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EMERGING CHALLENGES OF CAMBODIA'S LOCAL GOVERNMENT: RESOURCE MOBILISATION, LOCAL INITIATIVE AND CIVIC ENGAGEMENT

Introduction

The aim of this article is to stimulate discussion around emerging challenges facing local governments in Cambodia. The challenges identified represent their continued struggle to meet statutory responsibilities and expectations and adapt to their roles in the context of rapid changes at local government level since decentralisation reform began in 2002. Most prominent is the increasingly difficult task of matching the expectations created by mandates with the political capacity and ability to fulfil them. This problem is accentuated by the fact that local actors are demanded by various governance reforms to be more responsive and accountable to local citizens before they are adequately equipped with authority, resources and support.

The article begins by describing the dynamic relationship between the evolution of local government roles and higher expectations of public services, and how their juxtaposition widens the gap between political accountability and capacity. It then briefly discusses closing the gap as a critical prerequisite for accountable and responsive local governance. That is followed by identification and discussion of how local actors in Cambodia are attempting to fill the gap and the challenges



Local authorities from various provinces around the Tonle Sap visit the coastal provinces to learn about climate change adaptation planning, Koh Kong, Feb 2016

they encounter. Some final policy suggestions conclude.

Changing local context: Expectations and local government capacity

Decentralisation reform, which is envisioned by its advocates to promote democratisation, local development and eventually reduce poverty,

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Eng Netra PhD, unit head and research fellow, Governance Unit, CDRI. Citation: Eng Netra. 2016. "Emerging Challenges of Cambodia's Local Government: Resource Mobilisation, Local Initiative and Civic Engagement." *Cambodia Development Review* 20(4): 1-5. Phnom Penh: CDRI.

has brought about significant changes to the subnational governance structure in Cambodia (Rusten et al. 2004). Since the first commune council elections in 2002, the commune has taken on a more meaningful role in local development, a marked change from its previous primary emphasis on maintaining security and social order after the end of the Khmer Rouge regime. Decentralisation reform has also established a base for the commune council to build its legitimacy and created space for representatives from different parties to work together (Öjendal and Kim 2013). Administratively, the reform has put in place framework for local participatory development processes, including project prioritisation, procurement and financial management, which enable councils to respond to local needs and enhance accountability for local decision making.

The commune still has very limited functional and resource assignments, however. These shortcomings require the scaling up of decentralisation at intermediate (provincial and district) levels (RGC 2005; Pak 2011). The government, with support from international development partners, expanded decentralisation reform to district and provincial level with the first indirect election of district and provincial councils in 2009 and recently in 2014. Indirectly elected councils with councillors from different political parties and women are now in place. New institutions and structures such as boards of governors and various district offices have been established to carry out the policies and decisions of the councils. The boards of governors are membered by a governor and several deputy governors, only one of whom is a woman. The districts also have their own budgets that they can use to implement district-level participatory development plans in response to local needs.

The district is now the focus of the ongoing decentralisation reform as outlined in the 10-year National Program on Sub-National Democratic Development 2010-2019. The government wants to reshape the district from an administrative coordination hub into a decisive level of government able to promote local economic development and deliver services that commune councils, given their small size and administrative limitations, are unable to provide. This shift involves commune councils presenting demands from their constituencies to which districts will then respond. The district

also has a responsibility to support communes in implementing their work, to monitor and check the legality of commune decisions, and to provide capacity building for commune councils.

CDRI research on decentralisation reform and local governance documents three important changes in local governance. First, decentralisation has paved the way for the emergence of new actors and voices and hence a certain level of political pluralism in local politics. In most communes and districts, there are council members from oppositional political parties and women councillors. The pressure of the commune's direct election extends further to the political party system whereby the parties have to restructure themselves to be effective and efficient at the grassroots level by identifying competent candidates to win votes (Thon et al. 2009). At the district level, there are officials in the administration who represent Cambodia's post-war generation and are relatively well educated compared to district councillors who are mostly retired civil servants (Eng 2014).

Second, the reorganisation of the structure and accountability of local government (namely commune and district) has been observed to contribute to improved state-society relations and greater accountability and responsiveness from local authorities to their constituents. Research into the state-society relationship in Cambodia discerns a shift in the way citizens interact with authority from relations of fear to relations characterised by respect, although hierarchy and personal relations continue to be important (Öjendal and Kim 2006). A study of local leadership in three communes has also observed that rural villagers address local leaders using the family titles of aunt, uncle or grandfather to emphasise closeness and familiarity as well as obligation on the part of local leaders to protect and look after their villagers in the way family members would do for one another (Thon et al. 2009). This study also revealed that local actors tend to lean towards their villagers' side, except in conflicts that involve powerful external actors.

Finally, decentralisation reform has offered a new platform for citizens as well as civil society organisations and international donors to engage and work with state authorities in making local government more transparent and accountable while promoting local development projects. Voters now better understand the value of their votes and have

become more active in choosing more benevolent leaders and voting out those leaders who mistreated them if they are given a choice (Öjendal and Kim 2013). Civil society organisations and non-governmental organisations, which play important roles in Cambodia's development, have been able to work with local authorities in mobilising citizens' needs, participating in local planning and decision-making processes, as well as implementing development projects. Recent implementation of social accountability initiatives may further extend the space for engagement by both citizens and their civil society representatives with local authorities on selected public services.

Despite advances, these outcomes are subject to increasingly intense scrutiny and could be jeopardised as the gap between public expectations and local government's capacity to respond rapidly widens. Analysis of Cambodia's demography shows an increasingly diverse constituency, especially among the young population – people under 30. This young population is less marked by the country's violent history, is better educated than the previous generation, has greater access to information, is highly mobile and has a far higher exposure to the outside world. Expectations of local government to respond to the particular needs of this youth population coupled with expectations from higher levels of government have so far put enormous pressure on local government and could undermine their legitimacy and significance.

Progress in equipping local government with capacity – resources, power and autonomy – to respond to local expectations and high level demands has been painstakingly slow. At the commune level, although authorities have political legitimacy, their mandate and resources are fairly limited. The district, which is the focus of decentralisation reform in terms of service delivery, although lacking a democratic power base, has local development potential. However, the provision of resources and power over service delivery functions for the district as envisioned in the 2008 Law on Administrative Management of Capital, Provinces, Municipalities, Districts and Khans (the Organic Law) has not been implemented. Recent study reveals that the district's responsiveness to citizens and commune councils' demands remains constrained by their meagre own-source revenues and reluctance to exercise their permissive authority allowed by the

legal framework (NCDD 2016).

Local government's limited capacity is accentuated by local actors' close proximity to the problems, the immediacy of their interactions with citizens, and the blame they constantly receive from local citizens for problems experienced locally. Local government is also increasingly expected by higher level government to manage and contain local problems to prevent them from becoming worse or more widespread. Civil society organisations and NGOs' engagement with local government through various reform initiatives also adds pressure as they deflect attention from national to local government over government service delivery performance. These expectations and pressure have overwhelmed local government. The implication of this gap for local government in Cambodia has been significant as many decisions regarding the transfer of authority and resources from central ministries to local government have been subject to very long delays, despite central government's commitment to deepen decentralisation reform.

Emerging challenges of local government

Three key challenges emerge as local actors manage to narrow the gap between public expectations and capacity to be more locally accountable and responsive; they are local initiative, resource mobilisation and civic engagement.

Challenge 1: Taking local initiative

A widening gap between expectations and capacity signifies government institutions' inability, reluctance or lack of authority to deal effectively with public demands. At the local level, the scope of the problems faced often extends beyond local government boundaries. The major policy issues local government in Cambodia face such as infrastructure, employment, irrigation, land use and natural resource governance may be within their permissive functions, but have not yet been put under their authority.

For local government to be able to respond to local problems, whether mobilising support and collaboration from different sector ministries or their local constituents, they must exercise local agency and democratic discretions. So far, despite considerable authority granted to local government under the Law on the Administration and Management of Commune/Sangkat (the Commune

Law 2001) and the Organic Law 2008, studies have shown that local actors are both reluctant and constrained in their ability to exercise authority and take initiative (NCDD 2012; Eng 2014). This is partly because the laws provide only a broad outline of a general mandate for local government, and require detailed guidelines, many of which have yet to be developed, from central government as to how local actors implement these provisions. More importantly, it is because there are risks involved, politically or personally or both, for local actors to develop their own initiatives, fearing repercussions from constituents, higher-level government or powerful external actors.

Studies have shown that for local governments to become accountable and responsive providers, decentralisation reform must remould them from administrators of centrally mandated agencies, who merely comply and respond to central government policies and instructions, into assertive local bodies empowered to exercise authority with greater autonomy, and most important of all, to use their own initiative in addressing local concerns. Given the growing gap between public expectations and local government capacity in the context of the gradual approach to decentralisation in Cambodia, taking initiative and promoting a sense of ownership in local decision making are critical to strengthening the democratic authority of the rural villagers they represent. CDRI research finds that local government performance varies from one context to the next but is highly dependent on leadership initiatives. Taking local initiative requires not only leadership but also active encouragement, cooperation and backing from higher levels of government. At the same time, local actors need assured protection from official reprimands for testing new ideas or trying out new approaches in response to public expectations.

Challenge 2: Mobilising resources

Decentralisation reform awards a wide array of roles and responsibilities to local government: functions range from civil administrative services to basic services delivery and conflict resolution. Over the years, a gradual increase in financial resources has enabled local government to carry out their responsibilities and deliver services. Intergovernmental transfer of funds from national to local government for the commune/sangkat fund has steadily grown from 2 percent of domestic

revenue in 2002 to 2.8 percent in 2016. Similarly, transfer from domestic revenue for the district/khan fund has slowly increased from 0.8 percent in 2013 to 0.9 percent in 2016. However, commune and district operational and administrative costs swallow up significant amounts of these funds, while resources available for the commune and the district to respond to local needs and provide the delivery services assigned to them by law remain very limited. Other sources of local government funding allowed for by Commune Law 2001 and Organic Law 2008 such as tax and non-tax revenues including provisions for own-source revenues have yet to be activated.

At the moment, local resource mobilisation efforts aimed at responding to locally identified problems come from ad hoc opportunities linked to donor and NGO project activities and personal contacts with potential beneficiaries at local and national level. This practice has been quite problematic for local actors to exercise their agency and, equally important, for citizens to put pressure on local government for greater accountability. In essence, local government in Cambodia needs both a larger budget envelope and diverse revenue streams that would enable them to be seen not just as agency of national government but also as genuine local government: one that is accountable and responsive to local people.

Challenge 3: Engaging with citizens

The third challenge concerns the issue of public participation and accountability, and the imperative of engaging citizens with different interests, gender, ages and socioeconomic status in local governance. Public engagement is not only crucial in democratic governance so that the decisions and actions of local government are representative and responsive to their constituents. Working with citizens allows local officials to deliver services based on locally identified demands. Active public participation is also necessary for building a stronger accountability relationship between local officials and their electorates.

