

**HUMANITARIAN
AND DEVELOPMENT
PROGRAMME**

BANGLADESH: Country Scenarios

A five year outlook (2016-2020)

December 2015

HUMANITARIAN FORESIGHT THINK TANK

Key Trends in the Forecast Period

1. The Awami League (AL) has been consolidating its power over the country and is likely to continue doing so in the coming five years
2. The BNP-led opposition, weakened by the “Independence War Trials Hunt” will have limited options to gain back power, but will certainly seize any opportunity to do so
3. The governmental plans for the country’s economic and social development will remain unevenly implemented and lagged back by unchallenged corruption practices
4. The country will remain one of the most vulnerable worldwide to socio-natural disasters, with an increasing threat posed to urban areas as urbanisation goes on
5. Land and water resources management will be increasing challenges for the population in the outlook
6. The political and security management of the growing Islamist threat by the AL is likely to stay embedded within the frame of the AL-BNP competition
7. The action and the very presence of INGO could be jeopardized to an uncertain extent by the growing control from the AL-ruled Government on civil society by 2020

EXECUTIVE SUMMARY

Bangladesh (officially the People’s Republic of Bangladesh) benefits from an international image of a model country in tackling DRR and poverty challenges. It is obvious that achievements in these two fields have been consequent. However, recent changes in the national context send worrying signals. Limited governmental capabilities beyond ambitious policies, a growing unopposed power in the hands of the Awami League, and a potential for deterioration at both local and national levels (considering altogether the acceleration of climate change, the impasse in regional resources management issues, the political transition, the sustained corruption climate, and a growing religious intolerance and diffuse Islamic threat) place the country under great uncertainties. Whether the ruling party will manage in the coming five years to bring back stability to Bangladesh by gaining more powers, and by using this space of manoeuvre to implement a planned set of socio-economic reforms to further alleviate poverty and disasters vulnerability, or on the contrary will keep key challenges for the population unaddressed, is hard to say at this stage. There is definitely a need to get ready for both options.



Source: Nations Online Project - Political Map of Bangladesh

INTRODUCTION

This report examines key trends by 2020 for nine contextual drivers, identified as those impacting most the situation in Bangladesh, in particular from a humanitarian perspective. On this basis, four scenarios have been elaborated to support operational planning.

BANGLADESH CONTEXTUAL ANALYSIS

This section presents a thematic overview of the current situation in Bangladesh at country level, followed by a trend analysis of nine drivers identified through a preliminary structural analysis.

OVERVIEW OF THE CURRENT SITUATION IN BANGLADESH

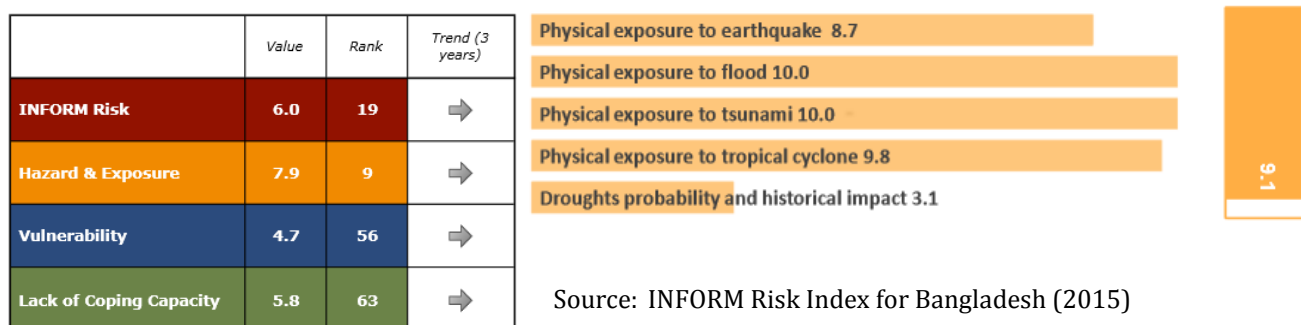
Bangladesh is widely defined by two extremes, its population density rates and its vulnerability to socio-natural disasters. Among the many challenges facing the country, its ambition to reach the middle-income status by 2021 and a growing Islamist threat will be particularly determinant.

The situation as of 2015 can be broken down through four analytical dimensions¹:

1. Bangladesh: A High Tribute to Disasters

Between 1980 and 2010, over 200 natural disasters have been recorded² in Bangladesh, an average of 8 per year. The country's location, coastal topography, massive hydrographic basin, and monsoon climate render it highly vulnerable to natural hazards. Bangladesh is subject to floods, cyclone, storm surge, river bank erosion, earthquake, drought, salinity intrusion, and tsunami. Cyclones and floods particularly cause massive human and economic damages.

In the long run, considering climate change will result in a one meter sea-level rise the threat is dire on the country while nearly a quarter of its land is less than two meters above sea level³.



Source: INFORM Risk Index for Bangladesh (2015)

Whether slow- or rapid-onset, climatic and natural disasters are the major cause of a permanent humanitarian crisis in this country⁴. Correlated to the natural phenomena, demography, poverty, social exclusion and political marginalisation have been aggravating factors. The constant threat posed to Bangladesh is therefore best described as 'socio-natural'. It

¹ This section is based on secondary data research and on 15 interviews conducted with NGO staff.

² Asian Disaster Reduction Center (ADRC)

³ The World Bank ranked the country among the twelve most at risk from climate change.

1.1. ⁴ **URD** C.Raillon. Climate change and natural disasters in Bangladesh: humanitarianism and the challenge of "resilience"

has caused a huge amount of human, material and territorial destruction⁵. As a result, combined to some of the highest density rates in the world, mass migration inflows reach the shanty towns of the major cities, such as Khulna and Dhaka. As many as 1.5 million of the 5 million slum inhabitants in Dhaka are estimated to have left villages of the Bay of Bengal (where the most vulnerable areas to cyclone, floods and salinization are to be found)⁶.

With the financial support of international institutions, Bangladesh became a global leader in disaster management and risk reduction that has developed early warning systems, built coastal shelters, and promoted the introduction of innovative technology⁷. Since the 1990s, the Government established dedicated bodies and developed planning guidelines to orientate coordinating structures⁸. Relief and rehabilitating operations are conducted under the supervision of the Ministry of Disaster Management and Relief⁹ (MoDMR)¹⁰, while a multi-donor program¹¹ supports disaster management activities. However, such policies are hardly fully implemented due to a lack of capacity at field level and of proper resource allocation. In addition, emergency coordination mechanisms are only activated in case of large-scale disasters, and the operational architecture of risk reduction and response deployment is complex and heavy¹².

