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Cambodia's New Growth Strategy

An Assessment of Medium and Long-term Growth for Resilient, Inclusive, and Sustainable Development

Background Paper 5

Climate Change, Gender, and Social Analysis for Cambodia's New Growth Strategy

Eng Netra, Caroline Hughes, Ngin Chanrith, Chea Phal and Cesci Cruz

FEBRUARY 2025

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CDRI – Cambodia Development Resource Institute
Phnom Penh, February 2025

Author(s) and affiliation(s):

Eng Netra, Executive Director, CDRI

Caroline Hughes, Director of Doctoral Studies and the Rev. Theodore M. Hesburgh, C.S.C. Chair in Peace Studies at the Kroc Institute for International Peace Studies, University of Notre Dame

Ngin Chanrith, Honorary Academic, The University of Auckland, New Zealand

Chea Phal, Senior Research Fellow at CERI, CDRI.

Cesci Cruz, Associate Professor in the Department of Political Science and the Department of Economics at UCLA

Citation:

Eng Netra, Caroline Hughes, Ngin Chanrith, Chea Phal, and Cesci Cruz. 2025. *Climate Change, Gender, and Social Analysis for Cambodia's New Growth Strategy*. Cambodia's New Growth Strategy—An Assessment of Medium and Long-term Growth for Resilient, Inclusive, and Sustainable Development. Background Paper No. 05. Phnom Penh: CDRI.

CDRI

- 56 Street 315, Tuol Kork
- PO Box 622, Phnom Penh, Cambodia
- +855 23 881 701/881 916/883 603
- @ cdri@cdri.org.kh
- www.cdri.org.kh

Layout and cover designed: Oum Chantha and Tim Borith
Edited by: Jessica Alice Kalisiak

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Acknowledgements

This research paper is the fifth in a series of background papers supporting the main overview report. Collectively, these works contribute to CDRI's research study, *Cambodia's New Growth Strategy—An Assessment of Medium and Long-term Growth for Resilient, Inclusive, and Sustainable Development*, which is funded by the Department of Foreign Affairs and Trade (DFAT) through its flagship programme, the Cambodia-Australia Partnership for Resilient Economic Development (CAPRED).

The author wishes to express sincere appreciation to DFAT and CAPRED for their support. Further gratitude is extended to all individuals and stakeholders who contributed to this work, whether through direct collaboration or indirect assistance, whose contributions were essential to its completion.

List acronyms and abbreviations

ASEAN	Association of Southeast Asian Nations
CamDX	Cambodia Data Exchange
CAPRED	Cambodia Australia Partnership for Resilient Economic Development
CBOs	Community-Based Organisations
CDRI	Cambodia Development Resource Institute
DFAT	Department of Foreign Affairs and Trade
EAC	Electricity Authority of Cambodia
FDI	Foreign direct investment
FOLU	Forestry and Other Land Use
GDP	Gross Domestic Product
GHGs	Greenhouse Gases
GIDA	Gender and Inclusive Development Analysis
HEF	Health Equity Funds
ID-Poor	Identification of Poor Households Programme
IFC	International Finance Corporation
ILO	International Labour Organization
IMF	International Monetary Fund
INDC	Intended Nationally Determined Contribution
LTS4CN	Long-Term Strategy for Carbon Neutrality
MEF	Ministry of Economy and Finance
MLVT	Ministry of Labour and Vocational Training
MME	Ministry of Mines and Energy
MOEYS	Ministry of Education, Youth and Sport
MSC	Mekong Strategic Capital
MSMEs	Micro, Small and Medium Enterprises
MtCO2e	Megatons of Carbon Dioxide Equivalent
NCSD	National Council on Sustainable Development
NDC	Nationally Determined Contribution
NGS	New Generation School
NIS	National Institute of Statistics
NLA	National Learning Assessments
NSSF	National Social Security Fund
OECD	Organisation for Economic Co-operation and Development
PFM	Public financial management
RGC	Royal Government of Cambodia
SEAMEO	Southeast Asian Ministers of Education Organization
STEM	Science, Technology, Engineering, and Mathematics
TPAP	Teacher Policy Action Plan
UN	United Nations
UNDESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNFCCC	United Nations Framework Convention on Climate Change
UNICEF	United Nations International Children's Emergency Fund
WHO	World Health Organization
WTO	World Trade Organization

ឯកសារសាវតារទី៥

ការប្រែប្រួលអាកាសធាតុ យេនឌ័រ និង ការវិភាគសង្គមសម្រាប់យុទ្ធសាស្ត្រកំណើនថ្មីរបស់កម្ពុជា

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ដើម្បីបន្តរក្សានិរន្តរភាពកំណើនសេដ្ឋកិច្ច ប្រទេសកម្ពុជាក៏បានខិតខំពង្រឹងភាពធន់ បរិយាបន្ន និងចីរភាពរបស់ខ្លួន។ ឯកសារសាវតារនេះ ពិភាក្សាអំពីបញ្ហាអាកាសធាតុ យេនឌ័រ និងសង្គមសំខាន់ៗ ដែលចាំបាច់ត្រូវដោះស្រាយ ដើម្បីសម្រេចបាននូវគោលដៅនេះ។ ជាពិសេស កម្ពុជាចាំបាច់ត្រូវដោះស្រាយបញ្ហាដូចខាងក្រោមនេះ៖ ១) កម្រិតខ្ពស់នៃដានកាបូនក្នុងវិស័យកំណើននានា ២) គ្រោះធម្មជាតិដែលបង្កឡើងដោយអាកាសធាតុ (ជាពិសេសទឹកជំនន់ និងគ្រោះរាំងស្ងួត) ៣) វិសមភាពយេនឌ័រក្នុងផ្នែកការងារ និងប្រាក់ឈ្នួល ៤) លទ្ធភាពទទួលបានការថែទាំសុខភាព និងការអប់រំមានកម្រិត ជាពិសេសក្នុងចំណោមកម្មករក្រៅប្រព័ន្ធ និង ៥) ការគាំពារសង្គម និងការបែងចែកអភិបាលកិច្ចឡើងវិញនៅមានកម្រិត។ ដើម្បីដោះស្រាយបញ្ហាទាំងនេះបាន អាទិភាពចំនួនប្រាំបីត្រូវកំណត់៖ ១) ការបង្កើនមូលនិធិអាកាសធាតុបន្ថែមទៀត ដើម្បីកាត់បន្ថយការបំភាយឧស្ម័នផ្ទះកញ្ចក់ពីវិស័យថាមពល សាធារណការ ឧស្សាហកម្ម និងកសិកម្ម។ ២) កាត់បន្ថយការបំភាយឧស្ម័នពីវិស័យថាមពល និងកសិកម្ម ដើម្បីបានជាប្រយោជន៍ដល់សហគ្រាសធុនតូច និងកសិករ។ ៣) ពង្រឹងការសម្របខ្លួនក្នុងវិស័យកសិកម្ម ធនធានទឹក រុក្ខាប្រមាញ់ និងសុខាភិបាល ដោយផ្ដល់មូលនិធិបន្ថែមដល់អាជ្ញាធរមូលដ្ឋាន និងសហគមន៍ ការលើកកម្ពស់ការសម្របខ្លួនតាមធម្មជាតិ និងការលើកកម្ពស់ការស្រាវជ្រាវផ្នែកអាកាសធាតុ។ ៤) ជំរុញការអប់រំស្នែមសម្រាប់ក្មេងស្រី និងផ្ដោតលើការបណ្ដុះបណ្ដាលជំនាញបៃតងសម្រាប់ស្ត្រី។ ៥) លើកទឹកចិត្តដល់ការវិនិយោគអាជីវកម្មនៅតំបន់ជនបទ ដើម្បីកាត់បន្ថយការធ្វើចំណាកស្រុក។ ៦) ពង្រីកការគ្របដណ្ដប់នៃការថែទាំសុខភាពសាធារណៈ ការធានារ៉ាប់រងសុខភាព និងការគាំពារសង្គម ដើម្បីរួមបញ្ចូលសមាជិកគ្រួសាររបស់កម្មករនិយោជិត។ ៧) ពង្រឹងកំណែទម្រង់ហិរញ្ញវត្ថុសាធារណៈ ដើម្បីបង្កើនចំណាយលើការវិនិយោគសង្គមនៅតាមតំបន់ជនបទ និង ៨) ផ្ដល់ការគាំទ្រ និងការលើកទឹកចិត្តគ្រប់គ្រាន់ដល់សហគ្រាសធុនតូចក្រៅប្រព័ន្ធឱ្យចុះបញ្ជី។

