Indian exports can be shipped to Yangon with transshipment at Chittagong. The Singapore-based Sea Consortium has also announced its interest to connect Bangladesh and Myanmar to expand the network in the region

Cost of locally made mechanized trawler is 25% less than importing from outside. As there is no any standard manufacturing guideline, Bangladesh is loosing foreign currency.

The recent sectoral reform had identified suitable privatization prospects in both the Road & Highways and in Inland Water Transport. Contracting out the existing operations and maintenance functions of these organizations is a promising possibility. Besides, private shipping liners and vessel services are in full operation in the country having no restrictions whatsoever.

### **3.8.1 Contribution to the economy**

- ◇ private sector may feel encouraged to set-up industries in the coastal areas;
- ◇ employment;
- ◇ other supporting business may evolve; and
- ◇ facilitate export and import of goods.

### **3.8.2 Key constraints**

- ◇ lack of clear policies; and
- ◇ inadequate encouragement to involve the private sector.

### **3.8.3 Key opportunities**

- ◇ increased coverage of transportation; and
- ◇ increased movement of goods, both raw materials and finished products.

### **3.8.4 Role of Government**

- ◇ encouraging local investors;
- ◇ involvement of private sector in developing policies;
- ◇ development of general and basic infrastructure facilities (shipyard)
- ◇ simplification of systems for private sector partnership.

## **3.9 Sea port**

The two sea ports in Bangladesh, Chittagong and Mongla, support bulk of the international trade of Bangladesh, and might provide a good headway for Nepal and Bhutan's international trade in the future (especially if Bangladesh is connected to the proposed Trans-Asian road network). The ports suffer from overstaffing, labor strikes, cumbersome customs procedures, out-dated and inefficient work rules, and out-dated and inflexible management practices. The cargo yards at Chittagong, which handles 80 percent of Bangladesh's foreign trade, is severely congested -- containers are filled and emptied in port, and cargo-handling equipment is often out of commission for want of spare parts. Turnaround time for feeder vessels in Chittagong is 6–10 days, compared with two days in Bangkok and one day in Singapore. Unofficial costs are inordinately high in Chittagong port. According to one study, for a twenty-foot container there is an extra toll of about \$250, and the congestion delays result on average in another \$150/container in demurrage and other costs. This is over and above the normal port charges of \$100/per container, thus raising the cost of moving the container at the Chittagong port to about \$500 compared to \$150-300 at neighboring ports. This discrepancy taxes Bangladesh's economy and passes the costs of inefficiency to consumers.

**3.9.1 Contribution to the economy**

- ◇ increased movement of goods;
- ◇ employment creation; and
- ◇ other supporting business may evolve.

**3.9.2 Key constraints**

- ◇ lack of clear policies;
- ◇ unhealthy labor-management relationship; and
- ◇ inadequate infrastructure.

**3.9.3 Key opportunities**

- ◇ gradual privatization;
- ◇ privatization of container handling; and
- ◇ deep sea port at Moheshkhali (proposed).

**3.9.4 Role of Government**

- ◇ public and private sector partnership;
- ◇ encouraging investors;
- ◇ simplification of systems for private sector involvement; and
- ◇ efficient port management.

**3.10 Banking & insurance**

Access to banking services for the population has improved during the last three decades. While population per branch was 57,700 in 1972, it was 19,800 in 1991. In 2001, it again rose to 21,300, due to winding up of a number of branches and growth in population. In the coastal area, this figure is even higher.

The large capital deficiency, operating inefficiencies and recurring losses of the banking system is the product of a combination of different factors including:

- ◇ weak corporate governance (bank-wide structures, policies, systems and procedures, especially credit risk management);
- ◇ deficient executive and staff banking skills;
- ◇ absence of professionalism, accountability and incentives;
- ◇ policy relating to lending;
- ◇ political patronage;
- ◇ pervasive and systemic default culture;
- ◇ non recovery of cost for governmental services extended;
- ◇ politically-influenced recruitment, extraordinary staff redundancy, bank-wide security of tenure, and disruptive labor union activity; and
- ◇ poor IT/MIS that hinders efficient and cost-effective operations.

At the moment financial sector reform programs are underway. Private Banks and insurance companies with few exceptions are functioning creditably. Uttara, Pubali and Rupali Banks, which were formally owned by the GOB, were privatized. Shadaran Bima Corporation's (General Insurance) 49% shares are contemplated to be off loaded in the local stock markets soon.

### **3.10.1 Contribution to the economy**

- ◇ investment opportunity may increase in the coastal community;
- ◇ savings and lending may improve.

### **3.10.2 Key constraints**

- ◇ inadequate encouragement;
- ◇ political influence; and
- ◇ poor banking policies.

### **3.10.3 Key opportunities**

- ◇ making coastal specific banking guidelines;
- ◇ encourage lending to small-scale enterprises.

### **3.10.4 Role of Government**

- ◇ create healthy financial and banking policies;
- ◇ monitor and evaluate private sector banks to safeguard local investments and deposits.

## **3.11 Telecommunication**

Telecom services used to be provided exclusively by Bangladesh Telephone and Telegraph Board (BTTB) - a government functionary. The recent revolution in information technology has opened up a new area for private investment in the telecom sector. In the meantime, the following two private companies are operating in rural telecom sector-

1. Bangladesh Rural Tele Communication Authority
2. Sheba

The government has decided to shake hands with a 13-country consortium titled SEA-ME-WE-4 (South East Asia- Middle East-West Europe-4) for ensuring access to information via submarine cable network within June 2004. Recently offshore island of Moheshkhali was brought under BTTB's Internet coverage. BTTB's international (ISD) and NWD (national) call charges have been reduced and the Internet connection fees, and call charge were also reduced. The government is also planning to expand the Internet based e-Post network to 122 post offices by 2005.

