

How Business Can Invest in the Future of the Rohingya and Host Community in Bangladesh

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ABSTRACT

Bangladesh is hosting more than a million Rohingya refugees, and businesses have a critical role to play in improving the situation for them and their Bangladeshi host communities. We have identified four viable areas for business investment and procurement in Cox's Bazar, the historically under-developed region that is hosting the Rohingya refugees: clean energy; fish, shrimp, and seafood;

fruits such as mango and pineapple; and handicrafts, specialized clothing, and home goods. This brief covers the background to the crisis and how it is affecting Bangladesh, why business should get involved, what investment and sourcing opportunities exist, and what next steps for interested businesses could be.

**WHAT IS THE CONTEXT OF THE ROHINGYA REFUGEE CRISIS IN BANGLADESH?**

In late 2017, a brutal campaign of ethnic cleansing and systematic rape caused over 740,000 people from the Rohingya minority group to flee their homes in Myanmar over the border into Bangladesh. In crossing that border, they became refugees.¹ And in joining some quarter-million Rohingya refugees that had previously fled from Myanmar, this influx made the Cox's Bazar area of Bangladesh home to the largest refugee camps in the world. In Teknaf and Ukhiya, the two subdistricts hosting the vast majority of Rohingya, refugees now outnumber locals nearly three to one.²

THE AVERAGE INCOME IN COX'S BAZAR HAS LONG LAGGED BEHIND THE BANGLADESH AVERAGE, WHICH ITSELF WAS ONLY USD\$1,750 PER YEAR IN 2018

There is tremendous need in Cox's Bazar amongst both the refugees and their host communities. Even before the refugee influx, Cox's Bazar was one of the poorest, least educated, and most climate vulnerable districts in Bangladesh. The average income in Cox's Bazar has long lagged behind the Bangladesh average, which itself was only USD\$1,750 per year in 2018.³ Recent studies have found that one-third of residents in Cox's Bazar are living below the poverty line, and half the population is illiterate.⁴ The district is also highly vulnerable to climate change: a World Bank report found that Cox's Bazar and the nearby district of Bandarban are the top two "climate hotspots" in Bangladesh and will likely face an 18 percent decline in their living standards due to climate change by 2050.⁵

Although these challenges pre-dated the recent influx of Rohingya refugees, their arrival has exacerbated them. As just one example, the arrival of Rohingya refugees has put pressure on the lowest-wage tiers of the labor market.

BUSINESSES HAVE AN IMPORTANT ROLE TO PLAY BECAUSE THEIR INVOLVEMENT HAS THE POTENTIAL TO SHAPE HOW THE GOVERNMENT OF BANGLADESH TREATS REFUGEES

Although refugees are legally not allowed to work by the Government of Bangladesh, some refugees end up working in the informal economy out of necessity, as the assistance they receive is barely enough to cover a very basic diet. This has caused a reduction in wages for day laborers in the parts of Cox's Bazar closest to the refugee camps. They were already making only about USD\$5 per day, and wage levels have now decreased by 5-20 percent depending on the exact area and the type of work.⁶

WHY SHOULD BUSINESSES GET INVOLVED?

From the perspective of the Government of Bangladesh, the international community, and Rohingya refugees themselves⁷, the first and best solution is safe, voluntary, and sustainable return to Myanmar. However, in the absence of progress toward these preconditions in Myanmar, there is a high risk that refugees will remain in Bangladesh in the medium-term. Given this reality, businesses should consider investing in Cox's Bazar and advocating for solutions for the Rohingya crisis. They should seize the opportunity for two-fold impact: effect positive change for refugees, and pursue credible investment opportunities. First, businesses have an important role to play because their involvement has the potential to shape how the Government of Bangladesh treats refugees. At the moment, the Government does not allow refugees the legal right to work, freedom of movement beyond the camps, or access to a formal, accredited education. These restrictions are based on the Government's fear that refugees will compete for jobs with Bangladeshis who also need jobs, and that already scarce resources will be diverted from Bangladeshi citizens.

Businesses have a unique ability to change this zero-sum calculation: by investing in the local area, businesses can create new jobs for both refugees and Bangladeshis. Engagement by businesses would be aligned with Bangladesh's priorities: in every national strategy, the government has emphasized the need to boost investment levels and foreign direct investment (FDI) in particular in order to reach its national goals of rapid GDP growth and job creation. If business can bring in investments into job-creating industries in Cox's Bazar that can offer work and alleviate poverty for both Bangladeshi locals and refugees, business has a chance to show that far from taking away opportunities for locals, improving refugee welfare would also change the lives of local Bangladeshis for the better.