Climate Change, Gender, and Social Analysis for Cambodia's New Growth Strategy

Summary

In pursuit of sustaining growth in the economy, Cambodia also strives to enhance resilience, inclusiveness and sustainability. This paper discusses the key climate, gender and social issues that need to be addressed in order to achieve this goal. Specifically, the following issues need to be tackled: (i) high carbon footprints of the growth sectors; (ii) climate-induced natural disasters (especially floods and droughts); (iii) gender disparity in employment and wages; (iv) limited access to healthcare and education, particularly among informal workers; and (v) limited social protection and redistributive governance. To address these issues, priorities should be placed on: (i) raising more climate funds to reduce greenhouse gas emissions from energy, transport, industry and agriculture sectors; (ii) mitigating emissions from the energy and agriculture sectors in the interests of small enterprises and farmers; (iii) strengthening the adaptation in agriculture, water, forestry and health sectors by providing more funds to local authorities and communities, promoting nature-based adaptation and enhancing climate research; (iv) bolstering STEM education for girls and targeting green skills training for women; (v) incentivising business investments in rural areas to reduce outmigration; (vi) expanding public healthcare coverage, health insurance and social protection to include workers' family members; (vii) enhancing the public financial reform to spend more on social investments in rural areas; and (viii) providing sufficient support and incentives to informal small enterprises to register.

1. Introduction

Increasing economic activity to raise income is crucial for Cambodia's development. Yet, non-economic issues such as climate, gender and social disparity can influence economic growth in both positive and negative ways. Climate change can hamper the growth of key economic sectors if left unaddressed. Gender disparity in labour force and sectoral employment can slow down the potential of growth. If social protection and skills training are insufficiently provided to unskilled and low-skilled workers, particularly in the informal sector, the economy cannot rise up the value chains or yield inclusive benefits.

This paper highlights the key climate, gender and social issues that need to be addressed before Cambodia can sustainably growth in a resilient and inclusive manner. The following section presents the main climate challenges and suggests ways to mitigate and adapt to these challenges. Next, access to livelihoods, healthcare and education are discussed; and ways to increase access for vulnerable groups are presented. Section 4 discusses how to reduce gender disparity in the workforce to enhance the growth potential, and examines ways to improve public governance for more equitable distribution of services and benefits. The last section concludes the discussion and offers the key areas for reform.

2. Climate challenges in the pursuit of green growth

Cambodia's economic growth has substantially reduced poverty but has also caused greater environmental impacts, including reduced forest coverage, increased waste volumes, and exacerbated air and water pollution, and caused associated health risks (UN Cambodia 2023). To achieve economic growth goals, the Cambodian economy needs to become greener, climate-resilient and more inclusive. This section provides the key mitigation and adaptation strategies that Cambodia must implement in order to respond to climate change in an inclusive way.

2.1. Mitigation strategies

Cambodia is a low emitter of greenhouse gases (GHGs), contributing about 0.16 percent of the total global emissions (Climate Watch 2020); nevertheless, it does have the fastest emissions growth in Southeast Asia (World Bank 2023a). During 1990-2022, GHG emissions from domestic production increased by 121 percent, and the country's carbon footprint by 172 percent (Climate Watch 2020). The forestry and other land use (FOLU) sector is the largest emitter (43.4 percent), primarily caused by deforestation and forest degradation. The other key emitters include agriculture (28 percent), energy (19.2 percent), industrial processes (8.6 percent), and waste sectors (.77 percent) (Climate Watch 2020).

In its Intended Nationally Determined Contribution (INDC) under the United Nations Framework Convention on Climate

Change (UNFCCC), Cambodia has made the following commitments to mitigate climate change impacts: (i) reducing GHG emissions by 47 percent by 2050; and (ii) focussing mitigation efforts on energy, transport, industry, agriculture, and waste management (RGC 2022).

How to meet these commitments is outlined in the following key policies and strategies: (i) the National Strategic Plan on Green Growth 2013-2030; (ii) the Long-Term Strategy for Carbon Neutrality (LTS4CN); (iii) the Power Development Plan 2022-2040; (iv) the National Energy Efficiency Policy 2022-2030; (v) the Production Forest Strategic Plan 2018-2032; (vi) the National Forest Programme 2010-2029; (vii) the Circular Strategy on Environment Sector 2023-2028; (viii) the Climate Change Strategic Plan for Climate Change Adaptation and Greenhouse Gas Mitigation in Transport Sector 2018; (ix) the National Agricultural Development Policy 2022-2023; (x) the Roadmap for Food Systems for Sustainable Development 2030; (xi) the National Waste Strategy and Action Plan for Cambodia 2018-2030; and (xii) the Circular Economy Strategy and Action Plan 2021.

The LTS4CN aims to achieve carbon neutrality by 2050 by decarbonising the power sector, promoting energy efficiency, and encouraging low-carbon agriculture, industrial processes, and waste management (MOE 2021). This strategy is intended to increase the production and consumption of renewable energy at both industry and household levels. In 2022, renewable energy comprised 61.06 percent of the domestic power production, and hydropower accounted for 53.89 percent of the renewable energy (EAC 2023). As per the Power Development Plan 2022-2040, Cambodia aims to have a renewable energy mix of 35 percent in 2050, of which 12 percent will be from solar (MME 2022). This target is feasible since the government has stopped granting new approvals for coal power plants and planned for early closures of the existing ones. Further, solar and wind power provide a huge potential to attract both domestic and foreign investments (CAPRED and MSC 2023). Increasing solar and wind energy will boost both the renewable energy mix and environmental sustainability since they will reduce adverse impacts (especially water stress) of hydropower dams.

However, to distribute clean energy in an equitable way is challenging. While the green industry in Cambodia is growing, small enterprises still struggle with sustainability in their businesses (UNDP 2019). The key challenge is limited access to clean energy for their production due to financial and regulatory barriers (Sean and Ngin 2023). Hence, maintaining and enhancing their productivity and competitiveness is critical during the green transition. Doing so will enhance inclusiveness since small businesses (over 60 percent of which are run by women) dominate the private sector and are a main source of employment in the informal economy (World Bank 2019b).

Another way to achieve inclusiveness is to increase impoverished households' access to clean energy. While access to the national power grid is high - 98.27 percent of villages connected in 2022 (EAC 2023) - most rural households use fossil fuels like charcoal for cooking and other consumption. In 2019, wood and charcoal made up more than 90 percent of the total household energy used in rural areas (World Bank 2019b). Thus, policies need to make clean energy attractive, accessible and affordable for rural households to reduce their dependence on fossil fuels. This can be done through subsidies, financial incentives, and innovative financing models that reduce the upfront costs of clean energy technologies (Rizzetti 2024).

Along with the generation of renewable energy, decarbonising key economic sectors will assist in Cambodia's vision of becoming carbon-neutral by 2050. Although it is possible, like the transition to green energy, it needs to consider marginality. Among the other sectors, the LTS4CN signifies the key role of the FOLU sector in achieving this target (MOE 2021). The LTS4CN suggest that Cambodia could be zero-carbon by 2050 if this sector provided a total carbon sink of 50 megatons of carbon dioxide equivalent (MtCO2e) by that year. To this end, the strategy aims to increase the forest cover from the current 42 percent to 60 percent of the total land area by 2050, and to reduce emissions from agriculture by 30 percent by 2050. Cambodia is likely to achieve the 60 percent forest cover target since it has expanded the size of protected areas to over seven million hectares (Flynn 2023b), made a commitment to plant one million trees annually, and ramped up law enforcement to curb illegal logging and forest land clearing. Cancellations of mining projects in protected areas are another positive contributor.

The focus on the FOLU sector is crucial since it is the largest source of GHG emissions, as mentioned above. Improving the FOLU sector will thus yield high benefits since it plays a critical role in adaptation to climate change. Particularly, improved forestry management will reduce the effects of floods and droughts that are the key climate events and will benefit rural communities through enhanced agricultural productivity and water resources.

