

付属書

Appendix 1-1. Domestic Questionnaire Survey Result

Table 2.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of Replacement cost (net asset)	%	n
> TK. 30 crore	42.0	115
TK. 10 – 30 core	17.9	49
TK. 50 lac to < 10 core	17.9	49
< TK. 50 lac	19.0	52
No response	3.3	9
N	100	274

Table 2.2: Percentage distribution of industries by nature of ownership

Foreign ownership	%	n
100%	30.7	84
> 50% to <100%	3.6	10
50%		
> 0% to < 50%	1.5	4
0%	61.7	169
No response	2.6	7
N	100	274

Table 2.3: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	40.9	112
100-250	16.1	44
25-99	14.2	39
< 25	25.5	70
No response	3.3	9
N	100	274

Table 2.4: Percentage distribution of industries by export ratio as proportion of turn over

Export Ratio as proportion of turn over	%	n
100%	48.9	134
75 - 99.99 %	4.0	11
25 - 74.99%	3.6	10
0.01 - 24.99%	6.2	17
0%	35.4	97
No response	1.8	5
N	100	274

Table 2.5: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	17.9	49
75 - 99.99 %	20.1	55
25 - 74.99%	21.2	58
0.01 - 24.99%	7.7	21
0%	31.4	86
No response	1.8	5
N	100	274

Table 2.6: Names of major export destination as reported by surveyed industries

Names of major export destination	%	n
US	52.3	90
EU	63.4	109
Japan	22.1	38
China (including Hong Kong)	22.7	39
India	12.2	21
Cambodia	14.0	24
No response	5.8	10
N	100	172

Table 2.7: Percentage distribution of industries by location

Location of Manufacturing/ Service site	%	n
Government EPZ	45.3	124
Private EPZ	0.0	0
BSCIC Industrial estate	4.4	12
other areas of the country	50.4	138
N	100	274

Table 2.8: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	33.6	92
Produce products in Bangladesh and export to other markets outside Bangladesh	50.7	139
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	15.0	41
No response	0.7	2
N	100	274

Table 2.9: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	89.8	246
Skilled labor	66.1	181
Positive attitude of labor (diligence, loyalty, hard working etc.)	68.6	188
English language proficiency of labor	2.2	6
Skilled managers	35.8	98
Incentive (Tax, duty)	35.0	96
Profit repatriation facilities (free repatriation)	11.3	31
Cheap raw material (e.g., agro product, leather)	26.3	72
Availability of supporting industry (components, engineering, etc.)	24.5	67
Domestic market (size, growth, and potential)	40.9	112
To get benefit of investing in Least Developed Countries (LDC status)	21.9	60
Cheap utility cost (electricity, water, gas, etc.)	33.6	92
Others	3.3	9
No response	0.7	2
N	100	274

Table 2.10: Countries compared by foreign owned/joint venture investors in the process of taking investment decision in Bangladesh

Status of comparison	%	n
Compared with other countries.	28.6	28
Did not compare with other countries.	15.3	15
Don't know	56.1	55
N (applicable)	100	98

Table 2.11: Countries compared with Bangladesh by investors (foreign owned/joint venture) before investing in Bangladesh

Compared countries	%	n
India	17.9	5
Pakistan	3.6	1
China	3.6	1
Srilanka	3.6	1
Japan	3.6	1
No response	82.1	23
N (applicable)	100	28

Table 2.12: Percentage distribution of companies by their opinion on several issues related to trade environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Custom clearance	3.3	47.1	33.2	10.9	5.5
Trade license	6.2	60.6	26.3	4.7	2.2
Import license	4.7	48.9	28.8	5.8	11.7
Export license	5.1	42.0	29.2	6.9	16.8
Bonded warehouse license	2.9	37.2	27.0	4.4	28.5

Table 2.13: Percentage distribution of companies by their opinion on several issues related to transport service related environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Ocean freight service	8.4	49.6	21.9	4.4	15.7
Air freight service	2.9	44.5	20.1	1.8	30.7
Land transport service	3.3	39.1	31.4	11.3	15.0
Railways service	0.7	13.9	29.2	4.4	51.8
River based transport service	2.2	22.3	19.3	4.4	51.8

Table 2.14: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	11.3	62.8	21.5	2.6	1.8
Labor relation	8.0	75.2	14.6	0.7	1.5
Easiness of hiring employees	4.7	63.9	26.3	3.3	1.8
Flexibility of firing employees	3.3	48.5	37.6	1.1	9.5
Availability of skill workers	5.5	39.1	38.3	12.4	4.7

Table 2.15: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	3.3	47.8	28.5	10.2	10.2
Gas	1.8	24.8	28.5	29.2	15.7
Electricity	1.1	23.4	43.8	31.0	0.7
Water	5.5	44.5	25.5	12.0	12.4
Communication	6.6	42.0	34.3	15.7	1.5
Land/Industrial Estate	5.8	42.3	28.5	17.9	5.5
Road (weight, alternative highway, quality of road, road management)	3.3	26.3	38.3	26.6	5.5

Table 2.16: Evaluation of investors (applicable) regarding administrative service of investment & trade promotion institutions of Bangladesh

Institutions/Indicators	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	No response (in %)
Board of Investment (BOI)					
Efficiency of one stop service	2.9	63.2	26.5	1.5	5.9
Transparency of administrative rules and regulations		70.6	26.5	1.5	1.5
Promotion function		58.8	30.9	5.9	4.4
Advisory function	1.5	50.0	38.2	5.9	4.4
Bangladesh Export Processing Zone Authority (BEPZA)					
Efficiency of one stop service	7.2	80.4	10.1	0.7	1.4
Transparency of administrative rules and regulations	5.1	86.2	7.2	0.7	0.7
Promotion function	4.3	84.1	10.1	0.7	0.7
Advisory function	1.4	84.1	11.6	1.4	1.4
EPZs' Industrial support facilities	5.8	76.8	13.0	2.2	2.2
Export Promotion Bureau (EPB)					
Efficiency of one stop service	3.9	67.5	19.5	5.2	3.9
Transparency of administrative rules and regulations	2.6	67.5	23.4	3.9	2.6
Promotion function		66.2	26.0	3.9	3.9
Advisory function (marketing, quality standard, etc.)	2.6	61.0	27.3	3.9	5.2
Bangladesh Small and Cottage Industries Corporation (BSCIC)					
Efficiency of one stop service	6.5	35.5	35.5	9.7	12.9
Transparency of administrative rules and regulations	3.2	48.4	25.8	9.7	12.9
Promotion function	3.2	45.2	35.5	9.7	6.5
Advisory function	3.2	38.7	38.7	12.9	6.5
BSCIC industrial estate supports/ facilities		38.7	32.3	16.1	12.9

Table 2.17: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	41.2	113
Increase moderately	44.9	123
Remain the same	5.8	16
Decrease	0.4	1
Do not know	6.2	17
No response	1.5	4
N	100.0	274

Table 2.18: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	41.3	71
Increase moderately	41.9	72
Remain the same	3.5	6
Decrease		
Do not know	7.0	12
No response	6.4	11
N (applicable)	100.0	172

Table 2.19: Future trade (export) plan of non-exporting firm

Export plan	%	n
Have future export plan	40.2	41
Do not have future export plan	42.2	43
No response	17.6	18
N (applicable)	100.0	102

Table 2.20: Constraints should be improved to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	66.4	182
Infrastructure (road, electricity, gas, water, etc.)	86.5	237
Finance	55.1	151
Training (Human Resource Development)	60.2	165
Marketing	37.6	103
Production Technology	46.0	126
Logistic (transportation, customs clearance, etc.)	43.4	119
Information Communication Technology (ICT)	34.7	95
Others	3.3	9
No response	1.5	4
N	100.0	274

Annex Tables: Chapter III

Table 3.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of replacement cost (net asset)	%	n
> TK. 30 crore	69.6	64
TK. 10 – 30 core	15.2	14
TK. 50 lac to < 10 core	9.8	9
< TK. 50 lac	1.1	1
No response	4.3	4
N	100	92

Table 3.2: Percentage distribution of industries by nature of ownership

Foreign ownership	%	n
100%	56.5	52
> 50% to <100%	3.3	3
50%	0	0
> 0% to < 50%	0	0
0%	37.0	34
No response	3.3	3
N	100	92

Table 3.3: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	66.3	61
100-250	16.3	15
25-99	12.0	11
< 25	2.2	2
No response	3.3	3
N	100.0	92

Table 3.4: Percentage distribution of industries by export ratio as proportion of turn over

Export Ratio as proportion of turn over	%	n
100%	83.7	77
75 - 99.99 %	4.3	4
25 - 74.99%	4.3	4
0.01 - 24.99%	1.1	1
0%	6.5	6
No response	0	0
N	100.0	92

Table 3.5: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	26.1	24
75 - 99.99 %	29.3	27
25 - 74.99%	30.4	28
0.01 - 24.99%	4.3	4
0%	8.7	8
No response	1.1	1
N	100.0	92

Table 3.6: Major export destination as reported by surveyed industries

Major export destination	%	n
US	61.6	53
EU	73.3	63
Japan	14.0	12
China (including Hong Kong)	16.3	14
India	7.0	6
Cambodia	12.8	11
No response	7.0	6
N	100	86

Table 3.7: Percentage distribution of industries by location

Location of Manufacturing/ Service site	%	n
Government EPZ	78.3	72
Private EPZ	0.0	0
BSCIC Industrial estate	2.2	2
Other areas of the country	19.6	18
N	100.0	92

Table 3.8: Purpose of investors in investing in Bangladesh

Purpose of investors in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	4.3	4
Produce products in Bangladesh and export to other markets outside Bangladesh	81.5	75
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	14.1	13
N	100.0	92

Table 3.9: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	93.5	86
Skilled labor	70.7	65
Positive attitude of labor (diligence, loyalty, hard working etc.)	68.5	63
English language proficiency of labor	2.2	2
Skilled managers	45.7	42
Incentive (Tax, duty)	47.8	44
Profit repatriation facilities (free repatriation)	15.2	14
Cheap raw material (e.g., agro product, leather)	27.2	25
Availability of supporting industry (components, engineering, etc.)	28.3	26
Domestic market (size, growth, and potential)	17.4	16
To get benefit of investing in Least Developed Countries (LDC status)	30.4	28
Cheap utility cost (electricity, water, gas, etc.)	45.7	42
Others	1.1	1
N	100	92

Table 3.10: Countries compared by foreign owned/joint venture investors in the process of taking investment decision in Bangladesh

Status of comparison	%	n
Compared with other countries.	38.2	21
Did not compare with other countries.	12.7	7
Don't know	49.1	27
N (applicable)	100.0	55

Table 3.11: Countries compared with Bangladesh by investors (foreign owned/joint venture) before investing in Bangladesh

Compared countries	%	n
India	18.2	4
Pakistan	4.5	1
China	4.5	1
Srilanka	4.5	1
Japan	4.5	1
No response	81.8	18
N (applicable)	100	22

Table 3.12: Percentage distribution of companies by their opinion on several issues related to political situation, market, economic and investment policy environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	0	45.7	42.4	7.6	4.3
Economic Policy Consistency	1.1	52.2	40.2	4.3	2.2
Terms and conditions of ownership	4.3	77.2	9.8	0	8.7
Market size	16.3	60.9	8.7	0	14.1
Market Potential	18.5	48.9	20.7	3.3	8.7

Table 3.13: Percentage distribution of companies by their opinion on several issues related to Trade environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Custom clearance	1.1	62.0	29.3	5.4	2.2
Trade license	4.3	67.4	25.0	1.1	2.2
Import license	3.3	62.0	29.3	1.1	4.3
Export license	3.3	63.0	29.3	1.1	3.3
Bonded warehouse license	1.1	46.7	34.8	5.4	12.0

Table 3.14: Percentage distribution of companies by their opinion on several issues related to transport service environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Ocean freight service	12.0	56.5	22.8	2.2	6.5
Air freight service	3.3	58.7	19.6		18.5
Land transport service	1.1	44.6	28.3	12.0	14.1
Railways service	1.1	12.0	29.3	5.4	52.2
River based transport service	1.1	22.8	15.2	4.3	56.5

Table 3.15: Evaluation of investors regarding labor market aspects of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	12.0	67.4	17.4	2.2	1.1
Labor relation	7.6	76.1	14.1	1.1	1.1
Easiness of hiring employees	5.4	60.9	30.4	2.2	1.1
Flexibility of firing employees	2.2	46.7	43.5		7.6
Availability of skill workers	3.3	45.7	38.0	10.9	2.2

Table 3.16: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	4.3	51.1	31.5	10.9	2.2
Gas	3.3	15.2	38.0	35.9	7.6
Electricity	1.1	29.3	39.1	29.3	1.1
Water	9.8	50.0	23.9	10.9	5.4
Communication	9.8	41.3	34.8	14.1	
Land/Industrial Estate	5.4	53.3	25.0	13.0	3.3
Road (weight, alternative highway, quality of road, road management)	3.3	29.3	38.0	27.2	2.2

Table 3.17: Evaluation of investors (applicable) regarding administrative service of investment & trade promotion institutions of Bangladesh

Institutions/Indicators	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	No response (in %)
Board of Investment (BOI)					
Efficiency of one stop service	8.3	58.3	29.2	0	4.2
Transparency of administrative rules and regulations	0	79.2	20.8	0	0
Promotion function	0	54.2	41.7	4.2	0
Advisory function	4.2	50.0	37.5	8.3	0
Bangladesh Export Processing Zone Authority (BEPZA)					
Efficiency of one stop service	10.5	78.9	10.5	0	0
Transparency of administrative rules and regulations	5.3	89.5	5.3	0	0
Promotion function	3.9	85.5	10.5	0	0
Advisory function	2.6	85.5	11.8	0	0
EPZs' Industrial support facilities	6.6	73.7	14.5	1.3	3.9
Export Promotion Bureau (EPB)					
Efficiency of one stop service	10.0	73.3	13.3	0	3.3
Transparency of administrative rules and regulations	6.7	80.0	13.3	0	0
Promotion function	0	76.7	23.3	0	0
Advisory function (marketing, quality standard, etc.)	6.7	70.0	20.0	3.3	0

Table 3.18: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	53.3	49
Increase moderately	33.7	31
Remain the same	1.1	1
Decrease		
Do not know	8.7	8
No response	3.3	3
N	100.0	92

Table 3.19: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	54.7	47
Increase moderately	27.9	24
Remain the same	1.2	1
Decrease	0	0
Do not know	9.3	8
No response	7.0	6

N (applicable)	100.0	86
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Table 3.20: Future trade (export) plan of non-exporting firm

Export plan	%	n
Have future export plan	50.0	3
Do not have future export plan	33.3	2
No response	16.7	1
N (applicable)	100	6

Table 3.21: Constraints should be minimized to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	63.0	58
Infrastructure (road, electricity, gas, water, etc.)	88.0	81
Finance	37.0	34
Training (Human Resource Development)	60.9	56
Marketing	30.4	28
Production Technology	44.6	41
Logistic (transportation, customs clearance, etc.)	50.0	46
Information Communication Technology (ICT)	35.9	33
Others	2.2	2
No response	2.2	2
N	100.0	92

Annex Tables: Chapter IV

Table 4.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of replacement cost (net asset)	%	n
> TK. 30 crore	40.0	4
TK. 10 – 30 core	40.0	4
TK. 50 lac to < 10 core	20.0	2
< TK. 50 lac	0.0	0
N	100.0	10

Table 4.2: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	10.0	1
100-250	50.0	5
25-99	10.0	1
< 25	20.0	2
No response	10.0	1
N	100.0	10

Table 4.3: Percentage distribution of industries by export ratio as proportion of turn over

Export ratio as proportion of turn over	%	n
100%	0.0	0.0
75 - 99.99 %	0.0	0.0
25 - 74.99%	0.0	0.0
0.01 - 24.99%	10.0	1
0%	70.0	7
No response	20.0	2
N	100.0	10

Table 4.4: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	0.0	0
75 - 99.99 %	30.0	3
25 - 74.99%	50.0	5
0.01 - 24.99%	0.0	0
0%	20.0	2
N	100	10

Table 4.5: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	70.0	7
Produce products in Bangladesh and export to other markets outside Bangladesh	20.0	2
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	10.0	1
N	100.0	10

Table 4.6: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	60.0	6
Skilled labor	40.0	4
Positive attitude of labor (diligence, loyalty, hard working etc.)	30.0	3
English language proficiency of labor	0.0	0
Skilled managers	30.0	3
Incentive (Tax, duty)	40.0	4
Profit repatriation facilities (free repatriation)	10.0	1
Cheap raw material (e.g., agro product, leather)	40.0	4
Availability of supporting industry (components, engineering, etc.)	10.0	1
Domestic market (size, growth, and potential)	90.0	9
To get benefit of investing in Least Developed Countries (LDC status)	10.0	1
Cheap utility cost (electricity, water, gas, etc.)	10.0	1
Others	20.0	2
N	100.0	10

Table 4.7: Percentage distribution of companies by their opinion on several issues related to trade environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Custom clearance	10.0	60.0	20.0	10.0	0.0
Trade license	30.0	50.0	10.0	10.0	0.0
Import license	30.0	50.0	10.0	10.0	0.0
Export license	10.0	30.0	20.0	10.0	30.0
Bonded warehouse license	30.0	10.0	20.0	20.0	20.0

Table 4.8: Percentage distribution of companies by their opinion on several issues related to transport service related environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Ocean freight service	20.0	50.0	10.0	10.0	10.0
Air freight service	0	40.0	10.0	10.0	40.0
Land transport service	20.0	60.0	10.0	10.0	0.0
Railways service	0	40.0	10.0	10.0	40.0
River based transport service	20.0	60.0	0	10.0	10.0

Table 4.9: Evaluation of investors regarding tax and market aspects of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Tax burden	0	20	80	0	0
Administrative services	0	30	60	10	0
Size of market	10	80	10	0	0
Potential of market	10	70	20	0	0

Table 4.10: Evaluation of investors regarding labor market aspects of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	30.0	60.0	0	10.0	0.0
Labor relation	10.0	60.0	30.0	0.0	0.0
Easiness of hiring employees	10.0	30.0	30.0	30.0	0.0
Flexibility of firing employees	10.0	50.0	30.0	0	10.0
Availability of skill laborer	10.0	50.0	40.0	0.0	0.0

Table 4.11: Evaluation of investors (applicable) regarding administrative service of investment & trade promotion institutions of Bangladesh

Institutions/Indicators	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	No response (in %)
Board of Investment (BOI)					
Efficiency of one stop service	0	87.5	12.5	0	0
Transparency of administrative rules and regulations	0	75.0	12.5	12.5	0
Promotion function	0	75.0	12.5	12.5	0
Advisory function	0	75.0	12.5	12.5	0
Bangladesh Export Processing Zone Authority (BEPZA)					
Efficiency of one stop service	0	100.0	0	0	0
Transparency of administrative rules and regulations	0	100.0	0	0	0
Promotion function	0	100.0	0	0	0
Advisory function	0	100.0	0	0	0
EPZs' Industrial support facilities	0	100.0	0	0	0
Export Promotion Bureau (EPB)					
Efficiency of one stop service	0	83.3	0	16.7	0
Transparency of administrative rules and regulations	0	83.3	0	16.7	0
Promotion function	0	83.3	0	16.7	0
Advisory function (marketing, quality standard, etc.)	0	83.3	0	16.7	0

Table 4.12: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	60.0	6
Increase moderately	30.0	3
Remain the same	0.0	0.0
Decrease	0.0	0.0
Do not know	10.0	1
N	100.0	10

Table 4.13: Future trade (export) plan of non-exporting firm

Export plan	%	n
Have future export plan	44.4	4
Do not have future export plan	55.6	5
N (applicable)	100.0	9

Table 4.14: Constraints should be improved to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	40.0	4
Infrastructure (road, electricity, gas, water, etc.)	70.0	7
Finance	80.0	8
Training (Human Resource Development)	60.0	6
Marketing	30.0	3
Production Technology	50.0	5
Logistic (transportation, customs clearance, etc.)	10.0	1
Information Communication Technology (ICT)	40.0	4
N	100.0	10

Annex Tables: Chapter V

Table 5.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of replacement cost (net asset)	%	n
> TK. 30 crore	8.2	5
TK. 10 – 30 core	1.6	1
TK. 50 lac to < 10 core	19.7	12
< TK. 50 lac	68.9	42
No response	1.6	1
N	100.0	61

Table 5.2: Percentage distribution of industries by nature of ownership

Foreign ownership	%	n
100%	8.2	5
> 50% to <100%	0.0	0
50%	0.0	0
> 0% to < 50%	1.6	1
0%	85.2	52
No response	4.9	3
N	100.0	61

Table 5.3: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	9.8	6
100-250	1.6	1
25-99	9.8	6
< 25	77.0	47
No response	1.6	1
N	100.0	61

Table 5.4: Percentage distribution of industries by export ratio as proportion of turn over

Export ratio as proportion of turn over	%	n
100%	6.6	4
75 - 99.99 %	1.6	1
25 - 74.99%		
0.01 - 24.99%	3.3	2
0%	85.2	52
No response	3.3	2
N	100.0	61

Table 5.5: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	4.9	3
75 - 99.99 %	4.9	3
25 - 74.99%	1.6	1
0.01 - 24.99%	11.5	7
0%	73.8	45
No response	3.3	2
N	100.0	61

Table 5.6: Names of major export destination as reported by surveyed industries

Names of major export destination	%	n
US	0.0	0
EU	28.6	2
Japan	28.6	2
China (including Hong Kong)	0.0	0
India	14.3	1
Cambodia	28.6	2
No response	14.3	1
N	100	7

Table 5.7: Percentage distribution of industries by location

Location of Manufacturing/ Service site	%	n
Government EPZ	8.2	5
BSCIC Industrial estate	1.6	1
Other areas of the country	90.2	55
N	100.0	61

Table 5.8: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	86.9	53
Produce products in Bangladesh and export to other markets outside Bangladesh	6.6	4
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	4.9	3
No Response	1.6	1
N	100.0	61

Table 5.9: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	93.4	57
Skilled labor	65.6	40
Positive attitude of labor (diligence, loyalty, hard working etc.)	70.5	43
English language proficiency of labor	1.6	1
Skilled managers	19.7	12
Incentive (Tax, duty)	13.1	8
Profit repatriation facilities (free repatriation)	1.6	1
Cheap raw material (e.g., agro product, leather)	23.0	14
Availability of supporting industry (components, engineering, etc.)	18.0	11
Domestic market (size, growth, and potential)	82.0	50
To get benefit of investing in Least Developed Countries (LDC status)	9.8	6
Cheap utility cost (electricity, water, gas, etc.)	8.2	5
Others	1.6	1
N	100.0	61

Table 5.10: Percentage distribution of companies by their opinion on several issues related to political situation and investment policy environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	0	39.3	14.8	42.6	3.3
Terms and condition of ownership	0	50.8	27.9	1.6	19.2

Table 5.11: Percentage distribution of companies by their opinion on several issues related to transport service related environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Ocean freight service	0.0	36.1	24.6	14.8	24.6
Air freight service	1.6	27.9	34.4	3.3	32.8
Land transport service	1.6	45.9	27.9	16.4	8.2
Railways service	0	19.7	52.5	3.3	24.6
River based transport service	0.0	27.9	32.8	8.2	31.1

Table 5.12: Evaluation of investors regarding the market of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Size	23.0	57.4	16.4	1.6	1.6
Potential	14.8	45.9	32.8	1.6	4.9

Table 5.13: Evaluation of investors regarding raw materials and semi-finished products

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Availability of domestic raw materials	3.3	63.9	26.2	4.9	1.6
Infrastructure to collect raw materials	1.6	55.7	31.1	9.8	1.6
Quality of domestic raw materials/semi finished products, suppliers	1.6	70.5	26.2	1.6	0

Table 5.14: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	4.9	54.1	34.4	3.3	3.3
Labor relation	3.3	70.5	23.0	0	3.3
Easiness of hiring employees	1.6	62.3	32.8	0	3.3
Flexibility of firing employees	1.6	42.6	34.4	0	21.3
Availability of skill labore	4.9	54.1	34.4	3.3	3.3

Table 5.15: Evaluation of investors regarding human resource development

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Education system	1.6	11.5	57.4	19.7	9.8
Vocational training system	1.6	8.2	44.3	27.9	18.0
Availability of competent trade/marketing managers	1.6	24.6	52.5	9.8	11.5
Availability of competent production managers (engineer, pharmacist etc.)	3.3	24.6	50.8	3.3	18.0

Table 5.16: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	1.6	37.7	18.0	21.3	21.3
Gas	0.0	27.9	19.7	27.9	24.6
Electricity	0.0	6.6	36.1	57.4	0.0
Water	0.0	26.2	26.2	26.2	21.3
Communication	0.0	29.5	39.3	29.5	1.6
Land/Industrial Estate	0.0	32.8	26.2	37.7	3.3
Road (weight, alternative highway, quality of road, road management)	0.0	21.3	34.4	41.0	3.3

Table 5.17: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	44.3	27
Increase moderately	39.3	24
Remain the same	14.8	9
Decrease	1.6	1
N	100.0	61

Table 5.18: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	28.6	2
Increase moderately	42.9	3
Remain the same	0	0
Decrease	0	0
Do not know	14.3	1
No response	14.3	1
N (applicable)	100.0	7