Finally, DRM in Bangladesh is also dependent on regional environmental policies. The issues of water distribution, utilisation and management, have gradually taking centre-stage in defining interstate relations in the region. Over the past decades it was a matter for dispute in an atmosphere of mistrust rather than a driver for effective collaboration. Water-sharing agreements have been highly politicised at domestic levels in Pakistan, Bangladesh and Nepal, while India displayed a dominant attitude, by virtue of its sheer size and with a view to controlling regional water resources it shares with others.

Overall, Bangladesh seems to have turned an extreme vulnerability to socio-natural disasters into an opportunity, providing the country with international resources and support. However, the impact of past and recent disasters, as well as the threat of those to come, is a main concern for the most vulnerable populations paying the daily price of the governmental response's limits.

2. Behind the Walls: A Growing Interconnection to the World

⁵ Infrastructures regularly disappear beneath the water. Villages that withstand the increasing water levels are more and more isolated from each other, while many communities have very little access to electricity, the health situation is critical, and access to clean water is very difficult in these areas.

⁶ [Bangladesh Center for Advanced Studies](#)

⁷ Such as the construction of 15,000 disaster-resilient homes and the development of drought- and saline-resistant crops

⁸ [UNDP](#). Bangladesh: Disaster Risk Reduction as Development

⁹ At field level, MoDMR's activities are carried out by two subordinate offices, namely the Department of Disaster Management (DDM) and the Cyclone Preparedness Programme (CPP), the former being responsible for dissemination of all information on natural disasters, including flood information at community level, flood preparedness, awareness raising and capacity building activities.

¹⁰ [Asian Disaster Reduction Center \(ADRC\)](#)

¹¹ [Comprehensive Disaster Management Programme \(CDMP\)](#)

¹² Government and non-governmental organizations (NGOs) convene under the UN's Humanitarian Coordination Task Team (HCTT) which triggers joint interventions (e.g. Joint Needs Assessment) to increase aid effectiveness through a more coordinated response effort. It is based on the JNA report that early-recovery and recovery phases are decided.

Despite increasingly guarded borders¹³, continuous flows of migration in and out of the country, intensifying participation in regional organisations and increasing levels of foreign investment contribute to the country's growing interconnectedness to global and regional structures.

Country of Destination	Bangladesh		Providing huge workers contingents to the Arabic Peninsula in particular, the country is also hosting many refugees, principally coming from Myanmar. While migration outflows are driven from a combination of structural and situational realities and send back significant amounts of remittances ¹⁴ , the support
	Aspirant (%)	Returnee (%)	
Saudi Arabia	12.0	36.0	
UAE	17.4	18.7	
Malaysia	28.0	9.0	
Singapore	14.8	-	
Qatar	2.7	4.0	
Kuwait	13.0	9.3	
Other*	47.2	23.0	
Total	100	100	

Source: The Asia Foundation (2013) – Table of destinations

provided by the Government to the 200,000¹⁵ so-called undocumented Myanmar nationals¹⁶ allows them to receive basic protection and life-sustaining assistance in two official camps. Issues with host communities, of uncovered gaps between the two camps and other temporary facilities, and of gender-based violences, concurrently aroused. The Bangladeshi Government has recently been accused of attempting to make the country as unappealing as possible to migrants, as regional negotiations fail to find sustainable solutions to the cross-borders problem.

Bangladesh's economy also builds on its flourishing Ready-Made Garment (RMG) Industry, which attracts investors worldwide and has gained huge importance both socially and economically. Being the country's main source of foreign currency (accounting for 81% of total export earnings), it is also an area where claims for improved working conditions and social development grow louder, as safety scandals regularly alerts the international public opinion of the realities sewed underneath the "Made in Bangladesh" tag. As a key part of the country's economic development, internal migrations (a huge share being of rural women precisely joining the RMG sector) feed the extreme urban density rates, as more and more people try to escape from poverty, disaster threats, or lack of access to public services, and look for a better future.

New dynamics of regional integration led by the BIMSTEC¹⁷, the creation of the Bangladesh-China-India-Myanmar Economic Corridor, or the Shanghai Cooperation Association – to which Bangladesh is candidate -, represent opportunities for the country¹⁸ vis-à-vis its ambitions to

¹³ To prevent flows of illegal migrations from Bangladesh, India has begun constructing a border fence in 1989 along over three-quarters of the 4,000 km long frontier, and implementing other deterrents (river lighting, border patrols). Home eviction, land destruction, economic isolation, political exclusion, and arbitrary measures have reportedly taken place along the fence. A recent agreement (August 2015), allowing people from 150 islands of land to be granted the citizenship in the country of their choice, finally gave them legal access to schools, medical services and public facilities, and temporarily alleviate pressures in the border area. However, India's readiness to great lengths to keep Bangladeshis out of its territory is still vivid.

¹⁴ In Saudi Arabia alone, since the ban on migrations was lifted early 2015, two million Bangladeshi make up a key revenue source for their families back home, for about \$3.7 billion a year in remittances from the Gulf Kingdom (*International Business Times*, Dec. 8, 2015).

¹⁵ UNHCR, as of December 2014

¹⁶ Refers to the prosecuted Muslim minority also known as Rohingyas, who are in effect stateless

¹⁷ Bangladesh, India, Myanmar, Nepal, Bhutan, Sri Lanka and Thailand, association of the countries of the Bay of Bengal

¹⁸ In terms of advantageous agreements on infrastructures, resources, and technology cooperation

become a middle-income country by 2021. However, they hardly seem so far to provide diplomatic arenas to solve cross-borders issues.

3. The end of a Bicephalous Power? A Political System in Transition

The President (a largely ceremonial role in Bangladesh's political structure), Abdul Hamid, was appointed by members of Parliament¹⁹ in April 2013. The Prime Minister, Sheikh Hasina Wajed, is Chief Executive, Head of the Council of Ministers, Minister for Defence, Home Affairs & Foreign Affairs, and leads the Awami League (AL). The opposition leader is Khaleda Zia. She is the head of the Bangladesh Nationalist Party (BNP).