Beyond the fact that it's simply the right thing to do, there are viable value chains for investment in Cox's Bazar. Just because the area has been under-developed does not mean that there are not promising investment opportunities. In fact, one of the reasons why the area has been under-invested in in the past is because other areas of Bangladesh, such as Chittagong and Dhaka, offered so many relatively easy investment opportunities, precluding the need to look slightly beyond to more remote areas like Cox's Bazar. Of course, there are other reasons contributing to the area's underdevelopment, but the fact remains that there do exist real business opportunities in Cox's Bazar. (In the next section, we will describe some promising value chains for investment).

WHERE HAS INVESTMENT PLAYED A ROLE IN CHANGING HOW REFUGEES ARE TREATED?

Ethiopia and Jordan are also developing countries hosting roughly a million refugees each. Until recently, the calculus in these countries used to be the same as in Bangladesh: that refugees should be denied the right to work because allowing them to do so would take opportunities and resources away from locals. (In actuality, studies⁸ show that refugees are net positive economic contributors to both developed and developing country economies, but this is often not reflected in public perceptions). The international community and development banks worked with these governments to turn crisis into opportunity: to bring additional trade, investment, and aid aimed at creating economic opportunity that there would be jobs for both locals and refugees. Jordan received USD\$700 million in grants, USD\$1.9 billion concessional loans, and trade concessions to the EU market to boost its economic growth engine in order to incorporate 200,000 Syrian refugees into its labor market.⁹ In Ethiopia, major development institutions, including those from the UK and the EU, agreed to provide USD\$500 million in financing to build two new industrial parks and help attract private sector businesses into these parks in order to create tens of thousands of new jobs. Of these, the aim is for the preponderance of opportunities to be for local Ethiopians and 30,000 new economic opportunities for refugees.¹⁰ While challenges have emerged in implementation, progress in both Jordan and Ethiopia suggests that this approach has important lessons for other refugee-hosting countries.



WHAT ARE THE INVESTMENT AND SOURCING OPPORTUNITIES IN COX'S BAZAR?

Our on-the-ground research, including interviews with more than 50 businesses and business groups, technical experts, and government officials, uncovered opportunities for businesses to invest or source from Cox's Bazar. Our preliminary research points to four particularly promising areas:

1. Investing in clean energy. The Government of Bangladesh has an ambitious target of sourcing 30 percent of Bangladesh's energy mix from renewable means by 2041.¹¹ Lack of power has also been a persistent challenge for businesses in Bangladesh, so new power generation in Cox's Bazar would have benefits for private sector development in the area.

Cox's Bazar has strong natural potential for solar and wind power production. A private sector power producer we interviewed identified Cox's Bazar as one of the few sites in Bangladesh where marginal land could be

converted to solar farms, since land in most other sites in Bangladesh would have comparatively more lucrative uses for agriculture or urban development. In addition, the Wind Energy Study Project (WEST) sponsored by the Government of Bangladesh as well as other academic studies have identified the potential for wind energy production in Cox's Bazar and in Teknaf.¹² A recent USAID and National Renewable Energy Laboratory (NREL) study confirmed that the Cox's Bazar area is "commercially relevant" for wind energy generation.¹³

The Government of Bangladesh is already conducting additional tenders for further renewable energy production in Cox's Bazar. Global renewable energy investors and operators could bid on these tenders, perhaps through a consortium with local Bangladeshi firms (e.g., Joules Power Limited, a Bangladeshi firm that already operates a 28-megawatt solar power farm in Cox's Bazar, the first utility-scale solar project in Bangladesh). There could also be useful linkages to

ongoing efforts by humanitarian actors inside the camps to train refugees and host communities in solar panel installation and repair.¹⁴ If these refugees could find job opportunities with new energy investments in the Cox's Bazar region, they could gain portable skills and work experience that could help them be successful in Myanmar once safe and dignified repatriation becomes possible. Finally, companies could explore concessional financing from global climate change mitigation programs such as the Global Environment Facility, the Clean Technology Fund, and the United Nations Environment Programme Finance Initiative.