Table 5.19: Future trade (export) plan of non-exporting firm

Export plan	%	n
Have future export plan	53.7	29
Do not have future export plan	46.3	25
No response		
N (applicable)	100	54

Table 5.20: Constraints should be minimized to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	85.2	52
Infrastructure (road, electricity, gas, water, etc.)	98.4	60
Finance	91.8	56
Training (Human Resource Development)	55.7	34
Marketing	55.7	34
Production Technology	59.0	36
Logistic (transportation, customs clearance, etc.)	34.4	21
Information Communication Technology (ICT)	31.1	19
Others	1.6	1
N	100.0	61

Annex Tables: Chapter VI

Table 6.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of Replacement cost (net asset)	%	n
> TK. 30 crore	56.3	18
TK. 10 – 30 core	9.4	3
TK. 50 lac to < 10 core	28.1	9
< TK. 50 lac	6.3	2
N	100.0	32

Table 6.2: Percentage distribution of industries by nature of ownership

Foreign ownership	%	n
100%	37.5	12
> 50% to <100%	0.0	0
50%	0.0	0
> 0% to < 50%	3.1	1
0%	59.4	19
N	100.0	32

Table 6.3: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	50.0	16
100-250	12.5	4
25-99	18.8	6
< 25	12.5	4
No response	6.3	2
N	100.0	32

Table 6.4: Percentage distribution of industries by export ratio as proportion of turn over

Export Ratio as proportion of turn over	%	n
100%	71.9	23
75 - 99.99 %	6.3	2
25 - 74.99%	3.1	1
0.01 - 24.99%	6.3	2
0%	12.5	4
N	100.0	32

Table 6.5: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	28.1	9
75 - 99.99 %	21.9	7
25 - 74.99%	12.5	4
0.01 - 24.99%	12.5	4
0%	21.9	7
No response	3.1	1
N	100.0	32

Table 6.6: Names of major export destination as reported by surveyed industries

Names of major export destination	%	n
US	25.0	7
EU	64.3	18
Japan	57.1	16
China (including Hong Kong)	50.0	14
India	25.0	7
Cambodia	7.1	2

N	100	28
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Table 6.7: Percentage distribution of industries by location

Location of Manufacturing/ Service site	%	n
Government EPZ	43.8	14
BSCIC Industrial estate	3.1	1
Other areas of the country	53.1	17
N	100.0	32

Table 6.8: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	18.8	6
Produce products in Bangladesh and export to other market outside Bangladesh	50.0	16
Produce and sell production in Bangladesh and export to other market outside Bangladesh	28.1	9
No Response	3.1	1
N	100.0	32

Table 6.9: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	93.8	30
Skilled labor	71.9	23
Positive attitude of labor (diligence, loyalty, hard working etc.)	71.9	23
English language proficiency of labor	0.0	0
Skilled managers	37.5	12
Incentive (Tax, duty)	50.0	16
Profit repatriation facilities (free repatriation)	9.4	3
Cheap raw material (e.g., agro product, leather)	50.0	16
Availability of supporting industry (components, engineering, etc.)	40.6	13
Domestic market (size, growth, and potential)	21.9	7
To get benefit of investing in Least Developed Countries (LDC status)	21.9	7
Cheap utility cost (electricity, water, gas, etc.)	46.9	15
Others	3.1	1
N	100.0	32

Table 6.10: Percentage distribution of companies by their opinion on several issues related to political situation, market, economic and investment policy environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	0	53.1	40.6		6.3
Economic Policy Consistency	0	62.5	28.1	6.3	3.1
Terms and condition of ownership	6.3	71.9	12.5	3.1	6.3
Market size	15.6	59.4	9.4	0	15.6
Market Potential	21.9	59.4	6.3	0	12.5

Table 6.11: Percentage distribution of companies by their opinion on Raw materials and semi finished products in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Availability of domestic raw materials	6.3	53.1	15.6	9.4	15.6
Infrastructure to collect raw materials	0	46.9	31.3	6.3	15.6
Quality of domestic raw materials/semi finished products, suppliers	6.3	56.3	15.6	3.1	18.8

Table 6.12: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	18.8	53.1	18.8	3.1	6.3
Labor relation	12.5	71.9	12.5	3.1	0.0
Easiness of hiring employees	9.4	65.6	21.9	3.1	0.0
Flexibility of firing employees	3.1	53.1	40.6	3.1	0.0
Availability of skill workers	3.1	40.6	25.0	18.8	12.5

Table 6.13: Evaluation of investors regarding human resource development

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Education system	0	18.8	53.1	9.4	18.8
Vocational training system	0	12.5	53.1	18.8	15.6
Availability of competent trade/marketing managers	0	46.9	40.6	6.3	6.3
Availability of competent production managers (engineer, pharmacist etc.)	6.3	56.3	31.3	3.1	3.1

Table 6.14: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	0.0	56.3	37.5	0	6.3
Gas	0.0	34.4	31.3	25.0	9.4
Electricity	0.0	21.9	50.0	28.1	0.0
Water	6.3	53.1	18.8	9.4	12.5
Communication	12.5	37.5	40.6	6.3	3.1
Land/Industrial Estate	6.3	25.0	50.0	12.5	6.3
Road (weight, alternative highway, quality of road, road management)	6.3	34.4	31.3	18.8	9.4

Table 6.15: Evaluation of investors (applicable) regarding administrative service of investment & trade promotion institutions of Bangladesh

Institutions/Indicators	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	No response (in %)
Board of Investment (BOI)					
Efficiency of one stop service	0	81.8	9.1	0	9.1
Transparency of administrative rules and regulations	0	72.7	18.2	0	9.1
Promotion function	0	63.6	27.3	0	9.1
Advisory function	0	45.5	36.4	0	18.2
Bangladesh Export Processing Zone Authority (BEPZA)					
Efficiency of one stop service	0	82.4	5.9	5.9	5.9
Transparency of administrative rules and regulations	5.9	88.2	0	5.9	0
Promotion function	5.9	82.4	0	5.9	5.9
Advisory function	0	82.4	0	11.8	5.9
EPZs' Industrial support facilities	11.8	76.5	5.9	5.9	0
Export Promotion Bureau (EPB)					
Efficiency of one stop service	0	62.5	18.8	12.5	6.3
Transparency of administrative rules and regulations	0	62.5	37.5	0	0
Promotion function	0	62.5	25.0	6.3	6.3

Institutions/Indicators	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	No response (in %)
Advisory function (marketing, quality standard, etc.)	0	62.5	25.0	6.3	6.3
Bangladesh Small and Cottage Industries Corporation					
Efficiency of one stop service	0	0	60.0	20.0	20.0
Transparency of administrative rules and regulations	0	60.0	0	20.0	20.0
Promotion function	0	60.0	20.0	20.0	0
Advisory function	0	0	60.0	20.0	20.0
BSCIC industrial estate supports/ facilities	0	40.0	0	40.0	20.0

Table 6.16: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	18.8	6
Increase moderately	71.9	23
Remain the same	3.1	1
Decrease	0.0	0
Do not know	6.3	2
N	100.0	32

Table 6.17: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	21.4	6
Increase moderately	71.4	20
Remain the same	3.6	1
Decrease	0.0	0
Do not know	3.6	1
N (applicable)	100.0	28

Table 6.18: Constraints should be improved to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	71.9	23
Infrastructure (road, electricity, gas, water, etc.)	75.0	24
Finance	34.4	11
Training (Human Resource Development)	75.0	24
Marketing	28.1	9
Production Technology	46.9	15
Logistic (transportation, customs clearance, etc.)	59.4	19
Information Communication Technology (ICT)	34.4	11
Others	12.5	4
N	100.0	32

Annex Tables: Chapter VII

Table 7.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of replacement cost (net asset)	%	n
> TK. 30 crore	18.2	2
TK. 10 – 30 core	54.5	6
TK. 50 lac to < 10 core	27.3	3
< TK. 50 lac	0.0	0
N	100.0	11

Table 7.2: Percentage distribution of industries by nature of ownership

Foreign ownership	%	n
100%	0.0	0
> 50% to <100%	9.1	1
50%	0.0	0
> 0% to < 50%	0.0	0
0%	90.9	10
N	100.0	11

Table 7.3: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	72.7	8
100-250	9.1	1
25-99	9.1	1
< 25	9.1	1
N	100	11

Table 7.4: Percentage distribution of industries by export ratio as proportion of turn over

Export ratio as proportion of turn over	%	n
100%	0.0	0.0
75 - 99.99 %	0.0	0.0
25 - 74.99%	0.0	0.0
0.01 - 24.99%	36.4	4
0%	63.6	7
N	100.0	11

Table 7.5: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	9.1	1
75 - 99.99 %	9.1	1
25 - 74.99%	63.6	7
0.01 - 24.99%	0.0	0
0%	18.2	2
N	100.0	11

Table 7.6: Names of major export destination as reported by surveyed industries

Names of major export destination	%	n
US	25.0	1
EU	25.0	1
China (including Hong Kong)	25.0	1
India	25.0	1
Cambodia	50.0	2

N	100	4
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Table 7.7: Percentage distribution of industries by location

Location of Manufacturing/ Service site	%	n
Government EPZ	0	0
BSCIC Industrial estate	63.6	7
Other areas of the country	36.4	4
N	100.0	11

Table 7.8: Purpose of investors in investing in Bangladesh

Purpose of investors in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	27.3	3
Produce products in Bangladesh and export to other markets outside Bangladesh	45.5	5
Produce and sell product in Bangladesh and export to other markets outside Bangladesh	27.3	3
N	100	11

Table 7.9: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	90.9	10
Skilled labor	72.7	8
Positive attitude of labor (diligence, loyalty, hard working etc.)	90.9	10
English language proficiency of labor	0.0	0
Skilled managers	27.3	3
Incentive (Tax, duty)	9.1	1
Profit repatriation facilities (free repatriation)	18.2	2
Cheap raw material (e.g., agro product, leather)	9.1	1
Availability of supporting industry (components, engineering, etc.)	54.5	6
Domestic market (size, growth, and potential)	18.2	2
To get benefit of investing in Least Developed Countries (LDC status)	63.6	7
Cheap utility cost (electricity, water, gas, etc.)	27.3	3
Others	9.1	1
N	100.0	11

Table 7.10: Percentage distribution of companies by their opinion on several issues related to political situation, investment policy and promotion environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	9.1	18.2	72.7	0	.0
Intellectual Property Right (IPR)	0	27.3	72.7	0	0
Investment promotion consistency	0	90.9	9.1	0	0
Investment Incentive	9.1	36.4	45.5	0	9.1

Table 7.11: Percentage distribution of companies by their opinion on several issues related to trade environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Custom clearance	27.3	36.4	36.4	0.0	0.0
Trade license	9.1	81.8	9.1	0.0	0.0
Import license	18.2	72.7	9.1	0.0	0.0
Export license	18.2	18.2	27.3	0	36.4
Bonded warehouse license	0.0	36.4	45.5	0	18.2

Table 7.12: Evaluation of investors regarding the market and tax scenario in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Size	18.2	63.6	18.2	0	0
Potential	18.2	63.6	0	0	18.2
Tax burden	0	36.4	54.5	0	9.1
Administrative service	0	45.5	45.5	0	9.1

Table 7.13: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	27.3	36.4	36.4	0	0
Labor relation	27.3	45.5	18.2	0	9.1
Easiness of hiring employees	0	54.5	36.4	0	9.1
Flexibility of firing employees	0	36.4	63.6	0	0
Availability of skill labor	9.1	18.2	54.5	18.2	0

Table 7.14: Evaluation of investors regarding human resource development

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Education system	9.1	27.3	45.5	18.2	0
Vocational training system	9.1	27.3	27.3	18.2	18.2
Availability of competent trade/marketing managers	0	63.6	27.3	0	9.1
Availability of competent production managers (engineer, pharmacist etc.)	9.1	72.7	18.2	0	0

Table 7.15: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	0.0	36.4	63.6	0	0
Gas	0.0	45.5	54.5	0.0	0
Electricity	0.0	18.2	72.7	9.1	0
Water	0.0	18.2	81.8	0.0	0
Communication	9.1	18.2	36.4	27.3	9.1
Land/Industrial Estate	18.2	27.3	18.2	36.4	0.0
Road (weight, alternative highway, quality of road, road management)	0.0	18.2	45.5	36.4	0.0

Table 7.16: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	27.3	3
Increase moderately	63.6	7
Remain the same	0.0	0.0
Decrease	0.0	0.0
Do not know	9.1	1
N	100.00	11

Table 7.17: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	25.0	1
Increase moderately	75.0	3
N (applicable)	100.0	4

Table 7.18: Future trade (export) plan of non-exporting firm

Export plan	%	n
Have future export plan	28.6	2
Do not have future export plan	14.3	1
No response	57.1	4
N (applicable)	100	7

Table 7.19: Constraints should be minimized to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	36.4	4
Infrastructure (road, electricity, gas, water, etc.)	72.7	8
Finance	54.5	6
Training (Human Resource Development)	36.4	4
Marketing	54.5	6
Production Technology	27.3	3
Logistic (transportation, customs clearance, etc.)	36.4	4
Information Communication Technology (ICT)	36.4	4
N	100	11

Annex Tables: Chapter VIII

Table 8.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of replacement cost (net asset)	%	n
> TK. 30 crore	8.3	1
TK. 10 – 30 core	16.7	2
TK. 50 lac to < 10 core	41.7	5
< TK. 50 lac	33.3	4
N	100.0	12

Table 8.2: Percentage distribution of industries by nature of ownership

Foreign ownership	%	n
100%	0.0	0
> 50% to <100%	0.0	0
50%	0.0	0
> 0% to < 50%	16.7	2
0%	83.3	10
N	100.0	12

Table 8.3: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	0.0	0
100-250	25.0	3
25-99	33.3	4
< 25	41.7	5
N	100	12

Table 8.4: Percentage distribution of industries by export ratio as proportion of turn over

Export ratio as proportion of turn over	%	n
100%	8.3	1
75 - 99.99 %	8.3	1
25 - 74.99%	8.3	1
0.01 - 24.99%	41.7	5
0%	25.0	3
No response	8.3	1
N	100.0	12

Table 8.5: Names of major export destination as reported by surveyed industries

Names of major export destination	%	n
US	100.0	8
EU	62.5	5
Japan	12.5	1
China (including Hong Kong)	12.5	1
India	25.0	2
N	100.0	8

Table 8.6: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	33.3	4
Produce products in Bangladesh and export to other markets outside Bangladesh	25.0	3
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	41.7	5
N	100.0	12

Table 8.7: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	50.0	6
Skilled labor	66.7	8
Positive attitude of labor (diligence, loyalty, hard working etc.)	41.7	5
English language proficiency of labor	25.0	3
Skilled managers	16.7	2
Incentive (Tax, duty)	33.3	4
Profit repatriation facilities (free repatriation)	8.3	1
Cheap raw material (e.g., agro product, leather)	0.0	0
Availability of supporting industry (components, engineering, etc.)	0.0	0
Domestic market (size, growth, and potential)	58.3	7
To get benefit of investing in Least Developed Countries (LDC status)	8.3	1
Cheap utility cost (electricity, water, gas, etc.)	41.7	5
N		

Table 8.8: Percentage distribution of companies by their opinion on several issues related to political situation, information security, investment policy environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	0	33.3	25.0	16.7	25.0
Security condition of information	0	66.7	16.7	8.3	8.3
Intellectual Property Right (IPR)	0	41.7	8.3	50.0	0

Table 8.9: Evaluation of investors regarding Tax and market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Tax burden	0	58.3	33.3	8.3	0
Administrative services	0	25.0	41.7	33.3	0
Size of market	8.3	41.7	33.3	16.7	0
Potential of market	58.3	33.3	8.3	0	0

Table 8.10: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	16.7	50.0	33.3	0.0	0.0
Labor relation	8.3	75.0	16.7	0.0	0.0
Easiness of hiring employees	0.0	41.7	41.7	16.7	0.0
Flexibility of firing employees	8.3	25.0	41.7	8.3	16.7
Availability of skill workers	8.3	16.7	75.0	0.0	0.0

Table 8.11: Evaluation of investors regarding human resource development

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Education system	16.7	0	50.0	33.3	0
Vocational training system	0	8.3	25.0	0	66.7
Availability of competent trade/marketing managers	8.3	25.0	33.3	33.3	
Availability of competent production managers (engineer, pharmacist etc.)	8.3	33.3	16.7	16.7	25.0

Table 8.12: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	25.0	3
Increase moderately	66.7	8
No response	8.3	1
N	100.0	12

Table 8.13: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	50.0	4
Increase moderately	37.5	3
No response	12.5	1
N (applicable)	100.0	8

Table 8.14: Future trade (export) plan of non-exporting firm

Export plan	%	n
Have future export plan	50.0	2
Do not have future export plan	0	0
No response	50.0	2
N (applicable)	100	4

Table 8.15: Constraints should be minimized to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	16.7	2
Infrastructure (road, electricity, gas, water, etc.)	66.7	8
Finance	83.3	10
Training (Human Resource Development)	66.7	8
Marketing	66.7	8
Production Technology	16.7	2
Logistic (transportation, customs clearance, etc.)	8.3	1
Information Communication Technology (ICT)	58.3	7
Others	16.7	2
N	100.0	12

Annex Tables: Chapter IX

Table 9.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of replacement cost (net asset)	%	n
> TK. 30 crore	42.1	8
TK. 10 – 30 core	57.9	11
TK. 50 lac to < 10 core	0.0	0
< TK. 50 lac	0.0	0
N	100.0	19

Table 9.2: Percentage distribution of industries by nature of ownership

Foreign ownership	%	n
100%	31.6	6
> 50% to <100%	21.1	4
50%	0.0	0
> 0% to < 50%	0.0	0
0%	42.1	8
No response	5.3	1
N	100.0	19

Table 9.3: Percentage distribution of industries by number of employees (full time)

Number of employees (full time)	%	n
>250	47.4	9
100-250	31.6	6
25-99	15.8	3
< 25	0.0	0
No response	5.3	1
N	100.0	19

Table 9.4: Percentage distribution of industries by export ratio as proportion of turn over

Export Ratio as proportion of turn over	%	n
100%	84.2	16
75 - 99.99 %	5.3	1
25 - 74.99%	5.3	1
0.01 - 24.99%	0.0	0
0%	5.3	1
N	100.0	19

Table 9.5: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	15.8	3
75 - 99.99 %	26.3	5
25 - 74.99%	26.3	5
0.01 - 24.99%	10.5	2
0%	21.1	4
N	100.0	19

Table 9.6: Names of major export destination as reported by surveyed industries

Names of major export destination	%	n
US	77.8	14
EU	44.4	8
Japan	5.6	1
China (including Hong Kong)	11.1	2
India	5.6	1
Cambodia	11.1	2
No response	16.7	3
N	100	18

Table 9.7: Percentage distribution of industries by location

Location of Manufacturing/ Service site	%	n
Government EPZ	84.2	16
BSCIC Industrial estate	5.3	1
Other areas of the country	10.5	2
N	100.0	19

Table 9.8: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	0.0	0
Produce products in Bangladesh and export to other markets outside Bangladesh	89.5	17
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	10.5	2
N	100.0	19

Table 9.9: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	89.5	17
Skilled labor	57.9	11
Positive attitude of labor (diligence, loyalty, hard working etc.)	78.9	15
English language proficiency of labor	0.0	0
Skilled managers	42.1	8
Incentive (Tax, duty)	42.1	8
Profit repatriation facilities (free repatriation)	21.1	4
Cheap raw material (e.g., agro product, leather)	15.8	3
Availability of supporting industry (components, engineering, etc.)	21.1	4
Domestic market (size, growth, and potential)	26.3	5
To get benefit of investing in Least Developed Countries (LDC status)	15.8	3
Cheap utility cost (electricity, water, gas, etc.)	63.2	12
Others	5.3	1
N	100.0	19

Table 9.10: Countries compared by foreign owned/joint venture investors in the process of taking investment decision in Bangladesh

Status of comparison	%	n
Compared with other countries.	30.0	3
Did not compare with other countries.	10.0	1
Don't know	60.0	6
N (applicable)	100.0	10

Table 9.11: Percentage distribution of companies by their opinion on several issues related to political situation, market and economic policy environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	0	63.2	15.8	15.8	5.3
Economic Policy Consistency	0	78.9	5.3	15.8	0
Market size	10.5	63.2	10.5	0	15.8
Market Potential	10.5	78.9	0	0	10.5

Table 9.12: Percentage distribution of companies by their opinion on several issues related to Trade environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Custom clearance	0.0	52.6	21.1	26.3	0.0
Trade license	0.0	68.4	15.8	15.8	0.0
Import license	0.0	57.9	26.3	15.8	0.0
Export license	0.0	57.9	26.3	15.8	0.0
Bonded warehouse license	0.0	52.6	31.6	0	15.8

Table 9.13: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	0.0	73.7	26.3	0.0	0.0
Labor relation	0.0	94.7	5.3	0.0	0.0
Easiness of hiring employees	0.0	94.7	5.3	0.0	0.0
Flexibility of firing employees	0.0	73.7	26.3	0.0	0.0
Availability of skill workers	0.0	73.7	10.5	10.5	5.3

Table 9.14: Evaluation of investors regarding human resource development

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Education system	0	15.8	31.6	21.1	31.6
Vocational training system	0	10.5	47.4	26.3	15.8
Availability of competent trade/marketing managers	0	63.2	26.3	5.3	5.3
Availability of competent production managers (engineer, pharmacist etc.)	0	57.9	36.8	0	5.3

Table 9.15: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	5.3	78.9	15.8	0.0	0.0
Gas	0.0	42.1	31.6	21.1	5.3
Electricity	0.0	47.4	36.8	15.8	0
Water	0.0	57.9	36.8	5.3	0
Communication	0.0	84.2	10.5	5.3	0
Land/Industrial Estate	5.3	57.9	31.6	5.3	0
Road (weight, alternative highway, quality of road, road management)	5.3	21.1	57.9	15.8	0

Table 9.16: Evaluation of investors (applicable) regarding administrative service of investment & trade promotion institutions of Bangladesh

Institutions/Indicators	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	No response (in %)
Bangladesh Export Processing Zone Authority (BEPZA)					
Efficiency of one stop service	0	86.7	6.7	0	6.7
Transparency of administrative rules and regulations	0	100.0	0	0	0
Promotion function	0	93.3	6.7	0	0
Advisory function	0	86.7	13.3	0	0
EPZs' Industrial support facilities	0	100.0	0	0	0

Table 9.17: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	47.4	9
Increase moderately	36.8	7
Remain the same	10.5	2
Decrease	0.0	0
Do not know	5.3	1
N	100.0	19

Table 9.18: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	27.8	5
Increase moderately	38.9	7
Remain the same	11.1	2
Decrease	0.0	0
Do not know	5.6	1
No response	16.7	3
N (applicable)	100.0	18

Table 9.19: Constraints should be minimized to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	84.2	16
Infrastructure (road, electricity, gas, water, etc.)	84.2	16
Finance	31.6	6
Training (Human Resource Development)	42.1	8
Marketing	15.8	3
Production Technology	36.8	7
Logistic (transportation, customs clearance, etc.)	57.9	11
Information Communication Technology (ICT)	31.6	6
No response	5.3	1
N	100.0	19

Annex Tables: Chapter X

Table 10.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of replacement cost (net asset)	%	n
> TK. 30 crore	66.7	4
TK. 10 – 30 core	16.7	1
TK. 50 lac to < 10 core	0.0	0.0
< TK. 50 lac	0.0	0.0
No response	16.7	1
N	100.0	6

Table 10.2: Percentage distribution of industries by number of employees (full time)

Number of employees (full time)	%	n
>250	66.7	4
100-250	0.0	0
25-99	33.3	2
< 25	0.0	0
No response		
N	100.0	6

Table 10.3: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	0.0	0
75 - 99.99 %	33.3	2
25 - 74.99%	33.3	2
0.01 - 24.99%	0.0	0
0%	33.3	2
N	100.0	6

Table 10.4: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	83.3	5
Produce products in Bangladesh and export to other markets outside Bangladesh	0.0	0
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	16.7	1
N	100.0	6

Table 10.5: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	100.0	6
Skilled labor	100.0	6
Positive attitude of labor (diligence, loyalty, hard working etc.)	100.0	6
English language proficiency of labor	0.0	0
Skilled managers	83.3	5

Factors	%	n
Incentive (Tax, duty)	0	0
Profit repatriation facilities (free repatriation)	50.0	3
Cheap raw material (e.g., agro product, leather)	83.3	5
Availability of supporting industry (components, engineering, etc.)	50.0	3
Domestic market (size, growth, and potential)	100.0	6
To get benefit of investing in Least Developed Countries (LDC status)	16.7	1
Cheap utility cost (electricity, water, gas, etc.)	83.3	5
Others		
N	100.0	6

Table 10.6: Percentage distribution of companies by their opinion on several issues related to political situation, economic and investment policy environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	0	66.7	16.7	0	16.7
Economic Policy Consistency	0	83.3	16.7	0	0
Terms and condition of ownership	0	100.0	0	0	0