The evolving local governance coupled with demographic shifts emphasises that engaging with this new and growing significance of young populations in local governance is indispensable and urgent. Although increasingly visible, youth often remain detached from local formal structures

and decision-making processes even though they comprise 60 percent of the population. CDRI research on youth's political participation in rural commune development planning suggests that commune institutions have not adapted to include and engage youth (Heng et al. 2014). The study also finds that local planning and development implementation processes have not been able to respond to youth's particular needs, for example in education, health and employment (Heng et al. 2014).

The challenge for local government in Cambodia is paramount in that they not only need to ensure they include this new group of citizens and their perspectives in local governance processes, but at the same time are able to adapt and respond to youth's particular needs.

Conclusion

Local government in Cambodia has undergone significant changes since decentralisation reform started in 2002. So has the socioeconomic and political context within which local government exists and functions, most notably the emergence of the largest youth generation in contemporary Cambodia who are rapidly becoming demographically dominant and operating with quite a different attitude to that of the old generation. Nonetheless, the strengthening of institutional capacities for reform by local government is lagging behind the public's increasingly diverse expectations. This widening gap between expectations of public services and capacity to deliver them puts local governments under intense pressure and scrutiny from both their constituencies and higher levels of government. As local government tries to narrow the gap, they face three major challenges.

Local actors may have good ideas and solutions to local concerns, but they are often reluctant to act on their ideas and actually exercise local agency as permitted under existing law. Taking initiative and ownership of decisions has also been constrained by the lack of resources and authority over revenue mobilisation. Finally, the impact of demographic changes with increased significance of young citizens challenges local government to find new strategies for public engagement and local services delivery.

The challenges facing local government in Cambodia are likely to intensify in the near future,

unless given immediate attention. The government has reoriented its efforts to deal with this situation in Implementation Plan 3 Phase II by focusing on promoting the implementation of permissive functions, expanding the transfer of sector functions, and implementing the social accountability framework (NCDD 2014). However, bolder and deeper reform efforts to enable local actors and their institutions to be more autonomous, well-resourced and locally accountable are desperately needed so that local government can tackle emerging challenges more effectively.

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A Comparison of Practices between Non-Indigenous and Indigenous Community Forestry in the Use of Firewood and Non-Timber Forest Products

Background

Forest cover in Cambodia

The Kingdom of Cambodia covers an area of 181,035 km², bordering Vietnam in the east, Laos in the north and Thailand in the north, west and south. It is among the richest Southeast Asian countries in the diversity of natural resources, containing 80 percent of the most valuable and endangered indigenous tree species in the region, which are under ongoing threat from development and land use changes (FA 2003). An assessment prepared by the Forestry Administration (2011) shows that between 2002 and 2010, the total forest cover in the country declined from 61.15 percent to 57.07 percent, a decrease of 0.51 percent annually, equivalent to 740,502 hectares in total.

Table 1: Forest type and area in Cambodia

Forest type	Area	
	ha	%
Evergreen	3499185	19.27
Semi-evergreen	1274789	7.02
Deciduous	4481214	24.68
Other	1108600	6.10
Total	10363789	57.07

Source: FA 2011

Firewood and non-timber forest products

Rural households in developing countries generally depend on firewood as the primary fuel for cooking. In Cambodia, wood is the main

cooking fuel for 80 percent of the population (FAO 2010; Chan, Sasaki and Ninomiya 2015). Non-timber forest products (NTFP) are also critically important for their livelihoods, either for subsistence or for cash income (De Boer and Baquete 1998; Kumar and Shahabuddin 2005). The over-exploitation of these forest products is likely leading to forest degradation and deforestation as well as social, environmental and economic impacts on local communities (San et al 2012; Chan, Sasaki and Ninomiya 2015; Chhun 2015).

Community forestry

Community forestry (CF) was introduced to Cambodia in the mid-1990s to foster the sustainable use and management of forest resources and improve local livelihoods, with support from international and national non-government organisations. The government officially adopted a Guideline on Community Forestry in 2006, in addition to a Sub-Decree on Community Forestry Management in 2003 and the Forestry Law in 2002 (FA 2015). The steps for a community forest to receive official recognition are listed in Table 2.

By completing steps 1-7, the community secures access to forest resources in the approved area for the agreed duration (15 years), which may be revoked only if the community fails to meet the requirements outlined in the CF agreement. However, four additional steps are required for the community to manage the forest optimally, to commercialise forest products legally and to maintain tenure over the land.

The number of community forests officially registered with the Ministry of Agriculture, Forestry and Fisheries increased rapidly. In September 2015, there were 499 CF areas covering 417,635.86 ha in 21 provinces (Figure

Drawing on Ouch (2016), this article was written by Ouch Chhuong, Program Assistant, Environment Unit, CDRI. Citation: Ouch Chhuong. 2016. "A Comparison of Practices between Non-Indigenous and Indigenous Community Forestry in the Use of Firewood and Non-Timber Forest Products." *Cambodia Development Review* 20(4): 6-13.

1). Of these, 401 had received approval from the ministry, equal to 338,316.78 ha, though only 328 forestry communities had signed an agreement with the Forestry Administration Cantonment.

Table 2: The 12 steps in formalising a community forestry site

Step 0: CF area identification and approval	Step 6: Preparation of CF regulations
Step 1: CF formulation	Step 7: Preparation and approval of CF agreement
Step 2: Information gathering	Step 8: CF management plan and inventory
Step 3: Establishment of CF management committee	Step 9: Enterprise/ livelihood development
Step 4: Development of internal rules	Step 10: CF management plan implementation
Step 5: Demarcation of boundaries and mapping	Step 11: Monitoring and evaluation

Source: RGC 2010

Minorities

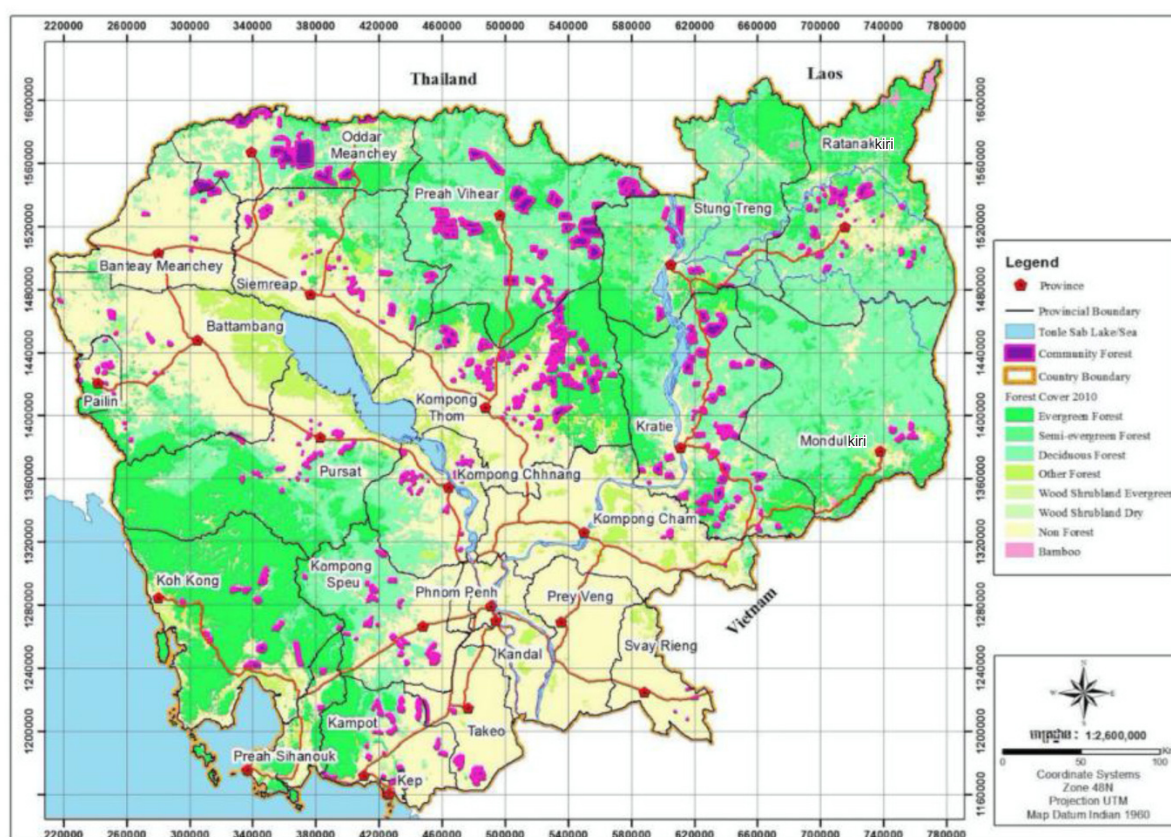
Cambodia is a multi-ethnic society, with Khmer making up the majority (90 percent). Indigenous and other minorities make up a much smaller proportion of the population than in neighbouring countries. Based on their spoken language, indigenous groups are classified into 17 different categories, predominantly in the north-east provinces (NGO Forum 2006).

In Ratanakiri, ethnic minorities form about 75 percent of the total population, comprising eight primary ethnic groups: Tampuan, Kreung, Cha Ray, Pnov, Pnong, Ka Vet, Ka Chak and Lun. Most of the indigenous residents are subsistence farmers who rely on gathering forest products.

Objectives

Studies on NTFP, firewood and its marketing chain flow have been conducted in different parts of Cambodia. However, there have been no recent studies of resource use patterns and stakeholder perspectives across different cultural groups (non-minority and minority) under the CF mechanism.