The rivalry between the two women -and by extension between their two parties- is renowned and deeply rooted in the country's historical fight for independence. Both women claim the political heritage of their respectively late father and husband to establish their authority and legitimacy. The competition between them reached all aspects of the judiciary and political life of Bangladesh. Besides, Sheikh Hasina has the backing of India, from where the AL elite and the government in exile worked during the Liberation war; Pakistan globally supports Khaleda Zia.

The share of power set up over years between the two main parties granted certain stability to the country, with alternating shifts being the implicit rule and elections a raw deal. However, the situation has twisted over the course of Sheikh Hasina's last mandate. This change is best illustrated by the amendment the AL brought to the constitution²⁰ in 2011, ending the use of a caretaker authority perceived by many as an arbitration power. While defending that this move would guarantee greater democracy (i.e. refusing non-elected bodies the role to oversee national elections), Sheikh Hasina encountered vivid opposition, interpreting this new amendment as a way to rig the next vote. Three years later, the 2014 elections saw a comfortable victory of the AL (winning more than two thirds of the seats in Parliament), while the BNP massively boycotted the polls. In the process of mass contestation, nearly 50 people have been killed and more than 7,000 opposition activists arrested. Yet, India was the first country to officially recognize the results giving the AL victorious. To date, BNP leaders are mostly in jail, in exile or hiding, many facing criminal charges that will probably prevent them from running in the next election (due to happen in 2019-20).

There is no doubt that the AL further consolidated its power over the country since 2014. Strong messages of greater control over the media and the civil society, as well as concerns over the rise of human rights abuse in the country, have been continuously reported since then. There is equally no doubt that the BNP-led opposition tries by all means to remain on the political game board. Traditional hartals (blockages resulting in the total disruption of the social and economic life in the country, which can last for months) are a resource to do so, but alliances -old and new- are also of particular importance to the BNP. The extent to which the party manages to maintain a

¹⁹ A unicameral parliament, the Jatiya Sangsad, consists of 300 seats occupied by members directly elected from geographical constituencies for five-year terms, plus 45 seats reserved for women elected by MPs.

²⁰ The constitution was amended in 1999, to include a new provision – that of holding general elections under a non-party neutral caretaker government. This procedure was designed to ensure a peaceful transfer of power, but the effectiveness of this system has repeatedly been called into question. Highly critical of how the supposedly temporary caretaker authority turned into a lasting, military-backed regime in 2006-8, which sent hundreds of politicians - including Sheikh Hasina and Khaleda Zia themselves - to jail on charge of abusing power.

network of dedicated supporters in a very centralized state and especially in the army ranks, which have been traditionally divided between the two camps, is difficult to assess.

For now, the AL has the necessary space to implement reforms supporting its goal of reaching the middle-income country status by 2021, shifting its economy from an agriculture-based one, building on a sustainable economic growth, and reinforcing its disaster management policy. The seventh 5-year plan (2016-2020)²¹ attests of where the ruling government intends to head next in terms of development planning. Successful efforts to reduce poverty in the first decade of 2000, cutting the total number of poor people in Bangladesh by almost 30% thanks to a widening of the social safety net, enhancement of employment generation for the extremely poor, food subsidies, and investment in education, is certainly to be credited.

Difficulties remain numerous on the way, though. Weak physical infrastructures, a poor tax collection capability, and an endemic corruption constitute serious opponents that the AL has so far proved little means – or willingness – to challenge.

4. Between Manipulation and Denial of the Islamist Threat

Despite the fact that the country is known for its moderate teaching of the Koran, a puritanical version of an intolerant Islam seems to be spreading in Bangladesh as extremist groups infiltrate society, successfully changing the way many dress, practice their faith, and interact with non-Muslims and secular Bangladeshis.

The Government's response has traditionally been to ban Islamist parties, as in October 2009 when the Government outlawed the local branch of the global Islamist organisation Hizb-ut Tahrir, saying it poses a threat to peace. The death penalty is applicable in the country. Six Islamist militants condemned for the 2005 bomb attacks were hanged in **March 2007**, including the leaders of Jagrata Muslim Janata Bangladesh and Jamaat-ul-Mujahideen. More recently²², death sentences on two senior opposition leaders (one from BNP, one from Jamaat-e-Islami) for crimes committed during the 1971 independence war were confirmed by the Bangladeshi highest court, in spite of accusation of justice miscarriages.

Critics say the AL-ruled Government is using tribunals to silence political opponents and doesn't address the real risks of a rising extremism in the country, when systematic intolerance and human rights abuse against all minorities seem to be on the rise in Bangladesh. Atheist bloggers have been particular targets of repeated attacks²³, or arrested in an attempt from PM Sheikh Hasina to please extremist wings. The ruling party plays a hazardous game, at the same time patronizing madrassas in a national uneven educational scheme and conveniently blaming the opposition²⁴ for all the terrorist actions taking place in the country.

²¹ Elaborated with UN support and driven from a multistakeholders consultation to cover all sectors of activity

²² [Al Jazeera](#) (11/2015)

²³ Atheist blogger Rajib Haider was killed in 2013, sparking nationwide protests. Since then, writers and bloggers with free thinking views have said being harassed, threatened, and sometimes killed, leading reporter Sanjay Kumar to conclude: "It's no exaggeration to say that secular bloggers are under siege in Bangladesh". [The Diplomat](#) (04/2015)

²⁴ That is called the politics of terror in the AL rhetoric.

The recent escalation in violence perpetrated against foreigners²⁵, a new pattern, backs up the idea that the official discourse and response are – deliberately or not - underestimating the nature and gravity of the risk. While recent killings of secular personalities were claimed by *Ansarullah Bangla Team (ABT)*, an offshoot of *Jamaat-e-Islami* that has established a relationship with *Al-Qaeda* in recent years²⁶, *ISIS-claimed attacks on foreigners and Shias*²⁷ tend to confirm that both Islamic State and al-Qaeda have inspired and are funding the most recent violences in Bangladesh. Besides, monitoring of jihadist social media in South Asia after the Paris attacks of November has indicated a significant shift of jihadist opinion in favour of the Islamic State, now perceived as the only extremist group with the ambition and means to conduct global attacks and inspire new recruitments.

Despite that authorities insist they ruled out any presence or activity of the militant groups in the country and blamed the BNP and its ally Jamaat for terrorist attacks, the Islamic State might now benefit from internal pressures within established local groups shifting their loyalty to ISIS, and from their eagerness to demonstrate it by new attacks following existing targeting patterns (foreigners, government and security forces installations, and atheist/religious minorities).