Table 10.7: Percentage distribution of companies by their opinion on several issues related to transport service related environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Ocean freight service	16.7	16.7	0	0.0	66.7
Air freight service	16.7	0	0.0	0.0	83.3
Land transport service	16.7	50.0	0	0.0	33.3
Railways service	0	0.0	0.0	0.0	100.0
River based transport service	16.7	33.3	33.3	0	16.7

Table 10.8: Percentage distribution of companies by their opinion on market condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Size	33.3	66.7	0	0	0
Potential	16.7	83.3	0	0	0

Table 10.9: Percentage distribution of companies by their opinion on Raw materials and semi finished products in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Availability of domestic raw materials	50.0	50.0	0	0	0
Infrastructure to collect raw materials	16.7	83.3	0	0	0
Quality of domestic raw materials/semi finished products, suppliers	33.3	50.0	16.7	0	0

Table 10.10: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	16.7	83.3	0.0	0.0	0.0
Labor relation	0.0	100.0	0.0	0.0	0.0
Easiness of hiring employees	0.0	83.3	16.7	0.0	0.0
Flexibility of firing employees	0.0	83.3	0	16.7	0.0
Availability of skill labors	0.0	100.0	0.0	0.0	0.0

Table 10.11: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	0.0	66.7	33.3	0.0	0.0
Gas	0.0	50.0	50.0	0.0	0.0
Electricity	0.0	33.3	66.7	0.0	0.0
Water	0.0	100.0	0	0.0	0.0
Communication	0.0	100.0	0	0.0	0.0
Land/Industrial Estate	0.0	100.0	0	0.0	0.0
Road (weight, alternative highway, quality of road, road management)	0.0	100.0	0	0.0	0.0

Table 10.12: Constraints should be minimized to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	83.3	5
Infrastructure (road, electricity, gas, water, etc.)	83.3	5
Finance	83.3	5
Training (Human Resource Development)	83.3	5
Marketing	33.3	2
Production Technology	100.0	6
Logistic (transportation, customs clearance, etc.)	66.7	4
Information Communication Technology (ICT)	100.0	6
N	100.0	6

Annex Tables: Chapter XI

Table 11.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of Replacement cost (net asset)	%	n
> TK. 30 crore	14.3	1
TK. 10 – 30 core	14.3	1
TK. 50 lac to < 10 core	57.1	4
< TK. 50 lac	14.3	1
N	100.0	7

Table 11.2: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	14.3	1
100-250	14.3	1
25-99	0.0	0
< 25	71.4	5
N	100.0	7

Table 11.3: Percentage distribution of industries by export ratio as proportion of turn over

Export Ratio as proportion of turn over	%	n
100%	0.0	0.0
75 - 99.99 %	0.0	0.0
25 - 74.99%	14.3	1
0.01 - 24.99%	14.3	1
0%	71.4	5
N	100.0	7

Table 11.4: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	0.0	0
75 - 99.99 %	57.1	4
25 - 74.99%	14.3	1
0.01 - 24.99%	0.0	0
0%	28.6	2
N	100.0	7

Table 11.5: Major export destination as reported by surveyed industries

Major export destination	%	n
US	0.0	0
EU	50.0	1
Japan	0.0	0
China (including Hong Kong)	0.0	0
India	50.0	1
Cambodia	100.0	2
N	100	2

Table 11.6: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	71.4	5
Produce products in Bangladesh and export to other market outside Bangladesh	14.3	1
Produce and sell production in Bangladesh and export to other market outside Bangladesh	14.3	1
N	100.0	7

Table 11.7: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	100.0	7
Skilled labor	14.3	1
Positive attitude of labor (diligence, loyalty, hard working etc.)	71.4	5
English language proficiency of labor	0.0	0
Skilled managers	14.3	1
Incentive (Tax, duty)	14.3	1
Profit repatriation facilities (free repatriation)	14.3	1
Cheap raw material (e.g., agro product, leather)	14.3	1
Domestic market (size, growth, and potential)	85.7	6
N	100.0	7

Table 11.8: Percentage distribution of companies by their opinion on several issues related to Trade environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Custom clearance	0.0	14.3	42.9	42.9	0.0
Trade license	0.0	14.3	57.1	28.6	0.0
Import license	0.0	14.3	42.9	42.9	0.0
Export license	0.0	14.3	14.3	0	71.4
Bonded warehouse license	0.0	14.3	0	0	85.7

Table 11.9: Percentage distribution of companies by their opinion on Raw materials and semi finished products in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Availability of domestic raw materials	0	28.6	57.1	0	14.3
Infrastructure to collect raw materials	0	42.9	57.1	0	0
Quality of domestic raw materials/semi finished products, suppliers	0	85.7	14.3	0	0

Table 11.10: Percentage distribution of companies by their opinion on support industries in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Availability	0	0	100.0	0	0
Quality	0	71.4	28.6	0	0
Cost	0	42.9	57.1	0	0
Delivery	0	71.4	28.6	0	0

Table 11.11: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	0.0	0
Increase moderately	85.7	6
Remain the same	14.3	1
N	100.0	7

Table 11.12: Constraints should be minimized to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	85.7	6
Infrastructure (road, electricity, gas, water, etc.)	100.0	7
Finance	71.4	5
Training (Human Resource Development)	57.1	4
Marketing	14.3	1
Production Technology	71.4	5
Information Communication Technology (ICT)	28.6	2
N	100.0	7

Annex Tables: Chapter XII

Table 12.1: Percentage distribution of industries by amount of replacement cost (net asset)

Amount of Replacement cost (net asset)	%	n
> TK. 30 crore	33.3	8
TK. 10 – 30 core	25.0	6
TK. 50 lac to < 10 core	20.8	5
< TK. 50 lac	8.3	2
No response	12.5	3
N	100.0	24

Table 12.2: Percentage distribution of industries by number of employees (full time)

Number of employees (Full time)	%	n
>250	25.0	6
100-250	33.3	8
25-99	20.8	5
< 25	16.7	4
No response	4.2	1
N	100.0	24

Table 12.3: Percentage distribution of industries by export ratio as proportion of turn over

Export Ratio as proportion of turn over	%	n
100%	54.2	13
75 - 99.99 %	8.3	2
25 - 74.99%	8.3	2
0.01 - 24.99%	4.2	1
0%	25.0	6
N	100.0	24

Table 12.4: Percentage of industries by import ratio as proportion of purchase (excluding machineries cost)

Import ratio as proportion of purchase	%	n
100%	37.5	9
75 - 99.99 %	12.5	3
25 - 74.99%	16.7	4
0.01 - 24.99%	4.2	1
0%	29.2	7
No response		
N		

Table 12.5: Names of major export destination as reported by surveyed industries

Names of major export destination	%	n
US	38.9	7
EU	61.1	11
Japan	33.3	6
China (including Hong Kong)	38.9	7
India	11.1	2
Cambodia	11.1	2
N	100.0	18

Table 12.6: Percentage distribution of industries by location

Location of Manufacturing/ Service site	%	n
Government EPZ	70.8	17
BSCIC Industrial estate	0.0	0
other areas of the country	29.2	7
N	100.0	24

Table 12.7: Purpose of investor in investing in Bangladesh

Purpose of investor in investing in Bangladesh	%	n
Produce and sell products in the domestic market of Bangladesh	20.84	5
Produce products in Bangladesh and export to other markets outside Bangladesh	66.7	16
Produce and sell production in Bangladesh and export to other markets outside Bangladesh	12.5	3
N	100.0	24

Table 12.8: Factors that attract investors in investing in Bangladesh

Factors	%	n
Cheap labor	87.5	21
Skilled labor	62.5	15
Positive attitude of labor (diligence, loyalty, hard working etc.)	62.5	15
English language proficiency of labor	0.0	0
Skilled managers	41.7	10
Incentive (Tax, duty)	41.7	10
Profit repatriation facilities (free repatriation)	4.2	1
Cheap raw material (e.g., agro product, leather)	12.5	3
Availability of supporting industry (components, engineering, etc.)	12.5	3
Domestic market (size, growth, and potential)	16.7	4
To get benefit of investing in Least Developed Countries (LDC status)	25.0	6
Cheap utility cost (electricity, water, gas, etc.)	16.7	4
Others	8.3	2
No response	4.2	1
N	100.0	24

Table 12.9: Percentage distribution of companies by their opinion on several issues related to political situation, and investment policy environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Political Stability	0	41.7	41.7	16.7	0
Economic Policy Consistency	0	50	41.7	0	8.3
Terms and conditions of ownership	12.5	83.3	0	0	4.2

Table 12.10: Percentage distribution of companies by their opinion on several issues related to trade environment in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Custom clearance	4.2	41.7	29.2	16.7	8.3
Trade license	20.8	50.0	25.0	4.2	
Import license	12.5	54.2	20.8	4.2	8.3
Export license	20.8	41.7	20.8	4.2	12.5
Bonded warehouse license	8.3	50.0	16.7	4.2	20.8

Table 12.11: Percentage distribution of companies by their opinion on several issues related market in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Market size	20.8	50.0	12.5	0	16.7
Market Potential	20.8	45.8	12.5	4.2	16.7

Table 12.12: Evaluation of investors regarding labor market aspect of Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Labor cost	8.3	75.0	12.5	4.2	0
Labor relation	16.7	79.2	4.2	0	0
Easiness of hiring employees	12.5	66.7	12.5	4.2	4.2
Flexibility of firing employees	12.5	41.7	33.3	0	12.5
Availability of skill workers	12.5	29.2	45.8	8.3	4.2

Table 12.13: Percentage distribution of companies by their opinion on several issues related to infrastructure condition in Bangladesh

Indicator	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	Not Applicable (in %)
Port (size, delivery time)	4.2	45.8	37.5	8.3	4.2
Gas	0	25.0	33.3	33.3	8.3
Electricity	0	33.3	41.7	20.8	4.2
Water	8.3	54.2	29.2	0	8.3
Communication	8.3	54.2	33.3	4.2	
Land/Industrial Estate	16.7	41.7	37.5	4.2	
Road (weight, alternative highway, quality of road, road management)	12.5	8.3	62.5	16.7	

Table 12.14: Evaluation of investors (applicable) regarding administrative service of investment & trade promotion institutions of Bangladesh

Institutions/Indicators	Excellent (in %)	Good (in %)	Fair (in %)	Bad (in %)	No response (in %)
Board of Investment (BOI)					
Efficiency of one stop service	0	55.6	44.4	0	0
Transparency of administrative rules and regulations	0	66.7	33.3	0	0
Promotion function	0	55.6	44.4	0	0
Advisory function	0	33.3	66.7	0	0

Bangladesh Export Processing Zone Authority (BEPZA)					
Efficiency of one stop service	12.5	68.8	18.8	0	0
Transparency of administrative rules and regulations	6.3	68.8	25.0	0	0
Promotion function	0	68.8	31.3	0	0
Advisory function	0	75.0	25.0	0	0
EPZs' Industrial support facilities	6.3	62.5	25.0	0	0
Export Promotion Bureau (EPB)					
Efficiency of one stop service	0	55.6	44.4	0	0
Transparency of administrative rules and regulations	0	44.4	44.4	0	11.1
Promotion function	0	33.3	55.6	0	11.1
Advisory function (marketing, quality standard, etc.)	0	33.3	55.6	0	11.1

Table 12.15: Percentage distribution of investors by their future plan of investment and trade in Bangladesh

Future investment and trade plan of investors	%	n
Increase remarkably	16.7	4
Increase moderately	58.3	14
Remain the same	8.3	2
Decrease	0.0	0
Do not know	16.7	4
N	100.0	24

Table 12.16: Future trade (export) plan of currently export oriented firm

Future trade (export) plan	%	n
Increase remarkably	27.8	5
Increase moderately	55.6	10
Remain the same	11.1	2
Decrease	0.0	0
Do not know	5.6	1
N (applicable)	100.0	18

Table 12.17: Constraints should be improved to expand business in Bangladesh as suggested by investors

Constraints	%	n
Land availability	50.0	12
Infrastructure (road, electricity, gas, water, etc.)	87.5	21
Finance	41.7	10
Training (Human Resource Development)	66.7	16
Marketing	37.5	9
Production Technology	25.0	6
Logistic (transportation, customs clearance, etc.)	50.0	12
Information Communication Technology (ICT)	12.5	3
Others	0.0	0
No response	4.2	1
N	100.0	24

Appendix 1-2. Foreign Questionnaire Survey Result

Table 2.1: Distribution of sample industries by country of origin

Origin of the surveyed industries	n	%
India	24	28.9
Other South Asian countries	23	27.7
China	8	9.6
Thailand	18	21.7
Taiwan	10	12.0
Total (N:83)	83	100.0

Table 2.2: Distribution of sample industries (in %) by business sectors

Business sectors	n	%
Textile and garment related products	2	2.4
Agro-products or agro-processed products	8	9.6
Light engineering products (including auto-parts and bicycles)	22	26.5
Footwear and leather products	2	2.4
Pharmaceutical products	2	2.4
Software and ICT products	1	1.2
Home textile	1	1.2
Ship building industries	1	1.2
Toiletries Products	6	7.2
Others	38	45.8
Total (N:83)	83	100.0

Table 2.3: Percentage distribution of industries by export as proportion of turnover

Export as proportion of turn over	n	%
100%	1	1.2
75 - 99.99 %	17	20.5
25 - 74.99%	43	51.8
0.01 - 24.99%	6	7.2
0%	11	13.3
No response	5	6.0
Total (N:83)	83	100.0

Table 2.4: Percentage distribution of industries by import as proportion of purchase

Import as proportion of purchase	n	%
100%	11	13.3
75 - 99.99 %	0	0.0
25 - 74.99%	2	2.4
0.01 - 24.99%	48	57.8
0%	17	20.5
No response	5	6.0
Total (N:83)	83	100.0

Table 2.5: Name of major export destination (multiple responses) as reported by surveyed applicable industries (in %)

Names of major export destination (multiple responses)	n	%
Europe	1	1.5
Asian Countries	4	6.0
EU Countries	22	32.8
Middle East Countries	1	1.5
Malaysia	1	1.5

Names of major export destination (multiple responses)	n	%
Japan	1	1.5
India	8	11.9
Pakistan	3	4.5
America/USA	23	34.3
Germany	6	9.0
UK	4	6.0
Australia	3	4.5
Argentina	1	1.5
Italy	1	1.5
China	2	3.0
Bhutan	1	1.5
Bangladesh	1	1.5
No response	22	32.8
Total* (applicable industries which export; N:67)	67	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Table 2.6: Distribution of potential investors by interest in investing in Bangladesh

Interest	n	%
Interested to invest in Bangladesh	49	59.0
Not interested to invest in Bangladesh	32	38.6
No response	2	2.4
Total (N:83)	83	100.0

Table 2.7: Percentage distribution of interested investors to invest in Bangladesh by purpose of future investment in Bangladesh

Purpose of investment	n	%
Produce and sell products in the domestic market of Bangladesh	7	14.0
Produce products in Bangladesh and sell in foreign market	0	0.0
Produce products in Bangladesh and sell in domestic and foreign market	34	69.0
Import product and sell in domestic market	5	10.0
To transfer technology	1	2.0
Through agent sell product in domestic market	2	4.0
Total (applicable industries; N:49)	49	100.0

Table 2.8: Distribution of interested potential investors (in %) by their opinion on major factors of attraction (multiple responses) for being interested to invest in Bangladesh

Factors of attraction (multiple responses)	n	%
Cheap labor	30	61.2
Skilled labor (attitude, diligence, intelligence, loyalty, hardworking)	8	16.3
Positive attitude of labor (diligence, loyalty, hard working etc.)	15	30.6
Skilled managers	16	32.7
Incentive (tax, duty)	6	12.2
Profit repatriation facilities (free repatriation)	1	2.0
Cheap raw material (e.g., agro product, leather)	8	16.3
Availability of supporting industries (component, engineering etc.)	4	8.2
Domestic market (size, growth, and potential)	48	98.0
To get benefit of investing in Least Developed Countries (LDC status)	2	4.1
Cheap Utility cost (electricity, water, gas etc.)	4	8.2
Total* (applicable industries; N:49)	49	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Table 2.9: Distribution of interested potential investors (in %) by their opinion on major constraints of having investment in Bangladesh (multiple response) Bangladesh

Major constraints of having investment in Bangladesh (multiple responses)	n	%
Political instability	38	77.6
Lack of transparency in governance system (including corruption) or clarity in business regulatory environment	15	30.6
Slow/cumbersome administrative procedure	3	6.1
Not enough cheap labor cost	6	12.2
Low skill level of workers	21	42.9
Unavailability domestic raw materials/semi finished products, suppliers	9	18.4
Lack of sufficient logistics	5	10.2
Lack of investment promotion incentive by Bangladesh government (e.g., tax holiday, profit repatriation facilities)	7	14.3
Lack of support industries (in terms availability, quality, cost, delivery)	7	14.3
Business regulation and custom in Bangladesh is not clear/troublesome	6	12.2
Small market size/low capacity of consuming produced products	3	6.1
Lack of utility support system (gas, water, electricity etc.)	22	44.9
Lack of/insufficient communication (e.g., ICT) facilities	11	22.4
Do not have enough information to decide investment.	12	24.5
Others	1	2.0
Total* (applicable industries; N:49)	49	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Table 2.10: Distribution of non-interested investors (in %) by their opinion on more attractive countries or regions for investment in compare to Bangladesh

More attractive countries or regions for investment (multiple responses)	n	%
India	13	40.6
Malaysia	1	3.1
Other area countries	1	3.1
No intention to invest in foreign countries	7	21.9
No response	11	34.4
Total* (applicable industries; N:32)	32	-
* '-' indicates that the numbers in percentage column are not additive due to multiple responses		

Table 2.11: Distribution of non-interested investors for Bangladesh (in %) by their opinion on factors that are important for choosing other countries for investment

Factors of attraction (multiple responses)	n	%
Political stability	24	75.0
Transparency in governance system (including corruption) or clarity in business regulatory environment	7	21.9
Streamlined administrative procedures	6	18.8
Cheap labor	15	46.9
Skilled labor (attitude, diligence, intelligence, loyalty, hardworking)	17	53.1
Positive attitude of labor (diligence, loyalty, hard working etc.)	2	6.3
English language proficiency of labor	1	3.1
Skilled managers	3	9.4
Incentive (tax, duty)	5	15.6
Profit repatriation facilities (free repatriation)	3	9.4
Cheap raw material (e.g., agro product, leather)	16	50.0
Availability of supporting industries (component, engineering etc.)	20	62.5
Domestic market (size, growth, and potential)	12	37.5
To get benefit of investing in Least Developed Countries (LDC status)	1	3.1
Cheap Utility cost (electricity, water, gas etc.)	15	46.9
Others	4	12.5
No response	4	12.5
Total* (applicable industries; N:32)	32	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Table 2.12: Distribution of importer (in %) by status of import from Bangladesh

Import status	n	%
Import from Bangladesh	3	3.6
Do not import from Bangladesh	80	96.4
Total (N:83)	83	100.0

Table 2.13: Distribution of importer (in %), which import from Bangladesh, by their reasons (multiple responses) behind importing from Bangladesh

Major reasons for import (multiple response)	n	%
Low cost	3	100
Good quality	3	100
Total* (applicable industries; N:3)	3	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Table 2.14: Distribution of importer (in %), which import from Bangladesh, by their future plan of import from Bangladesh

Future import plan	n	%
Increase moderately	3	100.0
Total (applicable industries; N:3)	3	100.0

Table 2.15: Distribution of Importer (in %) , which import from Bangladesh, by the future additional potential import items (multiple response)

Future potential import items	n	%
No response	3	100
Total (applicable industries; N:3)	3	-

Table 2.16: Distribution of importer (in %), which do not import from Bangladesh, by their interest in importing products and services from Bangladesh

Interest in importing from Bangladesh	n	%
Interested to import	15	18.8
Not interested to import	61	76.3
No response	4	5.0
Total (applicable industries; N:80)	80	100.0

Table 2.17: Distribution of importer (in %), which are interested to import from Bangladesh, by the reasons (multiple response) for being interested

Reasons for being interested (multiple responses)	n	%
Low cost	9	60.0
Good quality	11	73.3
Satisfactory lead time (time needed between order point to delivery point)	1	6.7
Other reasons	3	20.0
No response	2	13.3
Total* (applicable industries; N:15)	15	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Table 2.18: Distribution of importer (in %), which are not interested to import from Bangladesh, by the reasons (multiple response) of being not interested

Reasons for not being interested (multiple responses)	n	%
Do not have sufficient information	38	62.3
Types of products/services required are not in Bangladesh	45	73.8
Cost is not so reasonable	1	1.6
Product quality is not good enough	2	3.3
Political instability	1	1.6
Legal uncertainty	1	1.6
Lack of/insufficient transport services (road, railway, sea, air, etc.)	3	4.9
Lack of administrative service in providing update information about product produced in Bangladesh	2	3.3
Slow administrative services	1	1.6
Simply not imagined to invest in Bangladesh	2	3.3
No response	1	1.6
Total* (applicable industries; N:61)	61	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Table 2.19: Distribution of investors and importers (in %) by their suggestion on requirement (multiple responses) to initiate/expand their investment and trade with Bangladesh

Suggestions (multiple responses)	n	%
Improve land availability for plant location	32	38.6
Improve infrastructure including utility supply (power, gas, water and ICT) for business	46	55.4
Offer more fiscal incentives for investment (tax, finance)	8	9.6
Improve skill of workers	27	32.5
Provide more Special Economic Zones (SEZ) and Export Processing Zone (EPZ)	17	20.5
Develop supporting industries	15	18.1
Improve logistic service (transportation, port, custom, etc.)	16	19.3
Provide more information for potential investors	53	63.9
Reduce corruption and build more efficient governance system	15	18.1
Others	1	1.2
No response	11	13.3
Total* (N:83)	83	-
* '-' indicates that the number in percentage column is not additive due to multiple responses		

Annex Tables: Chapter III

Cross analysis based on country of origin of the surveyed industries

Table 3.1: Distribution of sample industries (in %) by country of origin of the industries and business sectors

Business sectors	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Textile and garment related products	0	0.0	2	8.7	0	0.0	0	0.0	0	0.0
Agro-products or agro-processed products	1	4.2	6	26.1	0	0.0	1	5.6	0	0.0
Light engineering products (including auto-parts and bicycles)	9	37.5	0	0.0	3	37.5	1	5.6	9	90.0
Footwear and leather products	1	4.2	1	4.3	0	0.0	0	0.0	0	0.0
Pharmaceutical products	0	0.0	0	0.0	0	0.0	2	11.1	0	0.0
Software and ICT products	0	0.0	1	4.3	0	0.0	0	0.0	0	0.0
Home textile	0	0.0	1	4.3	0	0.0	0	0.0	0	0.0
Ship building industries	0	0.0	1	4.3	0	0.0	0	0.0	0	0.0
Toiletries Products	0	0.0	1	4.3	0	0.0	5	27.8	0	0.0
Others	13	54.2	10	43.5	5	62.5	9	50.0	1	10.0
Total (N:83)	24	100.0	23	100.0	8	100.0	18	100.0	10	100.0

Table 3.2: Percentage distribution of industries by country of origin of the industries and export as proportion of turnover

Export as proportion of turnover	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
100%	0	0.0	0	0.0	0	0.0	0	0.0	1	10.0
75 - 99.99 %	4	16.7	3	13.0	2	25.0	6	33.3	2	20.0
25 - 74.99%	16	66.7	16	69.6	0	0.0	11	61.1	0	0.0
0.01 - 24.99%	0	0.0	3	13.0	2	25.0	0	0.0	1	10.0
0%	1	4.2	0	0.0	4	50.0	0	0.0	6	60.0
No response	3	12.5	1	4.3	0	0.0	1	5.6	0	0.0
Total (N:83)	24	100.0	23	100.0	8	100.0	18	100.0	10	100.0

Table 3.3: Percentage distribution of industries by country of origin of the industries and import as proportion of purchase

Import as proportion of purchase	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
100%	1	4.2	0	0.0	4	50.0	0	0.0	6	60.0
75 - 99.99 %	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
25 - 74.99%	0	0.0	0	0.0	0	0.0	2	11.1	0	0.0
0.01 - 24.99%	18	75.0	16	69.6	0	0.0	13	72.2	1	10.0
0%	2	8.3	6	26.1	4	50.0	2	11.1	3	30.0
No response	3	12.5	1	4.3	0	0.0	1	5.6	0	0.0
Total (N:83)	24	100.0	23	100.0	8	100.0	18	100.0	10	100.0

Table 3.4: Name of major export destinations (multiple responses) by country of origin of the industries (in %)