Figure 1: Registered community forestry sites



Source: FA 2015

Figure 2: Location of studied sites

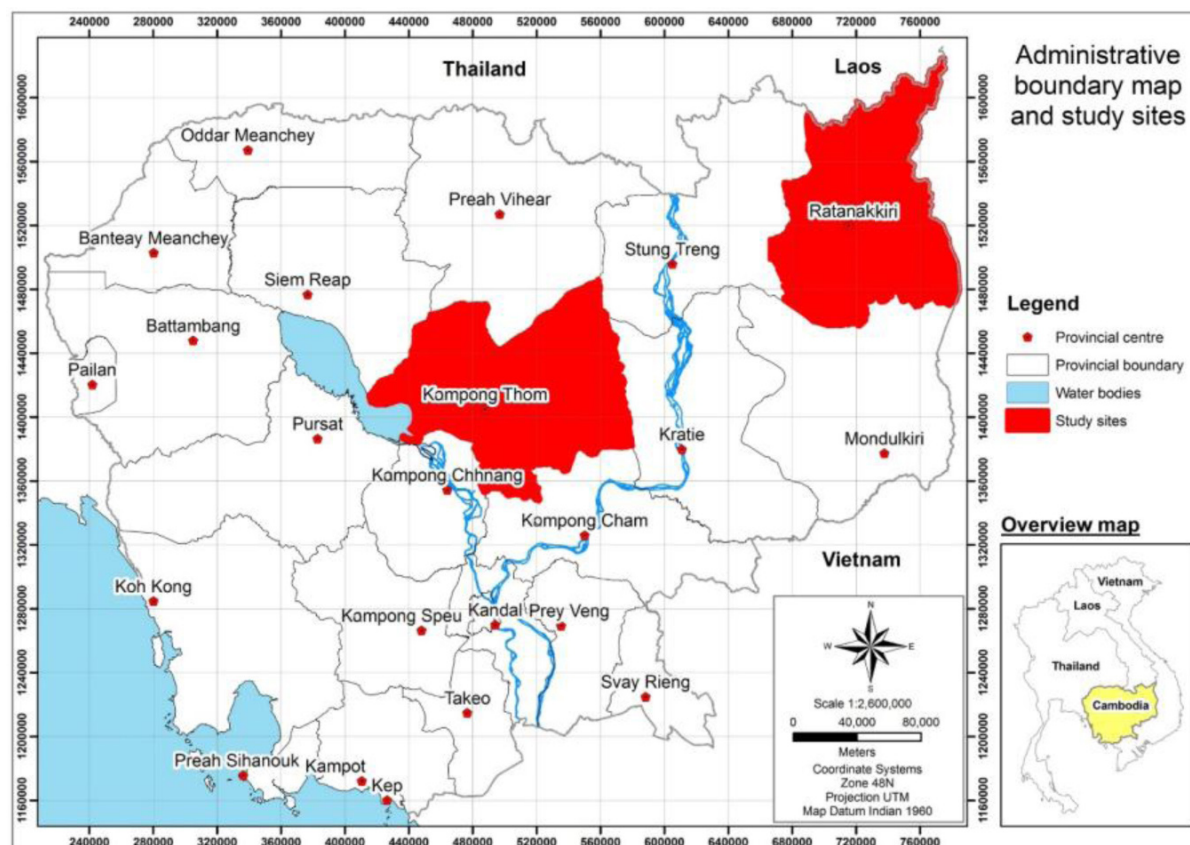
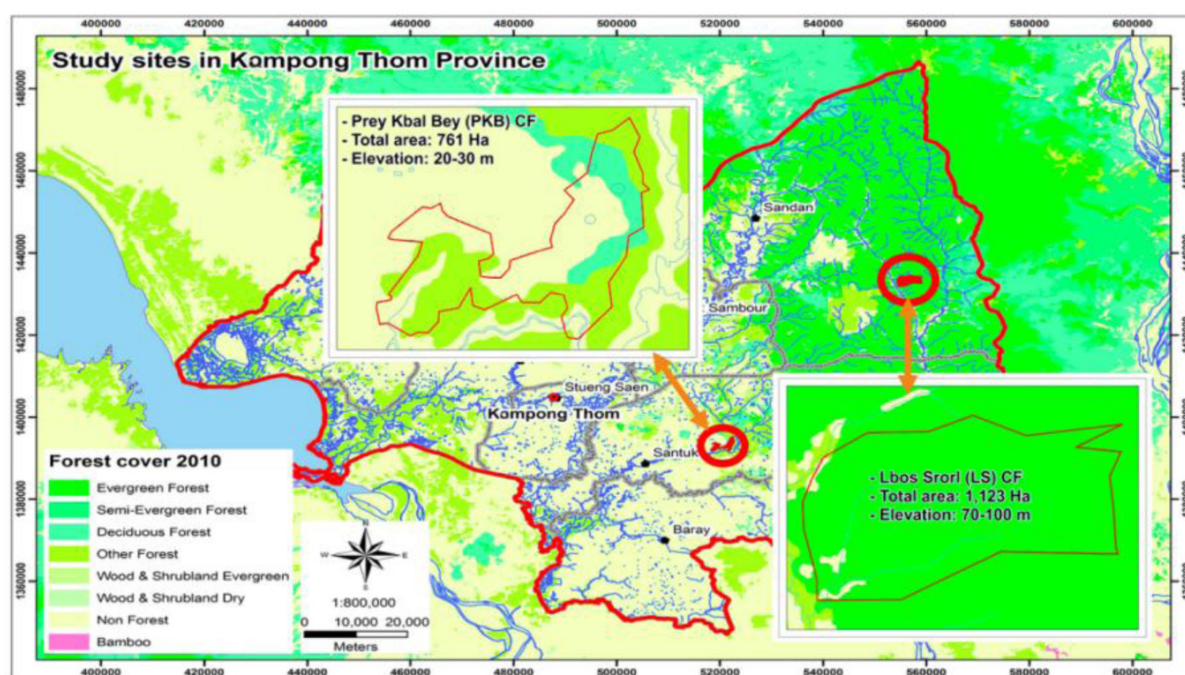


Figure 3: Study sites in Kompong Thom province



The objective of this study was to document differences among ethnic groups in their use of firewood and other NTFP in their designated community forests, as well as their perceptions on historical trends of firewood and NTFP and how well the current management scheme functions in each community.

Method

Two provinces in Cambodia were selected for this study (Figure 2): Kompong Thom in the central lowlands (non-minority groups) and Ratanakkiri in the north-east (minority groups). In each province, two registered forestry communities were selected, and semi-structured interviews of heads of household (or their representatives) were conducted, a sample of 37 in total and 8-10 households per community (Lbos Srrol 8, Prey Kbal Bey 9, Phnom Chra Phang 10 and Phruok10). These were complemented by direct observation and key informant interviews with representatives of Forestry Administration units (one national and two local), a non-government organisation assisting CF development, the head of each CF committee and the village chief.

In Kompong Thom, two communities were selected: Lbos Srrol with a total area of 1123 ha and Prey Kbal Bey, which covers an area of 761

ha. These communities represent non-minority groups.

In Ratanakkiri, representing minority groups, we selected Phnom Chra Phang, with an area of 191 ha, and Phruok, with an area of 136 ha.

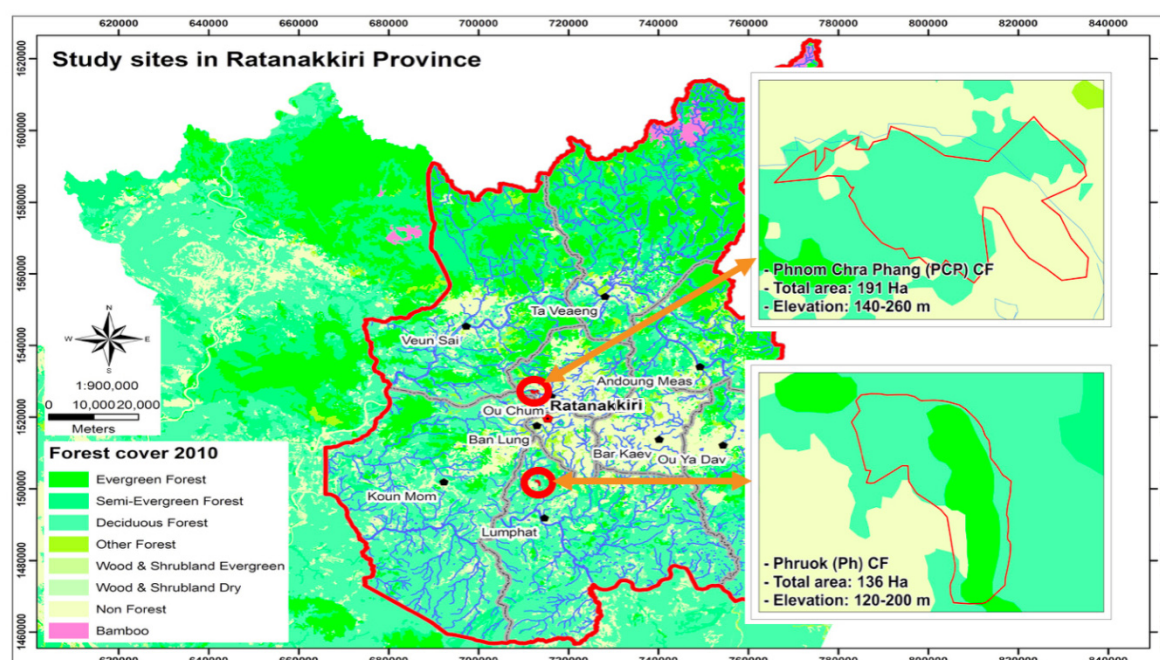
The selected communities in the two provinces differ in many aspects other than ethnicity, including the availability of a CF management plan (only in Kompong Thom), the size of areas approved for CF (larger in Kompong Thom), distance to cities (greater in Kompong Thom) and patterns of ongoing land-use change.

Key findings

Use of firewood and NTFP

In the four studied communities, households own both paddy fields and cashew nut plantations. All of the respondents reported that they use firewood as the main fuel for their daily cooking, and none of them had ever produced or used charcoal. Households in the non-minority groups in Kompong Thom, particularly in Lbos Srrol, lop the branches of their cashew nut trees to use as firewood instead of collecting wood from the community forest (Figure 5). These cashew nut plantations are located a short distance from their houses, so that it is easy to collect firewood, while the area designated for CF is substantially farther

Figure 4: Study sites in Ratanakkiri province



away. In contrast, in Ratanakkiri, especially in Phruok, the majority of households rely on community forests for their firewood.

Figure 5: Sources of firewood for daily consumption

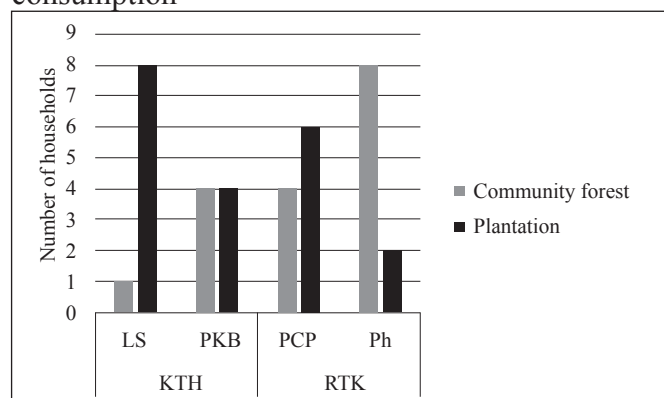


Table 3 summarises the NTFP reported. The four communities differ substantially in the type of NTFP they collect from their community forests, and the diversity of NTFP can be as low as a single product. In Kompong Thom, CF members in Lbos Srrol collect resin from Dipterocarpaceae trees (*Dipterocarpus alatus*) to supplement their incomes, and in Prey Kbal Bey collect several species of edible fruit. In Ratanakkiri, CF members in Phnom Chra Phang collect only bamboo shoots and those in Phruok collect mushrooms, honey and rattan in addition to bamboo shoots. In general, all four CF groups collect firewood only for subsistence because there is no market demand.