Hence, increasing the forest cover and reducing emissions from agriculture will enhance the capacity for carbon sinks and carbon offsets from other sectors. But this needs to be done in an inclusive manner, considering the significant role of agriculture in reducing poverty. About 75 percent of Cambodians live in rural areas and many of whom depend on agriculture and natural resources for their livelihoods (NIS 2022). Despite the structural transformation of the economy, agriculture is still crucial for economic growth and poverty reduction, contributing 22 percent of GDP in 2022 (World Bank 2024c) or 16.5 percent based on the rebased GDP (MEF 2024). Smallholder farmers, who operate through subsistence farming in traditional ways that are prone to climate change, dominate the sector. While climate change has rendered labour productivity losses and damage of assets for all key sectors, agriculture is the most affected (MEF and NCSD 2019). Small farmers cannot afford smart technologies that are environmentally friendly and climate-resilient. Approximately 26 percent of farmers apply climate-smart technologies and practices to tackle climate risks (Thomas et al. 2013). Lack of capital, lack of awareness of and limited access to extension services, and lack of financial services are the key reasons for this low adoption. Thus, promoting sustainable agriculture that balances production and emission targets is challenging if

Table 1: Key strategies to avoid heavy carbon dependence and move towards a sustainable, low-carbon future

No.	Strategy	Description
1	Long-term strategy for carbon neutrality	Achieve carbon neutrality by 2050 by decarbonising the power sector, promoting energy efficiency, and encouraging low-carbon agriculture, industrial processes, and waste management
2	Renewable energy expansion	Invest in renewable energy sources (solar, wind, hydropower) to reduce reliance on fossil fuels
3	Energy efficiency improvements	Improve energy efficiency in industries, transport, and buildings by adopting energy-efficient technologies and practices
4	Sustainable forest management	Increase forest cover and prevent deforestation by maintaining and expanding forest areas through reforestation, conservation and law enforcement
5	Green transportation	Promote the use of electric vehicles and improve public transportation infrastructure

Sources: Compiled by authors from Cambodia's *Long-Term Strategy for Carbon Neutrality by 2050, Power Development Plan 2022-2040, National Energy Efficiency Policy 2022-2030, Production Forest Strategic Plan 2018-2032, and National Forest Programme 2010-2029.*

comprehensive and well-coordinated policies are not in place. In other words, the move to smart and sustainable agriculture needs to address smallholders' persistent challenges.

2.2. Adaptation strategies

Cambodia is extremely vulnerable to climate change, ranking 144 out of 185 countries for vulnerability and 159th for readiness for climate change (University of Notre Dame 2022). Agriculture is the most vulnerable sector. Changes in rainfall patterns, floods and droughts have led to significant agricultural losses, threatening food security and rural livelihoods (World Bank 2023a). Further, climate change has affected the availability and quality of water resources for both agricultural production and household consumption in rural areas. Forests and fisheries, which are vital for rural livelihoods, have also been degraded.

Without effective adaptation, climate change could reduce GDP by 10 percent by 2050; improved adaptation policies and practices could reduce the impact by 66 percent by 2050 ((MEF and NCSD 2019). The Climate Change Strategic Plan (2014-2023) outlines a framework for integrating adaptation and mitigation into national development plans. The National Adaptation Plan provides an overarching approach to reducing vulnerability and integrating adaptation into sectoral policies and planning.

Despite the current adaptation efforts, there remains huge gaps that need to be filled. First, the present adaptation projects are small-scale and scattered. Cambodia needs a substantial amount of funding for large-scale climate action for better impact, which cannot be sufficiently sourced from the state budget. The Nationally Determined Contribution (NDC)

Table 2: Key impacts of climate change

No.	Affected Sector	Description
1	Agriculture	Droughts and floods reduce crop yields
2	Water	Droughts reduce availability and quality of water; floods contaminate water supplies
3	Health	Extreme heat and changing weather patterns cause heat stress, waterborne diseases, and malnutrition, particularly among children and the elderly
4	Economy	GDP could be reduced up to 10 percent by 2050
5	Biodiversity	Forests and fisheries are degraded, leading to losses of habitats and species

Sources: Compiled by authors from Cambodia: *Country Climate and Development Report and Addressing Climate Change Impacts on Economic Growth in Cambodia*

Table 3: Key sectoral adaptation strategies to address climate change impacts

No.	Sector	Strategy
1	Agriculture	o Develop high-yield, climate-resistant crop varieties o Improve crop management practices o Develop early warning systems for extreme weather events o Enhance climate resilience of irrigation systems
2	Water	o Develop climate-resistant technologies for waterworks o Climate-proof rural infrastructure such as roads, irrigation systems, wells, and culverts to withstand floods and droughts
3	Forestry	o Increase forest plantations o Enhance conservation of protected areas o Improve forest management practices
4	Health	o Strengthen the health system to handle the rise in tropical diseases o Address increased exposure to heat stress

Sources: Compiled by authors from *The Climate Change Strategic Plan (2014-2023) and The National Adaptation Plan* commitments are estimated at USD 5.8 billion for mitigation and USD 2 billion for adaptation (RGC 2020). Yet, about USD 8 billion is needed to meet an updated NDC commitment, which aims to reduce GHG emissions by 47 percent by 2050.

In 2019, the government allocated approximately USD 600 million for climate action, but mainly for climate-proofed infrastructure projects and climate change resilience co-benefits during COVID-19 (CAPRED and MSC 2023). Multilateral climate adaptation funds have contributed about USD 149 million, with 30 percent for agriculture. As for mitigation finance, Cambodia has received only USD 38 million by 2022, with 80 percent for renewable energy and energy generation. In March 2024, the Green Climate Fund approved a concessional funding of USD 100 million to bolster Cambodia's green economy (Niem 2024).

The limited public climate finance means the private sector needs to provide and channel the financing commitment. Besides domestic financial institutions, international capital is a crucial source of green finance for Cambodia. But not many local financial institutions have proper environmental and social management systems to attract and disburse competitive international climate capital (CAPRED and MSC 2023). Without environmental, social and governance policies and practices in place, access to foreign climate finance is limited.

Second, for further impact, more climate funds need to be directly provided to local authorities (particularly communes) and community-based organisations (CBOs). While these institutions need to improve their technical capacity to implement and manage adaptation projects, they have local knowledge and better understanding of their regions and conditions. Community-based adaptation meets local needs and contexts. Climate action needs to be mainstreamed in commune development plans that outline a multi-actor partnership, including the private sector, to address climate challenges.

Third, more effort is needed to promote ecosystem-based adaptation using nature-based solutions. Natural ecosystems, especially forests and water, need more protection and restoration to enhance resilience to climate impacts and co-benefits for biodiversity.

Finally, more investment is needed to do climate research and innovation to enhance adaptive capacity. This is urgently needed in agriculture where more resistant crops and better-managed irrigation, particularly green technologies, require substantial research and development.

2.3. Green transition

As part of mitigation, greening the manufacturing and services sectors will spur further growth. The global green transition provides Cambodia with new trade opportunities, particularly for the production and export of low-carbon goods and services. The total value of global trade in green goods rose from USD 100 billion in 2021 to USD 1.9 trillion in 2022 ((World Bank 2023a). Cambodia's export of solar panels, modules, and accessories was valued at USD 1.2 billion in 2022, or 5 percent of the total export. Another emerging sector is electric vehicles. The government plans to electrify 70 percent of motorcycles and 40 percent of cars and urban buses by 2050 (World Bank 2024c).

To enhance Cambodia's niche for trade in green products, more investments are needed in the following areas: (i) providing financial and technical support to local businesses to produce eco-friendly products, such as organic foods, sustainable textiles, and green-packaged goods; (ii) creating more eco-business platforms to promote environmentally-friendly business practices and to connect eco-conscious consumers and investors; (iii) encouraging businesses to adopt sustainable practices such as using renewable energy, reducing waste, recycling materials, and using ethically-sourced materials; (iv) promoting green certifications (such as Fair Trade, Organic, and other eco-labels) to enhance the credibility of Cambodian products in international markets; (v) providing incentives to businesses that adopt green practices, such as tax breaks or exemptions, grants, and subsidies; and (vi) seeking more foreign trade agreements that emphasise sustainability to expand new markets for Cambodian green products.

However, to realise the potential of a green economy, there is a need to focus on creating and preparing for green jobs. It is estimated that the investments to be made under the LTS4CN have the potential to create 449,000 green jobs and contribute 2.8 percent to the annual GDP by 2050 (MOE 2021). However, the sectoral demand and types of green jobs needed by specific industries are relatively unknown (Rizzetti 2024). More investment is needed to prepare workers, especially women, who will lose their jobs in unsustainable occupations, to reskill or upskill in order to compete within the green job market. Green jobs require a high technical competency and an ability to operate complex systems. Nine out of ten Cambodian workers are employed in elementary or low-skilled jobs (NIS 2022). Given current workers' limited education and skills, green skills may be challenging to achieve. Thus, the potential of green jobs is more likely to be realised if it was embedded in the overarching human resource development plan and targeted the lower skilled workforce. Presently, green skills are fragmented within the formal education and training curricula. A green skills development roadmap is needed for planning, coordination and skills provision among the key stakeholders, specifically the private sector and training institutions.