The ascendance taken by the Awami League since the 2010's is a clear element of disruption, which results in multiple changes in the making. Seemingly without much attention from the international community, external and internal dynamics are reshuffling politico-economic cards, making foresight analysis all the more difficult about the context's evolution in Bangladesh.

KEY TRENDS ANALYSIS IN A 5-YEAR OUTLOOK

²⁸The recent political shift in favour of AL is only one driver out of those having a major impact on the context, with potentially dire consequences on the humanitarian situation (in terms of needs, of access, of funding opportunities). Key trends will be presented for nine drivers identified as the most important ones in the Bangladeshi context, acknowledging that in reality the inter-dependence or close correlation between them (e.g. between population growth and urbanisation) requires a systemic approach, which the scenarios will ultimately bring.

1. Determinant Drivers

Four drivers have been identified as determinant variables²⁹. Interestingly two are exogenous to Bangladesh (major disasters and multilateral relations) and two are endogenous to the country (national politics and demography), embedding it in multiple scales of factorial vulnerability.

²⁵ Two foreign nationals (Italian and Japanese, the first one being an aid worker) were recently killed respectively in Dhaka in September and in Rangpur in October 2015. *Responsibility for both the killings was claimed by the Islamic State (ISIS) on social media, where it also warned that it would target more foreigners.*

²⁶ MEMRI (2015)

²⁷ A series of blasts exploded as Shia Muslims gathered for a procession in the old part of Dhaka to mark the holy day of Ashura (10/24/2015).

²⁸ This section is based on the results of a structural analysis conducted an NGO in September/October 2015. This methodology identifies the external drivers having the most important impact on the country's situation, out of a list of 41, established through a consultation process.

²⁹ Determinant or "influential" variables are altogether very influential and little dependent. Most of the system thus depends on these variables, located in the north-west frame of the perception chart. The influential variables are its most crucial elements since they can act on the system depending on how much we can control them as a key factor either of inertia or of movement. They are also considered as entry variables in the system. Among them, there are most often environment variables which strongly condition the system, but in general cannot be controlled by it. They will act rather as a factor of inertia.

a. Major Disasters

Date	Disaster type	Total Deaths
2007.11	Storm	4234
2007.07	Flood	1110
2009.05	Storm	190
2012.06	Flood	139
2009.12	Extreme temperatures	130
2007.06	Flood	120
2006.09	Storm	115
2012.10	Storm	108
2005.12	Extreme temperatures	100

Bangladesh top 10 disasters (2005-2015)

By number of deaths

Source: [The international Disaster Database](#) (2015)

As around 70% of the population lives in flood-prone, rural areas, and over 43% of the labour force is engaged in agricultural activities, despite all the efforts to reduce risks and impact of disasters the level of vulnerability is not likely to change much in the coming five years.

There is a lot of uncertainty as to what type, and moreover when, future disasters will hit Bangladesh. However, it is expected that the country experiences natural disasters in the coming five years, which will have a huge impact on the population's resources and livelihoods. This must be considered in conjunction with the resilience capabilities (or adverse implications of coping mechanisms such as over-cropping), DRR, governmental and international mitigation policies, and with a systemic perspective in which re-occurring events are seen to be worsening the impact of each previous disaster (e.g. salinization, a major problem in Bangladesh, can be the by-product of re-occurring floods, seas level rise, re-occurring cyclones, disrupted rainfall patterns, drought, and of human infrastructures and land use changes).

Despite this complexity, trends of this specific driver can be summarized as follows:

- There are fewer casualties related to 'socio-natural' disasters in Bangladesh,
- But more economic and non-economic damages³⁰ (as the country develops further).
- There are more disasters-induced land and water management issues (as population grows),
- But also a growing space for technical and policies innovation.
- Women are still more victims than men from natural disasters and will likely remain so.

In addition, there are weak signals of a potential shift in the coming years that deserve further monitoring. The first one is a policy focus on urban areas³¹, with a primary target on rising awareness of population and developing cities contingency planning, a sector that was quite lagging behind the attention given to coastal areas. Second, the Government of Bangladesh recently sought technical support from the Netherlands to consider taking back land from the waters³². The benefits from such an ambitious approach are unlikely to be seen in the outlook, but

³⁰ Such as weeks or months of missing school for children

³¹ See notably the [CDMP scheme](#) promoted with the UNDP support, or the [UDRR program](#) implemented by the Bangladesh Red Crescent Society.

³² The Bangladesh Water Development Board has carried out a number of projects using cross dams to accelerate the build-up of land, several with support from the Netherlands. Inspired by the construction of the Bestin cross dam, a project which was completed in 2010 and connects Char Montaz with Char Khalifa in Noakhali District, the World Bank is now carrying out studies on the possibility of connecting Urir Char and Noakhali using a cross dam. In addition the Government has identified 18 other potential cross dams to accelerate the building of land at the coast. Together they could help reclaim about 600 square kilometres of new land.

their perspective could influence how DRR programs are perceived and supported in the coming five years.

b. Multilateral Relations

Bangladesh is engaged in a broad range of multilateral relationships³³. As the main contributor of UN peacekeeping operations personnel around the world³⁴ the country occupies a particular seat in the UN system. Bangladesh's inscription within multilateral structures is also influenced by its position as a major recipient of foreign development assistance.

At the regional level, Bangladesh is a founding member of the association of the countries of the Bay of Bengal (Bangladesh, India, Myanmar, Nepal, Bhutan, Sri Lanka and Thailand, BIMSTEC), created in 1997, and of the Bangladesh – China – India - Myanmar Economic Corridor (BCIM-EC). Finally, Bangladesh has applied in 2012 to join the Shanghai Cooperation Organization, while discussions are currently on-going about SCO's first expansion to India and Pakistan. By 2020:

- Bangladesh will certainly maintain a high international and regional economic connectivity,
- Favours plurilateral agreements over multilateral³⁵,
- With a growing focus on the South and Southeast Asia area of cooperation.
- Bangladesh is likely to build on its internationally-recognized success towards the MDGs achievement to tackle the challenge of (and take the lead on) the SDGs
- It will remain a primary recipient of international aid, until the country reaches the middle-income status (when it will not be eligible anymore to a wide range of funding opportunities)
- Bangladesh is likely to remain the first contributor to the UN peacekeeping forces.
- Political changes in India might influence the SAARC's role in the region, with potential benefits for Bangladesh (notably in terms of regional resources dispute settlement).
- Despite small taken steps, the ASEAN is likely to remain close to an empty shell eroded by nationalistic concerns, while Bangladesh application to the Shanghai Cooperation Organization will hardly be considered any soon.