Table 3: NTFP collected in each community

English name	Local name	Collected in	Purpose	
			Subsistence	Generate income
Firewood	Os	LS, PKB, PCP, Ph	O	X
Charcoal	Khyoung	none	X	X
Resin	Chor teuk	LS	X	O
Edible fruit #1	Rumduol	PKB	O	O
Edible fruit #2	Kuy	PKB	O	O
Edible fruit #3	Raol, sae-maon	PKB	O	O
Mushroom	Psit	PKB, Ph	O	O
Bamboo shoots	Tum paing	PKB, PCP, Ph	O	O
Honey	Toek khmum	Ph	O	O
Rattan	Pdao	Ph	O	O

Note: LS - Lbos Srrol; PKB - Prey Kbal Bey; PCP - Phnom Chra Phang; Ph - Phruok.

Figure 6: Photos of the edible fruits listed in Table 4



Rumduol



Kuy



Raol/Sae-maon

Photos: Courtesy of Mr Kourn Mun, head of Prey Kbal Bey CF

Perceptions

Some CF groups gain more benefits from their forests than others, which may not gain much either for subsistence or cash income. Figure 7 summarises interviewees' perceptions of the importance of CF for their livelihoods. In Kompong Thom, 8 of 9 respondents in Lbos Srrol and 6 of 8 respondents in Prey Kbal Bey reported that CF is "very important" for trading and for subsistence. In Ratanakkiri, 9 of 10 respondents in Phnom Chra Phang said CF was important to them largely for some NTFP that they used, while 8 of 10 respondents in Phruok, replied that CF did not benefit them through sale of forest resources.

Asked about the trends of firewood use in their households, the majority of respondents in Kompong Thom, especially in Lbos Srrol, responded that firewood consumption had not changed much in the last five years (Figure 8). In contrast, in Ratanakkiri, responses were diverse.

More than half of the households in all communities expected that their firewood

consumption would keep increasing as their family size increases (Figure 9). In Ratanakkiri, some interviewees said that they were willing to go further into either their own community forest or other forested areas to find firewood for cooking, if necessary.

Many interviewees in Phnom Chra Phang, Ratanakkiri, reported that they are likely to depend less on NTFP because forest is being converted into agricultural land by both locals and outsiders/intruders. They intend to clear the remaining bamboo forest and stop harvesting bamboo shoots. But, even within the same province, many in Phruok reported that they were likely to increase use of NTFP, similarly to those in Lbos Srrol and Prey Kbal Bey in Kompong Thom.

Current management

On performance, all except one respondent in Kompong Thom rated their CF committees as "very good" or "good". In Ratanakkiri, many in Phnom Chra Phang considered the current

Figure 7: Perceptions of the importance of CF to livelihoods and communities

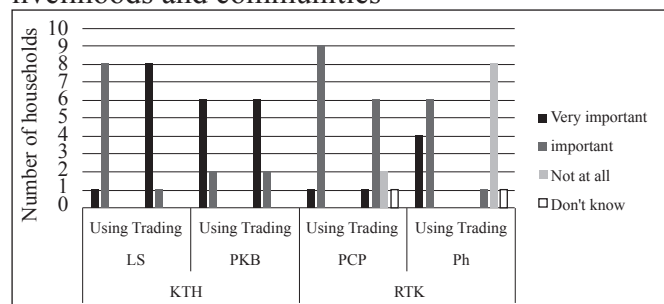


Figure 8: Perceptions of historical trends of firewood use

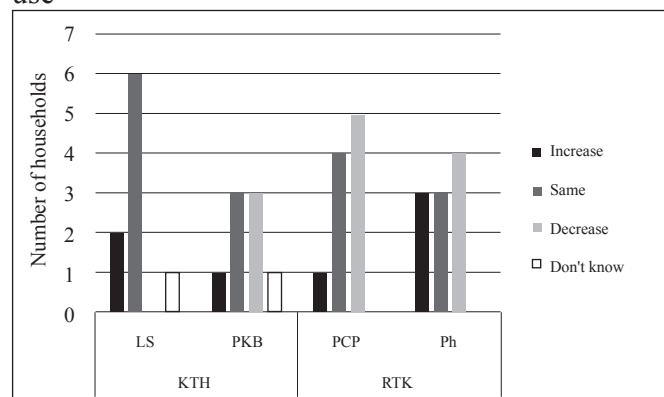


Figure 9: Perceptions of future firewood use

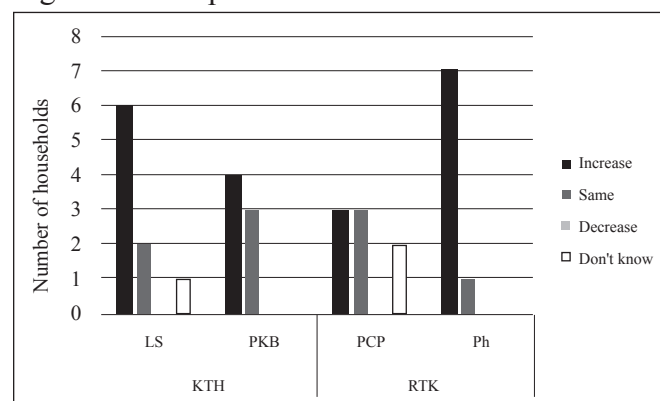


Figure 10: Perceptions of future use of other NTFPs

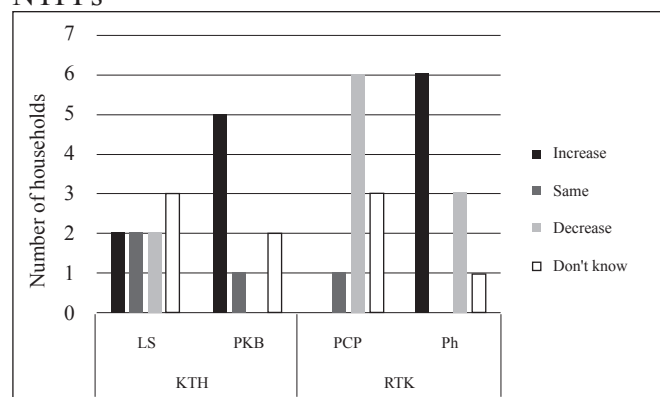
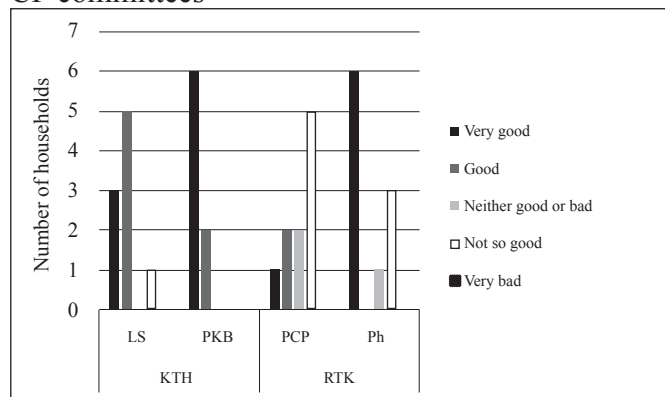


Figure 11: Perceptions of the performance of current CF committees



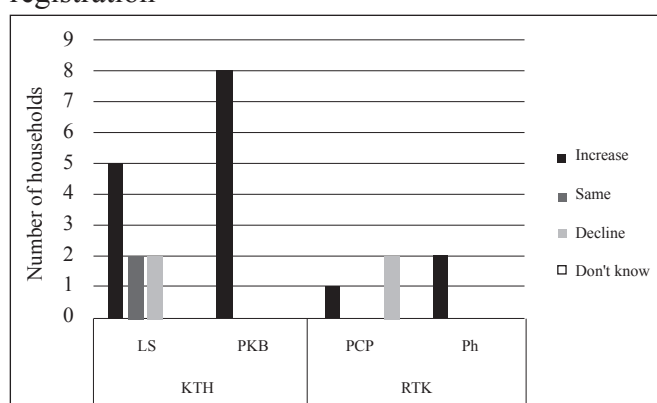
CF committee “not so good” because it cannot prevent land invasion activities, whereas many people in Phruok considered their CF committee “very good” (Figure 11).

There were major differences between the two provinces in perceptions of the impacts of CF registration on NTFP production (Figure 12). Thirteen out of 17 respondents in Kompong Thom considered that the production of NTFP increased after CF registration. All members in Prey Kbal Bey reported increased production of edible fruits, mushrooms and bamboo shoots as a result of better NTFP management and increased vegetation cover. In contrast, those in Phnom Chra Phang and Phruok in Ratanakkiri reported a decline in NTFP. All respondents confirmed that the decline in NTFP was due to continuing forest degradation, and that without CF, those areas would not be forested in the face of rapid economic development and land conversion.

Conclusion and recommendations

The study found that members in all four communities relied on firewood for cooking only, while none of them produced or used charcoal or used wood for commercial purposes because the profit after covering transport and labour costs is very low. Different communities extracted different types of non-timber forest products, which reflected availability in each locality (resin, mushrooms and three edible wild fruits in Kompong Thom, mushrooms, bamboo shoots, honey and rattan in Ratanakkiri). The rural Khmer communities in Kompong Thom owned cashew nut plantations in the vicinity of their villages, and depended on them for firewood as well, rather than travelling farther into designated

Figure 12: NTFP production before and after CF registration



community forests. In Ratanakkiri, in contrast, the two minority communities used their forests for firewood. In both provinces, firewood consumption was related to household size. In the respondents' perceptions, current firewood consumption is similar to what it has been in the past. However, all expected the demand for firewood and other forest resources to increase in the future given increases in household size and economic growth.

Firewood-saving solutions and wood energy management are critically needed to reduce the massive collection of firewood and improve forest management.

Community forestry is a good local mechanism for sustainable forest use; good collaboration and additional support are still needed.

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Economy Watch—External Environment

This section presents economic indicators of major world economies and economies in Southeast Asia during the third quarter of 2016.

Indonesia's real GDP growth was 5.0 percent year-on-year, only 0.2 percentage points lower than in the second quarter. This drop could be the result of the cut in government expenditure and a decrease in exports. Growth in Malaysia increased to 4.3 percent from 4.0 percent in the second quarter, driven by robust domestic demand. Services and manufacturing continued to expand in the third quarter. Singapore's growth dropped to 1.1 percent year-on-year from 2.1 percent in the previous quarter, as worry about the world economy continued. Thailand's economy expanded by 3.2 percent, 0.3 percentage points less than in the preceding quarter, while private consumption increased and tourism was more competitive. Vietnam's growth was 6.4 percent, driven by private consumption and investment in electronics.

