



UNITED NATIONS
CAMBODIA



CAMBODIA COMMON COUNTRY ANALYSIS

Building Forward Better Towards Transformative Growth and Development

Phnom Penh, Cambodia

January 2023

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January 2023

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ACRONYMS AND ABBREVIATIONS

| | | | |
|-------|--|---------|--|
| ASEAN | Association of Southeast Asian Nations | NIS | National Institute of Statistics |
| CCA | Common Country Analysis | NSDP | National Strategic Development Plan |
| CDC | Council for the Development of Cambodia | NSSF | National Social Security Fund |
| CDHS | Cambodia Demographic and Health Survey | ODA | Official Development Assistance |
| CNRP | Cambodia National Rescue Party | OHCHR | United Nations Office of the High Commissioner for Human Rights |
| CPP | Cambodian People's Party | RGC | Royal Government of Cambodia |
| CSDGs | Cambodia Sustainable Development Goals | SDG | Sustainable Development Goal |
| CSES | Cambodia Socio-Economic Survey | SME | Small and Medium Enterprise |
| CSO | Civil Society Organization | SRHR | Sexual and Reproductive Health and Rights |
| CSX | Cambodia Securities Exchange | TB | Tuberculosis |
| DALYs | Disability-Adjusted Life Years | UHC | Universal Health Coverage |
| ECE | Early Childhood Education | UN | United Nations |
| EBA | Everything but Arms | UNCT | United Nations Country Team |
| EU | European Union | UN DESA | United Nations Department of Economic and Social Affairs |
| FDI | Foreign Direct Investment | UNDP | United Nations Development Programme |
| GBV | Gender-based Violence | UNESCO | United Nations Educational, Scientific and Cultural Organization |
| GDP | Gross Domestic Product | UNFPA | United Nations Population Fund |
| HDR | Human Development Report | UNICEF | United Nations Children's Fund |
| ILO | International Labour Organization | UNODC | United Nations Office on Drugs and Crime |
| IOM | International Organization for Migration | UNRCO | United Nations Resident Coordinator's Office |
| IPV | Intimate Partner Violence | UNSDCF | United Nations Sustainable Development Cooperation Framework |

| | | | |
|-------|---|-------|---|
| LDC | Least Developed Country | UNTAC | United Nations Transitional Authority in Cambodia |
| LNOB | Leave No One Behind | US | United States |
| M&E | Monitoring and Evaluation | VNR | Voluntary National Review |
| MAFF | Ministry of Agriculture, Forestry and Fisheries | WASH | Water, Sanitation and Hygiene |
| MEF | Ministry of Economy and Finance | WDI | World Development Indicators |
| MoEYS | Ministry of Education, Youth and Sport | WFP | World Food Programme |
| NDC | Nationally Determined Contribution | WGI | Worldwide Governance Indicators |
| NGO | Non-governmental Organization | WHO | World Health Organization |

EXECUTIVE SUMMARY

In the decades preceding the COVID-19 pandemic, Cambodia had made considerable progress, rapidly expanding its economy through openness, low-wage strategy and preferential access to European Union (EU) and United States (US) markets, meeting the criteria to become a lower-middle-income country in 2015 and placing it on target to graduate from least developed country (LDC) status in 2021. In this same time period, Cambodia advanced towards sustainable development and demonstrated its commitment to align its national policies and development planning with the United Nations (UN) 2030 Agenda for Sustainable Development (2030 Agenda). Specifically, Cambodia committed to the 2030 Agenda, embracing all 17 sustainable development goals (SDGs) in addition to a goal related to ending mines/Explosive Remnants of War (ERW) (Cambodian SDG Framework 2016–2030). This commitment is reflected in its national vision for development (Cambodia Vision 2050), which aims for upper-middle-income status by 2030 and high-income status by 2050.

As throughout the world, however, the pandemic abruptly halted the progress Cambodia had made, triggering coinciding economic, public health and social crises, threatening its stability and obstructing efforts towards equality and sustainable development. Cambodian households struggled to meet needs, as communities faced school closures, job loss, food insecurity and elevated malnutrition rates, among other challenges. Although social protection programmes targeting groups at risk of being left behind are in place and supported vulnerable groups during the pandemic, with limited national budget allocated to human and social development, these programmes have been insufficient to continue to respond to and thwart the enduring impacts of the pandemic and have not been adequately reinforced in anticipation of future setbacks.