With so many implications on the country's political and economic development, multilateral relations will remain a key component of the country's context evolution. More specifically, this driver can influence the humanitarian situation in Bangladesh, more in terms of secured access for the Government to international funds to support its development planning policy, rather than of directly impacting humanitarian needs in the outlook.

c. The Bangladeshi Political System

The High Court's decision in 2009 (while the AL ruled the country) that it was the father of PM Sheikh Hasina, and not late husband of her arch-rival Khaleda Zia, who proclaimed independence

³³ Bangladesh is a member of the UN and its specialised agencies, of the South Asian Association for Regional Cooperation (SAARC), of the Commonwealth, and of the Organisation of the Islamic Conference (OIC), and is also a member of the Association of the Southeast Asian Nations (ASEAN) Regional Forum (an informal multilateral dialogue of 27 members that seeks to address security issues in the Asia-Pacific region).

³⁴ Bangladesh contributes today to the highest number of UN peacekeeping personnel (8420 as of September 2015).

³⁵ Plurilateral must be understood as strategically focused on a limited number of countries - of particular interest for Bangladesh -, versus multilateral as being inclusive of the largest possible number of countries (e.g. the UN).

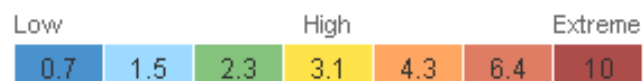
from Pakistan in 1971, has been a meaningful symbol of the growing Awami league's ascendance over its traditional BNP opponent.

As regards to the country political climate, four main trends can be observed:

- The AL control over power is likely to continue growing in the coming five years,
- While the BNP-led opposition is surely looking for new opportunities to rule again, and intends to maintain its relative weight on national politics (through the use of hartals for instance).
- There is a governmental rising intolerance of criticism, with increased risk of coercion for activists, and potentially (side-effect) for NGOs.
- The Islamist/terrorist threat is likely to grow, with continuous little recognition from the Bangladeshi Government of Islamist foreign groups' influence in the country.

For a synthesis of political and violence trends (over the coming 12 months):

IHS Outlook Q4 2015	Political Instability			Violent risks			
	Government instability	Policy instability	State failure	Protests and riots	Terrorism	Interstate war	Civil war
BGD	2.7 ↗	2.3 ↗	3.2 ↗	3.2 ↗	2.5 ↗	1.9 ↗	1.6 ↗

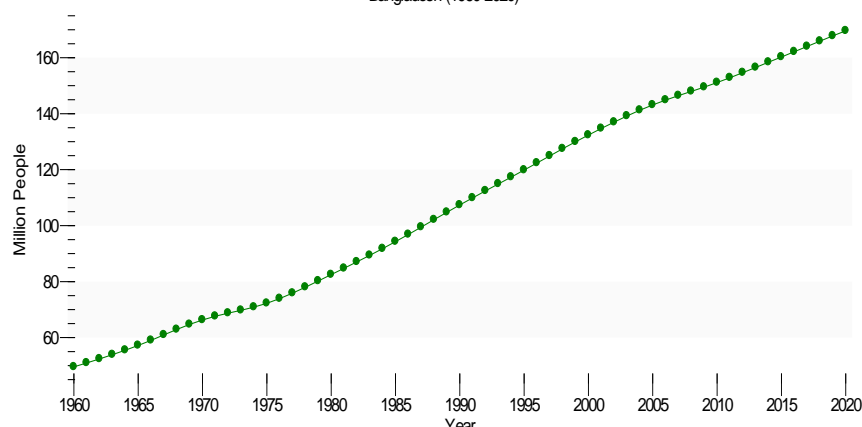


d. Population Growth

The country's spectacular demographic transition achieved over the last three decades has changed the national demographic patterns, but hardly reduced the burden of a growing population on the country's limited resources and infrastructures. To date, Bangladesh has a rate of yearly population increase of almost 2 million, on an already very densely populated territory (1,230 people per square kilometre, which ranks 5th in the world³⁶). Dhaka is by far the most densely populated city in the world (44,000 per square kilometre).

Bangladesh has a fairly young population with 34 percent aged 15 and younger, and just 5 percent aged 65 and older³⁷. The median age in the country is 25.8 years. Often presented as Bangladesh's main asset by representing a considerable active labour force, its young population will keep on growing (TFR being stable at 2.2 children born per women). This will raise continuous challenges in terms of access to education, access to jobs, and access to public services, as well as on food security, on urban settings, and on migration. A growing and young population is indeed likely to exhibit dynamic patterns of movement. Eventually, the younger cohorts in Bangladesh are

Population, History and Forecast
Bangladesh (1960-2020)



Source: The International Futures (IFs) modelling system, version 7.14

³⁶ Behind Monaco, Singapore, Bahrain, and Malta

³⁷ The International Futures

characterised by an important gender deficit (males will outnumber females by over 2.5 million by 2020).

In 2020, the total population of Bangladesh is forecasted to be 170 million, being 10 more million than it is today, even if the population growth rate will continue declining (to be 1% by 2020).

While life expectancy will continue to rise (to gain an additional year by 2020), together with the constant decline of the fertility rate (forecasted to be down to 2.1 children per women in 2020), the proportion of the elderly (above 65) related to the active population (aged 15-65) will increase (from 0.073 to 0.076 between 2015 and 2020), and yet will remain extremely small.

At a national scale, in a five-year outlook the overall population growth will impact:

- The population density (from 1,230 in 2015 to 1,300 persons per square kilometre)
- The urban population percentage (from 30 in 2015 to 32.2% in 2020)
- While the gender deficit will grow wider: there will be 2.51 million more males than females (cohorts from 0 to 34) in 2020.

These changes will have multiple offshoots on the social and economic life of Bangladesh (weighting on the already most needed urban planning policies, on the job and matrimonial markets, on vulnerability to disasters, etc.).