Finally, the pursuit of clean energy (such as hydro, solar and wind power) should engage local communities in the planning, implementation and assessment processes. Poor engagement could result in non-reception, missed priorities and needs, resource conflicts, environmental and biodiversity damage, and increased energy inequities. Early and genuine involvement of communities, giving them real voices in the decision-making processes, in environmental and social impact assessments would mitigate these pitfalls. Lessons can be drawn from the existing hydro power investments.

3. Social resilience

Further to climate action, social resilience at a household level is critical in ensuring that growth will leave no one behind. Cambodia's high level of integration into global value chains renders the Kingdom vulnerable to shocks arising from global events, such as the 2007-8 Global Financial Crisis and the 2020 COVID-19 pandemic. Promoting resilience in the face of episodic shocks is a central concern for social policy (strategies for promoting economic resilience are discussed in Background Paper No. 03). This section details priorities for promoting social resilience among Cambodian households.

3.1. Access to livelihoods

An important pathway to promote the resilience of Cambodian households is by improving access to jobs and business opportunities that do not require migration. Much of Cambodia's growth strategy has been focused on relocating workers from agricultural areas to urban centres to participate in industrial manufacturing and construction. While this creates a flow of remittances that can boost the income of rural households, these payment flows are vulnerable to shock, and risk creating social dislocation effects in villages that are left behind. Promoting access to jobs and business opportunities, particularly in rural areas, can strengthen households as well as build a more diversified economy.

Support for micro, small and medium enterprises (MSMEs) is central to this task. MSMEs constituted 99.8 percent of businesses in Cambodia in 2018 (UNDESA 2018), they provided more than 70 percent of Cambodia's jobs, and contributed about 58 percent of GDP (UNDESA 2018). However, they contributed less than 10 percent of Cambodia's exports. To promote further growth, MSMEs need to be supported to prosper, and a number of priorities have already been identified by the Cambodian government that can assist with this (MEF 2023).

One key area is training and vocational education. Promotion of skills amongst both employees and business owners can improve the level of productivity in small firms. It can also enable strategic planning on the part of business owners to take advantage of opportunities for growth. A particularly important area for small firms is digitisation. Small firms can benefit from maintaining an online identity that allows them to promote their brand and their products amongst a wider audience, both within the country and internationally. Reaching a wider set of clients and customers is central to MSME growth. A second area for government policy is in encouraging foreign-owned firms, such as hotels, large stores or construction companies, to source goods from small, local enterprises instead of importing them. This promotes better links between MSMEs and the Foreign Direct Investment (FDI) sector. Digitisation can promote such links, along with strategies to encourage FDI-funded firms to locate in a wider range of areas across Cambodia. Efforts to create infrastructure that are targeted towards MSMEs as well as towards foreign investors and building more flexibility for small firms into logistics systems for transportation and export processing can also build better links between small rural companies and urban and international markets.

Implementing policies to promote MSME growth and prosperity require a closer relationship between MSMEs and the government. In 2024, about 88 percent of MSMEs are informal. Because they are not registered, they do not benefit from government policies, and also face barriers in developing contractual relationships with private entities such as banks. The government already has a number of incentives and processes in place to promote MSME registration, such as tax breaks and a one-roof service process. However, encouraging MSME owners to come forward and register requires a more active outreach effort on the part of government. This includes a carefully designed plan to educate informal business owners about the benefits of registration; a strong stance on transparency to reassure MSMEs that they will not be asked for bribes or fees if they register; and a commitment to listening to the concerns of MSME owners to build trust in the relationship between the businesses and the government.

3.2. Access to land

Cambodia remains an agricultural country. Although the contribution of this sector to GDP and employment are steadily declining, almost 40 percent of the working population are still employed in agriculture, with more than two thirds of these working on their own land or for their family. Over the past two decades, agricultural policy has focused on the modernisation of farming practices to increase productivity and to cultivate cash crops for export. However, during the COVID-19 pandemic, agriculture was also regarded by the Cambodian government as an important sector for promoting economic and social resilience domestically, including as a prop for food security (RGC 2022). The inter-censal agricultural survey conducted in 2019 (NIS 2019) underlines the continued importance of household food production in Cambodia. The survey counted 1.72 million households engaged in agricultural production, of which 61 percent produced mainly for subsistence/household consumption and 39 percent for sale. More than half of those surveyed reported that agricultural production provided 40 percent of their income or more.

Access to land for rural Cambodian communities is an important issue for promoting social resilience at the household level, since it diversifies income sources and promotes food security. Promoting access to land requires policies designed to ensure that vulnerable Cambodians are better able to retain their property. In recent years, Cambodia has seen high rates of rural-urban migration and high rates of land conflict. The government has made efforts to promote security of tenure through formal land titling. These are important in supporting agricultural households and need to be reinforced by a more robust and transparent cadastral system that is trusted by small landowners. Titling initiatives should be underpinned by schemes to prevent impoverished families from having to sell their land in times of financial distress. Two factors have been identified as contributing to the high rates of land loss by low-income households. One is high, out-of-pocket healthcare expenses, which amount to 60 percent of healthcare spending, double the average for other countries at a similar income level (World Bank 2024b). These healthcare expenses have been linked to distress sales of landholdings by poorer households (Beban and Pou 2014). A second area is excessive household debt: some studies suggest that debt incurred through microfinance contributes to distress land sales, signifying that better regulation of this industry is required (Bliss 2022).

Promoting access to land also requires ensuring that small farmers can make a living. Orienting infrastructure towards the needs of small farmers is important in this respect. Working to link agricultural products to markets by building better communication, transport and logistics links between small farms and consumers in urban areas and tourist sites is one aspect of this. Another is irrigation; Cambodia's high vulnerability to climate change requires renewed investment in irrigation schemes. Provincial irrigation departments are severely understaffed and require significant investment of resources. Irrigation schemes should include the needs and concerns of small farming households, as well as the interests of large landowners. The government has delegated the responsibility for local water-resource management to subnational authorities and has established farmer and water-user committees at the local level to address this concern, but these institutions have not been adequately supported with finance, expertise, or links to the provincial levels. As a result, progress in setting up effective local water management systems has been slow (World Bank 2024a). Finally, the Economic Land Concession policy of the early 2010s led to the clearing of millions of hectares of forest, but in some cases the land was subsequently abandoned rather than cultivated (Flynn 2023a). Cancelling declining economic land concessions and redistributing land to impoverished households, while supporting their agricultural activities with better extension services, public services and infrastructure can contribute to the inclusion and resilience of poor rural households in the agricultural sector.

3.3. Access to healthcare

Improving access to affordable healthcare and increasing the proportion of health costs that are borne by insurers is vital to increasing social resilience. Cambodia has made strong progress in promoting key health measures such as infant mortality, and responded effectively to two major epidemics - HIV in the 1990s and COVID-19 in 2020-2021. However, access to healthcare remains unevenly distributed across the country, and public health facilities are under-used by the public. This contributes to the high level of out-of-pocket expenditure on healthcare reported above.

Life-changing and onerous health costs contribute to poverty and inequity in Cambodia. According to the World Bank, almost 17 percent of Cambodians spend 10 percent or more of their budget on health, including 6 percent who spend more than a quarter of their budget on out-of-pocket health expenses. Furthermore, almost 1 in 4 of the poorest 20 percent of households reported having experienced catastrophic health costs, compared to only 1 in 12 of the richest 20 percent (World Bank 2024b)

The government is expanding health insurance, including through the Health Equity Fund which reimburses public clinics that treat Cambodians who qualify as ID-Poor. This scheme was extended in 2023 to cover five million Cambodians. The government also offers voluntary health insurance to other citizens. However, although about a third of Cambodians were covered by some kind of health insurance as of 2023, only about 3 percent of health expenditures were covered by insurers. In part this is due to the widespread availability of private healthcare provision, which is not covered by government insurance schemes, as compared to the limited availability of public healthcare facilities.