As a result, progress towards achievement of the Cambodian SDGs (CSDGs) have decelerated, while other coinciding global and national challenges are adding to the country's precarity. Global challenges include: the war in Ukraine; global economic uncertainty; and the climate crisis. The war in Ukraine has undermined multilateralism and hindered regional stability and progress, deepening the setbacks caused by the pandemic. Rising energy, food and commodity costs, coupled with the slower global economy are likely to adversely affect agriculture, tourism, foreign direct investment (FDI) and merchandise exports, slowing economic growth and increasing inflation, eroding the purchasing powers and livelihoods of the people. Amidst an accelerating global climate crisis, Cambodia ranks among the countries most vulnerable to climate change, given its dependence on rain-fed agriculture, and risk of rising temperatures, floods and droughts. With limited capacity for climate change adaptation, Cambodia faces elevated risk of future climatic disasters.

At the same time, national challenges are making it more difficult for Cambodia to face the impacts of these global challenges. National challenges include: governance transparency and accountability issues, notably corruption, impunity, a lack of judiciary independence, and human rights restrictions that lead to inequality and risk national stability; and economic shortcomings, including low per-capita gross domestic product (GDP), declining development financing, and structural weakness to shocks. Transparency and accountability in governance are limited. Commune elections in 2022 resulted in the Cambodian People's Party (CPP) securing a majority of seats, followed by the Candlelight Party. Commentators and opposition groups voiced concerns about the legitimacy of the electoral process. Measures are increasingly being adopted by the Royal Government of Cambodia (RGC), stripping civil, labour and political rights and leading to the arbitrary arrests of human rights defenders, activists and journalists, with women disproportionately affected. Cambodia's per-capita GDP is the lowest of all nations in the Association of Southeast Asian Nations (ASEAN). External forms of development financing, like official development assistance (ODA), are changing: Grant-funded ODA is declining, while domestic resources (i.e. tax, non-tax revenues), remittances and FDI are increasing to finance rising investment demands for development.

These overlapping crises and challenges have substantial social, economic and environmental implications and require concrete planning and response measures, with emphasis on vulnerable groups. The RGC put in place its first social assistance programme in 2020, which proved impactful to respond effectively to the immediate needs of the pandemic but requires additional measures to respond to its lingering impacts and prepare Cambodia for future social, economic, and environmental crises, while supporting its achievement of sustainable development and upper-middle-income status and ensuring no one is left behind.

Cambodia is, thus, presented with the opportunity to implement concrete measures to address governance issues, ensure equality, and continue on its trajectory towards achievement of the 2030 Agenda and graduation from LDC status. With a predominantly young population (64% below 35 years of age), supporting young Cambodians with access to education and skills development that enable them to contribute to modern society will facilitate this process. By recognising the value of citizen participation and decision-making, continuing to improve women's representation, ensure gender equality and prioritise the engagement of vulnerable groups, including in decision-making processes, the RGC will be able to support good governance and improve trust and accountability, while paving the way for SDG and CSDG achievement. To realise these objectives, the RGC must first identify ministries responsible for CSDG implementation and, then, ensure a streamlined budget process to support the successful implementation of the CSDGs, allocate resources towards CSDG implementation and develop comprehensive financing strategies to mobilise the resources, and assess progress towards the CSDGs through monitoring and evaluation (M&E) (e.g. data collection and use). If these measures are not put in place to ensure CSDG implementation, measure progress towards the CSDGs and secure financial investment in implementation mechanisms in the next national development plan (anticipated in 2023), Cambodia may not achieve all CSDGs.

The UN's human rights-based approach, normative mandate, and expertise in human development represent areas of strength for the UN in Cambodia and offer the RGC the necessary support to focus on the rights and obligations of citizens and duty bearers and link these to the country's international obligations and conventions. The UN actively supports the RGC to act on the recommendations of international bodies and engages and mobilises the RGC and other development partners and stakeholders on these aims.