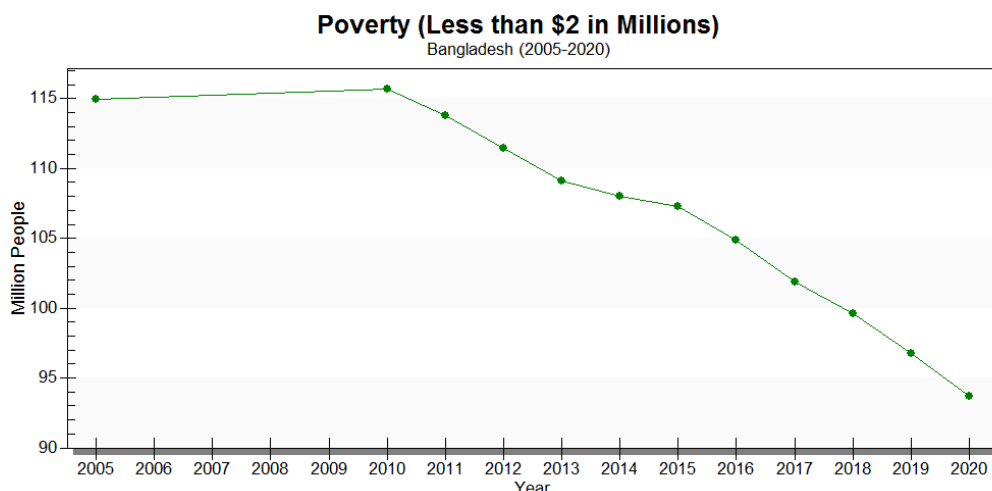
2. Secondary Drivers

The following five drivers can be considered as factors of instability depending on how actors in the system (be they political or not, be they Bangladeshi or not) will act on them (e.g. trying to reduce poverty in the country), impacting the whole context as a consequence.

a. Poverty

Bangladesh has about 60 million people in urban and rural areas that are food insecure and not consuming the minimum daily food intake required for a healthy life. Besides, Bangladesh has alarming rates of chronic and acute undernutrition, including the highest prevalence of underweight children in South Asia. Almost one in two children under five are chronically undernourished (stunted) and 14 percent suffer from acute undernutrition (wasting).

However, a continuous trend of reducing poverty in the country can be expected in the outlook.



Source: The International Futures (IFs) modelling system, version 7.14

b. Government Planning for Development

The Bangladesh Planning Commission is the central planning organization of the country. It determines objectives, goals and strategies of medium and short-term plans within the framework of long-term perspective, and formulates policy measures for the achievement of planned goals and targets. It is in charge of the Programme Planning, being the formulation of detailed resources allocation to realize the Plan objectives and goals. The Annual Development Programmes approach is sectorial³⁸. An ADP is prepared on the basis of a year's development budget and approved by the parliament.

Land scarcity relative to demand is showing an accelerating increase in land prices, especially in urban areas including Dhaka. Strengthening an organized and efficient land market is a key requirement for achieving the development goals of Bangladesh. Small area and rapid increase of population characterize Bangladesh with the lowest land-man ratio in the world (0.06 ha per person, FAO 2013). The situation is likely to deteriorate further with a growing demand for non-agricultural land. As a consequence, the rate of land transfer and land conversion is also very high in Bangladesh. The agricultural land, which is now about 84% of total land, has been depleting at a rate of almost 1% per year. Issues of conversion go along with those of land degradation.

c. Urbanisation

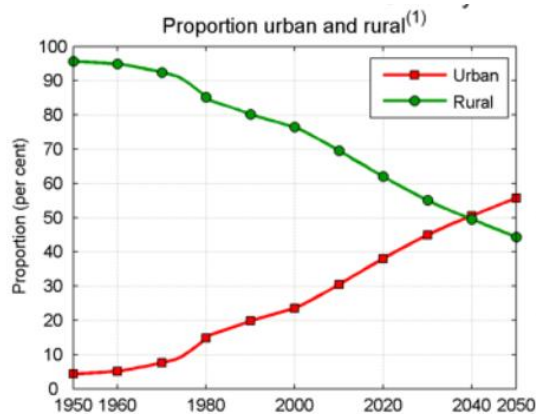
Bangladesh has experienced phenomenal growth of its urban population since the country's independence in 1971 (from around 4% in the 1950's up to 30% now).

- The country's urban share of the population will remain low comparatively to the rest of the world (global >50%, Asia ± 45%³⁹)
- However, it will continue to significantly increase by 2020 (from 30 in 2015 to 32.2% in 2020).

³⁸ ADP covering in 2015-2016 the fields of (non-exhaustive): agriculture, communication, education, foreign projects, health, industry, labour, sports, transports, etc.

³⁹ World Urbanization Prospects: The 2011 Revision

The speed and consistency of the increase together with a crucial lack of urban planning make the situation quite challenging for Bangladesh in the coming five years.



Source: World Urbanization Prospects
(2014)

One significant feature of recent urbanization and migration in Bangladesh has been the large-scale migration of rural poor women to major cities, particularly Dhaka. This has happened mainly as a result of the growth of the export-oriented garment industries⁴⁰, which in turn is the effect of economic globalization. Women in the past would only migrate to city as spouses or female members of the family. Now they also come as unmarried singles, which will have socio-economic impact on the country in the outlook.

In addition, urban growth should be considered in terms of urban and suburban dynamics separately, as the second is likely to have much greater impact in terms of access issues to basic services for the population.

d. Government-(I)NGOs relationships

Bangladesh has a vibrant civil society with thousands of national and international non-governmental organizations operating nationwide. (I)NGOs relationships with the Government have been turbulent, from periods of mutual defiance to times of cooperation. In 1989, the Bangladeshi authorities established a NGO Affairs Bureau, which is still today the main counterpart for any organization willing to work in the country. The push for better coordination often goes together with the fear of greater control. The extent to which (I)NGOs act under forms of governmental influence depends on various factors (the size of the organization, its past relations with governmental agencies, the nature of its work, etc.). Yet, some trends can be observed:

- The Government has gradually shown more interest in collaborating with NGO (through consultation or implementation process)⁴¹ and this has led to a “subcontracting” system for many service-delivery activities (including some aspects of health care, education, water and sanitation, etc.)
- Patron-clients binding relations between (I)NGO and governmental agencies, in a context where connections to power frame the overall socio-political system, are not likely to end
- Public perception of NGOs and INGOs tends to turn into greater scepticism, but they remain globally and by far less corrupt-perceived than public administration or institutions
- INGOs are increasingly dependent on governmental authorisations (FD) to operate

e. Connections to power/Corruption

1.2. ⁴⁰ 1.5 million women have already joined the garment industries in Dhaka. Cf. Kanti Ananta Nuzhat (2012). The New Urban Women in Bangladesh: Their Changing Economic Profiles

⁴¹ In the 1990s, a Government-NGO Consultative Council was created to better build cooperation ties, while the concept of “partnership” in public management was pushed forefront by international donors.