As with irrigation, the healthcare sector suffers from a lack of infrastructure and qualified personnel in rural areas. In part this is a result of absolute shortages. In 2021, Cambodia had the lowest number of qualified doctors per capita of any ASEAN country: four times lower than Vietnam and five times lower than Thailand (WHO 2021). This is partly due to a lack of government funding; the RGC spend only 6.1 percent of general expenditure on health, which is below the ASEAN average of 8.5 percent (WHO 2016). To achieve the goal of universal coverage and reduce the burden of out-of-pocket expenditure, the government need to prioritise healthcare in resource allocation, particularly public healthcare in rural areas, promote trust in public provision, and better regulate the private sector so that it serves the public well. The government should plan for a significant expansion in the use of public facilities as the policies promoting universal healthcare coverage are rolled out.

3.4. Family-friendly policies

Family-friendly policies are defined as "policies that help to balance and benefit both work and family life that typically provide three types of essential resources needed by parents and caregivers of young children: time, finances and services" (UNICEF 2019). Early childhood nutrition, care and education are important for Cambodia's youthful population to play their part in promoting ongoing economic and social development in the years to come, and lays the foundation for long-term productivity. Assistance in caring for children can also help boost the productivity of their parents. In Cambodia, care-giving responsibilities are a major determinant of poverty (OECD 2017).

Rights to paid parental leave are detailed in the Constitution and the Labour Law but there are persistent concerns that employers in Cambodia routinely lay off pregnant women. For women in the garment industry, there is reportedly high awareness amongst workers of their rights; for example, the right of nursing mothers to a paid hour off each day for breastfeeding. In addition, the Labour Law stipulated that large employers should also provide daycare facilities in or near factories, but few do so. Even where such facilities are provided, parents do not want to use them because the standards are low and the daily commute is long and dangerous (IFC 2020). More employers provide a childcare allowance to employees with children, but generally the childcare industry in Cambodia is underdeveloped and poorly regulated. Furthermore, affordable family housing is in short supply with many workers accommodated in single or shared dormitories, or in unsanitary informal housing.

Cambodia's growth model has been heavily based on the migration of adults in their 20s and 30s from rural areas to cities, special economic zones, or overseas for work. The difficulties in finding housing and childcare means that often children are left behind with grandparents as the primary caregiver (UNICEF 2023). A study by CDRI suggested that there are negative effects on the education of children who are left behind when parents migrate, with such children completing fewer years of schooling than their peers due to lack of supervision and encouragement (Marchetta and Sim 2021). This further affects the quality of the workforce over the long term.

The Cambodian government needs to better enforce the existing provisions in the Labour Law and develop stronger policies and strategies for childcare and housing for working and, especially, migrating parents. This includes regulating or contracting private suppliers of childcare and housing. These strategies would reduce commuting time, allowing parents to spend more time with their children, improve living environments, and decrease the likelihood of children being left behind in underserved rural communities. Crucially, effective planning requires far better data on the problems migrating and working parents face and the needs of their children.

3.5. Social protection and social insurance

Although Cambodia has made rapid progress in reducing poverty over the last twenty years, almost one in five Cambodians still live in poverty, and many more are just above the poverty line, vulnerable to falling back into the cycle. Adequate social protection mechanisms that keep households out of poverty are essential to economic growth since they conserve and enhance productivity levels amongst the labour force, even during economic downturns or periods of economic restructuring. They do so by allowing adult workers to maintain their health, continue to educate their children, and retrain or upskill for new jobs, preventing a long-term decline in productivity driven by a decline in human capital following an economic shock. In this context, the Cambodian government has been committed since 2017 to expanding social protection and social insurance schemes.

The ID-Poor scheme, initiated in 2011, forms the foundation of the government's social protection planning since it provides a robust database of poor households across the country. The database is regularly updated by commune/sangkat officials in response to requests by households. It provides data for disaster management agencies and for the Health Equity Fund, which facilitates free medical care from public clinics to poor households, and is considered to have played a significant role in allowing the government to roll out a cash transfer campaign to ameliorate the worst of the COVID-19 pandemic effects. The ID-Poor scheme covers an estimated 17 percent of the population. A second approach to social protection is the provision of social and health insurance to workers through payroll-based contributions, under the National Social Security Fund (NSSF). As of 2021, more than 1.5 million workers were contributing to NSSF health insurance scheme, translating to approximately 13 percent of the population (ILO 2024a).

Recent evaluations suggest that the two schemes are working well, but the priority is to find ways to reach the 70 percent of the population that is not covered by them. There are four main ways to expand coverage: include dependents; expand ID-Poor to include the near-poor; deepen collaboration between the Ministry of Commerce (MOC) and the NSSF so that businesses registered with the MOC can automatically be enrolled in the programme; and promote formalisation of informal enterprises.

Including dependents in NSSF: Expanding NSSF health coverage to include dependents of workers would increase the coverage by almost four million additional people, but in so doing would add a substantial financial burden on the scheme. This would require either an increase in workers' contributions or an increase in government funding to ensure sufficient capitalisation.

Expanding Health Equity Funds (HEF) to include the near-poor: Although Cambodia has made great strides in reducing the proportion of the population living in poverty, there remains a large number of households who hover just above the $1.25-a-day poverty line, and could be plunged into poverty by a natural disaster, economic downturn or adverse life event such as a serious illness. During the COVID-19 pandemic, almost 460,000 Cambodians fell back into poverty, and nearly three quarters of the population lived on less than $3 a day (World Bank 2022). Expanding the HEF to include near-poor households using a process similar to the ID-Poor process could, depending on the definitions and thresholds applied, bring large numbers of people into the programme. The potential for using this approach to move closer to universal health coverage, as well as to manage cash transfers and humanitarian deliveries in the context of disasters, is currently being studied. Since HEF is funded through the government budget rather than through contributions, this would have fiscal implications.

Deepening collaboration: Not all businesses registered with the MOC are enrolled in the NSSF. From 2023, the MoC and the Tax Department began sharing data with NSSF through the CamDX data platform. This kind of collaboration should be prioritised in order to maximise the coverage of the scheme amongst registered enterprises. The International Labour Organisation (ILO) also reported in 2024 that almost one in ten enterprises who are registered with NSSF do not actively contribute to the scheme, and that almost 50 percent of individuals registered with the NSSF are not active (ILO 2024b). The NSSF has an Inspections Department whose job is to intervene where enterprises are failing to contribute, but this department has not yet established standard operating procedures for effective intervention (ILO 2024a).

Encouraging formalisation: Around 90 percent of the non-civil service workforce are employed in the informal sector (ILO 2024b). Over half of these (56 percent) are own-account or family-employed workers. Another 44 percent are wage-earners employed by an enterprise, but more than two thirds of these are also informal, because their enterprises are not registered with the government (ILO 2024b). These figures align with the very low number of businesses that are formally registered - 87.6 percent are not registered, most of these being micro-enterprises, of which only about 10 percent are registered with the government. These figures have increased steadily in recent years but from a very low base – with only 3.4 percent of enterprises were registered in 2015 (ILO 2024a).

Expanding the NSSF to reach workers in the informal sector is a challenge. The government has recently made voluntary versions of the scheme available, but these need to be better advertised and potential scheme members need to be more proactively engaged. The government has also linked expansion of social protection schemes to formalisation of enterprises. Informality is caused by low levels of trust between citizens and government. This reflects past legacies as well as contemporary problems such as complexity and lack of transparency in the tax system, fear of interacting with state authorities, scepticism surrounding the quality of social protection schemes and relatively high registration costs (ILO 2024b; Oxfam 2022). There is also a lack of enforcement, and in the case of micro-enterprises, registration is not legally required. The government is offering incentives to promote formalisation, including term-limited tax holidays for registering enterprises and the creation of one-roof service centres that can ease the process of business registration. However, formalisation efforts have been slow to make progress, and require broader attention to the quality of service that the government offers to businesses (ILO and UNDP 2023).

Efforts to promote formalisation should proceed with an emphasis on outreach, education and support, rather than enforcement, especially for micro-enterprises whose proprietors may be unfamiliar with the law, and who may find interaction with state authorities intimidating at the best of times. Business registration for micro-enterprises could be facilitated by elected commune-level authorities who frequently have closer relationships with their constituents than district-level ministry staff. Formalisation not only assists with social protection, but also with strategies to support the growth and development of micro-enterprises, as outline in Section 3.1 above.