2. Investing in and/or sourcing seafood. With its long coastline and natural water resources, Cox's Bazar is an area naturally endowed for fish and other seafood production. Currently, the fish and shrimp industry is one of the biggest in the area, supporting ~5,000 commercial establishments and nearly 100,000 jobs.¹⁵ However, current production methods are inefficient, and the potential of this industry is severely under-realized. As an example, according to the Food and Agriculture Organization (FAO), current aquaculture fish production is only 15 percent of the potential 5,615 metric tons per year.¹⁶

To reach the full potential of these promising value chains, stakeholders should take a market-based approach to simultaneously resuscitate multiple parts of the value chain, as the business case in one part of the value chain cannot be fully realized without other parts of the value chain functioning better as well. This approach should be developed with the private sector in order to grow both domestic and export markets, and to enable 'moving up the value chain' – that is, participating in higher-value activities. In addition to generating positive economic impacts, these investments are

also complementary to Bangladesh's national goals to diversify its export basket beyond ready-made garments and to better ensure food safety policies and standards.

There is opportunity to invest across the value chains in both aquaculture and shrimp production. For aquaculture, donors such as the FAO and the World Food Program (WFP) have already started working with local refugee and host communities to create fishponds using more efficient and productive designs and practices.¹⁷ A commercial investor could leverage these beginnings and the capacity of these organizations to further scale up production. For shrimp, there is a 2,425 hectare area of land in Cox's Bazar designated by the Government of Bangladesh in the 1970s as a shrimp production zone that is currently severely under-utilized.¹⁸ Yields are only 300-400 kg per hectare per annum, whereas the potential is 10,000 kg per hectare if better production infrastructure were built and scientific production methods (e.g., introducing the Vannamei breed) were introduced.¹⁹ An initial study by the Bangladesh Frozen Foods Exporters Association (BFFEA) estimates the cost to repair the infrastructure at USD\$28 million, of which USD\$750,000 would be used for a pilot to demonstrate proof-of-concept on a government-owned 48-acre plot before scaling up to the full area.²⁰ An investor willing to provide capital and/or technical expertise could work with the BFFEA in a partnership arrangement, and/or approach the Government of Bangladesh in a public-private partnership arrangement to invest in resuscitating this shrimp production zone. In addition, both for the fish and shrimp value chains, as upstream production volumes increase, there will exist complementary investment opportunities in creating freezing and processing plants.



In addition to direct investment opportunities, there are sourcing opportunities in aquaculture fish, sea fish, shrimp, and crab for seafood buyers such as food companies, grocery retailers and wholesalers, and hospitality players. As Bangladesh implements its long-term strategy to develop international tourism in the Cox's Bazar area, there may be complementary opportunities to supply to the local tourism industry as it grows. Because most catch and production are conducted by relatively small-scale local companies, the chances for success in sourcing seafood from Cox's Bazar will be greatly improved if it were accompanied by supplier training programs (e.g., in partnership with donor organizations such as the FAO and the WFP) and the extension of supplier credit.

The jobs created through these new enterprises could be shared between the local host community and refugees. Amongst both, there are long traditions of fishing and seafood production, so enterprises will have

an available pool of local workers with experience in these industries. Additionally, engagement in this sector must include serious attention to ensuring decent work and protection, especially in light of the endemic labor abuses in the seafood industry in the region.²¹

3. Investing in and/or sourcing fruit products and non-timber forest products like honey. The Rohingya refugee situation has put an unprecedented strain on the ecology of Cox's Bazar, with deforestation and landscape degradation accelerating due to demand for habitation space, firewood, and other natural resources. While many essential initiatives such as providing fuelwood alternatives are already being undertaken, complementary investments that generate economic activities that enhance landscape restoration will also be needed. Boosting agri-business, particularly processing, would be a promising way forward, as Cox's Bazar is ecologically suitable for the production of high-quality mangoes, pineapples, coconuts, honey, and

other high value agri-products. Investing in production of these products could have a significant impact on rural incomes: as of 2017, more than 40 percent of the residents of Cox's Bazar work in agriculture.²²

Creating linkages to global markets could provide the necessary demand and incentives to invest in more productive methods, thereby generating higher incomes. In principle, there is a match between the crops already cultivated in Cox's Bazar and global market demand. Locally producible products like dried mango, dried coconut, and coconut water are popular in the European and American markets. In addition, the highest productivity agricultural product in Cox's Bazar is the Chinese date (also known as ber or jujube), and this fruit is popular in both India and China in both its fresh and dried forms.²³ Hence, there is opportunity for global food companies such as dried fruit processors to invest in processing capacity and to explore sourcing opportunities in Cox's Bazar. Of course, sourcing from a new and untested location involves risk for private sector companies, and donors and the development community can help by supporting market-based approaches and pilots to help private sector source from small-scale producers in Cox's Bazar. There may also be opportunities to link existing training and microfinancing programs for small-scale farmers to be able to meet the specifications of national or local companies interested in sourcing their products.