Bangladesh is usually ranked as one of the most corrupt countries in the world. An Anti-Corruption Commission (ACC), in line with global international standards, was created as a statutory independent body, operating under the Anti-Corruption Commission Act (2004). However, the Act was amended and passed by Parliament in November 2013, weakening the ACC in the process. Indeed, a provision of the amendment requires the ACC to seek permission from the government before investigating state officials (amendment to Section 32a), which constitutes a real limitation to the independence and power of the entity and gives weight to the accusation that the current government is unwilling to address the corruption issue in public administration.

In this context, connections to power must be understood as a collective scheme embedded in all aspects of social life. The police are perceived to be the institution most affected by corruption⁴². In public services, together with bribery and unauthorised payments, irregularities include politically influenced recruitment, transfers and promotions of professionals, irregularities in the procurement of materials, drugs and equipment, and absenteeism⁴³. On another hand, patronage networks linking landowners, the police and state bureaucrats make it difficult for peasants, especially Hindu minorities, to assert their property rights in rural areas in Bangladesh⁴⁴. Overall, the amount of unauthorised money paid for receiving public services is estimated to have increased.

- There is a high likelihood that people's ability to use the system in place at their benefit, depending on how well-connected to power they are, will remain the dominant feature with little political will to fight corruption practices within state administrations in particular.

Drivers are artificially isolated elements of stability or disruption in a given complex system, here the Bangladeshi context, for the sake of the analysis. As a whole, they represent different causality chains of potential humanitarian impact in the country, affecting either population's needs and vulnerabilities, or the possibility of a humanitarian response (access to the population, governmental control over INGOs, etc.). In the case of Bangladesh, both dimensions seem clearly likely to change, in a way or another, in the coming five years.

SCENARIOS (2016-2020)

Scenarios are descriptions of how the future may unfold according to an explicit, coherent and internally consistent set of assumptions about key relationships and driving forces. While they do not pretend being accurate predictions of the situation's evolution, they present plausible snapshots of what it might look like, in order to support decision-makers in designing the best-fit strategy considering the broader spectrum of possibilities.

Assumptions

At national level, while it is clear that the two opposition parties are weakened by years of trials and pressures from the ruling AL the means of action really at disposal of the BNP-Jamaat coalition and its remaining support base remain difficult to assess. The coming years will tell how much the

⁴² Global Corruption Barometer (2013)

⁴³ Transparency International

⁴⁴ Transformation Index 2014

opposition can do to regain power, and our assumption is that it is rather unlikely to have the needed levers to overweight AL in the outlook.

Focusing on the Bangladeshi context should not impede acknowledging the influence that the evolution of the situation in neighbouring countries can have on national matters by 2020. For the purpose of these scenarios, we made the assumption of no major disruption in the Indian and Myanmar contexts, knowing that both can have huge repercussions in Bangladesh. While this assumption of their stability can be challenged, potential repercussions of changes in either one or the other country will be briefly detailed in the uncertainty section, following the scenarios.

SCENARIO 1 – While the World Is Busy Elsewhere

The Awami League grows stronger on the political and economic stages and goes uncontested. The BNP-led opposition has been so weakened by the successive trials of their leaders and by targeted measures against their parties that it hardly stands against the AL at all anymore. The frequency of hartals decreased, as their inefficiency to maintain BNP's power of negotiation did not justify their increasingly contested social and economic costs country wise.

Reorienting its economic strategy towards the South and South East cooperation, the AL leads a determined policy benefitting from a stable national economic growth, a growing economic regional integration, and continuous support from most of the multilateral institutions (building on the country's success in the MDG's achievement). On-going internal and external migrations continue to contribute to the country's economic development (through remittances and the further booming RGM sector), while the population growth keeps on bringing an additional two million more young Bangladeshi on its territory every year. Benefiting from these dynamics, the Government manages to maintain its commitment to poverty reduction and DRR objectives, registering further successes in these two fields as the country doesn't experience bigger-than-average catastrophes. The middle-income country status is still out of reach in 2020, but is an achievable target in a rather short term perspective.

However, the situation of the extreme-poor and most vulnerable - still representing millions of Bangladeshis in rural and urban areas - worsens due to climate change accelerated impact as well as land and resources management issues. As a result of the limited governmental capacity to implement equally and efficiently its ambitious development planning policy and of the impact of a remaining disastrous urban planning, humanitarian needs of the economically, ecologically and politically marginalized households get worse over the period of the outlook. The accelerated urbanisation process poses exacerbated challenges in terms of access to basic services, slums development, and disasters risk reduction in more-densely ever urban spaces.

Finally, the AL's growing intolerance to criticism, intensified by the party's intrigues to win the 2019-20 elections and unleashed corruption practices, has sharpened the governmental control over the INGOs, which have less and less access to the most vulnerable populations, when they are able to remain present in the country. In addition, ISIS slowly but firmly confirms its influence, with a growing capability to fund and implement targeted actions having limited repercussions on the political space as the ruling party shot further down the media.

SCENARIO 2 – Far Worse

Confirming fears (and statistics), a major compound disaster in Bangladesh causes a high level of economic and social damages by 2020. The delta's rural areas are particularly hit, with severe material losses reported.

Unable to mitigate alone the impact on the population, Bangladesh is dependent on the support of international agencies, dedicating additional funds for the response (though insufficient to cover the needs due to competing priorities worldwide). The late and disorganized governmental response (suspicious at first to let INGOs react rapidly and beyond authorities' control) allows an opportunistic return of the BNP-led coalition. Grievances grow in neglected populations, and a significant number of idle, disaffected youth are recruited by the opposition and increasingly attracted to violent insurgencies aiming at removing the AL from power. BNP's roots in the military, also critical of the way the AL Government led the response and of the role they have been given in it, are reactivated. As a result of several coup attempts to reinstall a caretaker authority in a state of emergency the political space is gradually more cordoned off and conflict between the Government and opposition grows. The 2019-2020 elections have been postponed.