3.6. Promoting resilience through education

Education plays an important role in promoting the resilience of a labour force. Despite remarkable economic growth, the Cambodian economy is struggling with a productivity problem, with within-sector productivity in manufacturing and services being modest. Barriers in labour mobility and skills mismatches have hindered the efficient reallocation of labour to more productive sectors. To sustain economic gains, Cambodia needs to enhance the resilience of its workforce by addressing challenges in the education system and corresponding learning poverty. This must start from the early years to develop well-rounded human resources and a highly skilled workforce necessary for intra-sectoral diversification and for moving up the value chains.

3.6.1. Addressing learning quality

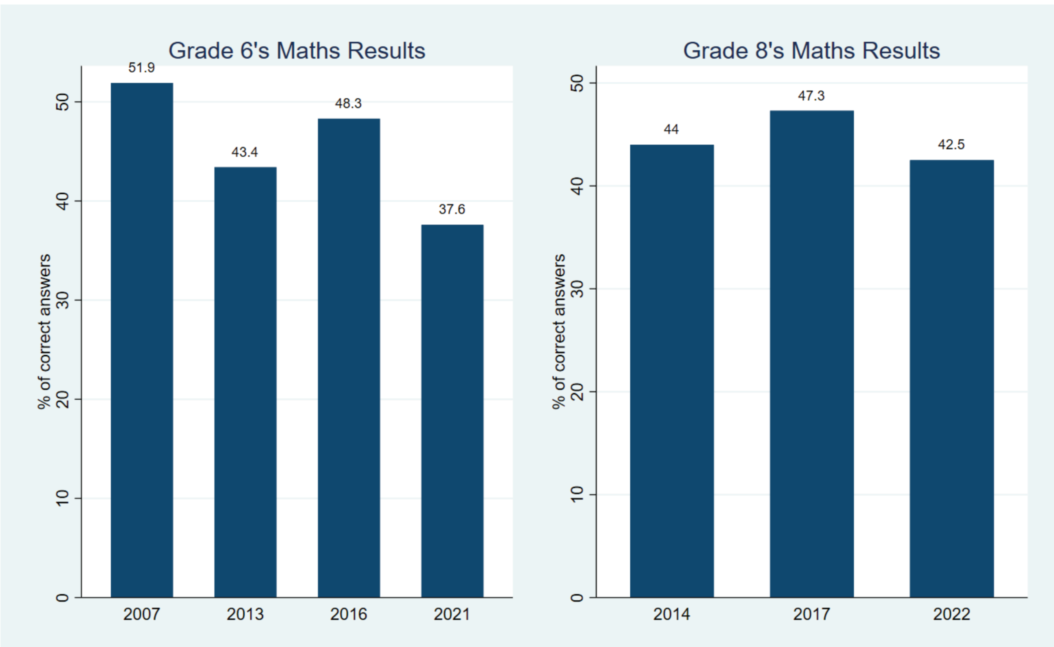
Cambodia has been applauded for its progress in expanding access to basic education and narrowing gender disparities. However, it lags behind surrounding nations in terms of learning outcomes

(OECD 2023; UNICEF and SEAMEO 2020). Despite government efforts to attract high-performing students to careers in education by sustainably increasing teacher salaries over the past decade and implementing the Teacher Policy Action Plan (TPAP) to better prepare and support teachers, results from the National Learning Assessments (NLA) indicate that these investments have had little impact on student learning. As shown in Figure 1, Grade 6 students' maths performance has been declining since the Ministry of Education, Youth and Sport (MOEYS) began the Grade 6 NLA in 2007, with a notable drop in 2021 following the COVID-19 pandemic. A similar trend is observed in the Grade 8 NLA.

A strong educational foundation is crucial for Cambodia to develop a highly skilled workforce capable of sustaining long-term economic growth. To enhance the quality of education, the government has implemented several education reforms. MOEYS has expanded access to early childhood education to better prepare students for primary school. However, enrolment in pre-school for children aged 3-5 remains very low at 37 percent compared to other countries in the region (MOEYs 2024). Additionally, many pre-school teachers are former primary school teachers without proper pre-school training.

To strengthen teacher quality, MOEYS has implemented reforms to enhance qualifications by transforming regional teacher training centres into teacher education institutes, extending the basic teacher training programmes from two to four years, and establishing a continuous professional development framework and career pathways for teachers. A recent survey by CDRI in 2023 involving more than

Figure 1: National learning assessment's maths results



Sources: MOEYS's national learning assessment reports

1,400 Grade 11 and 12 students revealed that teaching is the most popular career choice, with 15 percent of students aspiring to become teachers (Khantey et al. 2023). Nevertheless, based on the NLA results, it is unclear if more qualified teachers have translated into better student learning.

Recent efforts have also focused on school reform through the New Generation School (NGS) initiative, school-based management, and the introduction of model schools. These reforms aim to give schools more autonomy in planning and decision-making while holding them more accountable for students' learning outcomes. The NGS initiative seeks to improve the quality of education and develop skilled human resources by introducing an innovative full-day curriculum and eliminating the practice of private tutoring by teachers. While the NGS initiative has shown positive results, challenges remain, such as ensuring sustainable funding, maintaining high standards across all NGS, and scaling up the model to benefit more students.

Despite numerous educational reforms over the past decade, there is insufficient evidence on what has been effective and what has not. The NLA was intended to enhance learning quality, but it remains underutilised, and its data sets are not available to public researchers. Using rigorous evidence in decision-making and designing interventions is essential for Cambodia to achieve its educational goals.

3.6.2. Skills development

Skills development is crucial in helping Cambodia achieve its economic vision. However, Cambodian youth find skills training less attractive due to unfavourable perceptions, perceived irrelevance, and low quality of training programmes. According to the 2019 national census, only 0.7 percent of the Cambodian population aged 15 years or older had participated in technical and vocational training programmes (NIS 2020). Technical and vocational education and training institutes, provided by MOEYS and the Ministry of Labour and Vocational Training (MLVT), respectively, have the potential to address the skills gaps and mismatches by offering targeted training for medium-skilled occupations needed in the labour market.

To make training programmes more attractive and relevant to labour market demands, training providers need to modernise their programmes to include a broad set of transferable skills, such as digital and socioemotional competencies. Responsible agencies and training providers must ensure that training programmes respond to market demands and provide a conducive learning environment by regularly monitoring labour market trends, engaging employers in designing training curricula, and connecting students with opportunities for internships, apprenticeships, or work-based learning.

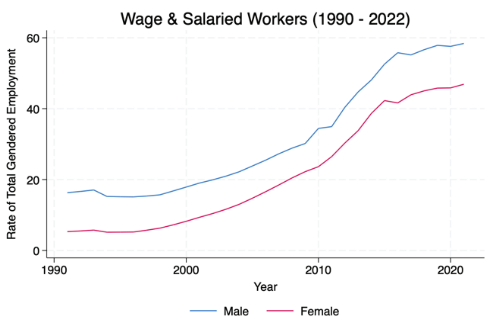
4. Inclusive Growth

Another important aspect of growth is inclusiveness. Inclusive growth requires paying attention to the ways in which the benefits are distributed. In this section, we discuss three main areas: reducing discrimination against particular groups, focussing on gender discrimination; inclusion in the benefits of growth through improved conditions of work, in both the formal and informal sectors; and inclusion in the benefits of growth through progressive distribution of resources, focussing on strengthening transparency, redistribution through taxation, and improved delivery of social services and public goods.

4.1. Gender: Evaluating and reducing discrimination

Inclusive growth in Cambodia hinges significantly on maximising the potential of the workforce, with women playing a pivotal role. Despite commendable progress, such as a relatively small gender gap in labour force participation, challenges such as disparities in wages, job security, and sectoral employment remain. Addressing these issues is critical for leveraging women's full economic potential.

Figure 2: Wage and salaried workers by gender 1990-2022



Source: GIDA Survey in 2020

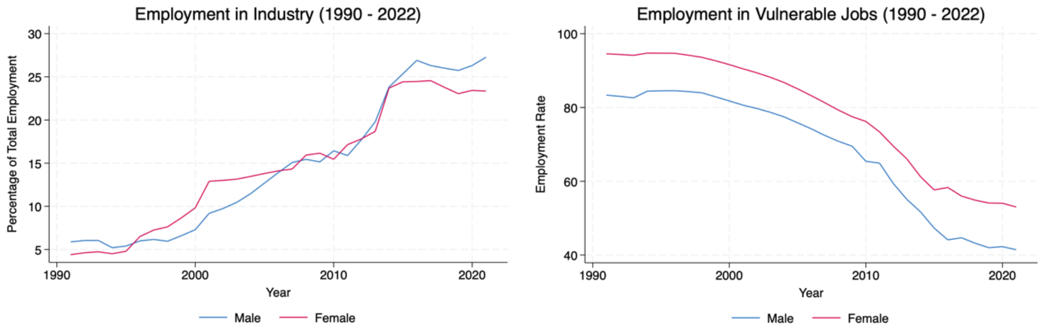
Cambodian women have a labour force participation rate of 69.6 percent compared to men's 82.1 percent, yielding a gender gap of 12.5 percentage points. This is notably smaller than the average for lower-middle-income countries and reflects the importance of women in the labour force. At the same time, these high participation rates do not fully reflect gender equity, as occupational segregation and wage disparities remain significant challenges.