Major destination of export (multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Europe	0	0.0	0	0.0	0	0.0	1	5.9	0	0.0
Asian Countries	0	0.0	0	0.0	0	0.0	4	23.5	0	0.0
EU Countries	13	65.0	5	22.7	0	0.0	4	23.5	0	0.0
Middle East Countries	0	0.0	0	0.0	0	0.0	1	5.9	0	0.0
Malaysia	0	0.0	0	0.0	0	0.0	1	5.9	0	0.0
Japan	0	0.0	0	0.0	0	0.0	1	5.9	0	0.0
India	0	0.0	6	27.3	0	0.0	2	11.8	0	0.0
Pakistan	0	0.0	2	9.1	0	0.0	1	5.9	0	0.0
America/USA	12	60.0	11	50.0	0	0.0	0	0.0	0	0.0
Germany	3	15.0	3	13.6	0	0.0	0	0.0	0	0.0
UK	1	5.0	3	13.6	0	0.0	0	0.0	0	0.0
Australia	2	10.0	1	4.5	0	0.0	0	0.0	0	0.0
Argentina	1	5.0	0	0.0	0	0.0	0	0.0	0	0.0
Italy	1	5.0	0	0.0	0	0.0	0	0.0	0	0.0
China	1	5.0	0	0.0	1	25.0	0	0.0	0	0.0
Bhutan	0	0.0	1	4.5	0	0.0	0	0.0	0	0.0
Bangladesh	0	0.0	1	4.5	0	0.0	0	0.0	0	0.0
No response	3	15.0	5	22.7	3	75.0	7	41.2	4	100.0
Total* (applicable industries; N:67)	20	-	22	-	4	-	17	-	4	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.5: Percentage distribution of potential investors by country of origin of the industries and interest in investing in Bangladesh

Interest to have investment in Bangladesh	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Interested	5	20.8	16	69.6	5	62.5	18	100.0	5	50.0
Not interested	17	70.8	7	30.4	3	37.5	0	0.0	5	50.0
No response	2	8.3	0	0.0	0	0.0	0	0.0	0	0.0
Total (N:83)	24	100.0	23	100.0	8	100.0	18	100.0	10	100.0

Table 3.6: Percentage distribution of interested investors (applicable investors who are interested to invest in Bangladesh) by country of origin of the industries and purpose of future investment in Bangladesh

Purpose of future investment	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Produce and sell products in the domestic market of Bangl	1	20.0	2	12.5	2	40.0	0	0.0	2	40.0
Produce products in Bangladesh and sell domestic and fore	2	40.0	10	62.5	3	60.0	16	88.9	3	60.0
Import product and sell in domestic market	1	20.0	2	12.5	0	0.0	2	11.1	0	0.0
To transfer technology	1	20.0	0	0.0	0	0.0	0	0.0	0	0.0
Through agent sell product in domestic	0	0.0	2	12.5	0	0.0	0	0.0	0	0.0

market										
Total (applicable industries; N:49)	5	100.0	16	100.0	5	100.0	18	100.0	5	100.0

Table 3.7: Distribution of interested potential investors (in %) by country of origin of the industries and their opinion on major factors of attraction (multiple responses) for being interested to invest in Bangladesh

Factors of attraction (multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Cheap labor	1	20.0	9	56.3	1	20.0	18	100.0	1	20.0
Skilled labor (attitude, diligence, intelligence, loyalty, hardworking)	1	20.0	2	12.5	2	40.0	1	5.6	2	40.0
Positive attitude of labor (diligence, loyalty, hard working etc.)	2	40.0	0	0.0	5	100.0	4	22.2	4	80.0
Skilled managers	2	40.0	6	37.5	3	60.0	1	5.6	4	80.0
Incentive (tax, duty)	0	0.0	0	0.0	2	40.0	3	16.7	1	20.0
Profit repatriation facilities (free repatriation)	0	0.0	0	0.0	0	0.0	1	5.6	0	0.0
Cheap raw material (e.g., agro product, leather)	1	20.0	0	0.0	1	20.0	4	22.2	2	40.0
Availability of supporting industries (component, engineering etc.)	1	20.0	0	0.0	1	20.0	2	11.1	0	0.0
Domestic market (size, growth, and potential)	5	100.0	16	100.0	5	100.0	16	88.9	5	100.0
To get benefit of investing in Least Developed Countries (LDC status)	0	0.0	0	0.0	1	20.0	0	0.0	1	20.0
Cheap Utility cost (electricity, water, gas etc.)	1	20.0	0	0.0	1	20.0	1	5.6	1	20.0
Total* (applicable industries; N:49)	5	-	16	-	5	-	18	-	5	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.8: Distribution of interested potential investors (in %) by country of origin of the industries and their opinion on major constraints of having investment in Bangladesh (multiple responses) Bangladesh

Major constraints of having investment in Bangladesh (multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Political instability	3	60.0	14	87.5	2	40.0	17	94.4	2	40.0
Lack of transparency in governance system (including corruption) or clarity in business regulatory environment	2	40.0	3	18.8	5	100.0	3	16.7	2	40.0
Slow/cumbersome administrative procedure	0	0.0	0	0.0	0	0.0	2	11.1	1	20.0
Not enough cheap labor cost	1	20.0	0	0.0	2	40.0	1	5.6	2	40.0
Low skill level of workers	2	40.0	1	6.3	3	60.0	12	66.7	3	60.0
Unavailability domestic raw materials/semi finished products, suppliers	1	20.0	4	25.0	1	20.0	3	16.7	0	0.0
Lack of sufficient logistics	1	20.0	1	6.3	0	0.0	3	16.7	0	0.0
Lack of investment promotion incentive by Bangladesh government (e.g., tax holiday, profit repatriation facilities)	0	0.0	2	12.5	0	0.0	4	22.2	1	20.0
Lack of support industries (in terms availability, quality, cost, delivery)	2	40.0	0	0.0	3	60.0	1	5.6	1	20.0
Business regulation and custom in Bangladesh is not clear/troublesome	1	20.0	2	12.5	0	0.0	1	5.6	2	40.0
Small market size/low capacity of consuming produced products	0	0.0	0	0.0	3	60.0	0	0.0	0	0.0
Lack of utility support system (gas, water, electricity etc.)	1	20.0	2	12.5	2	40.0	14	77.8	3	60.0
Lack of/insufficient communication (e.g., ICT) facilities	1	20.0	6	37.5	0	0.0	3	16.7	1	20.0
Do not have enough information to decide investment.	2	40.0	7	43.8	0	0.0	3	16.7	0	0.0
Others	0	0.0	1	6.3	0	0.0	0	0.0	0	0.0
Total* (applicable industries; N:49)	5	-	16	-	5	-	18	-	5	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.9: Distribution of non-interested investors (in %) by country of origin of the industries and their opinion on more attractive countries or regions for investment in compare to Bangladesh

More attractive countries or regions for investment (multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
India	9	52.9	1	14.3	1	33.3	-	-	2	40.0
Malaysia	0	0.0	0	0.0	1	33.3	-	-	0	0.0
Other countries	0	0.0	0	0.0	1	33.3	-	-	0	0.0
No intention to invest in foreign countries	1	5.9	4	57.1	0	0.0	-	-	2	40.0
No response	7	41.2	2	28.6	1	33.3	-	-	1	20.0
Total* (applicable industries; N:32)	17	-	7	-	3	-	-	-	5	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.10: Distribution of non-interested investors (in %) by country of origin of the industries and their opinion on factors of attraction (multiple responses) they consider before investment

Factors of attraction (multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Political stability	15	88.2	3	42.9	3	100.0	-	-	3	60.0
Transparency in governance system (including corruption) or clarity in business regulatory environment	0	0.0	0	0.0	3	100.0	-	-	4	80.0
Streamlined administrative procedures	0	0.0	0	0.0	3	100.0	-	-	3	60.0
Cheap labor	14	82.4	1	14.3	0	0.0	-	-	0	0.0
Skilled labor (attitude, diligence, intelligence, loyalty, hardworking)	13	76.5	1	14.3	2	66.7	-	-	1	20.0
Positive attitude of labor (diligence, loyalty, hard working etc.)	1	5.9	0	0.0	0	0.0	-	-	1	20.0
English language proficiency of labor	0	0.0	0	0.0	0	0.0	-	-	1	20.0
Skilled managers	1	5.9	0	0.0	1	33.3	-	-	1	20.0
Incentive (tax, duty)	0	0.0	1	14.3	2	66.7	-	-	2	40.0
Profit repatriation facilities (free repatriation)	0	0.0	0	0.0	1	33.3	-	-	2	40.0
Cheap raw material (e.g., agro product, leather)	12	70.6	4	57.1	0	0.0	-	-	0	0.0
Availability of supporting industries (component, engineering etc.)	15	88.2	2	28.6	2	66.7	-	-	1	20.0
Domestic market (size, growth, and potential)	8	47.1	4	57.1	0	0.0	-	-	0	0.0
To get benefit of investing in Least Developed Countries (LDC status)	1	5.9	0	0.0	0	0.0	-	-	0	0.0
Cheap utility cost (electricity, water, gas etc.)	12	70.6	3	42.9	0	0.0	-	-	0	0.0
Others	4	23.5	0	0.0	0	0.0	-	-	0	0.0
No response	1	5.9	2	28.6	0	0.0	-	-	1	20.0
Total* (applicable industries; N:32)	17	-	7	-	3	-	-	-	5	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.11: Distribution of Importer (in %) by country of origin of the industries and status of import from Bangladesh

Import status	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Import from Bangladesh	1	4.2	0	0.0	2	25.0	0	0.0	0	0.0
Do not import from Bangladesh	23	95.8	23	100.0	6	75.0	18	100.0	10	100.0
Total (N:83)	24	100.0	23	100.0	8	100.0	18	100.0	10	100.0

Table 3.12: Distribution of Importer (in %), which import from Bangladesh, by country of origin of the industries and reasons (multiple responses) behind importing from Bangladesh

Major reasons for import (multiple response)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Low cost	1	100.0	-	-	2	100.0	-	-	-	-
Good quality	1	100.0	-	-	2	100.0	-	-	-	-
Total* (applicable industries; N:3)	1	-	-	-	2	-	-	-	-	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.13: Distribution of Importer, which import from Bangladesh, (in %) by country of origin of the industries and their future plan of import from Bangladesh

Future import plan	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Increase remarkably	0	0.0	-	-	0	0.0	-	-	-	-
Increase moderately	1	100.0	-	-	2	100.0	-	-	-	-
Total (applicable industries; N:3)	1	100.0	-	-	2	100.0	-	-	-	-

Table 3.14: Distribution of importer (in %), which do not import from Bangladesh, by country of origin of the industries and their interest in importing products and services from Bangladesh

Interest to import from Bangladesh	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Interested	1	4.3	3	13.0	2	33.3	2	11.1	7	70.0
Not interested	20	87.0	20	87.0	3	50.0	15	83.3	3	30.0
No response	2	8.7	0	0.0	1	16.7	1	5.6	0	0.0
Total (applicable industries; N:80)	23	100.0	23	100.0	6	100.0	18	100.0	10	100.0

Table 3.15: Distribution of importer (in %), which are interested to import from Bangladesh, by country of origin of the industries and reasons (multiple response) of being interested

Reasons for being interested (multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Low cost	1	100.0	0	0.0	1	50.0	2	100.0	5	71.4
Good quality	1	100.0	2	66.7	1	50.0	2	100.0	5	71.4
Satisfactory lead time (time needed between order point to delivery point)	0	0.0	0	0.0	0	0.0	0	0.0	1	14.3
Other reasons	0	0.0	3	100.0	0	0.0	0	0.0	0	0.0
No Response	0	0.0	0	0.0	1	50.0	0	0.0	1	14.3
Total* (applicable industries; N:15)	1	-	3	-	2	-	2	-	7	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.16: Percentage distribution of importer, which are not interested to import from Bangladesh, by country of origin of the industries and reasons (multiple response) for not being interested

Reason for not being interested(multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Do not have sufficient information	9	45.0	11	55.0	2	66.7	13	86.7	3	100.0
Types of products/services required are not in Bangladesh	19	95.0	14	70.0	1	33.3	8	53.3	3	100.0
Cost is not so reasonable	0	0.0	1	5.0	0	0.0	0	0.0	0	0.0
Product quality is not good enough	0	0.0	0	0.0	0	0.0	2	13.3	0	0.0
Political instability	0	0.0	0	0.0	0	0.0	1	6.7	0	0.0
Legal uncertainty	0	0.0	0	0.0	0	0.0	1	6.7	0	0.0
Lack of/insufficient transport services (road, railway, sea, air, etc.)	2	10.0	1	5.0	0	0.0	0	0.0	0	0.0
Lack of administrative service in providing update information about product produced in Bangladesh	0	0.0	0	0.0	1	33.3	0	0.0	1	33.3
Slow administrative services	0	0.0	0	0.0	1	33.3	0	0.0	0	0.0
Simply not imagined to invest in Bangladesh	0	0.0	0	0.0	1	33.3	0	0.0	1	33.3
No response	0	0.0	0	0.0	1	33.3	0	0.0	0	0.0
Total* (applicable industries; N:61)	20	-	20	-	3	-	15	-	3	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 3.17: Distribution of investors and importers (in %) by country of origin of the industries and their suggestion on requirement (multiple response) to initiate/expand their investment and trade with Bangladesh

Suggestions (multiple responses)	Country of origin									
	India		Other South Asian countries		China		Thailand		Taiwan	
	n	%	n	%	n	%	n	%	n	%
Improve land availability for plant location	4	16.7	7	30.4	5	62.5	10	55.6	6	60.0
Improve infrastructure including utility supply (power, gas, water and ICT) for business	7	29.2	11	47.8	7	87.5	13	72.2	8	80.0
Offer more fiscal incentives for investment (tax, finance)	0	0.0	0	0.0	3	37.5	1	5.6	4	40.0
Improve skill of workers	9	37.5	5	21.7	3	37.5	6	33.3	4	40.0
Provide more Special Economic Zones (SEZ) and Export Processing Zone (EPZ)	1	4.2	1	4.3	5	62.5	3	16.7	7	70.0
Develop supporting industries	4	16.7	2	8.7	4	50.0	3	16.7	2	20.0
Improve logistic service (transportation, port, custom, etc.)	5	20.8	5	21.7	1	12.5	3	16.7	2	20.0
Provide more information for potential investors	13	54.2	14	60.9	6	75.0	10	55.6	10	100.0
Reduce corruption and build more efficient governance system	4	16.7	3	13.0	3	37.5	2	11.1	3	30.0
Others	1	4.2	0	0.0	0	0.0	0	0.0	0	0.0
No response	9	37.5	2	8.7	0	0.0	0	0.0	0	0.0
Total* (N:83)	24	-	23	-	8	-	18	-	10	-

* '-' indicates that the numbers in percentage column are not additive due to multiple responses

Annex Tables: Chapter IV

Cross analysis based on export ratio

Table 4.1: Distribution of sample industries (in %) by business sectors and export as proportion of turnover

Business sectors	Export as proportion of turnover											
	100%		75-99.99 %		25-74.99%		0.01-24.99 %		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Textile and garment related products	0	0.0	0	0.0	0	0.0	2	33.3	0	0.0	0	0.0
Agro-products or agro-processed products	0	0.0	1	5.9	6	14.0	0	0.0	0	0.0	1	20.0
Light engineering products (including auto-parts and bicycles)	1	100.0	5	29.4	5	11.6	0	0.0	10	90.9	1	20.0
Footwear and leather products	0	0.0	0	0.0	2	4.7	0	0.0	0	0.0	0	0.0
Pharmaceutical products	0	0.0	1	5.9	1	2.3	0	0.0	0	0.0	0	0.0
Software and ICT products	0	0.0	1	5.9	0	0.0	0	0.0	0	0.0	0	0.0
Home textile	0	0.0	1	5.9	0	0.0	0	0.0	0	0.0	0	0.0
Ship building industries	0	0.0	0	0.0	1	2.3	0	0.0	0	0.0	0	0.0
Toiletries Products	0	0.0	0	0.0	6	14.0	0	0.0	0	0.0	0	0.0
Others	0	0.0	8	47.1	22	51.2	4	66.7	1	9.1	3	60.0
Total (N:83)	1	100.0	17	100.0	43	100.0	6	100.0	11	100.0	5	100.0

Table 4.2: Percentage distribution of industries by export as proportion of turnover and import as proportion of purchase

Import as proportion of purchase	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
100%	0	0.0	0	0.0	0	0.0	0	0.0	11	100.0	0	0.0
75 - 99.99 %	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
25 - 74.99%	0	0.0	1	5.9	1	2.3	0	0.0	0	0.0	0	0.0
0.01 - 24.99%	1	100.0	9	52.9	35	81.4	3	50.0	0	0.0	0	0.0
0%	0	0.0	7	41.2	7	16.3	3	50.0	0	0.0	0	0.0
No response	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	5	100.0
Total (N:83)	1	100.0	17	100.0	43	100.0	6	100.0	11	100.0	5	100.0

Table 4.3: Name of major export destinations (multiple response) by export as proportion of turnover as reported by surveyed industries (applicable industries which export products) (in %)

Major destination of export (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Europe	0	0.0	0	0.0	1	2.3	0	0.0	-	-	-	-
Asian Countries	0	0.0	1	5.9	3	7.0	0	0.0	-	-	-	-
EU Countries	0	0.0	4	23.5	18	41.9	0	0.0	-	-	-	-
Middle East Countries	0	0.0	1	5.9	0	0.0	0	0.0	-	-	-	-
Malaysia	0	0.0	1	5.9	0	0.0	0	0.0	-	-	-	-
Japan	0	0.0	1	5.9	0	0.0	0	0.0	-	-	-	-
India	0	0.0	2	11.8	4	9.3	2	33.3	-	-	-	-
Pakistan	0	0.0	1	5.9	2	4.7	0	0.0	-	-	-	-
America/USA	0	0.0	5	29.4	17	39.5	1	16.7	-	-	-	-
Germany	0	0.0	2	11.8	4	9.3	0	0.0	-	-	-	-
UK	0	0.0	1	5.9	3	7.0	0	0.0	-	-	-	-
Australia	0	0.0	1	5.9	2	4.7	0	0.0	-	-	-	-
Argentina	0	0.0	0	0.0	1	2.3	0	0.0	-	-	-	-
Italy	0	0.0	0	0.0	1	2.3	0	0.0	-	-	-	-
China	0	0.0	0	0.0	1	2.3	1	16.7	-	-	-	-
Bhutan	0	0.0	0	0.0	0	0.0	1	16.7	-	-	-	-
Bangladesh	0	0.0	0	0.0	1	2.3	0	0.0	-	-	-	-
No response	1	100.0	7	41.2	11	25.6	3	50.0	-	-	-	-
Total* (Applicable)	1	-	17	-	43	-	6	-	-	-	-	-

industries; N:67)													
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*'-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.4: Percentage distribution of potential investors by export as proportion of turnover and interest in investing in Bangladesh

Interest to have investment in Bangladesh	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Interested	1	100.0	10	58.8	24	55.8	4	66.7	7	63.6	3	60.0
Not interested	0	0.0	7	41.2	18	41.9	2	33.3	4	36.4	1	20.0
No response	0	0.0	0	0.0	1	2.3	0	0.0	0	0.0	1	20.0
Total (N:83)	1	100.0	17	100.0	43	100.0	6	100.0	11	100.0	5	100.0

Table 4.5: Percentage distribution of interested investors (applicable investors who are interested to invest in Bangladesh) by export as proportion of turnover and purpose of future investment in Bangladesh

Purpose of future investment	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Produce and sell products in the domestic market of Bangl	0	0.0	0	0.0	2	8.3	1	25.0	4	57.1	0	0.0
Produce products in Bangladesh and sell domestic and fore	1	100.0	8	80.0	17	70.8	2	50.0	3	42.9	3	100.0
Import product and sell in domestic market	0	0.0	2	20.0	2	8.3	1	25.0	0	0.0	0	0.0
To transfer technology	0	0.0	0	0.0	1	4.2	0	0.0	0	0.0	0	0.0
Through agent sell product in domestic market	0	0.0	0	0.0	2	8.3	0	0.0	0	0.0	0	0.0
Total (applicable industries; N:49)	1	100.0	10	100.0	24	100.0	4	100.0	7	100.0	3	100.0

Table 4.6: Distribution of interested potential investors (in %) by export as proportion of turnover and their opinion on major factors of attraction (multiple response) for being interested to invest in Bangladesh

Factors of attraction (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Cheap labor	0	0.0	8	80.0	16	66.7	2	50.0	1	14.3	3	100.0
Skilled labor (attitude, diligence, intelligence, loyalty, hardworking)	0	0.0	1	10.0	2	8.3	1	25.0	4	57.1	0	0.0
Positive attitude of labor (diligence, loyalty, hard working etc.)	1	100.0	3	30.0	2	8.3	2	50.0	7	100.0	0	0.0
Skilled managers	1	100.0	3	30.0	5	20.8	0	0.0	7	100.0	0	0.0
Incentive (tax, duty)	0	0.0	3	30.0	1	4.2	1	25.0	1	14.3	0	0.0
Profit repatriation facilities (free repatriation)	0	0.0	0	0.0	1	4.2	0	0.0	0	0.0	0	0.0
Cheap raw material (e.g., agro product, leather)	0	0.0	1	10.0	3	12.5	0	0.0	4	57.1	0	0.0
Availability of supporting industries (component, engineering etc.)	0	0.0	1	10.0	1	4.2	0	0.0	1	14.3	1	33.3
Domestic market (size, growth, and potential)	1	100.0	10	100.0	23	95.8	4	100.0	7	100.0	3	100.0
To get benefit of investing in Least Developed Countries (LDC status)	0	0.0	0	0.0	0	0.0	1	25.0	1	14.3	0	0.0
Cheap Utility cost (electricity, water, gas etc.)	0	0.0	0	0.0	1	4.2	0	0.0	3	42.9	0	0.0
Total* (applicable industries; N:49)	1	-	10	-	24	-	4	-	7	-	3	-

*'-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.7: Distribution of interested potential investors (in %) by export as proportion of turnover and their opinion on major constraints of having investment in Bangladesh (multiple responses) Bangladesh

Major constraints of having investment in Bangladesh (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Political instability	0	0.0	7	70.0	21	87.5	3	75.0	4	57.1	3	100.0
Lack of transparency in governance system (including corruption) or clarity in business	1	100.0	1	10.0	3	12.5	3	75.0	5	71.4	2	66.7

Major constraints of having investment in Bangladesh (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
regulatory environment												
Slow/cumbersome administrative procedure	0	0.0	1	10.0	1	4.2	0	0.0	1	14.3	0	0.0
Not enough cheap labor cost	1	100.0	2	20.0	1	4.2	1	25.0	1	14.3	0	0.0
Low skill level of workers	0	0.0	5	50.0	8	33.3	0	0.0	6	85.7	2	66.7
Unavailability domestic raw materials/semi finished products, suppliers	0	0.0	2	20.0	6	25.0	1	25.0	0	0.0	0	0.0
Lack of sufficient logistics	0	0.0	1	10.0	2	8.3	0	0.0	0	0.0	2	66.7
Lack of investment promotion incentive by Bangladesh government (e.g., tax holiday, profit repatriation facilities)	0	0.0	3	30.0	3	12.5	0	0.0	1	14.3	0	0.0
Lack of support industries (in terms availability, quality, cost, delivery)	0	0.0	1	10.0	2	8.3	2	50.0	2	28.6	0	0.0
Business regulation and custom in Bangladesh is not clear/troublesome	0	0.0	0	0.0	2	8.3	1	25.0	3	42.9	0	0.0
Small market size/low capacity of consuming produced products	0	0.0	0	0.0	0	0.0	2	50.0	1	14.3	0	0.0
Lack of utility support system (gas, water, electricity etc.)	1	100.0	7	70.0	10	41.7	0	0.0	3	42.9	1	33.3
Lack of/insufficient communication (e.g., ICT) facilities	0	0.0	4	40.0	5	20.8	0	0.0	2	28.6	0	0.0
Do not have enough information to decide investment.	0	0.0	3	30.0	6	25.0	2	50.0	0	0.0	1	33.3
Others	0	0.0	0	0.0	1	4.2	0	0.0	0	0.0	0	0.0
Total* (applicable industries; N:49)	1	-	10	-	24	-	4	-	7	-	3	-

*-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.8: Distribution of non-interested investors (in %) by export as proportion of turnover and their opinion on more attractive countries or regions for investment in compare to Bangladesh

More attractive countries or regions for investment (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
India	-	-	3	42.9	8	44.4	1	50.0	1	25.0	0	0.0
Malaysia	-	-	1	14.3	0	0.0	0	0.0	0	0.0	0	0.0
Other countries	-	-	0	0.0	0	0.0	0	0.0	1	25.0	0	0.0
No intention to invest in foreign countries	-	-	2	28.6	4	22.2	0	0.0	1	25.0	0	0.0
No response	-	-	2	28.6	6	33.3	1	50.0	1	25.0	1	100.0
Total* (applicable industries; N:32)	-	-	7	-	18	-	2	-	4	-	1	-

*-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.9: Distribution of non-interested investors (in %) by export as proportion of turnover and their opinion on factors of attraction (multiple responses) they consider before investment

Factors of attraction (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01-24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Political stability	-	-	4	57.1	15	83.3	1	50.0	3	75.0	1	100.0
Transparency in governance system (including corruption) or clarity in business regulatory environment	-	-	3	42.9	0	0.0	1	50.0	3	75.0	0	0.0
Streamlined administrative procedures	-	-	2	28.6	0	0.0	1	50.0	3	75.0	0	0.0
Cheap labor	-	-	3	42.9	11	61.1	0	0.0	0	0.0	1	100.0
Skilled labor (attitude, diligence, intelligence, loyalty, hardworking)	-	-	5	71.4	10	55.6	0	0.0	1	25.0	1	100.0
Positive attitude of labor (diligence, loyalty, hard working etc.)	-	-	0	0.0	1	5.6	1	50.0	0	0.0	0	0.0
English language proficiency of labor	-	-	0	0.0	0	0.0	0	0.0	1	25.0	0	0.0
Skilled managers	-	-	2	28.6	0	0.0	0	0.0	1	25.0	0	0.0
Incentive (tax, duty)	-	-	1	14.3	1	5.6	1	50.0	2	50.0	0	0.0
Profit repatriation facilities (free	-	-	1	14.3	0	0.0	0	0.0	2	50.0	0	0.0