As a consequence of the disaster's impact on fragile economic structures, emigration in the Gulf region increases, while the international community still struggles to move forward on the climate-refugee status. With lasting consequences of the catastrophe on households' livelihoods, and considering the surface of the country that has been affected, the poverty reduction trend is reversed. More people joined urban areas and shanty towns, where health conditions are reaching unspeakable levels. However, economic development in urban centers is not as badly affected and a more educated population keeps on claiming for more preparedness and more rights.

SCENARIO 3 - Unliveable Towns

Despite some efforts to shift from a rural-exclusively focused DRR policy to implement some urban prevention measures, the reality of years of disastrous urban planning caught up the country when Dhaka and Chittagong are massively flooded following a storm surge. Casualties in the destruction of poorly-constructed buildings are enormous, as is the economic impact. RMG factories paid a particularly heavy tribute to the disaster.

International, regional and diaspora solidarity resulted in important inflows of money. However, the political dispute fuelled by the catastrophe (not least due to the death of several key AL leaders) led to serious misuses of external funding. The AL party is accused of having a political-agenda approach of the response and using it to strengthen its own position. While people relied almost exclusively on their social networks and relations to survive in the first weeks following the catastrophe, political instability increases and national and regional economic opportunities are shuttered. Poverty rates rise again as the destruction of urban infrastructures altered already weak basic services provision, and the scope of income-generative activities is seriously challenged. Reconstruction is jeopardized by exacerbated corrupted practices.

Slum areas became no go zones, with the most basic needs of inhabitants being totally unaddressed and a disease outbreak worsening even more the situation. The only ones to settle in these devastated areas are Islamist groups, using the little relief provided to serve recruitment purposes. Enrolment is perceived as a way to prove allegiance to the ISIS internationally growing factions, as traditional extremist networks have also been disrupted by the catastrophe. Some NGOs and INGOs tried to react as well and implement emergency programs, but lacking urban

contingency planning and greater governmental control over their action did not allow them to do much. The AL manages to keep the disastrous situation of the slums relatively hidden from the international stage, on which it reaffirms its capability to rule and intention to remain in power.

SCENARIO 4 – Bangladesh under International Scrutiny

The economic development of the country went as planned, and the AL-ruled government is proud of getting closer to its target of reaching the middle-income country status. However, increasing tensions about the way the government handles the ISIS threat on its territory tarnished Bangladesh's international picture of a praised model among developing countries.

The number of terrorist attacks increased during the five-year outlook, with more foreigners directly targeted. Western countries limited their expatriate presence and issued warnings for their national companies. Diplomacy is at stand still, as the US officials became more and more virulent in their critics against the regime. As a result, the nationally unchallenged AL further reduces freedom of speech. Prisons are full of political opponents, and human rights INGOs have a harder time ever to maintain a presence in the country.

Yet, Bangladesh found greater support in regional cooperation, at least from an economical perspective. Stronger links among the BIMSTEC – and in Asia in general - allow the AL to pursue its development policy without fearing much Western complaints or threats (potentially impacting the financial inflow from multilateral institutions). In addition, as there is still no consensus worldwide on the best way to fight the Islamist threat, security management conveniently remains a way for the AL to shut down the opposition. Using this increasing regional support, infrastructure development and poverty reduction policies improve the living conditions of many in Bangladesh, lifting an increasing share of the population out of absolute poverty, while urban planning finally became a clear priority at country level and resources management a topic for agreement at regional level.

Uncertainties

Despite framing the scope of possible futures through a trends analysis and the design of a consistent set of hypotheses, uncertainties remain that need to be taken into consideration.

In a regional perspective, elaborating these scenarios we considered that the situation in neighbouring countries of Bangladesh (India and Myanmar) would be stable by 2020. There is little chance that the situation in both countries changes radically in the outlook. However, potential alterations would have significant repercussions on the Bangladeshi situation with two main uncertainties:

- India: From one of isolationism to one in which it is increasingly reaching out to the outside world, Indian openness policy is a deal changer, and might strengthen further opportunities for Bangladesh while India will certainly remain the country's big brother model type as long as the AL stays in power. This means that the current trend in India showing increasing difficulties for INGOs to implement programs might very well unfold in Bangladesh as well.
- Myanmar's transition to democracy is fragile and the intentions of the NLD – led by icon Aung San Suu Kyi – are blurred. New social tensions and sectarian violence between Buddhist and Muslim communities (violences beginning in southwestern Rakhine State and spreading

further inland in 2013) are not unlikely to escalate as no real attempts to curb anti-Muslim sentiment was shown by the next-in row party to rule. The Muslim minority of Myanmar having close links with Bangladesh, and constituting the main share of refugees on Bangladesh's territory, a deteriorating situation in Myanmar could have direct consequences in the country.

In addition, the Bangladeshi policy about the Myanmar migrants in its eastern region (Cox's Bazar) comes with uncertainty beyond an increasingly deterrent posture. Officials (starting with the Prime Minister Sheikh Hasina) mentioned at several occasions a relocation plan that would resettle refugees on an island formed by the sediments of the Meghna River. The potential for touristic development of the area certainly plays a role in that regard. How realistic this plan is and how determined is the government to implement it constitute a wild card in the outlook.

On the international stage, recent developments in the midst of the Syrian crisis, favouring a potential reconciliation between ISIS and Al Qaeda against a common enemy, might impact the extent and shape of the Islamist threat posed to South Asia and Bangladesh in particular. The volatility of the conflict and of its offshoots makes it one of the biggest uncertainties in the outlook.

As the world grows globally more interconnected, it is not surprising to see that the main uncertainties in the Bangladesh context are linked to external factors to the country.

CONCLUSION

The situation in Bangladesh has a huge potential for worsening. Intrinsic challenges, such as the unplanned urban growth or the demographic pressure on disaster-prone areas, are doubled by regional uncertainties and international dynamics both having a potential for a degrading impact on the national situation. The ambitions of the Awami League to remain in power, whatever it takes to do so, can eventually bring elements of stability and further socio-economic development, as well as elements of disorder in particular in the field of humanitarian assistance, with a likely growing control over INGOs. Considering these trends all together, the situation clearly deserves a regular monitoring to anticipate the next changes to come especially as in most of the cases they are likely to leave significant parts of the population in needs for humanitarian assistance in the coming five years. ■

BANGLADESH: Country Scenarios A five year outlook (2016-2020)

December 2015

Humanitarian Foresight Think Tank

A think tank under the
HUMANITARIAN AND DEVELOPMENT PROGRAMME

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