China's economy expanded at a steady rate of 6.7 percent in the first three quarters of 2016, boosted by rebuilding after floods, the property market and private consumption. Hong Kong's economy grew by 1.3 percent in the third quarter, lower than the preceding quarter's 1.7 percent. South Korea's growth was 2.3 percent, 0.9 percentage points lower than a quarter earlier. GDP in Taiwan expanded by 2.0 percent, which was the highest growth since the second quarter of 2015.

The eurozone's real growth was 1.7 percent, compared to 1.6 percent in the previous quarter. Japan's economy expanded by 1.1 percent, the highest growth since the second quarter of 2014. Growth in the United States was 1.3 percent year-on-year, as non-residential fixed investments, personal consumption and government spending increased.

World inflation and exchange rates

All Asian and ASEAN countries had inflation, except for Singapore and Japan. Inflation in Cambodia was 3.0 percent, in Indonesia 3.0 percent, in Thailand 0.3 percent and in Vietnam 2.8 percent. Deflation in Singapore was 1.5 percent.

Inflation in China was 1.7 percent, in Hong Kong 3.1 percent, in South Korea 0.8 percent and in Taiwan 0.7 percent. Inflation in the eurozone was 0.3 percent and in the United States 1.1 percent. Japan faced deflation of 0.5 percent.

In the third quarter, the US dollar-riel exchange rate was KHR4094.1. The riel depreciated by 0.9 percent from a quarter earlier. The Thai baht appreciated by 1.2 percent from the preceding quarter, and the Vietnamese dong by 0.1 percent. The Chinese yuan depreciated by 2.0 percent, while the Japanese yen appreciated by 5.4 percent from the previous quarter.

Commodity prices in world markets

Prices of most major commodities in world markets dropped in the third quarter; only those of a few commodities rose. The price of maize decreased by 11.5 percent to USD153.5/tonne, rubber 4.3 percent to USD1349.4/tonne, rice 1.1 percent to USD430.3/tonne, soybeans 1.8 percent to USD416.7/tonne, gasoline 1.9 percent to USD0.368/litre and crude oil 3.2 percent to USD43.3/barrel. The prices of palm oil increased by 1.5 percent to USD714.7/tonne and diesel 2.1 percent to USD0.363/litre.

Economy Watch—External Environment

Table 1: Real GDP growth of selected trading partners, 2010–16 (percentage increase over previous year)

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
Selected ASEAN countries												
Cambodia	6.0	7.1	7.3	7.4	-	-	-	-	-	-	-	-
Indonesia	6.2	6.5	6.3	5.8	5.2	4.7	4.7	4.7	5.0	4.9	5.2	5.0
Malaysia	9.0	4.9	5.4	4.6	6.0	5.6	4.9	4.7	4.5	4.2	4.0	4.3
Singapore	14.7	4.7	1.3	3.8	3.0	2.6	1.8	1.9	1.8	1.8	2.1	1.1
Thailand	7.9	0.0	6.7	2.8	1.6	3.3	2.2	2.9	2.8	3.2	3.5	3.2
Vietnam	6.4	6.2	5.2	5.4	5.9	6.1	6.5	6.8	7.0	5.5	3.5	6.4
Selected other Asian countries												
China	10.4	9.3	7.7	7.7	7.3	7.1	7.0	6.9	6.8	6.7	6.7	6.7
Hong Kong	6.9	4.9	2.9	3.0	2.3	2.1	2.8	2.3	1.9	0.8	1.7	1.3
South Korea	6.1	3.6	2.1	2.8	3.4	2.4	2.2	2.7	3.0	2.7	3.2	2.3
Taiwan	11.1	4.2	1.2	2.2	3.5	3.4	0.5	-1.0	-0.5	-0.8	0.7	2.0
Selected industrial countries												
Euro-12	1.6	1.6	-0.5	0.1	0.7	1.0	1.2	1.6	1.5	1.5	1.6	1.7
Japan	4.1	-0.8	1.7	1.7	0.6	-0.9	0.7	1.0	0.5	0.2	0.8	1.1
United States	2.7	1.8	2.1	1.8	2.4	2.7	2.3	2.2	1.8	2.1	1.2	1.3

Sources: International Monetary Fund, Economist and countries' statistics offices

Table 2: Inflation rate of selected trading partners, 2010–16
(percentage price increase over previous year—period averages)

	2010	2011	2012	2013	2014	2015					2016		
							Q1	Q2	Q3	Q4	Q1	Q2	Q3
Selected ASEAN countries													
Cambodia	4.1	5.5	3.0	3.0	3.9	1.0	1.0	0.8	2.0	2.4	3.1	3.0	
Indonesia	5.1	5.4	4.3	7.0	6.4	6.6	7.1	7.1	4.8	4.3	3.5	3.0	
Malaysia	1.7	3.2	1.7	2.1	3.2	0.7	2.1	3.0	2.6	3.4	1.9	1.4	
Singapore	2.9	5.2	4.6	2.3	1.0	-0.3	-0.4	-0.6	-0.7	-0.8	-0.9	-1.5	
Thailand	3.1	3.8	3.0	2.2	1.9	-0.5	-1.1	-1.1	-0.9	-0.5	0.3	0.3	
Vietnam	9.0	18.6	9.3	6.6	4.8	0.7	1.0	0.5	0.3	1.3	2.2	2.8	
Selected other Asian countries													
China	3.2	5.4	2.7	2.6	2.0	1.2	1.4	1.7	1.5	2.1	2.1	1.7	
Hong Kong	2.4	5.3	4.1	4.0	4.4	4.4	3.1	2.3	2.4	2.9	2.6	3.1	
South Korea	3.0	4.4	2.1	1.1	1.3	0.6	0.5	0.6	1.1	0.2	0.9	0.8	
Taiwan	1.0	1.4	1.9	0.8	1.5	2.9	-0.7	0.0	0.3	1.7	1.3	0.7	
Selected industrial countries													
Euro-12	1.6	2.7	2.5	1.4	0.4	-0.3	0.2	0.0	0.3	0.1	0.2	0.3	
Japan	-0.7	0.1	-0.03	0.4	2.8	2.3	0.5	0.2	0.7	0.2	-0.4	-0.5	
United States	1.7	3.2	2.1	1.5	1.6	-0.4	0.0	0.1	0.4	1.1	0.7	1.1	

Sources: International Monetary Fund, Economist and National Institute of Statistics

Table 3: Exchange rates against US dollar of selected trading partners, 2010–16 (period averages)

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
Selected ASEAN countries												
Cambodia (riel)	4187.1	4063.6	4037.8	4027.2	4037.6	4042.2	4056.7	4091.8	4050.9	4022.4	4056.3	4094.1
Indonesia (rupiah)	9089.9	8748.0	9363.0	10,419.2	11,850.2	12,809.9	13,125.2	13,858.0	13,786.3	13,627.3	13,324.1	13,136.6
Malaysia (ringgit)	3.2	3.1	3.1	3.1	3.3	3.6	3.7	4.1	4.3	4.2	4.0	4.0
Singapore (S\$)	1.4	1.3	1.2	1.3	1.3	1.4	1.3	1.4	1.4	1.4	1.4	1.4
Thailand (baht)	31.7	30.5	31.1	30.7	32.5	32.6	33.2	35.2	35.8	35.6	35.3	34.8
Vietnam (dong)	19,200.8	20,574.3	20,856.9	20,990.3	21,138.2	21,372.9	21,712.7	22,164.6	22,420.7	22,929.4	22,314.5	22,292.2
Selected other Asian countries												
China (yuan)	6.8	6.5	6.3	6.1	6.2	6.2	6.2	6.3	6.4	6.5	6.5	6.7
Hong Kong (HK\$)	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8
South Korea (won)	1156.3	1108.6	1126.6	1095.0	1053.6	1101.7	1097.4	1170.0	1158.3	1200.8	1163.4	1120.9
Taiwan (NT\$)	31.5	29.4	29.6	29.7	30.3	31.6	30.8	32.0	32.6	33.1	32.4	31.7
Selected industrial countries												
Euro-12 (euro)	0.8	0.7	0.8	0.8	0.8	0.9	0.9	0.9	0.9	0.9	0.9	0.9
Japan (yen)	87.8	79.9	79.8	97.6	105.9	119.2	121.4	122.2	121.4	115.3	107.9	102.4

Sources: International Monetary Fund, Economist and National Bank of Cambodia

Table 4: Selected commodity prices on world market, 2010–16 (period averages)

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
Maize (US No.2)—USA (USD/tonne)	185.9	291.7	298.4	259.4	192.9	174.2	168.4	169.5	167.1	160.0	171.1	153.5
Palm oil—northwest Europe (USD/tonne)	900.8	1125.4	999.3	856.9	821.4	627.9	664.0	514.6	518.0	586.9	647.8	714.7
Rubber SMR 5 USD/tonne)	3405.7	4630.6	3200.7	2575.3	1755.6	1450.2	1525.9	1365.5	1229.1	1190.0	1408.1	1349.4
Rice (Thai 100% B)—Bangkok (USD/tonne)	506.6	558.5	594.8	533.8	434.9	426.0	396.3	383.3	376.3	385.3	465.0	430.3
Soybeans (US No.1)—USA (USD/tonne)	449.8	540.7	591.4	538.4	491.8	363.9	393.7	347.6	358.0	328.0	418.7	416.7
Crude oil—OPEC spot (USD/barrel)	76.8	106.2	109.5	105.9	96.2	50.9	60.5	48.2	38.0	31.2	44.7	43.3
Gasoline—US Gulf Coast (cents/litre)	53.3	71.9	74.6	71.2	65.6	40.1	49.0	42.2	32.9	27.9	37.5	36.8
Diesel(low sulphur No.2)—US Gulf Coast (cents/litre)	56.1	75.7	80.7	78.4	71.5	44.6	48.4	39.9	34.0	27.2	35.6	36.3

Sources: Food and Agriculture Organisation and US Energy Information Administration

Economy Watch—Domestic Performance

Main economic activities

In the third quarter of 2016, total fixed asset investment approvals increased by 15.0 percent to USD955.5 m from USD831.2 m in the previous quarter. Year on year, it expanded by 242.0 percent. Agricultural investment rose to USD7.4 m from zero in the second quarter. Garment investment approvals were USD51.1 m, much lower than the USD239.9 m in the previous quarter. Approvals for hotels and tourism expanded to USD679.8 m from USD19.8 m a quarter earlier.

Total international tourist arrivals expanded by 2.8 percent to around 1,147,000 persons compared to the previous quarter, and by 9.8 percent year on year. Compared to the last quarter, arrivals by air increased by 1.5 percent to about 602,000 persons, while arrivals by land and water increased by 4.3 percent to approximately 545,000 persons.