Physical infrastructure being a limitation, with the country's long route transmission systems mainly composed of microwave, UHF and VHF radio links, Bangladesh is now encouraging the growth of mobile telephone, which is entirely run by the private sector. The following private companies are operating in the country:

1. Pacific Bangladesh Telephone Ltd.
2. Grameen Telephone
3. Sheba
4. Telecom Malaysia International Ltd.

The government is going to allow fixed-line phones (land) in the private sector very soon as several companies have lined up to increase tele-density in the country. The government has already agreed in principle to open up the PSTN (Public Switch Telecom Network) and expressions of interest would be sought from the private companies soon. The coastal area remains one of the lowest densities of telephone in Bangladesh

#### ***3.11.1 Contribution to the economy***

- ◇ improved communication in the coastal area;
- ◇ supporting business may evolve; and
- ◇ increased coverage of telephone in the coastal area.

#### ***3.11.2 Key constraints***

- ◇ lack of clear policies;
- ◇ frequent change in policies;
- ◇ bureaucracy; and
- ◇ inadequate infrastructure.

#### ***3.11.3 Key opportunities***

- ◇ telecommunication infrastructure development.

#### ***3.11.4 Role of Government***

- ◇ public and private sector partnership;
- ◇ encouraging investors (both local and international);
- ◇ create an environment to ensure quality partnership; and
- ◇ involvement of private sector in developing policies.



## 4 CONCLUSION

Economic development in its basic sense relates to the qualitative change and restructuring in a country's economy in connection with technological and social progress. The main indicator of economic development is increasing GNP per capita (or GDP per capita), reflecting an increase in the economic productivity and average material well-being of the people.

Bangladesh is in the process of a transition from a predominantly state controlled economy to a private sector dominated economy, with the private sector playing an increasingly active role in the economic life of the country. The government of Bangladesh is slowly and gradually devising concrete strategies to facilitate an enabling environment to expand private investment. Although there has not been any strategic thrust for the coastal zone, there are interventions in targeted sectors that are highly relevant for the coastal zone.

The role and importance of private sector investment in accelerating social and economic development in the coastal zone were neglected because of the absence of a visionary policy. With the changing global economic scenario, the need for specialized institutions in promoting private investment, both foreign and domestic, has started to emerge and, as a result, investment promotion and facilitation bodies such as Bangladesh Small and Cottage Industries Corporations, Bangladesh Export Processing Zones Authority, Privatization Commission and Board of Investment, etc. have been developed. Major incentives and facilities for the investors include tax holiday, concessionary taxation, duty free import of machinery and raw materials, depreciation allowance, avoidance of double taxation, remittance of royalty, technical know-how and technical assistance fee have began to attract private investment. However, these facilitative bodies and incentives could not adequately attract the private investments in the coastal zone due to certain reasons including lack of appropriate infrastructures and security. A more in-depth study should be undertaken to understand the underlying reasons and the rationales.

Moreover, in order to achieve PRSP targets nationally and also at the coastal, industrialization and involvement of private sector in small and medium scale enterprises are crucial. It has been estimated that at least 0.20 million off-farm jobs have to be created annually in the coastal zone.



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**ANNEX-A: PERSONS INTERVIEWED AND ORGANIZATIONS VISITED****Entrepreneurs**

Md. Ramzan Ali  
Salt Processing  
Mahmooda Mansion, Choudhury Para  
Near BDR Camp  
Jhlongjha, Cox's Bazar

Md. Nazmul Hossain  
Fishing Trawler Owner  
Maddham Kutubdia Para  
Cox's Bazar

Md. Mohammad Ali/Md Omar Ali  
President/Vice President  
Chamber of Commerce and Industries  
Cox's Bazar

Md. Zamiruddin  
Dehydrated Fish Businessmen  
West Kutubdia Para  
Cox's Bazar

Md. Shafi Showdagar  
Dehydrated Fish Businessmen  
Kutubdia Para  
Cox's Bazar

Mr. Shapan Bhattacharja  
General Manager  
Sea Queen Hotel  
Cox's Bazar

Mr. A.B.M. Siddique  
Managing Director  
Kranti Associate Ltd.  
Dhaka

Mr. Paritash Pal  
Md. Abdul Haq Company  
Kandurghat  
Cox's Bazar

Md. Solimullah  
Macca Salt Industries  
Islampur, Cox's Bazar

Md Abdul Shukur  
Salt Merchant  
Khanghona, Islampur  
Cox's Bazar

Mr. Golam Mostafa Kamal  
Assistant Secretary  
Chittagong Chamber of Commerce & Industry  
Chamber House, Agrabad C/A, Chittagong

Mr. A.S.M. Zakaria  
Assistant Manager  
Summit United Tanks Terminal Limited

Mr. Anis Ahmed  
Gemini Fish Industries  
Khulna

Mr. Shumon Sharkar  
Shrimp Farmer  
Shathkhira  
Khulna

#### NGOs

- Grameen Krishi Foundation
- Resource Integration Center (RIC)
- Organization for Social Association Development (OSAD)
- Tribedi
- Bangladesh Disaster Preparedness Center (BDPC)
- Bangladesh Center for Advancement Society (BCAS)
- Muktee
- Bastob
- Pulse
- SHED
- World Vision
- CARE
- BRAC
- BGS
- GSK
- Anando