Factors of attraction (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
repatriation)												
Cheap raw material (e.g., agro product, leather)	-	-	2	28.6	13	72.2	0	0.0	0	0.0	1	100.0
Availability of supporting industries (component, engineering etc.)	-	-	5	71.4	12	66.7	1	50.0	1	25.0	1	100.0
Domestic market (size, growth, and potential)	-	-	2	28.6	9	50.0	0	0.0	0	0.0	1	100.0
To get benefit of investing in Least Developed Countries (LDC status)	-	-	0	0.0	1	5.6	0	0.0	0	0.0	0	0.0
Cheap utility cost (electricity, water, gas etc.)	-	-	3	42.9	11	61.1	0	0.0	0	0.0	1	100.0
Others	-	-	1	14.3	3	16.7	0	0.0	0	0.0	0	0.0
No response	-	-	0	0.0	2	11.1	1	50.0	1	25.0	0	0.0
Total* (applicable industries; N:32)	-	-	7	-	18	-	2	-	4	-	1	-

*'-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.10: Distribution of Importer (in %) by export as proportion of turnover and status of import from Bangladesh

Import status	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Import from Bangladesh	0	0.0	0	0.0	0	0.0	1	16.7	2	18.2	0	0.0
Do not import from Bangladesh	1	100.0	17	100.0	43	100.0	5	83.3	9	81.8	5	100.0
Total (N=83)	1	100.0	17	100.0	43	100.0	6	100.0	11	100.0	5	100.0

Table 4.11: Distribution of Importer (in %), which import from Bangladesh, by export as proportion of turnover and reasons (multiple responses) behind importing from Bangladesh

Major reasons for import (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Low cost	-	-	-	-	-	-	1	100.0	2	100.0	-	-
Good quality	-	-	-	-	-	-	1	100.0	2	100.0	-	-
Total* (applicable industries; N:3)	-	-	-	-	-	-	1	-	2	-	-	-

*'-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.12: Distribution of Importer, which import from Bangladesh, (in %) by export as proportion of turnover and their future plan of import from Bangladesh

Future import plan	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Increase moderately	-	-	-	-	-	-	1	100.0	2	100.0	-	-
Total (applicable industries; N:3)	-	-	-	-	-	-	1	100.0	2	100.0	-	-

Table 4.13: Distribution of importer (in %), which do not import from Bangladesh, by export as proportion of turnover and their interest in importing products and services from Bangladesh

Interest to import from Bangladesh	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01 - 24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Interested	1	100.0	3	17.6	3	7.0	2	40.0	5	55.6	1	20.0
Not interested	0	0.0	12	70.6	38	88.4	3	60.0	4	44.4	4	80.0
No response	0	0.0	2	11.8	2	4.7	0	0.0	0	0.0	0	0.0
Total (applicable industries; N:80)	1	100.0	17	100.0	43	100.0	5	100.0	9	100.0	5	100.0

Table 4.14: Distribution of importer (in %), which are interested to import from Bangladesh, by export as proportion of turnover and reasons (multiple response) of being interested

Reasons for being interested (multiple responses)	Export as proportion of turnover											
	100%		75 - 99.99 %		25 - 74.99%		0.01-24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Low cost	1	100.0	3	100.0	2	66.7	0	0.0	3	60.0	0	0.0
Good quality	1	100.0	2	66.7	3	100.0	1	50.0	3	60.0	1	100.0
Satisfactory lead time (time needed between order point to delivery point)	0	0.0	0	0.0	0	0.0	1	50.0	0	0.0	0	0.0
Other reasons	0	0.0	0	0.0	1	33.3	1	50.0	0	0.0	1	100.0
No response	0	0.0	0	0.0	0	0.0	0	0.0	2	40.0	0	0.0
Total* (applicable industries; N:15)	1	-	3	-	3	-	2	-	5	-	1	-

*'-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.15: Percentage distribution of importer, which are not interested to import from Bangladesh, by export as proportion of turnover and reasons (multiple response) for not being interested

Reason for not being interested (multiple responses)	Export as proportion of turnover											
	100%		75-99.99 %		25-74.99%		0.01-24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Do not have sufficient information	-	-	8	66.7	23	60.5	2	66.7	4	100.0	1	25.0
Types of products/services required are not in Bangladesh	-	-	9	75.0	28	73.7	1	33.3	3	75.0	4	100.0
Cost is not so reasonable	-	-	0	0.0	1	2.6	0	0.0	0	0.0	0	0.0
Product quality is not good enough	-	-	0	0.0	2	5.3	0	0.0	0	0.0	0	0.0
Political instability	-	-	0	0.0	0	0.0	0	0.0	0	0.0	1	25.0
Legal uncertainty	-	-	1	8.3	0	0.0	0	0.0	0	0.0	0	0.0
Lack of/insufficient transport services (road, railway, sea, air, etc.)	-	-	1	8.3	2	5.3	0	0.0	0	0.0	0	0.0
Lack of administrative service in providing update information about product produced in Bangladesh	-	-	0	0.0	0	0.0	0	0.0	2	50.0	0	0.0
Slow administrative services	-	-	0	0.0	0	0.0	0	0.0	1	25.0	0	0.0
Simply not imagined to invest in Bangladesh	-	-	0	0.0	0	0.0	0	0.0	2	50.0	0	0.0
No response	-	-	0	0.0	0	0.0	1	33.3	0	0.0	0	0.0
Total* (applicable industries; N:61)	-	-	12	-	38	-	3	-	4	-	4	-

*'-' indicates that the numbers in percentage column are not additive due to multiple responses

Table 4.16: Distribution of investors and importers (in %) by export as proportion of turnover and their suggestion on requirement (multiple response) to initiate/expand their investment and trade with Bangladesh

Suggestions (multiple responses)	Export as proportion of turnover											
	100%		75-99.99 %		25 - 74.99%		0.01-24.99%		0%		No response	
	n	%	n	%	n	%	n	%	n	%	n	%
Improve land availability for plant location	1	100.0	9	52.9	11	25.6	2	33.3	7	63.6	2	40.0
Improve infrastructure including utility supply (power, gas, water and ICT) for business	1	100.0	13	76.5	19	44.2	2	33.3	9	81.8	2	40.0
Offer more fiscal incentives for investment (tax, finance)	0	0.0	0	0.0	1	2.3	3	50.0	4	36.4	0	0.0
Improve skill of workers	0	0.0	5	29.4	12	27.9	1	16.7	7	63.6	2	40.0
Provide more Special Economic Zones (SEZ) and Export Processing Zone (EPZ)	1	100.0	7	41.2	2	4.7	1	16.7	6	54.5	0	0.0
Develop supporting industries	0	0.0	3	17.6	6	14.0	1	16.7	5	45.5	0	0.0
Improve logistic service (transportation, port, custom, etc.)	0	0.0	5	29.4	6	14.0	2	33.3	2	18.2	1	20.0
Provide more information for potential investors	1	100.0	10	58.8	26	60.5	3	50.0	11	100.0	2	40.0
Reduce corruption and build more efficient governance system	0	0.0	2	11.8	5	11.6	2	33.3	4	36.4	2	40.0
Others	0	0.0	0	0.0	1	2.3	0	0.0	0	0.0	0	0.0
No response	0	0.0	1	5.9	6	14.0	2	33.3	0	0.0	2	40.0
Total* (N:83)	1	-	17	-	43	-	6	-	11	-	5	-

*-' indicates that the numbers in percentage column are not additive due to multiple responses

Appendix 1-3. Questionnaire Survey Result - Japan

Table 1.1: Distribution of sample industries (in %) by business sectors

Business Sector	%	n
Textile and garment related products	21.4	6
Agro-products or agro-processed products	0.0	0
Light engineering products (including auto-parts and bicycles)	32.1	9
Footwear and leather products	0.0	0
Pharmaceutical products	3.6	1
Software and ICT products	0.0	0
Home textile	0.0	0
Ship building industries	14.3	4
Toiletries Products	3.6	1
Others	25.0	7
Total	100	28

Table1.2: Distribution of sample industries (in %) by major products (multiple responses)

Name of Major Product	%	n
Aircraft	3.6	1
Automotive filter	3.6	1
Automotive part	3.6	1
Automotive rubber part	3.6	1
Automotive seat	3.6	1
Bearing	3.6	1
Cold medicine	3.6	1
Compact motor	3.6	1
Detergent	3.6	1
Diesel	3.6	1
Filter for chemical industry	3.6	1
Garment	10.7	3
Gloves	7.1	2
HDD suspension	3.6	1
Heavy metal absorbent	3.6	1
Industrial part	3.6	1
IT Service	3.6	1
LED backlight	3.6	1
Medicine	3.6	1
Perforated metal	3.6	1
Personal solution	3.6	1
Plant	3.6	1
Plastic injection mold	3.6	1
Plastic injection molding part	3.6	1
Polystyrene sheet	3.6	1

Polyvinyl chloride film and sheet	3.6	1
Pre-roofing sheet	3.6	1
Pressure gauge	3.6	1
Railway vehicle	3.6	1
Sheet-metal part	3.6	1
Ship	17.9	5
Special paper / Paper filter	3.6	1
Specialty protective gloves	3.6	1
Sports shoes	3.6	1
Sportswear	3.6	1
Suspension spring	3.6	1
Thermometer	3.6	1
Toothpaste	3.6	1
Wireless equipment	3.6	1
N (applicable)	-	28

Table1.3: Percentage distribution of industries by amount of capital (paid-up)

Amount of Replacement cost (net asset)	%	n
>JPY100,000 million	14.3	4
JPY10,000-100,000 million	21.4	6
JPY100-10,000 million	25.0	7
<JPY100 million	39.3	11
No response	0.0	0
Total	100.0	28

Table1.4: Percentage distribution of industries by number of full time employee

No. of employees (Full time)	%	n
>250	53.6	15
100-250	7.1	2
25-99	32.1	9
< 25	7.1	2
No response	0.0	0
Total	100.0	28

Table1.5.1: Percentage distribution of industries by export as proportion of turnover

Export ratio of turnover	%	n
100%	3.6	1
75-99.99%	0.0	0
25-74.99%	21.4	6
0.01-24.99%	42.9	12
0%	7.1	2
No response	25.0	7
Total	100.0	28

Table1.5.2: Percentage distribution of industries by import as proportion of purchase

Import ratio of purchase	%	n
100%	3.6	1
75-99.99%	3.6	1
25-74.99%	21.4	6
0.01-24.99%	42.9	12
0%	3.6	1
No response	25.0	7
Total	100.0	28

Table1.6: Name of major export destination (multiple responses) as reported by surveyed applicable industries (in %)

Major destination of export	%	n
America/USA	26.3	5
Brazil	5.3	1
China	47.4	9
France	5.3	1
Germany	5.3	1
Greece	5.3	1
Hong Kong	5.3	1
India	5.3	1
Indonesia	5.3	1
Italy	5.3	1
Korea	31.6	6
Liberia	5.3	1
Malaysia	5.3	1
Myanmar	5.3	1
Nigeria	5.3	1
Panama	10.5	2
Philippines	5.3	1
Russia	5.3	1
Taiwan	10.5	2
Thailand	15.8	3
UK	5.3	1
Vietnam	10.5	2
No response	47.4	9
Total	-	19

Opinion of potential investors which have not invested in Bangladesh

Table2.1: Distribution of potential investors by interest in investing in Bangladesh

Interest	%	n
Interested to invest in Bangladesh	25.0	7
Not interested to invest in Bangladesh	71.4	20
No response	3.6	1
Total	100.0	28

Table2.2: Percentage distribution of interested investors to invest in Bangladesh by purpose of future investment in Bangladesh

Purpose of future investment in Bangladesh	%	n
Produce and sell products in the domestic market	14.3	1
Produce products in Bangladesh and export to other market	71.4	5
Produce and sell products in domestic market and export to other markets	0.0	0
Produce products and export to home country	14.3	1
N (Applicable)	100.0	7

Table2.3: Distribution of interested potential investors (in %) by their opinion on major factors of attraction (multiple responses) for being interested to invest in Bangladesh

Attracting factors to invest in Bangladesh	%	n
Cheap labor	100.0	7
Skilled labor	0.0	0
Positive attitude to labor	14.3	1
Skilled manager	0.0	0
Incentive (tax, duty)	28.6	2
Profit repatriation facilities	0.0	0
Cheap raw material	0.0	0
Availability of supporting industries	0.0	0
Domestic market	14.3	1
LDC status	28.6	2
Cheap Utility cost	0.0	0
English proficiency	14.3	1
N (Applicable)	-	7

Table2.4: Distribution of interested potential investors (in %) by their opinion on major constraints of having investment in Bangladesh (multiple response) Bangladesh

Constraining factors to invest in Bangladesh	%	n
Political instability	57.1	4
Lack of transparency in governance system or clarity in business regulatory environment	42.9	3

Slow/cumbersome administrative procedure	57.1	4
Not enough cheap labor cost	0.0	0
Low skill level of workers	57.1	4
Unavailability domestic raw materials/semi finished products, suppliers	28.6	2
Lack of sufficient logistics	57.1	4
Lack of incentive by government	28.6	2
Lack of support industries	28.6	2
Business regulation and custom is not clear	14.3	1
Small market size/low capacity of consuming produced products	0.0	0
Lack of utility service	57.1	4
Lack of/insufficient communication (e.g., ICT) facilities	0.0	0
Lack of information to decide investment.	42.9	3
Complicated tax system	28.6	2
N (Applicable)	-	7

Table2.5.1: Distribution of non-interested investors (in %) by their opinion on more attractive countries or regions for investment in compare to Bangladesh

Attractive emerging countries for investment compared to Bangladesh	%	n
Vietnam	60.0	12
India	50.0	10
Indonesia	50.0	10
Thailand	45.0	9
Myanmar	30.0	6
Philippines	25.0	5
Malaysia	20.0	4
Cambodia	15.0	3
Singapore	10.0	2
China	10.0	2
Brazil	10.0	2
Australia	5.0	1
Russia	5.0	1
Other area countries	5.0	1
No intention to invest overseas	5.0	1
No response	5.0	1
N (applicable)	-	20

Table2.5.2: Distribution of non-interested investors for Bangladesh (in %) by their opinion on factors that are important for choosing other countries for investment

Reasons why those countries or regions are more attractive for investment	%	n
Large population	15.0	3

Major customers had advanced into those countries.	15.0	3
Growing market	15.0	3
Infrastructures have been build at some level.	10.0	2
Resource-rich country	10.0	2
Development programs	5.0	1
We already have bases there.	5.0	1
Enough labor force based on growing population.	5.0	1
Tax benefits from FTA/EPA	5.0	1
Peoples' potential	5.0	1
large younger population	5.0	1
Favorable level of economic development	5.0	1
National character	5.0	1
We can share the way of thinking based on Buddhism thought.	5.0	1
Our products are recognized in those countries.	5.0	1
Friendly to Japan	5.0	1
Cheap labor	5.0	1
No response	25.0	5
N (applicable)	-	20

Table2.5.3: Distribution of non-interested investors for Bangladesh (in %) by their opinion on factors that are important for choosing countries for investment

Important factors for investment in foreign countries	%	n
Political stability	70.0	14
Transparency in governance system or clarity in business regulatory environment	65.0	13
Streamlined administrative procedures	70.0	14
Cheap labor	90.0	18
Skilled labor	35.0	7
Positive attitude of labor	55.0	11
English ability of labor	15.0	3
Skilled managers	25.0	5
Incentive (tax, duty)	40.0	8
Profit repatriation facilities	50.0	10
Cheap raw material	15.0	3
Availability of supporting industries	20.0	4
Domestic market	70.0	14
To get benefit of investing in Least Developed Countries (LDC status)	15.0	3
Cheap Utility cost (electricity, water, gas etc.)	50.0	10
Others	5.0	1
No response	10.0	2
N (Applicable)	-	20

Opinion of existing and potential importer for Bangladesh

Table3.1: Distribution of importer (in %) by status of import from Bangladesh

Import status	%	n
Industries import from Bangladesh	3.6	1
Industries which do not import from Bangladesh	96.4	27
Total	100.0	28

Table3.2.1: Distribution of importer (in %), which import from Bangladesh, by major import products or services

Major import products and services	%	n
No response	100.0	1
N (applicable)	100.0	1

Table3.2.2: Distribution of importer (in %), which import from Bangladesh, by their reasons (multiple responses) behind importing from Bangladesh

Reasons for import from Bangladesh	%	n
Low cost	100.0	1
Good quality	0.0	0
Satisfactory lead time	0.0	0
Other reason	0.0	0
N (applicable)	100.0	1

Table3.2.3: Distribution of importer (in %), which import from Bangladesh, by their future plan of import from Bangladesh

Future import plan from Bangladesh	%	n
Increase remarkably	0.0	0
Increase moderately	100.0	1
Remain the same	0.0	0
Decrease	0.0	0
Do not know	0.0	0
N (applicable)	100.0	1

Table3.2.4: Distribution of Importer, which import from Bangladesh, (in %) by the future additional potential import items (multiple response)

Future potential import items	%	n
No response	100.0	1
N (applicable)	100.0	1

Table3.3: Distribution of importer (in %), which do not import from Bangladesh, by their interest in importing products and services from Bangladesh

Interest in importing from Bangladesh	%	n
Interested to import	14.3	4
Not interested to import	78.6	22

No response	7.1	2
N (applicable)	100.0	28

Table3.3.2: Distribution of importer (in %), which are interested to import from Bangladesh, by the reasons (multiple response) for being interested

Reasons of being interested (multiple response)	%	n
Low cost	100.0	4
Good quality	25.0	1
Satisfactory lead time	25.0	1
Other reason	25.0	1
No response	0.0	0
N (applicable)	-	4

Table3.3.3: Distribution of importer (in %), which are not interested to import from Bangladesh, by the reasons (multiple response) of being not interested

Reasons of not being interested (multiple responses)	%	n
Lack of information	59.1	13
Products or services we need are not in Bangladesh	40.9	9
Product quality	27.3	6
Insufficient transportation services	18.2	4
Insufficient port facilities	13.6	3
Cost is not so reasonable	4.5	1
Others	13.6	3
No response	9.1	2
N (applicable)	-	22

Opinion of potential investors and potential and existing importer on requirement to initiate their investment and trade with Bangladesh

Table4: Distribution of investors and importers (in %) by their suggestion on requirement (multiple responses) to initiate/expand their investment and trade with Bangladesh

Suggestions to expand/initiate investment and trade with Bangladesh	%	n
Improve land availability for plant location	35.7	10
Improve infrastructure (incl.utility supply)	67.9	19
More fiscal incentives for investment	42.9	12
Improve skill of workers	42.9	12
Provide more SEZ and EPZ	53.6	15
Develop supporting industries	21.4	6
Improve logistic service	39.3	11
Provide more information	32.1	9
Reduce corruption and build more efficient governance system	21.4	6

Others	10.7	3
No response	14.3	4
N	-	28

Free Comment

In the field of sheet-metal parts, I haven't heard of exports from Bangladesh nor companies which advance into Bangladesh. I haven't seen sheet-metal products imported even from India because it takes too much time for transportation. It may be because there are few customers and suppliers there and infrastructure is not build enough. (I've only heard that some products have been imported from India).
I've visited Dhaka, Bangladesh and Yangon, Myanmar. Environment in Myanmar seems better than in Bangladesh at this point, however Bangladesh would be better for future. It takes more than one to two years to overcome the risk.
We suggest that Bangladesh should prepare against natural disasters such as flood.
We are interested to invest in Bangladesh to produce products mainly for Japan.
Import itself is not our core business and it is not meaningful to expand import to Bangladesh.
Products what we use are not produced in Bangladesh.
The reason why other countries are more attractive to invest in compare to Bangladesh..
Those countries have potential for growth since infrastructures have been build at some level. They are resource-rich countries and have development programs.
It is more efficient to invest in those countries where we already have bases.
Those countries are suitable for shipbuilding because of enough labor force based on growing population.
Those countries have good quality of labors.
Major customers had advanced into those countries.
We expect growing market for our products in those countries.
1.Increasing middle-class 2.Demographic dividend (1. and 2. mean growing market) 3.Tax benefits from FTA/EPA
Peoples' potential, resources, and large population.
Those countries are favorable as a whole, such as their level of economic development, population and national character.
We heard that those countries have large younger population and population is increasing even more.
Japanese-affiliated companies had advanced into those countries, and our products are recognized there.
Friendly to Japan. Cheap labor. We can share the way of thinking based on Buddhism thought.
Our customers have already advanced into those countries.