In this quarter, total exports were USD2817.7 m, an increase of 18.2 percent from the previous quarter, and 8.6 percent year on year. Garment exports expanded by 20.6 percent to USD2072.5 m from the last quarter, and 3.9 percent year on year. Garment exports to the US were USD554.5 m, to the EU USD733.3 m, other ASEAN countries USD21.4 m, Japan USD216.0 m and the rest of the world USD547.1 m. Agricultural exports rose by 19.4 percent to USD118.1 m from the previous

quarter, and 6.0 percent from the same quarter last year. Exports of rubber amounted to USD48.3 m, wood USD11.6 m, fish USD0.2 m, rice USD53.4 m and other agricultural products USD4.6 m.

Total imports in this quarter declined by 50.8 percent from a quarter earlier, but increased by 3.8 percent from the previous year, to USD3017.0 m. Imports of gasoline were USD 93.3 m, diesel fuel USD173.7 m, construction materials USD83.1 m and other imports USD2667.0 m.

Public finance

Total government revenue in this quarter was KHR3413.7 bn, 11.3 percent less than a quarter earlier, of which current revenue was KHR3375.9 bn, 12.0 percent less than in the second quarter. Tax revenue was KHR2850.5 bn, 15.4 percent less than the previous quarter, while non-tax revenue was KHR525.4 bn, 12.2 percent more than the preceding quarter. Total revenue was KHR3413.7 bn, 11.3 percent lower than the last quarter. Total expenditure was KHR3460.8 bn, 1.6 percent more than a quarter earlier. Capital expenditure was KHR811.3 bn, 25.6 percent less than the previous quarter. Current expenditure was KHR2649.1 bn, 14.5 percent higher than a quarter earlier.

Inflation and foreign exchange rates

The increase in the overall price index in the third quarter remained the same as in the second quarter, 3.0 percent. The prices of food and non-alcoholic beverages increased by 5.5 percent but that of transport declined 7.9 percent.

Compared to the previous quarter, the riel depreciated by 0.9 percent against the US dollar to KHR4094.1, 2.1 percent against the Thai baht to KHR118.1 and 0.8 percent against the Vietnamese dong. The price of diesel fuel increased by 4.0 percent to KHR3050.2, while the gasoline price decreased by 1.1 percent to KHR3281.4 from the previous quarter.

Poverty situation

Average real daily earnings of cyclo drivers, porters, rice-field workers and motorcycle taxi drivers decreased year on year, while those of small vegetable sellers, scavengers, waitresses/waiters, garment workers and skilled and unskilled construction workers increased.

In November 2016, rice-field workers' earnings decreased to KHR8229 per day, a year-on-year 7.5 percent decrease. Sixty-three percent of those interviewed were the main income earners for their families. Their income decreased compared to the previous quarter, 50.0 percent said. The majority stated that their income during November could support their families only partially. Sixty-five percent were in debt, and the average interest rate on their borrowing was around 2.4 percent per month.

Garment workers' daily wages decreased by 10.9 percent from a year earlier, to KHR 13,136. Sixty-four percent of them were married. Their average level of education was fifth grade. On average they had worked in the factory for 3.6 years. Eighty-one percent of them gained skills from training in the factory and 3.3 percent from training at home, while the other 15.8 percent had no skills. On average, they worked 55.4 hours per week and saved up to 48.3 percent of their wages. Eighty-nine percent of them sent savings to their families, which could partially support them. About 66 percent of them did not want to change their jobs. Seventy-six percent were optimistic that their factory would continue in operation.

In November, earnings of vegetable vendors rose to KHR17,488 per day, 6.1 percent higher year on year. Vegetable vendors came from Kandal (35

percent), Svay Rieng (35 percent), Prey Veng (10 percent), Kompong Speu (5 percent), Phnom Penh (5 percent), Takeo (5 percent), Kompong Cham (2.5 percent) and Kompot (2.5 percent). Seventy-five percent of them had 0.3 to 1.5 hectares of agricultural land, while the 22.5 percent did not own any. Ninety-eight percent of the respondents were the main income earners in their families. Seventy-eight percent indicated that their capital was not enough for their business.

Scavengers' earnings increased by 0.1 percent from a year earlier to KHR11,347 per day. While the number of scavengers rose, the source of rubbish and its price dropped, the majority of them said. All of the scavengers interviewed were their family breadwinners. On average, scavengers needed to work around 11.6 hours per day. They spent 39.5 percent of their income, mainly on food (73.7 percent of their total spending), rent (15.1 percent), health care (1.8 percent) and other expenses (9.4 percent).

Daily earnings of unskilled construction workers expanded by 31.1 percent from a year earlier to KHR19,174, while the number of unskilled construction workers and construction activities increased. Ninety-three percent of these workers migrated alone to Phnom Penh or Siem Reap for work. They worked 9.4 hours per day on average. They spent mainly on food. Their income could partially support their families.

Compared to the same month last year, porters' earnings decreased by 4.7 percent to KHR13,514 per day. Ninety-three percent of these workers migrated alone to Phnom Penh or Siem Reap for work. Their income was spent on food (77.4 percent of total spending), rent (15.4 percent), healthcare (0.4 percent) and other expenses (6.7 percent). Since they started as porters, their families were better off, 75.0 percent of respondents reported, while 22.5 percent said that their families' livelihoods remained the same.

The daily earnings of waiters/waitresses increased by 3.6 percent compared to the same month last year, to KHR8015. All waiters/waitresses interviewed were provided accommodation by their employers. They had been working in this occupation for about three years and worked on average 10.4 hours per day. They spent 66.4 percent of their income on food, 5.4 percent on healthcare and 15.3 percent on other spending.

Economy Watch—Economic Indicators

Table 1: Private investment projects approved, 2010–2016*

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	Fixed Assets (USD m)											
Agriculture	530.7	725.0	531.6	930.5	56.5	25.8	38.1	79.1	26.8	27.6	0.0	7.4
Industry	403.7	2860.1	829.3	3257.0	1002.5	342.8	130.9	130.6	410.4	252.4	597.0	266.1
<i>. Garments</i>	122.8	393.9	497.0	324.1	393.5	63.9	42.4	63.7	55.2	70.8	239.9	51.1
Services	1337.3	3425.4	916.6	140.7	622.6	2504.6	85.6	69.7	74.5	643.6	234.1	681.9
<i>. Hotels and tourism</i>	1105.1	2850.9	691.5	106.0	446.9	60.6	0.0	0.0	38.0	611.1	19.8	679.8
Total	2271.7	7010.4	2278.0	4328.0	1583.9	2873.2	254.6	279.4	511.7	923.7	831.2	955.5
	Percentage change from previous quarter											
Total	-	-	-	-	-	1816.8	-91.1	9.7	83.1	80.5	-10.0	15.0
	Percentage change from previous year											
Total	-61.3	209.0	-67.5	90.1	63.4	573.0	-33.2	-55.3	241.4	-67.9	226.4	242.0

* Including expansion project approvals. Source: Cambodian Investment Board

Table 2: Value of construction project approvals in Phnom Penh, 2009–15

	2009	2010	2011	2012	2013	2014				2015		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	USD m											
Villas, houses and flats	213.9	220.1	405.1	547.3	658.9	133.6	84.0	33.1	20.4	122.3	-	637.6
Other	187.8	217.8	199.9	463.6	859.6	190.0	141.7	105.6	11.7	49.8	-	252.6
Total	441.2	489.8	605.0	1010.9	1518.5	323.6	225.7	138.7	32.1	172.0	-	897.4
	Percentage change from previous quarter											
Total	-	-	-	-	-	34.3	-30.2	-38.5	-77.8	437.3	-	
	Percentage change from previous year											
Total	-60.5	11.0	23.5	67.1	28.1	8.0	-9.2	-64.2	-86.7	-46.8	-	

Source: Department of Cadastre and Geography of Phnom Penh municipality

Table 3: Foreign visitor arrivals, 2010–2016

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	Thousands											
By air	1304.3	1480.4	1722.1	2017.7	2273.5	725.1	497.4	563.8	681.3	785.0	593.5	602.2
By land or water	1094.6	1401.4	1862.2	2192.5	2229.3	647.6	496.7	481.1	747.0	557.4	522.7	545.3
Total	2398.9	2881.8	3584.3	4210.2	4502.8	1372.6	994.2	1044.9	1428.4	1342.5	1116.2	1147.5
	Percentage change from previous quarter											
Total	-	-	-	-		5.4	-27.6	5.1	36.7	-0.6	-16.9	2.8
	Percentage change from previous year											
Total	13.6	20.1	24.4	17.5	7.0	8.3	6.5	4.6	9.6	-2.4	12.3	9.8

Source: Ministry of Tourism

Table 4: Exports and imports, 2010–2016*

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	USD m											
Total exports	3630.2	4929.5	6106.4	6982.4	8106.0	2170.1	2182.0	2595.0	2309.3	2388.3	2383.4	2817.7
Of which: Garments	3223.4	4259.6	5015.4	5386.1	5960.5	1548.8	1601.7	1995.3	1681.2	1759.4	1717.8	2072.5
<i>To US</i>	1853.9	2055.3	2143.3	2075.2	1963.6	491.1	494.3	585.3	438.8	423.1	440.4	554.5
<i>To EU</i>	809.5	1322.2	1716.9	1969.6	2403.7	617.3	685.9	844.1	756.6	789.6	776.6	733.4
<i>To ASEAN</i>	9.9	17.6	39.4	60.2	83.3	24.8	24.6	26.4	27.5	25.6	25.7	21.4
<i>To Japan</i>	86.5	147.0	188.6	278.7	383.1	121.4	93.6	170.8	138.4	176.0	122.5	216.0
<i>To rest of the world</i>	463.6	717.5	927.2	1002.9	1126.8	294.2	303.4	368.8	319.9	345.2	352.7	547.1
Agriculture	164.9	362.1	376.7	554.5	624.4	150.3	127.3	111.4	159.7	137.5	98.9	118.1
<i>Rubber</i>	89.1	197.6	176.6	175.2	153.9	41.7	40.9	42.1	40.7	30.7	26.8	48.3
<i>Wood</i>	34.1	48.8	36.8	73.6	132.0	13.9	9.8	7.3	15.3	4.9	12.4	11.6
<i>Fish</i>	2.8	3.1	2.0	1.2	0.8	0.2	0.2	0.1	0.1	0.2	0.1	0.2
<i>Rice</i>	34.7	106.6	146.4	262.3	248.5	89.5	72.4	54.7	98.8	91.4	56.1	53.4
<i>Other agriculture</i>	4.1	6.0	14.9	42.4	89.1	5.2	4.0	7.2	4.9	10.3	3.6	4.6
Others	242.0	307.9	714.4	1088.2	1520.1	471.0	452.9	488.0	468.4	491.3	566.6	627.1
Total imports	5190.6	6375.9	8593.3	8639.4	10,295.4	2717.3	2920.3	2907.9	2949.1	2784.7	6136.6	3017.0
Of which: Gasoline	108.6	294.4	308.0	306.4	334.7	34.5	92.2	96.5	65.1	95.4	99.2	93.31
Diesel	203.8	447.0	559.5	569.1	602.3	45.1	152.7	139.6	150.0	163.1	194.6	173.7
Construction materials	57.6	48.1	66.1	80.8	117.6	12.4	42.0	45.9	42.1	50.8	62.1	83.05
Other	4820.6	5586.4	7659.1	7682.6	9240.7	835.2	2633.0	2626.0	2691.9	2475.0	5780.8	2667.0
Trade balance	-1560.5	-1446.4	-1341.6	-1610.9	-2184.3	-547.2	-738.3	-312.9	-639.7	-390.7	-3753.3	-199.4
	Percentage change from previous quarter											
Total garment exports	-	-	-	-	-	3.8	3.4	24.6	-15.7	4.7	-2.4	20.6
Total exports	-	-	-	-	-	1.5	0.5	18.9	-11.0	3.4	-0.2	18.2
Total imports	-	-	-	-	-	-3.2	7.5	-0.4	1.4	-5.6	120.8	-50.8
	Percentage change from previous year											
Total garment exports	25.7	32.1	17.7	7.4	10.7	5.8	16.1	22.8	12.6	13.6	7.2	3.9
Total exports	25.1	35.8	23.9	14.3	16.1	9.8	17.3	21.7	8.1	10.1	9.2	8.6
Total imports	19.8	22.8	16.8	15.4	19.7	21.4	19.2	4.0	5.0	2.5	110.1	3.8