Similar to above, the jobs created through these new enterprises could be shared between the local host community and refugees.

4. Sourcing handicrafts, specialized clothing, and home goods.

The Rohingya community has a long history of producing high quality and intricate handicrafts, including

carved wooden objects, embroidery, and other labor-intensive crafts. Much of their production was disrupted when they were uprooted from their homes in Myanmar and forced to flee into Bangladesh. Today, some small-scale skills-building programs are starting to resuscitate specific crafts such as embroidery amongst refugee women as a way to help them deal with trauma and build skills. These programs are an important contribution to trauma recovery and livelihoods provision for women in particular. In addition, since these handicraft skills are specific to the Rohingya community, these activities largely do not displace local labor. But at the moment, the goods produced by Rohingya women have no sizeable market outlet. If an international buyer would source their production in a manner that ensures decent working conditions²⁴, it would provide a significant boost to refugee incomes and the sustainability of these critical skills and trauma recovery programs.

One practical way to get started sourcing these products from Cox's Bazar would be to work with the Bangladeshi NGO BRAC. BRAC's Aarong social enterprise is well-established and runs an entire supply chain spanning 65,000 rural artisans across Bangladesh to well-performing retail outlets in large cities in the country. In Cox's Bazar, it also already runs embroidery and sewing skills training centers inside the refugee camps and workshops employing the local host community.²⁵ International buyers can source handicrafts, specialized clothing, and home goods from refugees and the host community via Aarong, which can receive orders, produce samples, oversee production, and ensure quality control and on-time delivery. The range of goods that Aarong has experience producing include embroidered clothing and home goods, screen- and block-printed clothing, hand-stitched shoes, hand-made jewelry, and souvenirs and home goods made of wood and other natural materials.

WHERE HAS SOURCING HANDICRAFTS AND HOME GOODS MADE A DIFFERENCE TO REFUGEES?

One example of a major global buyer working to source from refugee communities is Ikea's partnership with the Jordan River Foundation to source products from Syrian refugee women in Jordan.²⁶ Ikea designers and local Jordanian artisans designed a special collection to utilize the craft production skills of these refugee women. In the first phase, 110 women were employed to craft products

for this collection, which went on sale worldwide in June 2018. Driven by the success of the first collection, production is now being ramped up to include 400 refugee women.²⁷

Another example is the Made51 initiative by UNHCR, which has supported social enterprises in Africa and Asia that sell home goods, clothing, and jewelry crafted by refugees.



In addition to these four areas, there may be additional opportunities for investment and/or sourcing. We would also like to note that although we believe these areas to be promising based on our preliminary research, further work

will be needed to confirm and develop these opportunities. Interested businesses will need to conduct further business case development and assessment based on their own business models, capacities, and risk appetite.

WHAT IS THE CONTEXT OF THE ROHINGYA REFUGEE CRISIS IN BANGLADESH?