Policy Matrix on the Private Sector Development in Bangladesh

	Outline Perspective Plan of Bangladesh 2010-2021 (Vision 2021)	6th 5-Year Plan	National Industrial Policy 2010	SME Policy Strategy 2005	Export Policy Order 2009-12	Import Policy Order 2009-12	Foreign Private Investment (Promotion and Protection) Act (1980)
Agency Responsible	General Economic Division Planning Commission The Ministry of Planning	General Economic Division Planning Commission The Ministry of Planning	The Ministry of Industries	The Ministry of Industries	The Ministry of Commerce	The Ministry of Commerce	Board of Investment The Prime Minister's Office
Planning Period	2010-2021	2011-2015	2010-2015		2009-2012	2009-2012	
Effective Date	June, 2010	August, 2011	September, 2010	2005	September, 2009	January, 2010	April, 1980
Status of the Documents	The Documents being served as the strategic articulation of the development vision, mission, goals and objectives towards the Digital Sonar Bangla in 2021.	The Documents clearly articulated the Objectives, Policies, Strategies and Resources within the planning period for attaining Nation's long term goals.	The Documents which issues specific guidance with respect to the development and diversification of the export economy of Bangladesh and cite the policy and institutional arrangements to ensure that the industrialization process is compliant with internationally agreed environment, health, safety and labour standards.	The SME Policy Strategies have been formulated to assist in the achievement of the goals and targets of the Millennium Development Goals (MDGs) set by the Government.	The Policy has been formulated on the basis of recommendations of a Consultative Committee comprising of representatives from both of Public and Private Sectors to ensure the sustainability of the Export growth. The Export Policy is aimed at playing the pioneering roles in employing generation and poverty alleviation through burgeoning growth of Export.	The Import policy is being published by keeping the impact of free global trade and aimed at allowing a greater national goal of sustained economic growth with a view to promote exports and ensure competitiveness, efficiency and quality of indigenous industry.	This act is expedient to provide for the promotion and protection of Foreign Private Investment in Bangladesh. As a result of this policy, sanctioning and other procedures for obtaining different facilities and services have been simplified. The roles of the Government has also been changed from regulatory to promotional.
Major Objectives	<ul style="list-style-type: none"> Expansion and diversification of the industrial sector for enlarging the share of the secondary/industrial sector to 35 percent within the entire GDP and for employment generation. Raising per capita income to US\$2,000. Reduction of unemployment rate to 15 percent. Decrease in the number of people below poverty line to 25 million, i.e. to 15 percent. Ensure per capita energy consumption rising to 600 kwh, and others 	<ul style="list-style-type: none"> Acceleration of Economic Growth and Employment by attaining average real GDP growth rate of 7.3% per year over the plan period. At the end of 2015, Share of Manufacturing shall constitute 21% within total GDP which consists of: Leather Products(0.9%), Textile & Clothing (8.7%), Chemical Fertilizer(1.9%), Machinery (5.5%) and Other Manufacturing (4.0%). Reduction in the head-count poverty ratio by about 10 percentage points. Creating good jobs for the large pool of under-employed and new labor force entrants by increasing the share of employment in the industrial sector from 17 to 25 percent. Increasing the contribution of factor productivity in economic growth to 10%. Ensuring food security. Addressing the land constraint. Managing the spatial dimensions of growth. Ensuring environmental sustainability. Improving Governance and enhancing administrative capacity. Strengthening Public Private Partnerships. Establishing a results-based Monitoring & Evaluation (M&E) Systems, and others. 	<p>The Industrial Policy issues directions towards the Vision, Objectives and Strategies and a plan for their implementation.</p> <p>[Vision]</p> <ul style="list-style-type: none"> Contribution of Industrial sector to GDP shall be increased from 28% to 40% by 2021 and the proportion of the labour force employed will rise from 16% to 25%. Vibrant and dynamic private sector will be the indicator for Bangladesh's industrial sector. Three pivotal characteristics of industrial sector of Bangladesh will be (1) the promotion of domestic content in output, (2) wherever practicable, the substitution of imports, and (3) sustainable development and husbandary of export-oriented industries. <p>[Objectives]</p> <ul style="list-style-type: none"> Final objectives of the Industrial Policy will be to put in place a medium- and long-term policy framework for industrialization, against which the actual implementation can subsequently be monitored. <p>[Strategy]</p> <ul style="list-style-type: none"> Private sector will spearhead the industrialization drive and it will be abetted by the productive nurturing of agro-processing and labour-intensive industries. Development of small, medium, micro, cottage and IT industries including IT enabled services, will be two cornerstones of government's industrialization strategy. 	<p>The government is committed to SMEs as vehicles for quality of life improvement, economic growth and poverty alleviation of the common people. The primary role of the government shall, firstly, be that of a facilitator removing policy obstacles and neutralizing market failures and, secondly, that of providing necessary promotional support. The broad objectives of the Policy shall be to:</p> <ol style="list-style-type: none"> Accept SMEs as an indispensable player in growth acceleration and poverty reduction, worthy of its great potential and commitment in the requisite overall policy formulation and execution; The SME Policy Strategies shall be embedded, in a broad-based and integrated manner, in the Government's Poverty Reduction Strategy Paper (PRDP); Encourage and induce private sector development and promote the growth of FDI, develop a code of ethics and establish good governance, ICT-based knowledge managements and customersupremacy in the markets; Identify and establish an appropriate physical and ICT network of infrastructure and institutional delivery mechanism that facilitate the promotion of SMEs; Re-orient the existing fiscal and regulatory framework and government support institutions towards facilitating achievement of the goals of SME Policy; and others 	<p>Major Objectives of the Export Policy are summarized as follows:</p> <ol style="list-style-type: none"> Updating and liberalizing the trade regime in accordance with the needs and requirements of the WTO and Globalization. Encouraging labor-intensive & export-oriented productions, Ensuring availability of raw materials for manufacturing export goods. Increasing productivity and diversity of products, Improving the quality of products, encouraging the use of modern, appropriate and environment-friendly technology, producing high-end products and improving the design of the products, Enhancing efficiency and dynamism by using e-Commerce and e-Governance. Initiating new strategies for the expansion of the markets for export products, making proper utilization of computer technology and encouraging all modern technologies including e-Commerce, Assisting the development of necessary infrastructure, particularly for backward and forward linkages in order to encourage the production of exportable goods, Providing all-ouot support to new exporters as well as to existing exporters, Assisting the development of s skilled labor-force through proper training for managing international trad Providing adequate guidance to trade bodies, business organizations, business people and related individuals in understanding the changing international trading systems, etc. 	Not clearly defined.	<p>The Act will define the principal and guideline for the investment activities by the private sector, the procedures to be followed for establishing permanent premises, contents of the incentives and facilities, Foreign Exchange Control, and legal protections for the investment in Bangladesh by the investor; Objectives of this Act are;</p> <ol style="list-style-type: none"> Promotion of Investment from foreign countries and domestic investors, Protection of the activities of investment in Bangladesh arising from Expropriation and Nationalization and other incident, Assuring equitable treatment to foreign private investment so that they can enjoy full protection and security in Bangladesh.
Technology Assistance		<ul style="list-style-type: none"> The performance of the Bangladesh Standard Testing Institute(BSTI) will be reviewed and effective measures will be introduced to enhance its functional capability through necessary expansion and modernization. Some vital components of modernizing the institutes will be strengthening its methodology, quality control and testing sections and induction of sufficient number of quality professionals into it. Presently Bangladesh Industrial Technical Assistance Center (BITAC) has 4 extension centers and they will assist the private sector entrepreneurs to solve their technical problems as well as in adopting/adapting new technologies in their production practices. 	<p>Government will provide support to the private sector industries in their search, acquisition and adaptation of best-practice technology, which typically originate in foreign countries</p>	<ul style="list-style-type: none"> Technical assistance and investment are both urgently needed to appropriately accent the training and motivational environment in these training institutions so that they can become durable fixtures of technical and managerial skills, in a format of public-private partnership. R & D that lead to prototypes with a scope for replication in potentially high-impact product niches (eg in the field of mobile game, 3-D animation, or bio-optics, or the manufacture of computer-controlled industrial and medical appliances, or spurring the use of resin in new production applications, etc.) Technology Exchange Programs between countries in similar stages of development, and with a similar maturity of the infrastructural development for SME development, shall be implemented in the interest of rapid technology transfer. 	<ol style="list-style-type: none"> The National Board of Reveue will consider the possibility of permitting duty-free import of machinery and equipment which will be imported for the research and development (R&D) purposes. The Ministry of Commerce has taken initiatives to put in place a National Trade Portal to be connected to all business and trade related websites, and an Management Information Systems (MIS) will be installed in the MOC where all the officials are provided with computers and internet facilities. 	<ul style="list-style-type: none"> Importer may import the Samples, Advertising Materials and Gifts at free of charge within the certain conditions and limits. Export-oriented Industry may also import the Samples for facilitating manufacture of new product with new design for the purpose of Export or Domestic Market. Those Industries included: Ready-made Garments, Mechanized Shoe, and Tannery. For those who are not included, a certification/recommendation from EPB is required. 	
Assistance in HRD		<ul style="list-style-type: none"> Major objectives of Bangladesh Institute of Management (BIM) are: a) Upgrade the existing centre to a self-sustained higher institute of training, research and learning, b) Train and develop managers at all levels of the economy, c) Assist, develop and maintain higher productivity in business and industry, d) Give consultancy services for solving management and related problems faced by various sectors, e) Carry out research in different fields of management, economics and business. Institutional capability of the National Productivity Organization (NPO) will be further developed to create productivity consciousness and awareness to the people for launching productivity as a national objective, undertake program for human resource development for productivity improvement, build productivity infrastructure and convert industrial enterprises into an efficient and profitable organization, work as a catalyst to promote plant-level productivity through consultancy services, conduct survey, study and research work on productivity and assist the government in formulating productivity policy. 	<p>Government will take various measures to meet growing demand for skilled managers and technology and technical workers. In order to better align the curriculum and capability of those public institutions that impart business and technical education, the government will add to their capacities, modernize their curricula, ramp up their research capability.</p>	<ul style="list-style-type: none"> Bangladesh Small and Cottage Industries Corporation (BSCIC)/Small and Cottage Industries Training Institute (SCITI), Bangladesh Institute of Management (BIM), Bangladesh Industrial Technical Assistance Center (BITAC) and National Productivity Organization (NPO) - where a lot of equipment, infrastructure and other resources are in place - should undergo a significant strategic reorientation of their own core competencies under the watchful eye of the Advisory Panel/SME Cell. In particular, the skills and competencies needed to enable SME hold their own in the booster-industries in the changed global business environment should be re-emphasized in the ensuing revamping of these institutions. Curriculum of vocational training institutes shall be revised and reviewed to make it SME development friendly. 	<ol style="list-style-type: none"> Bangladesh Foreign Trade Institute (BFTI) is providing training and seminars on the foreign trade, EPB will organize trainings, seminars and workshops on various export related training. 		

	Outline Perspective Plan of Bangladesh 2010-2021 (Vision 2021)	6th 5-Year Plan	National Industrial Policy 2010	SME Policy Strategy 2005	Export Policy Order 2009-12	Import Policy Order 2009-12	Foreign Private Investment (Promotion and Protection) Act (1980)
Outlines of the Policy	Financial Assistance	Special Facilities and Venture Capital will be provided to Export-oriented Industries under "Thrust Sectors".	<ul style="list-style-type: none"> Existing regime of industrial finance such as Equity and Entrepreneurship Fund (EEF) will be reorganized and strengthened. The government will encourage to set up and operate venture capital funds. On-going campaign to strengthen the capital market will be intensified. 	<ul style="list-style-type: none"> Donor financial resources made available specifically to help with implementation of SME Policy being enunciated here would only be allocated to competitively-selected enterprises within the booster industries here being prescribed. Within the preview of the Advisory Panel, projects to be funded from the venture-capital fund will be evaluated by a team of experts that which will be constituted as a part of the implementation of SME Policy. 	<ol style="list-style-type: none"> Use of Foreign Exchange earned from Export. Use of Export Promotion Fund (EPF) for the production of goods, paying fees for technical assistance/royalty, for the costs of sending mission and participating trade fairs, for the costs of training and R & D activities. Extension of Export Credit. Exemption from Insurance Premium. Reduction of Air fare for the export specially privileged products. Initiatives will be taken to introduce SME Credit Guarantee Scheme for increasing export in export-oriented industries. 		<ol style="list-style-type: none"> Accelerated depreciation in lieu of Tax Holiday is allowed at the rate of 80% of actual costs of machinery or plant for the year in which the unit starts commercial production and 20% for the following years.
	Tax Relief	Essentially the Tax Structure affecting incentives in the manufacturing sector can be broken down into 5 parts: a) Corporate Tax, b) Tax Holiday, c) Tax Exemption, d) Custom Duty, e) Facilities for Non-resident Bangladesh(NRB). <ul style="list-style-type: none"> Corporate Taxes Tax Rates have been rationalized from 60% to 40% in early 1990s then to 27.5% in 2000. Tax Holidays For the Industries set up in Bangladesh enjoy Tax Holiday packages of various rates by different districts, and the existing sectors for Tax Holiday are kept in tact and some additional Tax Holiday sectors are added. Tax Exemptions Number of Tax Exemptions are allowed for; <ul style="list-style-type: none"> Royalties, Technical know-how fees, For the incomes from private sector power generators For Capital Gains from the transfer of shares of public companies listed in the stock exchange Custom Duty For Capital Machinery and spare parts(3%) For Basic Raw Materials(7%) For Intermediate Raw Materials(12%) For Food stuff, fertilizer, medicines and raw cotton(0%) 	<ul style="list-style-type: none"> Initiatives will be taken to expand/update the list of (a) Industry, (b) Infrastructure, and (c) Tourism Industry projects/subsectors entitled to enjoy the tax holiday under the Income Tax Ordinance 1984. Import substitute industries will also be brought under the purview of the same ordinance. Tax exemption to those countries which are not bound by the agreement of Exemption of Double Tax so that the government can provide the tax exemption to others if and when proper and necessary. 		<ol style="list-style-type: none"> Easing VAT Return on export-facilitating services Duty-free import of spare parts upto 10% of total capital machinery will be allowed every two years for export oriented industries. 	Import into and Export from the EPZs shall remain outside the purview of this Import Policy Order, provided that the banned items mentioned in the Annexure-1 of the Order shall not be imported and in case of import of other items, the rules & regulations related to public health and environment must be observed strictly.	<ol style="list-style-type: none"> Tax Holiday Tax holiday is allowed to industries for the following period according to the location of the establishment; <ul style="list-style-type: none"> Dhaka, Sylhet and Chittagong Div.: 5 years Other Division: 7 years 3 Hill districts of Chittagong Div.: 7 years Tax Holiday facility can be availed by industries set up in Bangladesh with June 30, 2000. Concessionary duty on imported machinery Import duty at the rate of 7.5% is payable on capital machinery and spares imported for initial installation, but value of spare parts should not exceed 10% of the total C&F value of the machinery. Tax Exemption on royalty, technical knowhow fees received by any foreign collaborator, firm, company and expert. Rationalization of import duty Duties and taxes on import of goods which are produced locally will be higher than those applicable to import of raw materials for producing such goods The export-oriented industries are exempted from paying local taxes such as municipal tax.
	Fiscal Incentives	During 6th 5-year plan, Foreign Direct Investment (FDI) is encouraged in all industrial activities. The policy framework for FDI is based on the Foreign Private Investment (Promotion and Protection) Act, 1980, which provides measures for the non-discriminatory treatment and protection of foreign investment. <ul style="list-style-type: none"> Incentives to Foreign Investment The Government has liberalized its industrial and investment policies in recent years by reducing bureaucratic control over private investment and opening up many areas. Some of the major incentives are tax exemptions, import duty exemptions, tax holidays. Double taxation can be avoided on the basis of bilateral agreements. Facilities for the full repatriation of invested capital, profit and dividend exist. The Government is making efforts to update its legislation and improve enforcement for the benefits of the Intellectual Property Rights and Investment Protection. 	<ul style="list-style-type: none"> Fiscal incentives will be given for firm-level research and technology development. Incentives for the growth of small, medium and cottage industries, protection of handloom industry, development of silk village similar to banarasi and jamdani village including weaver, potter, blacksmith, pottery, bamboo, cane copper and mat sectors. Special incentives to be taken to provide incentives for the industry/ factory having their own power generating facilities or using biomass or solar or windmill based power and to enterprise for setting up of environment friendly industries. Incentives will be provided to import-replaceable industries capable of producing cost-effective quality products to lessen reliance on import of materials needed to meet the internal demand. Accelerated depreciation is allowed for certain products. 	The industrial enterprises identified in the Industrial Policy 2005 as Thrust Sectors including small and medium enterprises (SMEs) will enjoy special fiscal and financial incentives. The Ministry of Industries and the SME Advisory panel/Foundation, as the case may be, will determine modalities of how to implement both the credit-fund and the venture-capital fund.	<ol style="list-style-type: none"> Encouraging facilities will be provided for participating in international trade fairs, single country exhibitions and other market promotion activities in different countries, and organizing single trade fairs abroad under joint initiatives of the Government and the private sector. 		<ol style="list-style-type: none"> The export-oriented industries identified by the Government as thrust sectors are provided special facilities in the form of cash incentives, venture capital and other facilities.
	Infra-structure/Utility Development	<ol style="list-style-type: none"> Special Economic Zones and Industrial Parks A key objective of SEZs and industrial parks would be to stimulate efficient use of skilled labor, land infrastructure, energy and other resources as well as to facilitate backward, horizontal and forward linkages with local industries. The SEZs will also permit the relocation of pollution-prone and manufacturing enterprises from metropolitan areas. Export Processing Zones (EPZs) There are currently eight EPZs in Bangladesh spread throughout the Country. The main fiscal and non-fiscal incentives provided to the locators in EPZs are; Tax Holiday for 10 years, Duty-free import of materials, machinery and spare parts, Duty-free Export and Import, Exemption from dividend tax, GSP facilities, and others. These incentives will remain in place during 6th 5-year plan. 	<ul style="list-style-type: none"> Priority will be given to infrastructural needs of industrialization such as electricity, gas, port facilities, road and railway transportation telecommunications etc. Participation of the private sector in all infrastructure development endeavours, and the use of public-private partnership will be strongly promoted through various incentives. The government will pursue the creation of special economic zones (SEZs) for both export and local market oriented industries at zone laws are enacted. Taking into account the capability of the region, additional initiatives will be taken to set up backward linkage to provide and ensure agro-service. Economic Zone set up by private, private public partnership, or public initiative for specialized industry of similar type. Economic zone will include the following areas: Export processing zone, Internal processing zone, Commercial area, Processing-free zone, Dedicated economic zone for the agro-sector, and High-tech Park, ICT Village and Software technology zone. 	A high-performance fiber-optics communications backbone shall be put in place in six of the country's largest metro-markets (namely, Dhaka, Chittagong, Rajshahi, Khulna, Sylhet and Barishal) so that the launch of some serious ICT-centric applications to benefit e-governance to the profit of SME development is not unduly handicapped by woefully inadequate bandwidth.	<ol style="list-style-type: none"> Establishment of cold chains will be encouraged to prevent quick putrefaction of the products and import of reefer vans and reefer containers will be encouraged in this regard. The best use of modern technology and automation system including one stop service will be ensured in order to expedite customs related services for releasing imports and exports. The National Board of Revenue will consider the possibility of providing bonded warehouse facilities to import-dependent export industries. Special transportation by railway, roads, and water-ways will be arranged for internal movements in order to export the agro products and agro-processed products. 		
Environmental Conservation	<ul style="list-style-type: none"> During a survey covering 11,149 industrial units conducted during 2002-2005, the Department of Environment (DOE) had identified 524 falling under the Red Category as per the Environmental Conservation Rules (ECR) 97. Among the above identified 524 red-listed industrial units, 417 were found to have constructed their Effluent Treatment Plants (ETPs) in their own initiative while 105 had no ETP at all. Environmental Clearance Certificates (ECCs) are being issued from the DOE to proposed industrial enterprises in pursuance of ECR, 95 & ECR 97. 	Government will ensure that industrialization in Bangladesh is environmentally sound and compliant with the health and safety and other standards required under the rules of the WTO.	There shall be an effort to identify three or four promising lines of production in a handful of clusters in the metros of Dhaka and Chittagong where small enterprises around. Gap analysis that lead to the diagnoses of weakness that stymie their productivity shall be launched and several technical assistance studies shall then be aimed at these problem.	<ol style="list-style-type: none"> Initiatives will be taken to establish a centralized waste management plant in the Tannery Village in Savar, and installation of clean technology will be encouraged. Less use of nitrogen and sodium chlorate in the leather industry will be encouraged. 			

	Outline Perspective Plan of Bangladesh 2010-2021 (Vision 2021)	6th 5-Year Plan	National Industrial Policy 2010	SME Policy Strategy 2005	Export Policy Order 2009-12	Import Policy Order 2009-12	Foreign Private Investment (Promotion and Protection) Act (1980)
Area of Special Emphasis		On the basis of past performance and some notion of future potential, the Government has prepared a list of thrust manufacturing sectors which will deserve priority in assigning favorable treatment with regard to taxes, subsidies, credit facilities, land allotments, foreign exchange allocations, and the like. The list is given below: 1. Agro-based and Agro-processing Industry 2. Ship Building, 3. Ready-made Garments Industry 4. Renewable Energy (Solar Power, Windmill) 5. Basic Chemicals/dye and chemicals 6. Active Pharmaceuticals Ingredient Industry and Radio Pharmaceutical Industry 7. Herbal Medicinal Plant 8. Radio-active (diffusion) Application Industry (e.g. developing quality of decaying polymer/preservation of food/disinfecting medicinal equipment) 9. Development of Polymer Industry 10. Jute and Jute Products, 11. Light Engineering Industry 12. Leather and Leather Products 13. Plastic Industry 14. Furniture 15. Handicrafts 16. Energy Efficient Appliances/Manufacturing of Electronic goods/Development of Electronic materials 17. Frozen Fish Industry 18. Tea Industry 19. Home Textile 20. Ceramics 21. Jewellery 22. Tissue Grafting and Biotechnology 23. Toy 24. Innovative and Import Substitute Industry 25. Cosmetics and Toiletries	• Export-oriented industrialization is one of the major objectives of the present Industrial Policy. In this respect, export-oriented industries, both existing and potential ones, will be prioritized and all-out government assistance will be provided for their promotion in line with the provisions of the Export Policy. • The government will prepare the list of Thrust Sectors and update them from time to time in consultation with all stakeholders and on the basis of information collected on various industries, their growth potentials and likely positive impact on the economy. • The government will also determine specific policy support to be provided to these industries on the basis of the identification of constraints faced and past performances of the industries. The current thrust sector list consists of 31 industries: 1. Agro-based and agro-processing Industry, 2. Human Resource Export, 3. Ship Building, 4. Tourism, 5. Renewable Energy (Solar Power, Windmill), 6. Basic Chemicals/dye and Chemicals, 7. ICT and ICT-based Services, 8. Ready-made Garments Industry, 9. Active Pharmaceuticals Ingredient Industry, 10. Herbal Medicinal Plant, 11. Radio-active (diffusion) Application and Radio Pharmaceuticals Industry, 12. Development of Polymer Industry, 13. Jute and Jute Products, 14. Leather and Leather Industry, 15. Hospital and Clinic, 16. Light Engineering Industry, 17. Plastic Industry, 18. Furniture, 19. Handicrafts, 20. Energy Efficient Appliances/Manufacturing of Electronic goods/ Development of Electronic Materials, 21. Frozen Fish Industry, 22. Tea, 23. Home Textiles Industry, 24. Ceramic, 25. Tissue Grafting and Biotechnology, 26. Jewellery, 27. Toy, 28. Container Service, 29. Warehouse, 30. Innovative and Import Substitute Products, 31. Cosmetics and Toiletries.	For promotional support the following 11 booster sectors have been identified and the list will be reviewed every three years: 1. Electronics and electricals; 2. Software development; 3. Light Engineering and metal-working; 4. Agro-processing/Agri-business/Plantation Agriculture/Specialist farming/Tissue-culture; 5. Leather-making and leather goods; 6. Knitwear and ready-made garments; 7. Plastics and other synthetics; 8. Healthcare & diagnostics; 9. Educational services; 10. Pharmaceuticals/Cosmetics/Toiletries; 11. Designer, Aesthetically-challenging, Personal wear and effects.	The Government will identify "Highest Priority Sector" and "Special Development Sectors" depending on the level of production and supply, potential contribution to the export sector, demand in the international market and above all the capacity to contribute to the socio-economic development. [Highest Priority Sectors] 1. Agro-products and agro-processed products, 2. Light engineering products (including auto-parts and bicycles), 3. Footwear and leather products, 4. Pharmaceutical products, 5. Software and ICT products, 6. Home textile, 7. The sea-bound ship-building industries, and 8. Toiletries products. [Special Development Sectors] 1. Crushed and finished leather products, 2. Frozen fish production and processing, 3. Handicrafts, 4. Electric and electronic products, 5. Fresh flower and foliage, 6. Jute and jute products, 7. Hand-woven textiles from hilly areas, 8. Uncut diamond, 9. Producing herbal plants, medicine and medicinal products, 10. Ceramic products and melamine, 11. Plastic products, and 12. Furniture industries.	The following items are not importable: 1. Those identified in the Annexure-1 of the Order. (Poppy, Grass and Bhang, Opium) 2. Maps, charts and geographical globes which do not indicate the territory of Bangladesh. 3. Horror comics, obscene and subversive literature including such pamphlets, posters, newspapers, etc. 4. Books, newspapers, periodicals, documents and other papers, and other materials containing matters likely to outrage the religious feelings and beliefs of any class of the citizens of Bangladesh. 5. Unless otherwise specified in this order, any goods of secondary or sub-standard quality or below-standard or old, used, reconditioned goods or factory rejects and goods of job-lot/stock-lot. 6. Reconditioned office equipment, photocopier, type-writer machine, telex, phone and fax. 7. Unless or otherwise specified in this order, all kinds of waste, 8. Goods (including their containers) bearing any words or inscriptions of religious connotation the use or disposal of which may injure the religious feelings and beliefs of any class of the citizens of Bangladesh. 9. Goods (including their containers) bearing any obscene picture, writing inscription or visible representation, and 10. Import of live swine and any item prepared from swine.	1. Legal Protection This Act ensures legal protection to foreign investment in Bangladesh against nationalization and expropriation and it also guarantees repatriation of capital and dividend and equitable treatment with local investors. 2. Avoidance of double taxation Bangladesh Government has already concluded with the 20 countries (as of 1980) for avoidance of double taxation and negotiations are going on with many other countries.
Others		Strengthening Supporting Institutions is an essential part of a strategy to boost manufacturing growth, exports and employment in the 6th 5-year plan. Those institutions are: 1. Board of Investment (BOI), 2. Privatization Commission (PC), 3. Chamber of Commerce & Industries (CCI), 4. Export Promotion Bureau (EPB), 5. Bangladesh Tariff Commission (BTC), 6. Bangladesh Standard Testing Institute (BSTI), 7. Bangladesh Institute of Management (BIM), 8. Bangladesh Industrial Technical Assistance Centre (BITAC), 9. National Productivity Organization (NPO)				In case of any dispute between an importer and the Custom Authority on Import Trade Control (ITC) classifications of good imported, importer may ask for adjudication by the local ITC Committee set up at Chittagong, Dhaka, Khulna, Banapole and Sylhet.	
Related Laws & Implementation Program			• The Bangladesh Small and Cottage Industries Corporation Act, 1957 • Plot Allocation Policy in BSCIC Industrial Estate, 2010 • The Small and Medium Enterprise Foundation, 2006 • The Information and Telecommunication Technology Act, 2006 • Automobile Road Map be ready by April 2012 • Ship-building Road Map be ready by June 2012		• Import Policy Order 2009-2012 • ICT Business Promotion Council (IBPC) (December 2002) • Leather Sector Business Promotion Council (LSBPC) (February 2004) • Light Engineering Product Business Promotion Council (LEPBPC) (March 2004) • Medical Plants & Herbal Products Business Promotion Council (MPHPBPC) (April 2006) • Fishery Products Business Promotion Council (PBPC) (March 2008)		• The Bangladesh Economic Zone Act, 2010 • The Bangladesh Export Processing Zone Authority Act, 1980 • The Bangladesh Private Export Processing Zone Authority Act, 1996 • The EPZ Workers Association and Industrial Relations Act, 2004 • The Bangladesh High-tech Park Authority Act, 2010 • Bangladesh Private Sector Infrastructure Guidelines, 2004 • Policy and Strategy for Public- Private Partnership (PPP), 2010 • Policy Guidelines for Enhancement of Private Participation in the Power Sector, 2008 • Private Sector Power Generation Policy of Bangladesh 1996 and revised 2004 • Renewable Energy Policy of Bangladesh, 2009