* Import data include tax-exempt imports. Sources: Department of Trade Preference Systems, MOC and Customs and Excise Department, MEF (web site)

Table 5: National budget operations on cash basis, 2010–16 (billion riels)

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
Total revenue	5989.0	6251.4	7691.9	8255.2	10,543.4	2647.8	3301.6	3063.8	2867.3	3533.1	3849.7	3413.7
Current revenue	5859.1	6179.3	7443.8	8233.2	10,359.4	2638.0	3274.5	3028.7	2818.2	3514.7	3836.3	3375.9
Tax revenue	4693.0	5277.5	6334.8	7198.1	8995.2	2430.6	3006.1	2656.2	2409.7	3255.5	3368.1	2850.5
Domestic tax	3533.6	4071.6	5002.8	5728.1	7226.5	2012.6	2481.6	2153.9	1943.6	2715.3	2854.5	2378.5
Taxes on international trade	1159.4	1205.9	1331.7	1470.0	1822.7	418.0	524.5	502.3	466.1	540.1	513.6	472.0
Non-tax revenue	1166.1	901.8	1118.2	1035.2	1310.3	207.4	268.5	372.5	408.5	259.3	468.2	525.4
Property income	291.1	63.8	143.0	84.0	88.5	3.0	16.7	35.9	21.7	8.1	26.1	43.2
Sale of goods and services	460.1	588.7	667.4	750.3	871.2	189.6	219.2	304.6	333.9	198.5	315.3	294.9
Other non-tax revenue	408.9	249.3	298.8	200.8	350.5	14.8	32.6	31.8	53.0	52.7	126.8	187.3
Capital revenue	129.9	72.1	247.9	73.4	184.0	9.8	27.1	35.0	49.1	18.3	13.4	38.4
Total expenditure	8784.6	9032.4	9660.9	12,535.7	13,306.5	2093.3	1964.8	3337.5	5121.3	2364.3	3405.3	3460.8
Capital expenditure	2853.2	3546.9	3628.3	5567.5	5590.7	654.4	584.7	649.9	2083.4	620.9	1091.1	811.3
Current expenditure	4773.1	5341.2	6188.4	6968.3	7715.8	1438.9	1380.1	2687.7	3038.0	1743.4	2314.2	2649.1
Wages	2048.8	2170.6	2486.6	2997.3	3755.5	945.3	959.1	1281.2	1086.3	1133.1	1418.3	1403.6
Subsidies and social assistance	1099.4	1518.8	1586.8	1563.0	1627.0	194.3	207.1	544.0	797.1	259.1	439.7	447.5
Other current expenditure	1624.8	1651.8	2115.1	2408.0	2333.4	299.3	213.9	862.4	1154.6	351.2	456.2	798.1
Overall balance	-2795.7	-1271.4	-1969.0	-4280.6	-2763.1	554.5	1336.8	-273.8	-2254.0	1168.8	444.4	-47.0
Foreign financing	1845.2	-2781.0	2457.8	4326.2	3972.1	368.9	330.1	297.6	1414.8	266.4	775.6	141.0
Domestic financing	938.6	2379.2	-332.9	824.4	-1428.7	-2464.8	-793.3	-259.1	-109.4	-1631.4	-488.5	37.5

Source: MEF web site

Table 6: Consumer price index, exchange rates and gold prices (period averages), 2010–16

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
Consumer price index (percentage change from previous year)												
Phnom Penh - All Items	4.1	5.4	2.3	3.0	3.9	1.0	1.0	0.8	2.0	2.5	3.0	3.0
- Food & non-alcoholic bev.	4.4	6.5	2.5	3.9	4.9	4.2	3.9	3.3	4.7	4.7	6.2	5.5
- Transportation	7.0	6.9	3.3	-0.6	-1.0	-10.9	-7.9	-9.1	-8.9	-6.5	-9.9	-7.9
Exchange rates, gold and oil prices (Phnom Penh market rates)												
Riels per US dollar	4187.1	4063.6	4039.2	4036.2	4060.4	4042.2	4056.7	4091.8	4050.9	4022.4	4056.3	4094.1
Riels per Thai baht	133.1	133.2	130.0	124.9	119.4	124.4	122.6	116.8	113.6	113.4	115.7	118.1
Riels per 100 Vietnamese dong	21.7	19.7	19.4	19.1	18.7	19.0	18.8	18.6	18.2	18.1	18.3	18.5
Gold (US dollars per chi)	147.5	184.5	200.9	175.9	152.3	150.9	144.4	136.0	130.9	151.2	151.2	157.1
Diesel (riels/litre)	3859.3	4761.2	4941.2	4852.1	4934.1	3823.4	4032.0	3840.2	3389.4	2903.8	2932.8	3050.2
Gasoline (riels/litre)	4368.1	5044.5	5312.7	5083.3	5155.7	3986.2	4189.0	4048.9	3582.5	3310.6	3318.2	3281.4

Sources: NIS, NBC and CDRI

Table 7: Monetary survey, 2010–16 (end of period)

	2010	2011	2012	2013	2014	2015				2016		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
Billion riels												
Net foreign assets	16,697.9	17,893.9	18,154.5	21,260.1	26,699.7	26,823.0	27,975.3	26,359.2	26,665.5	29,247.8	30,138.5	32,188.4
Net domestic assets	2778.9	5760.8	10,437.4	11,508.3	15,859.8	16,863.2	18,178.3	20,600.9	22,157.6	21,643.0	24,399.1	24,939.2
Net claims on government	-2126.6	-2123.1	-2486.4	-2794.9	-4359.1	-5064.0	-5666.1	-5933.1	-6428.8	-7621.2	-7977.4	-7916.6
Credit to private sector	13,331.2	17,552.8	23,536.6	27,608.8	36,244.6	37,759.4	40,995.0	43,807.1	46,071.0	47,627.0	52,528.6	54,551.1
Total liquidity	19,476.8	23,654.7	28,591.9	32,768.4	42,559.5	43,685.2	46,153.7	46,960.1	48,823.1	50,890.9	54,537.6	57,127.5
Money	3220.9	3956.2	4045.7	4878.2	6308.4	6628.0	6293.1	6287.5	6741.4	6717.8	6872.0	7460.9
Quasi-money						37,058.2	39,860.6	40,672.6	42,081.7	44,173.1	47,665.6	49,666.6
Percentage change from previous year												
Total liquidity	20.0	17.8	20.9	14.6	29.9	24.2	20.6	15.2	14.7	16.5	18.2	21.7
Money	3.2	16.9	2.3	20.6	29.3	23.3	20.3	12.6	6.9	1.4	9.2	18.7
Quasi-money	24.0	17.9	44.6	13.6	30.0	24.4	20.7	15.6	16.1	19.2	19.6	22.1

Source: National Bank of Cambodia

Table 8: Real average daily earnings of vulnerable workers (base November 2000)

	Daily earnings (riels)									Percentage change from previous year		
	2011	2012	2013	2014	2015**	2016				2016		
						Feb	May	Aug	Nov	May	Aug	Nov
Cyclo drivers	9532	10,303	10,438	10,774	12,405	11,880	11,898	11,302	10,985	1.9	1.9	-44.0
Porters	10,785	12,143	13,247	13,580	15,631	14,888	11,774	14,094	13,514	-0.1	4.7	-4.7
Small vegetable sellers	8337	10,771	11,366	14,751	15,867	20,337	18,979	11,903	17,488	11.5	-5.7	6.1
Scavengers	8388	8680	9819	9173	12,344	11,159	8737	9953	11,347	-34.2	-13.5	0.1
Waitresses/waiters*	5986	6111	6697	7789	8,436	7860	8187	7895	8,015	-0.01	3.6	3.6
Rice-field workers	5695	6151	6599	7514	8,745	8,484	7916	7722	8,229	4.8	-16.8	-7.5
Garment workers	8409	8932	10,161	11,178		14,937	13,828	12,900	13,136	-3.0	-11.6	-10.9
Motorcycle taxi drivers	11,568	12,930	13,450	13,386	14,455	15,526	15,425	13,653	13,434	12.1	2.8	-6.7
Unskilled construction workers	10,307	11,078	13,184	13,336	15,349	16,164	20,227	13,894	19,174	39.7	6.2	31.1
Skilled construction workers	13,159	13,743	15,442	17,420	18,624	18,853	21,150	19,184	20,287	13.4	7.9	13.8

* Waitresses/waiters' earnings do not include meals and accommodation provided by shop owners. Surveys on the revenue of waitresses, rice-field workers, garment workers, motorcycle taxi drivers and construction workers began in February 2000. **November 2015 data are not available, so percentage changes in November 2016 were estimated.

Source: CDRI

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28-29 October, Suzhou, China

Development cooperation for sustainable development. The North-East Asia Development Cooperation Forum 2016, this year on the theme “Development Cooperation for Sustainable Development Goals (SDGs)”, was co-hosted by ESCAP East and North-East Asia Office, China International Development Research Network (CIDRN) and Department of International Cooperation/Development Research Center of the State Council of China. The ED was a presenter in the session on “Partnership for SDGs Implementation”. The event was an opportunity to network and identify potential policy research partners from China, Japan and South Korea.