First, the high rates of labour force participation can mask problems of wage disparities and occupational segregation. Women are less likely to be employed in more stable and salaried positions (Figure 2).

Women are also concentrated in lower-paying sectors like textiles and garments, while men dominate higher-paying industries such as construction and manufacturing (Figure 3). Even within industries, women often hold lower-paying positions and are more likely to be employed in vulnerable jobs with poor working conditions. This segregation perpetuates gender-based wage gaps and limits women's career advancement opportunities.

Third, inadequate resources, maternity support and entrenched cultural norms can also inhibit women's economic activities. This includes direct barriers to women's economic participation, such as limits on their ability to work or biases in hiring and promotion practices. For example, household survey data shows that while

Figure 3: Type of employment by gender 1990-2022



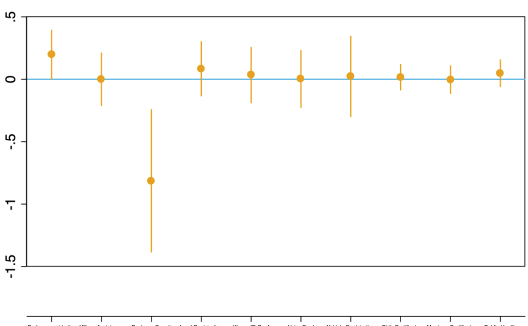
Source: GIDA Survey in 2020

women and men do not significantly differ in their perception of access to most government services, women report more perceived difficulty in getting a business permit than men (Figure 4).

Social expectations and other indirect limitations can also inhibit women's economic participation. For example, women spend significantly more time on housework, shopping, and childcare, and significantly less time on paid work and maintenance/outdoor household tasks (Figure 5). Women also spend less time on leisure in all forms than men do, and slightly more time doing voluntary work.

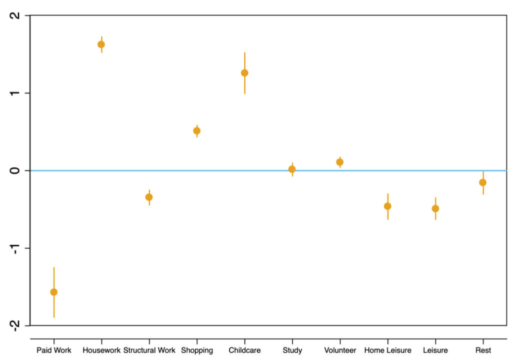
Women also report differing perceptions of safety and experiences of discrimination. Women feel less safe than men while walking (both during the day and at night), while at work, and while in their villages (Figure 6). The greatest differences are while walking at night and while at work, suggesting that efforts to support women's safety should focus on public and work spaces.

Figure 4: Gender differences in perceived ease of accessing government services (Women vs men)



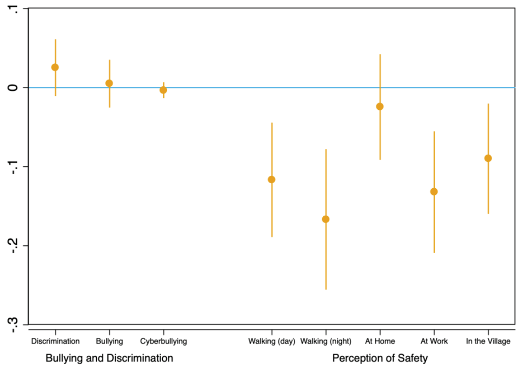
Source: GIDA Survey in 2020

Figure 5: Gender differences in time allocation across activities (Women vs men)



Source: GIDA Survey in 2020

Figure 6: Gender differences in perceptions of safety and experiences of discrimination (Women vs men)



Source: GIDA Survey in 2020

Strategic recommendations

The gender challenges to inclusive development require a multi-faceted approach:

1. **Education and training**: Invest in early STEM education for girls and provide targeted skills training for women. Programmes should be subsidised and include support services such as childcare to increase retention in high-skilled jobs.

2. **Policy interventions**: Implement policies to reduce occupational segregation, address wage disparities, and improve job security. This includes creating safer, well-paid workplaces with clear growth opportunities for women.

3. **Public and private sector collaboration**: Both sectors must work together to foster an inclusive work environment, ensuring that women have equal opportunities to contribute across various industries.

Cambodian women are already a cornerstone of the country's economic framework, and maximising their potential is essential. By addressing gender disparities in employment and wages, and providing targeted support and opportunities, Cambodia can enhance its economic growth trajectory and move closer to long-term goals. Investment in women's skills and employment conditions will not only boost individual livelihoods but also drive broader economic development.

4.2 Improving conditions of work

Cambodia's manufacturing industry has been the centre of innovative efforts in promoting better conditions of work, including the Better Factories initiative for monitoring standards and the Arbitration Council established to manage industrial disputes. There is also a strong legal framework establishing workers' rights, active union representation of workers and a minimum wage that is renegotiated annually between employers, unions and government. However, enforcement of workers' rights has nevertheless been varied and there is some evidence that conditions of work have declined in the garment industry over recent years, particularly since the pandemic.

Several recent surveys conducted since the COVID-19 pandemic (summarised in Asia Floor Wage (2023)) suggest that levels of pay in the garment industry have failed to keep pace with inflation, with the gap between median wage and median expenditure increasing, associated with high levels of debt amongst garment workers. Although the minimum wage in Cambodia is not the lowest in the region, basic food costs are higher in Cambodia than in neighbouring countries. The industry experienced large scale job losses during the pandemic, and buyers in some cases failed to pay wages and severance fees owed (Clean Clothes Campaign et al. 2023). Despite the government's response through the cash transfer programme, this pushed a number of workers into debt as a means to pay for basic living expenses (Clean Clothes Campaign et al. 2023). Furthermore, there are reports that even before the pandemic, subcontracted or piecework was an increasing feature of the Cambodian garment industry (Human Rights Watch 2015). Although pieceworkers are covered by minimum wage legislation, this form of employment is far more difficult to monitor, and arrangements are more likely to be informal. Currently there is a drift towards informalisation in the garment sector; a theme which is regressive with respect to the government's formalisation agenda.

Holding down real wages, reducing labour standards, refraining from enforcing laws and allowing creeping informalisation may boost short-term competitiveness, but these factors do not promote inclusive growth over the long term. Rather, they reduce the conditions of workers, exacerbate their vulnerability to poverty and debt, and impede their ability to upgrade their own skills and those of their children. Thus, all of the aforementioned points reduce the prospects of achieving high-income status by 2050. Remaining competitive while ensuring social inclusion in the benefits of growth, there is an urgent need to find ways to upgrade productivity. Upgrading productivity includes promoting more technologically sophisticated industries by providing a better environment for foreign investors through better infrastructure, governance, logistics and through nurturing the skills and talents of the workforce, as outlined in Section 3.6 above.

The informal sector is very varied, comprising own-account workers, family workers and employees. Strategies for promoting the resilience and growth of MSMEs have already been outlined in Section 3.1. As far as MSME employees are concerned, three key policy priorities require immediate attention. First, conditions of work go unmonitored in this sector, and consequently there is little available data to build from. There is an urgent need to generate more detailed knowledge about this sector. Second, basic social protection, including health coverage, should be extended to informal workers. Third, there is a need to enforce the Labour Law with respect to minimum wages and conditions in this sector. Efforts to formalise the informal sector have been described above. In the immediate future, there is also a need to consider ways of ameliorating conditions in the informal sector even before formalisation is achieved, for example through expansion of the ID-Poor scheme.