附表3. バングラデシュ国 主要産業の発展戦略実施に係る課題

産業形態	産業分野	具体的戦略名	戦略実現へ向けた課題						
			品質(技術)	コスト	販路拡大	人材育成	金融制度	原材料の調達	その他
国内資源活用型	農産加工	競争力のある価格を武器として新興市場への販路拡大を図る	品質向上も重要	価格競争力の確保に努める	新市場への参入戦略が必要	海外ビジネス要員の育成が必要	輸出金融等の整備が必要	果樹・園芸技術の向上による原料の安定供給が必要	政府関連機関との連携が必要
		外国企業の投資を活用しコールドチェーン・物流施設を整備する	品質保持の意識向上が必要	低価格での施設整備を進める	物流業者との連携が必要	外国企業と協働できる人材育成が必要	外国企業の資金に期待	-	-
		外国企業との合併等を通じて品質管理や加工技術を習得する	外国企業との合併を通じた技術力の向上	-	-	外国企業と協働できる人材育成が必要	-	-	-
		BPCの活動を通じて新商品の開発や市場開拓を推進する	新商品の開発に注力品質向上も重要	-	新市場への参入戦略が必要	商品開発面での人材育成が目標	開発資金の融資制度が望まれる	-	政府関連機関との連携が必要
		外国ドナーの支援を受け人材開発を促進する	-	-	-	農産加工分野での人材育成を図る	外国ドナーの資金に期待	-	政府機関を通じた外国ドナーへの働きかけが必要
		外国ドナーの支援を受け品質保証・認証システムの導入整備を図る	品質保証・認証制度の導入は品質(技術)の向上に極めて重要	-	-	品質保証・認証制度を運用できる人材育成を図る	外国ドナーの資金に期待	-	政府機関を通じた外国ドナーへの働きかけが必要
	製靴・皮革	革新的デザインと良質な皮革原料により靴製品のブランド化を図る	工業デザイナー等との連携が必要	価格競争力の確保に努める	市場デマンドのフィードバックが必要	製品企画・生産・販売(広告)での人材育成が目標	開発資金の融資制度が望まれる	優良な原皮の確保が重要であり、なめし業界との連携が必要	政府関連機関との連携が必要
		新興市場への販路拡大で輸出市場の多角化を図る	品質向上は極めて重要	価格競争力の確保に努める	欧米・北米市場への偏重脱却が目的でありEPB等との連携が重要	海外ビジネス要員の育成が必要	輸出金融等の整備が必要	-	政府関連機関との連携が必要
		バリューチェーン拡大のためのバックワード産業の育成を図る	バックワード産業との品質面での摺り合せが必要	価格低下の可能性を探る	-	バックワード産業との人材交流を図る	-	-	-
		外国ドナーの支援を得た製靴・皮革分野の専門職業教育機関を設立する	-	-	-	製靴・皮革分野での人材育成を図る	外国ドナーの資金に期待	-	政府機関を通じた外国ドナーへの働きかけが必要
		市場多角化のためのマーケティングデータシステムを開発する	-	-	データシステム開発に係るハード・ソフト面でのリソース調達が必要	データシステム開発に係る人材育成が必要	官民協調による開発資金の調達が必要	-	政府関連機関との連携が必要
		政府の支援を得てなめし業界の環境問題への対応を図る	環境保全技術の取得が必要	-	-	環境保全技術分野の人材育成を図る	官民協調による開発資金の調達が必要	-	政府関連機関との連携が必要
	家具	高級木材と洗練されたデザインを活用した高級家具で市場浸透を図る	工業デザイナー等との連携が必要	価格競争力の確保に努める	高級家具の販売に必要な販路拡大策が必要	製品企画・生産・販売(広告)での人材育成が目標	開発資金・輸出金融等の整備が必要	原料となる高級木材の調達が重要	政府関連機関との連携が必要
		低価格家具を武器に新興市場への参入を図る	低価格を実現する仕様の開発が必要	価格低下の可能性を探る	新市場への参入戦略が必要	製品企画・生産・販売(広告)での人材育成が目標	開発資金・輸出金融等の整備が必要	-	政府関連機関との連携が必要
		民間事業者による家具専門職業訓練機関を設立し熟練工の養成を図る	-	-	-	家具分野での人材育成を図る	民間事業者の資金に期待するが一部資金の支援が必要	-	-
		官民が協力して高級家具の原料となる高級木材種の造林を図る	-	-	-	-	官民協調による開発資金の調達が必要	高級木材の自給率を高めるための長期的取組み	政府関連機関との連携が必要

産業形態	産業分野	具体的戦略名	戦略実現へ向けた課題						
			品質(技術)	コスト	販路拡大	人材育成	金融制度	原材料の調達	その他
加工プロセス追求型(原材料輸入加工型)	セラミック	高品質と競争力のある価格を武器に新興市場への浸透を図る	デザイナー育成施策が必要	価格競争力の確保に努める	新市場への参入戦略が必要	海外ビジネス要員の育成が必要	輸出金融等の整備が必要	-	政府関連機関との連携が必要
		外国企業との合併により技術力を向上し、ハイテク商品分野へ進出する	外国企業との合併を通じた技術力の向上	価格競争力の確保に努める	-	ハイテク商品の開発・生産の人材育成を図る	開発資金融資制度が必要	-	
		外国ドナーの支援を受けて窯業産業人材育成機関を設立する	-	-	-	窯業分野での人材育成を図る	民間事業者の買込に期待するが一部資金の支援が必要	-	
		八国政府や外国政府の支援を受けて磁器原料の調達先の多様化を図る	-	-	磁器原料の調達先調査が必要	海外ビジネス要員の育成が必要	輸入金融制度の整備が必要	磁器原料の調達先多角化を図りリスクを軽減する	EPB・八国在外公館や外国政府からの支援を求める
		八国政府支援機関と連携し、毒物規制等への対応を図る	-	-	-	環境保全や毒物管理の人材育成が必要	-	-	政府関連機関との連携が必要
	プラスチック	輸出拡大と産業振興を目的として官民によるBPCを立ち上げる	新商品の開発に注力し品質向上も重要	価格競争力の確保に努める	新市場への参入戦略が必要	BPCへの派遣メンバーを選定する	開発資金・輸出金融等の整備が必要	-	政府関連機関との連携が必要
		先進技術と工業デザインを活用して包装製品市場へ参入する	技術導入による新製品開発を目指す	-	新市場への参入戦略が必要	製品企画・生産・販売(広告)での人材育成が必要	開発資金融資制度が必要	-	政府関連機関との連携が必要
		外国ドナーの支援を得て廃棄プラスチック再利用技術を改善する	外国ドナーの支援による技術レベルの向上	価格競争力の確保に努める	-	廃プラ再生技術の専門家育成を目指す	外国ドナーの資金に期待	-	政府機関を通じた外国ドナーへの働きかけが必要
		外国ドナーの支援により研究開発機関を設立し人材育成等を図る	外国ドナーの支援による技術開発・研究能力の向上	-	-	高分子化学分野等での人材育成を図る	外国ドナーの資金に期待	-	政府機関を通じた外国ドナーへの働きかけが必要
		政府の支援を得て環境保全技術を向上させる	環境保全技術の向上	-	-	環境保全分野の人材育成を図る	-	-	政府関連機関との連携が必要
	ホームテキスタイル	外国企業との合併により資本力と技術力を向上させる	外国企業との合併を通じた技術力の向上	価格競争力の確保に努める	-	外国企業と協働できる人材育成が必要	-	-	
	ライトエンジニアリング	国内の2輪・4輪組立業者や造船業界との取引を開始する	組立産業・造船業等との取引を通じた技術力の向上	価格競争力の確保に努める	新規顧客への販路拡大戦略が必要	品質管理や経営システム分野の人材育成が必要	-	-	
		タイ自動車部品メーカーへの下請けビジネスを推進する	海外企業との取引を通じた技術力の向上	価格競争力の確保に努める	新規顧客への販路拡大戦略が必要	品質管理や経営システム分野の人材育成が必要	-	-	政府関連機関との連携が必要
		外国アンカー企業を誘致し下請け業務を通じて品質の向上を図る	国内へ投資した企業との取引を通じた技術力の向上	価格競争力の確保に努める	新規顧客への販路拡大戦略が必要	品質管理や経営システム分野の人材育成が必要	-	-	
		外国ドナーの支援を受けて品質管理・認証システムの導入を図る	品質管理システム等の導入による品質保証を実現	-	-	品質保証・認証制度を運用できる人材育成を図る	外国ドナーの資金に期待	-	政府機関を通じた外国ドナーへの働きかけが必要
		外国ドナーの支援を受け電炉を導入し品質水準の向上を図る	電炉の導入による品質水準の向上	価格競争力の確保に努める	-	新技術が運用できる人材育成を図る	外国ドナーの資金に期待	-	政府機関を通じた外国ドナーへの働きかけが必要
		政府機関と協調し新規工業団地の開発を推進する	-	-	-	-	官民協調による開発資金の調達が必要	-	政府関連機関との連携が必要
		八国政府の指導を受けて職場の安全管理を向上させる	-	-	-	職場の安全管理を行える人材育成を図る	-	-	政府関連機関との連携が必要
		価格競争力を武器として欧州・アフリカ市場での浸透を図る	低価格を実現する仕様の開発が必要	価格低下の可能性を探る	新市場への参入戦略が必要	製品企画・生産・販売(広告)での人材育成が必要	開発資金・輸出金融等の整備が必要	-	
		外国企業との合併により技術力を向上させる	外国企業との合併を通じた技術力の向上	価格競争力の確保に努める	-	外国企業と協働できる人材育成が必要	-	-	

産業形態	産業分野	具体的戦略名	戦略実現へ向けた課題							
			品質(技術)	コスト	販路拡大	人材育成	金融制度	原材料の調達	その他	
	造船	外国企業との合弁や現地銀行からの融資を受けて造船所の近代化を図る	-	-	-	外国企業と協働できる人材育成が必要	外国企業や民間銀行の投融資に期待	-		
		民間による造船分野の専門職業訓練機関を設置して人材育成を図る	-	-	-	造船分野での人材育成を図る	民間事業者の資金に期待するが一部資金の支援が必要	-		
		FBCCI等の支援機関と連携し造船産業への体系的な支援策を確立する	-	-	-	-	-	-	政府関連機関との連携が必要	
		金融機関の融資を受け運転資金や輸出信用の資金需要を満たす	-	-	-	-	民間銀行の融資に期待	-		
		国際海事関連機関の支援を受けて八国船級協会を設立する	船級協会による業界規格の導入を図る	-	-	-	船級協会の業務に必要な人材育成を図る	-	-	政府機関を通じた国際関連機関への働きかけが必要
高度人材活用型	製薬	海外事業活動を規制する規則の緩和を求め海外投資を拡大する	-	-	海外事業活動拡大に係る戦略が必要	海外ビジネス要員の育成が必要	-	-		
		医薬品の品質確保のための管理制度を確立する	医薬品管理制度の導入による品質の確保・向上	-	-	医薬品管理制度の運用に必要な人材育成が必要	-	-	政府関連機関との連携が必要	
		源薬(API)製造のための工業団地の建設を促進する	-	-	-	-	-	源薬(API)の国内生産で競争力の向上に繋がる	政府関連機関との連携が必要	
	ソフトウェア・ITサービス業界	小規模事業者が中心であるオープンプラットフォーム市場へ参入を促進する	OPF市場の品質基準に見合った品質確保が必要	価格競争力の確保に努める	新市場への参入戦略が必要	海外ビジネス要員の育成が必要	-	-	政府関連機関との連携が必要	
		海外の八国人IT技術者とのマッチングを図り新興市場の開拓に役立てる	-	-	海外IT技術者とのマッチングが必要	-	-	-	政府関連機関との連携が必要	
		EPBと連携し低価格ソフトウェア開発・ITサービス市場への売込みを図る	品質確保に努める	価格低下の可能性を探る	新市場への参入戦略が必要	海外ビジネス要員の育成が必要	-	-		
		海外ドナーの支援を受けてIT実務教育を実施し人材育成を図る	IT実務教育で技術レベルの向上を図る	-	-	-	IT技術者の制度的育成	外国ドナーの資金に期待	-	
		国際通信回線や地方での通信回線の拡充に努める	-	-	-	-	-	-	政府によるインフラ整備	
		海外ドナーの支援によりIT事業者育成のための資金供給制度を整備する	-	-	-	-	-	外国ドナーの資金に期待	政府機関を通じた国際関連機関への働きかけが必要	
		建設中のITハイテクパークを早期に完成させる	-	-	-	-	-	外国ドナーの資金に期待	政府機関を通じた国際関連機関への働きかけが必要	
新興市場への進出を図り欧州・米国に偏重した顧客を平準化させる	新興市場の要求に合った商品の開発が必要	価格競争力の確保に努める	新市場への参入戦略が必要	海外ビジネス要員の育成が必要とIT技術者の育成が必要	海外展開資金の融資制度が必要	-	政府関連機関との連携が必要			

ラップアップセミナー開催概要

本調査団の調査結果を広くバングラデシュ政府関係者、民間セクター及びドナー等に普及する目的で、2012年7月19日にダッカ市内の Ruposhi Bangla Hotel においてラップアップセミナーを開催した。参加者は、183名と数多くの人が集まり非常に盛況であったが、主催者及びセミナーのプログラム概要は以下のとおりである。

1. 主催者 / 共催者

JICA、三菱 UFJ リサーチ & コンサルティング(株)、(株)ワールドビジネスアソシエーツ、Human Development Research Centre / バングラデシュ商工会議所連合会 (FBCCI)、JETRO

2. プログラム内容

Seminar on Strong Potential of Domestic Consumer Market and Future Challenges of Strategic Industries in Bangladesh

July 19, 2012 at Ballroom, Ruposhi Bangla Hotel

Inaugural Session

0900-1000 hrs Registration

1000-1005 hrs Introduction of the Study by

Mr. Junichiro Motoyama, Deputy Team Leader of JICA Study Team for Private Sector Development Program in Bangladesh

1005-1015 hrs Opening Remarks by Special Guest

Mr. ISHIZUKA Kenji, Deputy Director, South Asia Division 4 (Bangladesh/Nepal), South Asia Department, JICA Tokyo, Japan.

1015-1025 hrs Opening Remarks by Special Guest,

Md. Jashim Uddin, First Vice-President, FBCCI

1025-1040 hrs Key Note Speech on “ Emerging middle class and consumer market in Bangladesh ” by

Prof. Abul Barkat, Department of Economics, Dhaka University/ President, Bangladesh Economic Association.

1040-1055 hrs Address by the Chief Guest

付属書 4

Mr. A. B. M. Khorshed Alam, Additional Secretary, Ministry for Industries.

1055-1110 hrs Coffee Break

Working Session

Chaired by Mr. Monoj Kumar Roy, Additional Secretary, Ministry of Commerce

1110-1240 hrs “The Strong Potential of Domestic Consumer Market and Future Challenges of Strategic Industries in Bangladesh”

- 1) Introduction: Macro economy and general perception of Bangladesh(Analysis by statistics and Q-survey)
- 2) Our New Findings
- 3) Challenges of High Potential Strategic Industries
- 4) Towards the Future Cooperation Between Bangladesh and Japan

1240-1300 hrs Open Discussion (Q & A)

1300-1310 hrs Closing Remark by

(Additional Secretary, Ministry of Commerce)

1310 hrs Networking Lunch

3. 主な質疑内容及びコメント

- バングラデシュにおいては貿易政策と産業政策が別々に策定され、実施機関の各々のプログラムも調整されておらず、非効率的であるため、日本の経済産業省のような強力な省庁を作るべきである。
- 製造業を振興させるためには、品質標準化とテスト機器の改善が不可欠であるため JICA にこの分野での協力を望みたい。また、企業家の経営能力が弱いために、マネジメント研修への支援も御願いたい。
- 製造業を発展させるための最大のボトルネックは電力・ガスなどのエネルギーの不足であり、政府はエネルギーの安定的な供給に努力すると共に、民間側は省エネルギーに努めるべきである。
- バ国の経済はアグロセクターからの貢献度が高いが、土地に制約があるため、どのようにして土地問題を解決して経済を成長させればいいのか？
- バ国の北西地域は土地が豊饒で農業に適しているが、政府によって長年輕視されてきたため

付属書 4

に農産物加工業が発展していない。今後是非同地域を経済特区として開発してほしい。

- 調査団の提言ではバ国の経済を長期的には素材から最終製品までの一貫生産を行うべきであるとしているが、バ国が置かれているポジションを考えるとアウトソーシングを中心とした発展モデルを考えるべきではないか？
- プラスチック産業は有望であり、リサイクルもある程度始まっているが、成型機が古く陳腐化した技術を使っているために、日本の援助で技術サービスセンターを設立してほしい。
- 家具産業については、JICA の調査でも有望な産業として分析してもらっているが、今後一層の発展のためには、熟練工を養成するための研修機関が必要であり、JICA に支援を御願いたい。
- その他、観光産業やセラミック産業からも支援の要請があった。

なお、セミナー開催写真及び JICA 調査団のプレゼン資料については次頁以降に示すとおりである。

写真セミナー光景



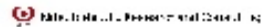
セミナー光景



Seminar on Strong Potential of Domestic Consumer Market and Future Strategies of Strategic Industries in Bangladesh

July 19, 2012
At Ballroom, Ruposhi Bangla Hotel

JICA Study Team for Private Sector Development Programme

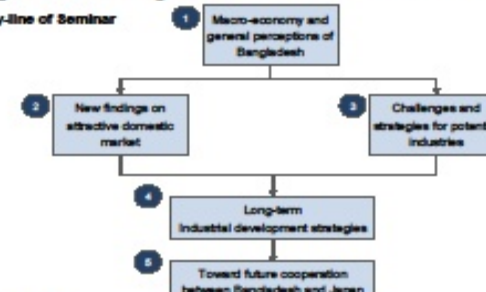


0. Overall structure

Structure and outline of seminar

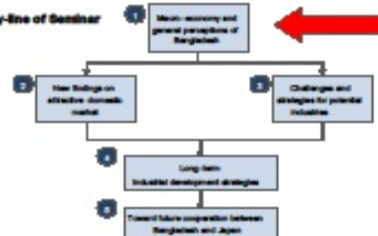
■ Focal points: JICA Private Sector Development Study Team aims to identify high potential and attractive domestic market and to propose new development strategies for generating interaction between growing domestic middle class market and upgrading manufacturing industries in Bangladesh.

Story-line of Seminar



1. Macro Economy and General Perception of Bangladesh

Story-line of Seminar



1. Macro economy and general perception of Bangladesh (Analysis by statistics and Q-survey)

"Clichés" of Bangladesh

■ Still the image of Bangladesh is not recognized fully among Japanese business.

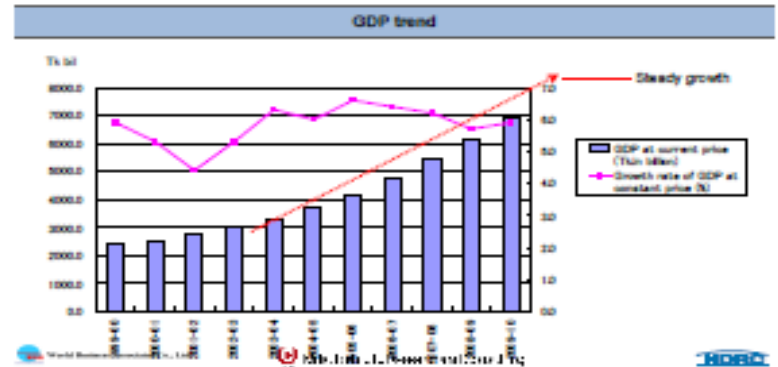
Traditional perception of Bangladesh from foreign companies



1. Macro economy and general perception of Bangladesh (Analysis by statistics and Q-survey)

Steady growth of GDP

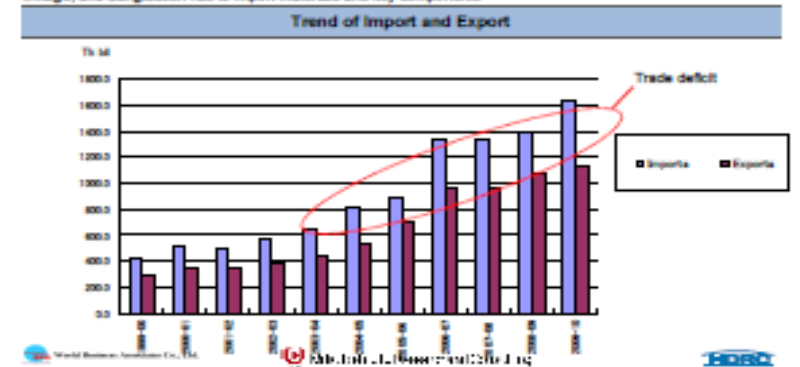
- After the independence of Bangladesh, your country have been growing steadily.
- Especially the performance of economy in these years are very desirable.



1. Macro economy and general perception of Bangladesh (Analysis by statistics and Q-survey)

Trade trends

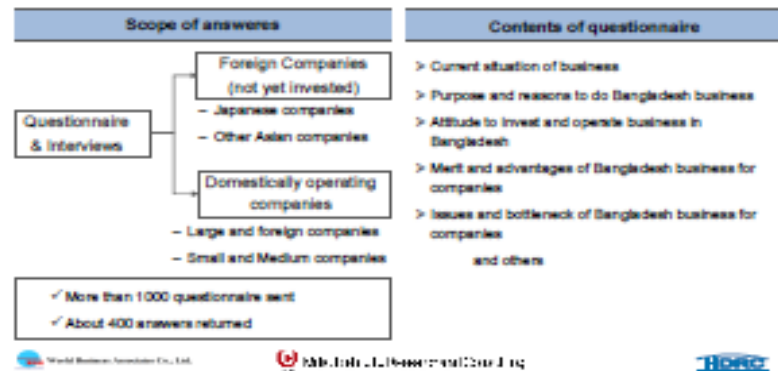
- Trade amount is rapidly growing in accordance with development of economy growth.
- But the problem is there that imports exceeds export all the years. Some of reasons are lack of backward linkage, and Bangladesh has to import materials and key components



1. Macro economy and general perception of Bangladesh (Analysis by statistics and Q-survey)

Conducted questionnaire research in the project

- The interviews and questionnaire are conducted in the project.



1. Macro economy and general perception of Bangladesh (Analysis by statistics and Q-survey)

Summary of investment climate

- The companies which have already started business here have positive attitude for Bangladesh business.
- Foreign companies seems to be relatively reluctant due to lack of information of Bangladesh and other reasons.

Samples	Perception of business in Bangladesh		Attitude of investment in the future (including additional investment)	Issues to be solved suggested by answers			
	Manufacturing location	Bangladesh domestic market		Distance	Infrastructure	Facilities for the daily business	Lack of information
Foreign companies (not invested)	Japanese companies	No	Low	Strongly	Strongly		Strongly
	Other Asian companies	Yes	Yes	Middle	Strongly	Strongly	Strongly
Domestically operating companies	Large and foreign companies	Yes	Yes	High		Strongly	
	Small and Medium companies	Yes	Yes	High		Strongly	Strongly

Common issues: Distance, Infrastructure, Facilities for the daily business, Lack of information

No image...

Manufacturing location for Japanese companies

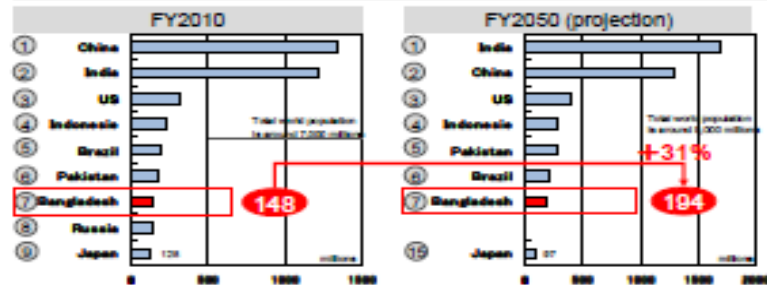
Difference in positiveness

2. Our findings on attractive domestic consumer market

Population as a engine for economic growth

Population is one of the most important determinant factor to economic growth.
(Economic growth = Working population × Capital Stock × Productivity × Exchange rate)

Bangladesh's position in world population (millions)



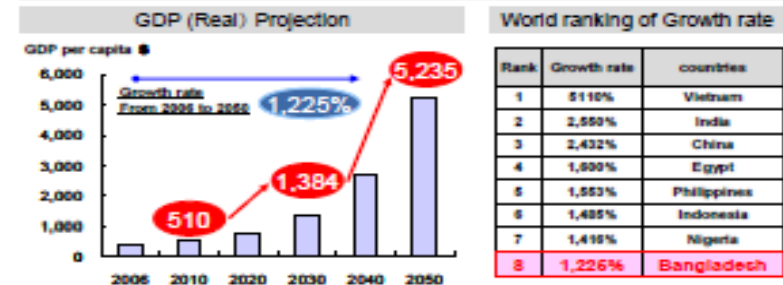
Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2010 Revision, World Bank, November 2010. © M&I, Ltd. All Rights Reserved. © HOBIC

2. Our findings on attractive domestic consumer market

GDP growth rate of Bangladesh is the 8th place in the world

Bangladesh are estimated as one of the highest Economic growth countries in the world.

Projection of GDP per capita of Bangladesh in 2050



Source: Outlook India, "WFO Report", 2008. © M&I, Ltd. All Rights Reserved. © HOBIC

2. Our findings on attractive domestic consumer market

Top 20% income group control about 38% of the total national expenditure

Top 20% people occupy around 40% of total expenditure.
Expenditure from overseas workers (5 millions) amount for about 1,000 billions taka, but it is not included.