3 November, CDRI, Phnom Penh

CDRI-Sida Resource Partnership 2016-21. HE Ms Maria Sargren, Ambassador of Sweden to Cambodia, and Dr Chhem Rethy, Executive Director of CDRI, signed the CDRI-Sida Partnership Agreement 2016-21 in the presence of HE Dr Sok Siphana, Chairman of CDRI’s Board of Directors. This agreement represents an historic achievement for our Cambodianised senior management team, who designed the program in consultation with Sida.

5 November, Phnom Penh

Cambodia hosts 8th International Conference on Public Health. Organised by the National Institute of Public Health (NIPH) on the theme “Road Map to Universal Health Coverage: Strengthening Quality of Care”, the conference assembled health personnel, academics and researchers from the Mekong region to share their expertise and knowledge. The aim was to strengthen regional cooperation in public health training and research.

21-23 November 2016, Siem Reap

Tackling transition to STEM disciplines, was the topic of discussion at the workshop on “Building Foundation and Supporting Environment for Better Transition of Students from General to Higher Education in Science, Technology, Engineering and Mathematics”.

28 November, CDRI, Phnom Penh

Senior Chinese academics visit CDRI. Senior researchers had a productive briefing from a large Chinese delegation comprising senior academics from Beijing Foreign Studies University, School of International Studies/Academy of Overseas Chinese Studies, Jinan University, Institute of South and Southeast Asia and Oceania Studies, China Institutes of Contemporary International Relations and officials from the Department of Asian Affairs, Ministry of Foreign Affairs of China. Discussions covered connectivity and production capacity cooperation in the framework of China’s Belt and Road Initiative, China-Cambodia relations, and China’s economic development.

3-7 December, Siem Reap

Annual Meeting and 9th Policy Dialogue Forum of the International Task Force on Teachers. Discussion focused on teacher motivation and teacher development in the field of science education. The ED acted as a resource person for the Ministry of Education.

28 December, Phnom Penh

Regional Workshop on Lancang-Mekong Cooperation, co-hosted by the Cambodian Institute for Strategic Studies (CISS) and the China Centre for Contemporary World Studies. Participants from Cambodia, China, Laos, Myanmar, Thailand and Vietnam discussed how Mekong countries can work together to promote cooperation with China towards improving agriculture, water management and sustainable economic development.

30 December-1 January, Sen Monorum City, Mondulhiri.

Annual retreat of the Rector Council of Cambodia. All rectors of public universities and training institutes were present. Discussion was chaired by Education Minister HE Hang Chuon Naron. The ED gave a lecture titled “The History of Hong Kong University of Science and Technology: A Success Story”.

RESEARCH

Agriculture

The team successfully completed two of the seven projects they have been implementing. The study on the *Impact of Education Public Spending on Human Capital, Poverty and Inequality: A CGE Approach for Cambodia*, supported by Partnership for Economic Policy (PEP), concluded with the publication of a working paper on the PEP website. For the second, *HARVEST Final Impact Evaluation*, funded by the United States Agency for International Development (USAID), the final cleaned data and field report have been submitted to Michigan State University (MSU).

Report writing for the project *Impact of Rice Export Promotion Policy and Food Security* has resumed after a long delay while team members were busy doing fieldwork. The final draft report for *Irrigated Agriculture in Cambodia*, a study backed by the Australian National University (ANU), is pending comments. The last two rounds of a follow-up telephone survey for *Testing Innovative Models of Extension in Cambodia's PADEE Programme*, funded by the International Food Policy Research Institute (IFPRI), were completed and the cleaned data submitted to IFPRI. Data analysis and final report writing has started on *Rice Policy Analysis*, a study funded under the Lower Mekong Public Policy Initiative (LMPPI).

The final project is the newly started *Agricultural Commodity Exports to the Mekong Region –Thailand, Vietnam and China*, conducted under CDRI-Sida partnership 2016-21. So far the study team has undertaken a comprehensive review of recent literature, including national and regional development policy, and compiled secondary data.

Economics

The study *Revisiting the Unfinished Agenda: Determinants of Credit Access and Its Impact on Farm Production and Use of Fertiliser in Rural Cambodia* was successfully completed. Also nearing completion is the project on *Interrelations between Partner Countries' Public Policies, Migration and Development: Case Studies and*

Policy Recommendations. The team attended the international dissemination workshop in Paris on 13-14 October and will arrange the national dissemination workshop in April 2017.

Making good progress is the project *Vocational Training and Labour Market Transitions: A Randomised Experiment among Cambodian Young Adults*, which receives funding under the Greater Mekong Subregion Research Network (GMS-Net), supported by Canada's International Development Resource Centre (IDRC). The team presented the progress report at the regional technical workshop in November in Bangkok and is now preparing the survey data for analysis and reporting.

Also making good progress are two other projects. The first is *Mapping Cambodia's Participation in Global Value Chains (GVCs)*, a research study under the Sida-funded five-year program on *Industrial Development, Human Capital and SME Development in Cambodia*. Key questions this research will address are: Where is Cambodia positioned within GVCs relative to other ASEAN countries such as Vietnam and Thailand? What production components and sectors does Cambodia want to specialise in? What are the key constraints to GVC development? How to create an enabling environment upgrading GVCs? The second is a project on *Enhancing China-Mekong Research and Policy Dialogue*, funded by China's Ministry of Foreign Affairs under the Lancang-Mekong River Dialogue and Cooperation framework. The team completed the detailed research proposal and is preparing for the Kick-Off Workshop.

The Unit received a grant from Agence Française de Développement (AFD) through Asia-Pacific Research and Training Network on Trade (ARTNeT) to conduct a study on *Exploring Non-Tariff Measures on Cambodia's Fisheries Export*. The team attended a capacity building workshop on tools for non-tariff measures analysis in December 2016 in Bangkok and is now preparing the empirical analysis and the written report.

Education

After the pilot test for *STEM Studies for Labour Market*, a project funded by Australia's Department for Foreign Affairs (DFAT), the survey was rolled-out across 16 higher education institutions in Phnom Penh and four provinces. Data collection for the project on *Internationalisation of Higher Education* is progressing while the research team is drafting a research framework and conducting some preliminary interviews for a research typology of higher education institutions.

The Education Team is working with the Japanese International Cooperation Agency and the Ministry of Labour and Vocational Training to conduct a study on the *Current Status and Industrial Needs of Electrical Technicians* among over 100 companies and three technical training providers. The results will be used to improve electrical training curriculum and bridge information gaps between industry, training providers and policy formulation.

In October, the unit partnered with the International Business Chamber (IBC) of Cambodia and the Ministry of Education, Youth and Sport (MOEYS) to organise Education Forum 2016 on "Public and Private Sector Collaboration for a Quality Education". A policy brief that synthesises the discussion and provides key action recommendations arising from the Forum has been prepared by IBC and CDRI in consultation with MOEYS.

In November two senior researchers participated in the Global Citizenship Education (GCED) Partner Meeting in Seoul, South Korea, thanks to an invitation from the Asia Pacific Centre of Education for International Understanding. CDRI is a member of the Local GCED Curriculum Development Committee under MOEYS, which receives support from the UNESCO Category II Centre.

Two researchers are each preparing a chapter, one on internationalisation in Cambodian higher education and the other on technical and vocational education and training, for an edited volume titled "Education in Cambodia: From Year Zero towards International Standards" to be published by Springer in 2017.

Environment

The final report and a policy brief for *Gender in Environmental Impact Assessment in Cambodia*, a project funded by USAID under the Mekong Partnership for the Environment, were submitted and well received. The unit has joined with the Stockholm Environmental Institute to organise and co-host a meeting on "Arsenic Uptake in Rice in Cambodia", which is scheduled for January 2017. A working paper titled *Common Pool Resources and Climate Change Adaptation* was published and a synthesis study on *Climate Change Adaptation, Livelihoods and Inclusive Growth* is being prepared for release early next year. A cross-unit research project on *Gender and Resettlement Process* is at the conceptualisation stage, with data collection expected to start in late December.

Governance

The team for the *Mekong Water Governance* study conducted field visits in the immediate vicinity of the Lower Sesan 2 dam to consolidate information for the preparation of two working papers. These papers are to be published by mid-2017. The team also participated in the 2016 Annual Mekong Forum on Water, Food and Energy, organised by the CGIAR Research Program on Water, Land and Ecosystems on 9-11 November in Bangkok. In collaboration with the National University of Singapore, the team prepared and delivered academic papers at the panel presentation titled "Space for Dialogue: Local Narratives, Social Networks and Coping Costs of Resettlement".

The Sida-funded *Ponlork* project is also making good progress with a state-of-the-art working paper on Cambodia's new generation. This paper assesses gaps in existing knowledge, information and data on this segment of the Cambodian population. As this is a relatively new field; hence, taking a broad approach, the team is making an inventory of what is already known. The aim of this exploratory and inductive approach is to define a narrower research agenda, with a more theoretical slant, for the following years.

Mr Vong Mun presented a paper titled "Facebooking: Youth's Everyday Politics in Cambodia" at the 14th Asia Pacific Conference 2016 on November 5-6 at Ritsumeikan Asia Pacific University, Japan.

CDRI Update

MAJOR EVENTS

From October to December 2016, senior researchers and the executive director (ED) represented CDRI at the following events:

5 October, Phnom Penh

Cambodia marks ADB's 50th anniversary with high-level panel discussion. Co-hosted by the Asian Development Bank (ADB) and the Ministry of Economy and Finance, discussion highlighted the contribution of the ADB-Cambodia Partnership to Cambodia's economic and social development.

6 October, Phnom Penh

Scientists and engineers and economic growth. The ED's keynote speech on the critical roles of engineers and scientists in economic development set the scene for discussions at the workshop on "Advantages and Opportunities in the Future of Engineering", organised by the Institute of Technology of Cambodia (ITC).

12-14 October, Bandung, Indonesia

Innovation, creativity and development: Strategies for inclusiveness and sustainability. The 14th Globelics Conference was organised by a group of scholars at Padjadjaran University. Six thematic sessions covered important issues related to building core competencies for innovation. The ED was a panelist for the session "Science

Technology and Innovation for Development". The event was a unique opportunity to network and interact with policymakers, academics, researchers and practitioners from ASEAN.

21 October, Phnom Penh

Connectivity skills for regional cooperation. What's driving China's Belt and Road Initiative? Sparked lively debate at the workshop on "Developing Connectivity Skills for Regional Cooperation" organised by the Cambodia 21st Century Maritime Silk Road Research Center, Royal University of Phnom Penh.

27 October, Phnom Penh

Public-private collaboration for excellence in the classroom. Education Minister HE Hang Chuon Naron opened the Education Forum on "The Private Sector's Role in Education: Collaboration with Public Sector Policy Making Excellence for Quality Education", hosted by the International Business Chamber (IBC) of Cambodia in collaboration with Auscham and other chambers, associations and partners. The twice-yearly forum provides a space for the Ministry of Education to update the business community on education reforms, and for the business community to give feedback on their needs for economic growth and development.

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