4.3. Improving redistributive governance

Improving governance is a key strategic priority of the RGC. Significant achievements have already been made in public financial management (PFM) reform, and last year the government announced a new round of public administration reform designed to promote the capacities and effectiveness of the civil service. Improving the effectiveness and integrity of the government fosters the smooth functioning of social services and delivery of public goods that benefit the poor. Meanwhile promoting the transparency, predictability, efficiency and progressive impact of the tax system allows for more effective revenue generation while directly promoting the wellbeing of impoverished communities.

PFM and public administration reform are essential to ensuring that public revenues are not diverted towards private entities or wasted due to ineffectual processes within government, but instead made available to fund policies that can lift people out of poverty. PFM reform is considered to be one of the flagship reform programmes implemented by the government over the past 15 years, with significant achievements made through a combination of technical reforms relating to the way in which money is moved and handled, and administrative reforms in the way that budgets are planned and approved. The use of a platform approach, in which a number of specified milestones were set out against which to track progress has been considered to be a key factor driving the success of this reform programme. The RGC has also partnered with the international Public Expenditure and Financial Accountability programme, which provides regular independent assessments of PFM reform progress. The key components of success here are strong leadership by MEF; strengthening of data through the use of new automated reporting systems; a clear path for reform with graduated milestones along the way, and independent monitoring of progress.

As a result of economic growth and successful PFM reform, including implementation of a Revenue Mobilization Strategy, tax revenues have increased from 12.8 percent of GDP to 22.5 percent in 2022, peaking 25.1 percent of GDP in 2019 (World Bank 2024a). This permitted an expansion of government spending from 20.2 percent of 2011 to 27.9 percent of GDP in 2021 (World Bank 2024a). Spending on healthcare and education increased in particular, from a combined total of 4.6 percent of GDP in 2011 to 10.5 percent in 2021, although this is still low in comparison to the region. The share of spending on economic and infrastructure sectors declined between 2011 and 2021.

A large part of the increase in social sectors was spent on increasing the wages of civil servants, including teachers and healthcare workers. The public wage bill increased from just over a quarter of government spending in 2005 to a third of government spending in 2020 (World Bank 2024a). According to the recent World Bank public expenditure review, this increase has not yet translated into better outcomes - for example, better teaching in schools or greater public trust in the national healthcare system (World Bank 2024a). It also does not significantly address the redistributive aspect of public service delivery - i.e. the extent to which service delivery can be used to benefit the poor in particular.

With respect to the redistributive effects of public service delivery there are four key areas that require attention: better use of data, increasing meritocracy, tax reform and decentralisation.

Better use of data: A study conducted by the Asian Development Bank in 2021 concluded that the RGC and development partners collect a lot of data regarding development trends in Cambodia, but that the data collected is not used sufficiently to inform policy making. The study found that where policies explicitly set out a monitoring and evaluation process, data is collected and used, but that this is not utilised in policy-making. Data is not routinely shared, either between ministries, nor between government and non-government agencies, and there is no clear process by which researchers outside government can access government data. This limits the ability to cross-check the government's own accounts of its policy achievements using different techniques and approaches, conducted by independent researchers. It also reduces the ability of the government to draw on the wider pool of in-country research expertise in non-governmental organisations to help define policy strategies and goals. The government is making progress on the use of data to inform policy internally, including through the establishment of the CamDX database for information sharing between ministries. However, the government needs to address issues of transparency and access to data around policy formulation and implementation.

Increasing transparency: Reducing the lack of transparency is considered to be a key factor in promoting service delivery outcomes (IMF 2019). Raising salaries to provide public servants with a living wage is necessary but not sufficient, and in fact, Cambodia's Corruption Perceptions Index score has recently declined by two points between 2022 and 2023 (Transparency International 2023). This leaves Cambodia two points higher than before the pandemic, but still 158th out of 180 countries worldwide, ahead only of Afghanistan, Myanmar and North Korea in the Asia-Pacific region. Other measures required to tackle effective governance include:

- Insistence on effective enforcement of the law and punishment of violators even when they are well-connected, as urged by the Prime Minister recently with respect to hit-and-run traffic accidents (Soth 2023);
- Routine incorporation of transparency and accountability mechanisms in public service provision and procurement processes, particularly those which allow the public to make complaints about incidents without fear of retaliation;
- Deployment and mandatory use of technology that can track transactions, for example the Financial Management Information System deployed by the Ministry of Economy and Finance as part of the PFM reform programme;
- Continued efforts to design processes throughout government so as to reduce the number of permissions required and the discretionary power of officials, in line with the ongoing effort to simplify transactions using the One Window Service Office approach;
- Increased emphasis on merit and integrity in the recruitment, training and promotion of individuals to the public service, as envisaged in the Pentagonal Strategy and other public administration reform strategies.

Tax reform: A key concern in the World Bank's recent public expenditure review for Cambodia was the high level of tax exemptions offered by the Cambodian government (World Bank 2024a). This results in a loss of almost a third of potential revenues from imports, while disincentivising foreign firms from seeking to source inputs locally. The 2021 Law on Investment aims to promote the predictability and transparency of taxation of foreign investments, but the World Bank suggests that the law is generous to investors, likely reducing the government's profits tax take (World Bank 2024a). The new Law on Taxation that passed in 2023 closed some loopholes in existing tax arrangements, thereby broadening the tax base, and increased penalties for non-compliance or non-payment, as well as strengthening the ability of the Department of Taxation to investigate tax-related crimes.

As with the enforcement of labour standards, levels of taxation are closely related to views about competitiveness, particularly in relation to foreign firms. High levels of taxation are considered to deter foreign investment, and the Cambodian government has followed a policy of using tax incentives to encourage investors to establish enterprises in Cambodia. However, there is a need to assess the point at which this policy becomes counter-productive: lower tax revenues mean less funding for the government to use to upgrade other aspects of the business environment, particularly public infrastructure and human capital, therefore making growth less inclusive. The IMF (2022) suggested a review of Cambodia's tax holiday policy which it regards as "particularly attractive to relatively short-lived or footloose investment and encouraging rent-seeking behaviour." The same report also suggested that tax incentives should be costed in terms of revenue lost, and responsibility for approving and monitoring them should be solely in the hands of MEF (IMF 2022).

Decentralisation: Cambodia has a highly centralised public administration system, with financial and human resources concentrated at the national level. Less than 10 percent of total government budgetary resources go to the subnational level (World Bank 2024a). Provincial line ministry offices are understaffed, while ministry headquarters in Phnom Penh are overstaffed, and rural services, particularly healthcare services, suffer from acute shortages. The redistributive impact of public spending would be increased if more budgets and services were decentralised and if more civil servants were deployed to rural areas. This would allow greater responsiveness and accountability at local levels, as well as reduce the sharp disparity in resources between Phnom Penh and provincial areas.

5. Conclusion and key areas for reform

Climate, gender and social factors influence the potentiality of the Cambodian economy achieving desired growth in an equitable way. The key factors include: (i) high carbon footprints of the growth sectors; (ii) climate-induced natural disasters (especially floods and droughts); (iii) gender disparity in employment and wages; (iv) limited access to livelihoods, healthcare and education, particularly among informal workers; and (v) limited social protection and redistributive governance. To address these issues, we propose the following:

1. Mobilise more climate funds, especially from the domestic private sector, to reduce GHG emissions from energy, transport, industry, agriculture and waste management sectors.
2. Focus the mitigation on the energy and agriculture sectors, prioritising the benefits of small enterprises and farmers.
3. Enhance the adaptation in agriculture, water, forestry and health sectors, focussing on allocating more funds to local authorities and communities, promoting ecosystem-based adaptation, and investing more in climate research and innovation particularly in agriculture.
4. Invest in early STEM education for girls and target green skills training for women, along with childcare support and progressive career pathways.
5. Incentivise business investments in rural areas, particularly in agriculture, to reduce outmigration, focussing on forging partnerships between community enterprises and large investors.
6. Expand public healthcare coverage, health insurance and social protection to include workers' family members, especially those in the informal economy, to reduce impacts from external shocks and to prevent them from falling back into poverty.
7. Keep reforming public financial management to reduce leakages and waste and to spend more on social sectors, especially health, education and agriculture investments in rural areas.
8. Enhance the tax collection system through digitalisation and improvement of the business environment to raise revenues for social investments, yet prioritising support and incentives for informal small enterprises.

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Cambodia Development Resource Institute

56 Street 315, Tuol Kork,
PO Box 622, Phnom Penh, Cambodia
+855 23 881 701/881 916/883 603
cdri@cdri.org.kh
www.cdri.org.kh