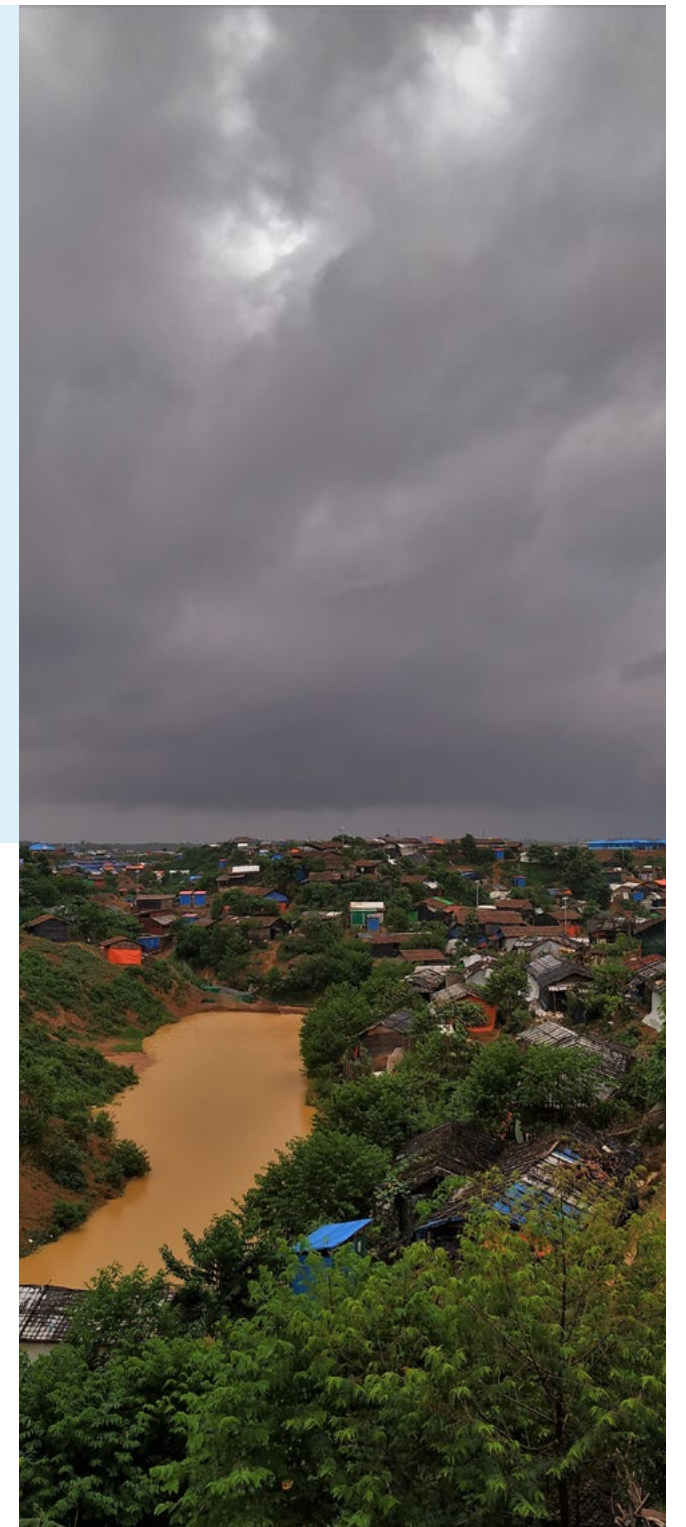
In addition to exploring the investment and sourcing opportunities outlined above, businesses interested in the plight of Rohingya refugees and Bangladeshi host communities can take the following steps:

- ▶ **Support vocational training efforts:** Donors and humanitarian agencies are already running vocational training and skills development programs with refugees and host communities in Cox's Bazar.²⁸ These efforts include training in trades such as embroidery and sewing, solar panel installation and repair, and mobile phone repair, as well as support for fishermen and small-scale seafood producers. Larger-scale businesses can help by providing apprenticeship and internship opportunities, by volunteering technical expertise to make sure that the skills covered are to industry standards, and by donating materials.
- ▶ **Work with policymakers:** Policymakers from a large array of countries, including Canada, China, the EU, the Gulf Cooperation Council countries, Japan, Malaysia, and the U.S. are all engaged in policy dialogues and aid arrangements for Bangladesh. However, global experience shows that 'donor fatigue' can set in quickly, even after the most horrific of crises. Hence, it is important that a wide range of actors, including businesses, express to policymakers that they care about the plight of the Rohingyas and their host community in Bangladesh. If applicable, work with local policymakers, expressing an interest in investing in Cox's Bazar and/or hiring refugees, including linking to broader advocacy efforts to help refugees secure the right to work and freedom of movement in Bangladesh.

- ▶ **Support the efforts of humanitarian agencies:** The Rohingya refugee response has entailed massive humanitarian operations involving multiple UN agencies and more than 100 NGOs. The Joint Response Plan, the estimate of the budgetary requirements to support refugees for the upcoming year, is only 55 percent funded, and donations are urgently required. In addition, businesses might have unique expertise and or capabilities (e.g., technology or logistics capacities) that could be brought to bear. Interested businesses should contact UNHCR and IOM, the two agencies leading the response, to find out how they can help.

GETTING INVOLVED

- ▶ For additional details about the ideas described above, see our full paper on sustainable approaches to the Rohingya crisis.²⁹
- ▶ Contact the [Tent Partnership for Refugees](#) to understand how businesses can help with refugee situations, including in Bangladesh, and become a member.
- ▶ Visit Cox's Bazar to understand the situation better and investigate potential investment and sourcing opportunities. Contact the local embassy to Bangladesh, the Bangladesh Investment Development Authority, UNHCR, or IOM for contacts and practical advice on arranging a visit.



Endnotes

- 1 While Bangladesh is not a signatory to the 1951 Refugee Convention, and does not recognize these new arrivals as refugees, Rohingya who have fled across borders unequivocally meet the refugee definition and are recognized as refugees by the UN High Commissioner for Refugees (UNHCR) and the international community.
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