Distribution of expenditure of groups by yearly household per capita income group

	Annual income (Taka)	Number of household (millions)	Annual expenditure (Billions taka)
1	< 72,000	13.0 (39%)	1,029 (24%)
2	72,000<, >168,000	13.2 (40%)	1,654 (38%)
3	<168,000	6.8 (21%)	1,677 (38%)
		33.0	4,361

Source: BBS, "The HBSC07". © M&I, Ltd. All Rights Reserved. © HOBIC

2. Our findings on attractive domestic consumer market

Top 20% income group expend more in housing and household effects etc

Consumption expenditure by household income groups differs greatly in following group of item: Food & beverage, Housing, household effects & miscellaneous.

Distribution of consumption expenditure of groups of item by yearly household income group

	Food & Beverage	Clothing & Footwear	Housing	Fuel & lighting	Medical & Education	Household effects & Miscellaneous
1	65%	5%	5%	8%	7%	14%
2	59%	5%	8%	6%	8%	18%
3	47%	5%	14%	5%	12%	26%

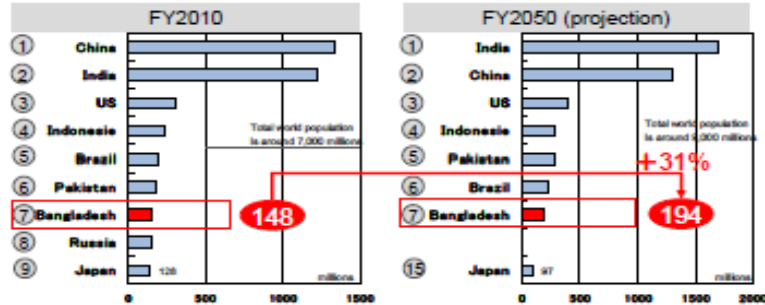
Source: BBS, "The HBSC07". © M&I, Ltd. All Rights Reserved. © HOBIC

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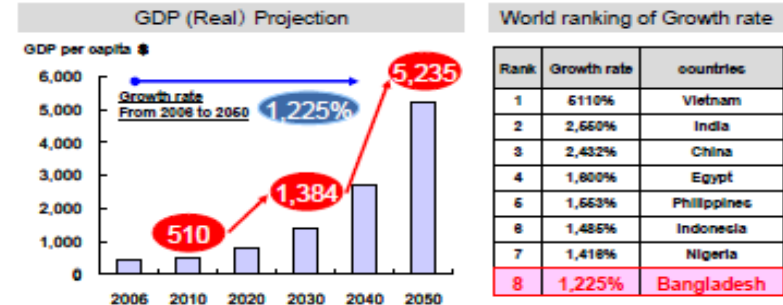
Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2010 Revision, World Bank Associates Co., Ltd. MIRA, Inc., J.L. Presentational Co., Ltd. HDRC

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Source: Goldman Sachs, "BRICs report" 2006, World Bank Associates Co., Ltd. MIRA, Inc., J.L. Presentational Co., Ltd. HDRC

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Source: BBS, "The HIES2010", World Bank Associates Co., Ltd. MIRA, Inc., J.L. Presentational Co., Ltd. HDRC

2. Our findings on attractive domestic consumer market

Top 20% income group occupies half of total market in some groups of item

Consumption expenditure by household income groups differs greatly in following group of item: Food & beverage, Housing, household effects & miscellaneous.

Distribution of consumption expenditure of groups of item by yearly household income group

	Food & Beverage	Clothing & Footwear	Housing	Fuel & lighting	Medical & Education	Household effects & Miscellaneous
1	27%	24%	13%	31%	10%	16%
2	40%	39%	33%	39%	37%	34%
3	33%	37%	54%	30%	53%	50%
Market scale	2,397 Billions taka	217 Billions taka	434 Billions taka	246 Billions taka	414 Billions taka	653 Billions taka

World Business Associates Co., Ltd. | M&E Global Presentation | Source: SBS, "The HBS2012" | HDRC

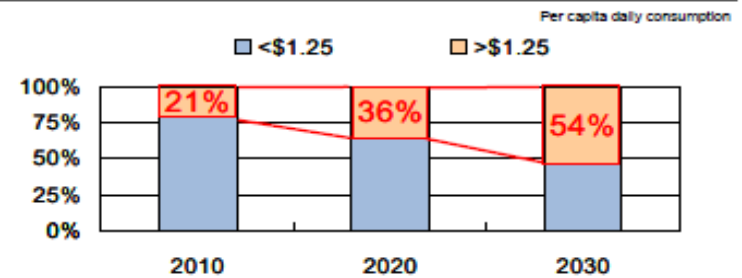
2. Attractive domestic consumer market

Income level of Present top 20% spread up to about 50% in 2030

ADB adopt the definition of "middle class" as following: people having per capita daily consumption of \$2-\$20.

"Middle class" of Bangladesh are estimated to expand further.

Baseline Income Distributions for consensus Real GDP growth trends



World Business Associates Co., Ltd. | M&E Global Presentation | Source: ADB, "Key Indicator for Asia and Pacific" 2010. | HDRC

2. Our findings on attractive domestic consumer market

Targeting top 20% income group as a market

Top 20% income group has the preference for the high-class products.
Their buying intention for high-class consumer durable goods is so high.

Consumption behavior of top 20% income group

Attractive goods for top 20% income group

Household effects & Miscellaneous

Consumer durable goods

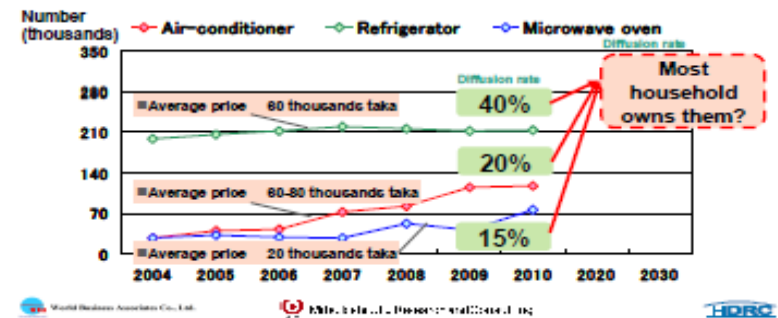
World Business Associates Co., Ltd. | M&E Global Presentation | HDRC

2. Our findings on attractive domestic consumer market

Durable consumer products (Air conditioner etc) will diffuse further in 2030

The sales number of air-conditioner, micro oven and refrigerator will be expanded greatly toward 2030, although it is still now low level.

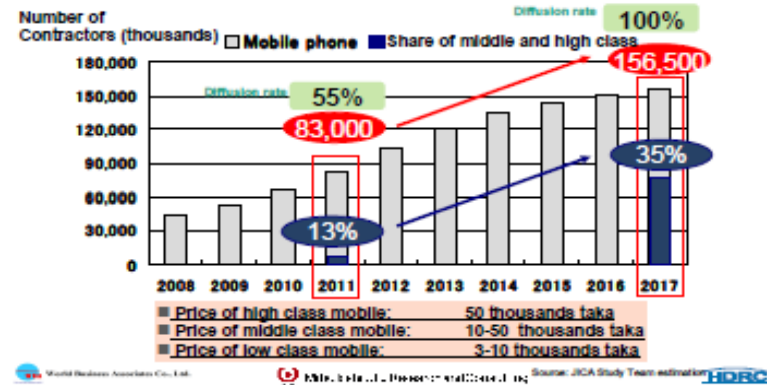
Consumption behavior of top 20% income group



2. Our findings on attractive domestic consumer market

Middle and high class products will expand their share from 13% to 35%

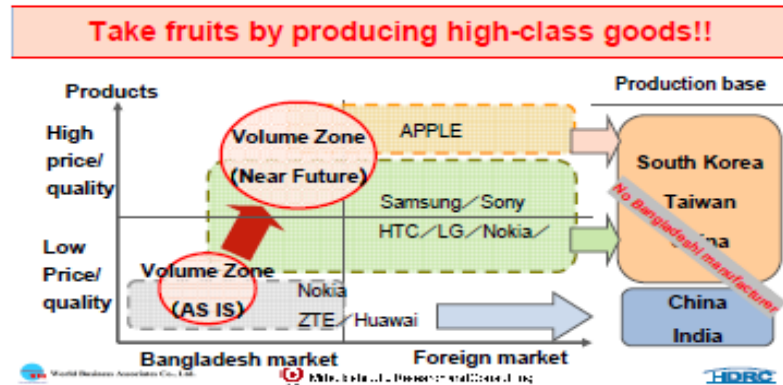
- According to our estimation, the number of mobile phone contractors in 2017 will be expanded about twice comparing with those in 2011.



2. Our findings on attractive domestic consumer market

Who manufactures and sells high-class goods in domestic market ?

- High quality goods selected by top 20% income group are supplied mainly by foreign companies.



2. Our findings on attractive domestic consumer market

Summary

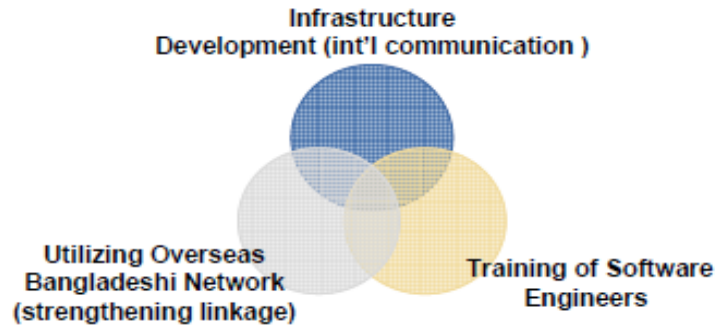
- GDP per capita will grow about 10 times
- Bangladesh already has approximate 30 million middle class consumers
- Middle class consumers are expected to spread more than 50% in 2030
- Durable consumer goods will diffuse further in 2030
- How can we take fruits by producing middle-class goods?

3. Challenges and Strategies for High Potential Industries



<p>3. Challenges and strategies for High Potential Industries</p> <p><i>Selection of 10 high potential industries</i></p> <ul style="list-style-type: none"> ✓ Light-Engineering Industry ✓ Ship Building Industry ✓ Ceramic Industry ✓ RMG and Home textile Industries ✓ Plastic Industry <p style="text-align: right;">} Imported material processing industries</p> <ul style="list-style-type: none"> ✓ Software and ICT Service Industry ✓ Pharmaceutical Industry <p style="text-align: right;">} Knowledge based industries</p> <ul style="list-style-type: none"> ✓ Agro-Processing Industry ✓ Leather & Footwear Industry ✓ Furniture Industry <p style="text-align: right;">} Natural resource utilization industries</p> <p style="font-size: small;">World Business Association Co., Ltd. MIRA, Dhaka, Ltd. Presentation (2014-15) HDRC</p>	<p>3. Challenges and strategies for High Potential Industries</p> <p><i>SWOT Analysis on Foundry Industry (Light Engineering Industry)</i></p> <table border="1"> <thead> <tr> <th></th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Strength</td> <td> <ul style="list-style-type: none"> ✓ Availability of supply chain of raw material like scrap iron ✓ Existence of industrial cluster such as Bogra </td> </tr> <tr> <td>Weakness</td> <td> <ul style="list-style-type: none"> ✓ Obsolete production technology (cupola furnace) ✓ Insufficient quality control due to lack of testing machine ✓ Insufficient mold production capacity ✓ Insufficient skilled labor and management capacity ✓ Lack of government support program ✓ Insufficient power and gas supply </td> </tr> <tr> <td>Opportunity</td> <td> <ul style="list-style-type: none"> ✓ Domestic market is expanding fast (ex. Handy pump). ✓ Import substitution of spare parts in auto and ship is growing </td> </tr> <tr> <td>Threat</td> <td> <ul style="list-style-type: none"> ✓ Difficulty of expansion due to unavailability of industrial land </td> </tr> </tbody> </table> <p style="font-size: small;">World Business Association Co., Ltd. MIRA, Dhaka, Ltd. Presentation (2014-15) HDRC</p>		Description	Strength	<ul style="list-style-type: none"> ✓ Availability of supply chain of raw material like scrap iron ✓ Existence of industrial cluster such as Bogra 	Weakness	<ul style="list-style-type: none"> ✓ Obsolete production technology (cupola furnace) ✓ Insufficient quality control due to lack of testing machine ✓ Insufficient mold production capacity ✓ Insufficient skilled labor and management capacity ✓ Lack of government support program ✓ Insufficient power and gas supply 	Opportunity	<ul style="list-style-type: none"> ✓ Domestic market is expanding fast (ex. Handy pump). ✓ Import substitution of spare parts in auto and ship is growing 	Threat	<ul style="list-style-type: none"> ✓ Difficulty of expansion due to unavailability of industrial land
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<p>3. Challenges and strategies for High Potential Industries (Light engineering)</p> <p><i>Upgrade the technology and workers' skills while strengthening recycling</i></p> <p style="font-size: small;">World Business Association Co., Ltd. MIRA, Dhaka, Ltd. Presentation (2014-15) HDRC</p>	<p>3. Challenges and strategies for High Potential Industries (Knowledge based Industries)</p> <p><i>SWOT Analysis on Software Industry</i></p> <table border="1"> <thead> <tr> <th></th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Strength</td> <td> <ul style="list-style-type: none"> ✓ Availability of HR with IT and English capacity. ✓ Availability of micro finance institutions necessary for starting business </td> </tr> <tr> <td>Weakness</td> <td> <ul style="list-style-type: none"> ✓ Insufficient training system for software engineers/ programmers ✓ Insufficient communication infrastructure especially for connection with foreign network ✓ Insufficient SME financing institutions </td> </tr> <tr> <td>Opportunity</td> <td> <ul style="list-style-type: none"> ✓ Availability of Bangladeshi overseas IT entrepreneur ✓ Business opportunities are expanding due to Open Platform System ✓ Cost competitiveness is strengthening due to the cost up of India and Philippines </td> </tr> <tr> <td>Threat</td> <td> <ul style="list-style-type: none"> ✓ Market contraction in EU and US ✓ Increasing competition by new competitors from Africa </td> </tr> </tbody> </table> <p style="font-size: small;">World Business Association Co., Ltd. MIRA, Dhaka, Ltd. Presentation (2014-15) HDRC</p>		Description	Strength	<ul style="list-style-type: none"> ✓ Availability of HR with IT and English capacity. ✓ Availability of micro finance institutions necessary for starting business 	Weakness	<ul style="list-style-type: none"> ✓ Insufficient training system for software engineers/ programmers ✓ Insufficient communication infrastructure especially for connection with foreign network ✓ Insufficient SME financing institutions 	Opportunity	<ul style="list-style-type: none"> ✓ Availability of Bangladeshi overseas IT entrepreneur ✓ Business opportunities are expanding due to Open Platform System ✓ Cost competitiveness is strengthening due to the cost up of India and Philippines 	Threat	<ul style="list-style-type: none"> ✓ Market contraction in EU and US ✓ Increasing competition by new competitors from Africa
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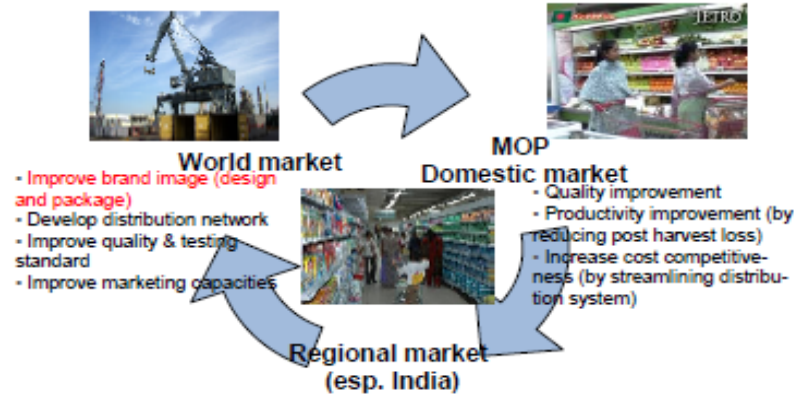
3. Challenges and strategies for High Potential Industries (Knowledge based Industries)
Strengthen infrastructure, training, and Bangladeshi overseas network



3. Challenges and strategies for High Potential Industries (Agro-processing Industry)
SWOT Analysis on Agro-processing Industry

	Description
Strength	<ul style="list-style-type: none"> ✓ Availability of good quality agro products ✓ Cheap and abundant labor ✓ Availability of fertile agriculture land
Weakness	<ul style="list-style-type: none"> ✓ Brand image (design and package) ✓ Insufficient cold storage facilities ✓ Too many middle men in distribution system ✓ Insufficient marketing capacity ✓ Insufficient quality testing system
Opportunity	<ul style="list-style-type: none"> ✓ Emerging market is growing such as India and middle east ✓ Availability of incentive system such as GSP, fiscal incentive ✓ Availability of foreign donor assistance
Threat	<ul style="list-style-type: none"> ✓ Higher requirement for quality and safety standard ✓ Pressure on lower price due to high competition

3. Challenges and strategies for High Potential Industries (Resource-based Industries)
Improve brand image by strengthening design, quality and productivity



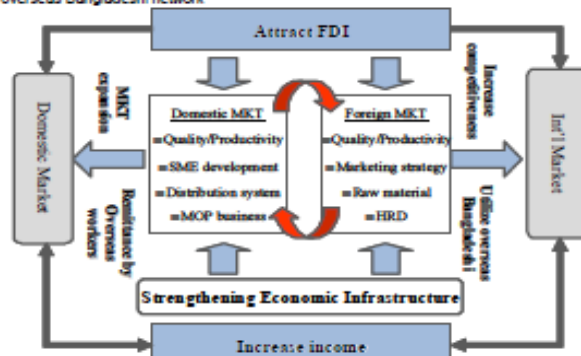
4. Long-term Industrial Development Strategies



4. Long-term strategies

Conceptual framework for interacting domestic and foreign market

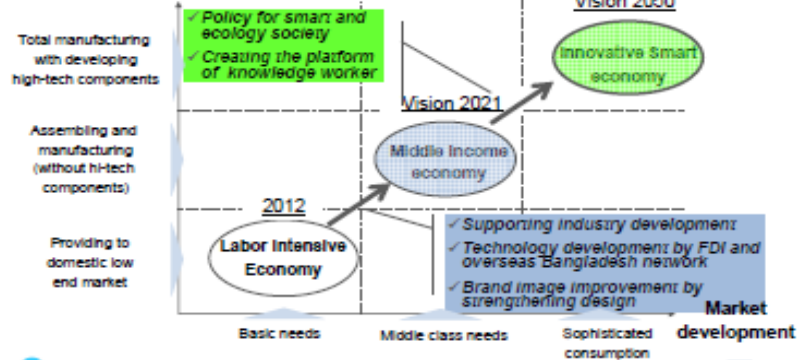
- Foreign Investment is the Key for Increasing Competitiveness
- Utilizing overseas Bangladeshi network



4. Long-term strategies

New Development Strategy: Generating strong interaction between market and industries

Industry Development



4. Long-term strategies

Government Initiatives to Accelerate Industrial Growth

- Private sector in Bangladesh is quite dynamic and potentials to grow
- Government role is to facilitate the PSD's growth as catalyser not as controller

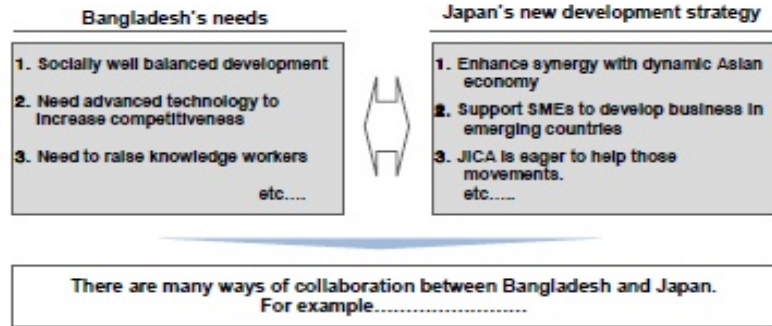
- Develop and promote economic zone by PPP/Private scheme
- Restructure trade and investment promotion institutions so that more close coordination can be made (Ex. JETRO, MIDA/MATRADE)
- Strengthen investment promotion activities and one stop service for FDI (including NRB's investment)
- Strengthen capacity of support institutions for increase competitiveness of private sector
 - Quality standard & testing improvement
 - Productivity enhancement
 - Industrial human resource development
 - Export marketing, etc.

5. Towards Future Cooperation Between Bangladesh and Japan



5. Towards Future Cooperation Between Bangladesh and Japan

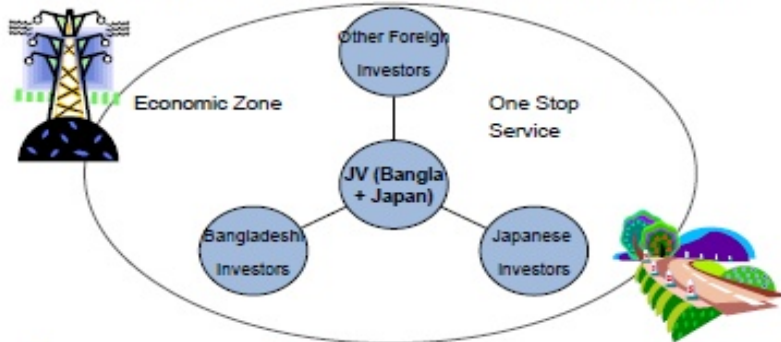
Building Win – Win Relationship



5. Towards Future Cooperation Between Bangladesh and Japan

Economic Zone Development by PPP framework

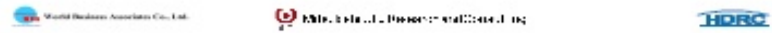
- Development of EZ by the partnership with Japanese investors that has worldwide marketing network
- Developing surrounding infrastructure (ex. Access road, electric transmission, etc.) by Japan's cooperation



5. Towards Future Cooperation Between Bangladesh and Japan

Economic Zone by Using Japanese Eco Friendly Technology

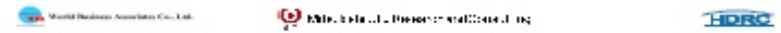
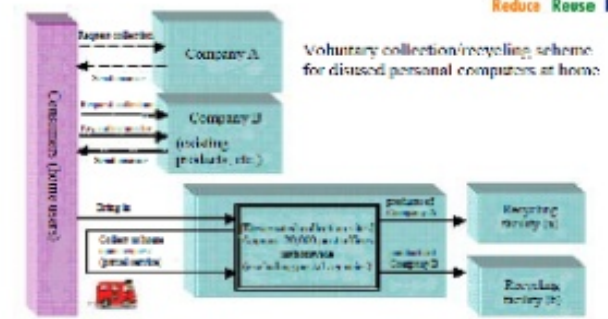
- Producing recycling water through sophisticated technology
- Producing biogas through the process of waste water treatment



5. Towards Future Cooperation Between Bangladesh and Japan

Promote Recycling Business Model by Japanese Technology

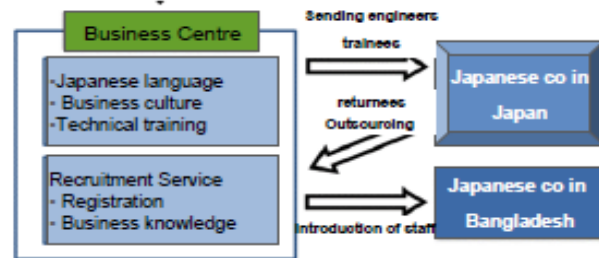
- Japanese policy measures for promoting 3R
- Advanced 3R technology of Japanese companies



4. Towards Future Cooperation Between Bangladesh and Japan

Promoting Japan-Bangladesh Business Centre

- Training Japanese language and business knowledge and send to Japanese companies for technical training
- After coming back from Japan, the engineers are expected to get outsourcing from Japanese co. in Japan and Bangladesh



World Business Associates Co., Ltd.

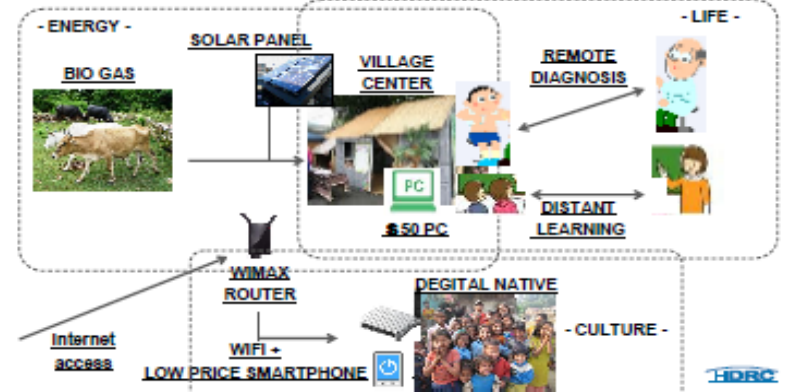
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HDRC

5. Towards Future Cooperation Between Bangladesh and Japan

Realize "Smart Village in Bangladesh"

- Technology advancement can develop smart village at "very low cost"
- Japanese companies have all the technology and can assist Bangladesh's remote village to reduce "digital gap".



Internet access

WIMAX ROUTER

WIFI +

LOW PRICE SMARTPHONE

PC \$50 PC

DEGITAL NATIVE

- CULTURE -

HDRC

Let us make prosperous future with strong partnership!

Thank you for your attention!



World Business Associates Co., Ltd.

WBA JAPAN, INC. (Representative Office)

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