CHAPTER 1: Introduction

The Common Country Analysis (CCA) is a diagnostic tool of the United Nations (UN) system, which provides strategic analysis of the progress a country has made towards realisation of its national development ambitions and the Sustainable Development Goals (SDGs), established in the 2030 Agenda for Sustainable Development (2030 Agenda). It is integral to the formulation of the UN Sustainable Development Cooperation Framework (UNSDCF), which guides the UN's development activities towards achievement of the 2030 Agenda at the country level. In Cambodia, the UN Country Team (UNCT) has prepared the CCA annually since 2020 in accordance with UN development system reform.

Given the current national and global challenges confronting Cambodia, a forward-looking, systematic analysis of its status of development is warranted. The COVID-19 pandemic remains an eminent threat to social and economic stability and has obstructed efforts towards equality and sustainable development, while geopolitical tensions at regional and global levels, like the war in Ukraine, are undermining multilateralism and the country's stability and progress. Rising energy, food and commodity prices, coupled with the slower global economy, are likely to adversely affect Cambodia's agriculture, tourism, foreign direct investment (FDI) and merchandise exports, slowing economic growth and increasing inflation, eroding the purchasing powers and livelihoods of the people, especially vulnerable groups, like farmers and the poor. Having erupted against the backdrop of an accelerating global triple planetary crisis (i.e. climate change, biodiversity loss and pollution), these challenges have substantial implications for Cambodia.

This CCA analyses the status of sustainable development in Cambodia and informs the UNSDCF 2024–2028, the five-year development cooperation instrument the UN uses to support the Royal Government of Cambodia (RGC) and Cambodian people towards Cambodia's SDGs (CSDGs).

1.1 Methodology

This CCA was developed using strategic foresight and both quantitative and qualitative data analysis, drawing on data and evidence (e.g. from previous CCAs, deep-dive studies, other UN analyses) as well as the diverse perspectives and evidence-based recommendations of varied stakeholders, including groups at risk of being left behind (Table 1). This approach enabled the team to reflect on its first-hand experience and anticipate multidimensional risks and vulnerabilities that would affect the country's sustainable development. This CCA examines development through the lens of leaving no one behind (LNOB), human rights, gender equality and women's empowerment.

Data Sources

A mixed method approach was used, drawing on quantitative and qualitative data from diverse data sources, including the UN Cambodia Reports Dashboard. Primary data was derived from surveys and other research conducted by UN agencies. Secondary and qualitative data was collected via: applied and policy research and studies; national development plans; government policy and strategy documents; programming and evaluation documents; etc. Social, economic and environmental statistical data were collected from national and international sources (National Institute of Statistics [NIS], Ministry of Economy and Finance [MEF], National Bank of Cambodia, International Labour Organization [ILO], World Development Indicators [WDI], World Economic Outlook Database).

1.2 LNOB Consultations

The CCA provides an opportunity to consult a range of stakeholders involved in, or impacted by, the country's development process. Consultations were held with community members, with an emphasis on population groups at risk of being left behind, as well as with representatives of the RGC, private sector, development organizations, civil society and academia (Table 1). Discussions focused on vulnerability and deprivations and their root causes, drawing on first-hand feedback from community members and corroborating key data and findings from the lens of human rights, gender equality and LNOB. The population groups at risk of being left behind were identified based on existing literature (e.g. CCA 2021, Assessment of the Economic and Social Impacts of COVID-19 Pandemic in Cambodia).

Strategic foresight methods (inclusive foresight co-creation, futures triangles) were utilized to envision a preferred future and identify root causes of vulnerability and drivers of change with the aim to reduce the vulnerabilities in favour of the future envisioned. The consultations were conducted in two rounds from March to November 2022. The first round was co-organized by the UN system and civil society organizations (CSOs) with population groups deemed vulnerable or at risk of being left behind. After the preliminary findings were collected and a first draft of the CCA was developed, the second round was conducted with the RGC, private sector, development partners, international financial institutions (IFIs), CSOs and academia.

Table 1. List of the consulted stakeholders

| No. | Stakeholder Groups |
|-----|--|
| 1 | Population groups: <ul style="list-style-type: none"> • Persons with disabilities • Youth (students, private employees, indigenous persons, ethnic minorities) • Women (informal economy, tourism, construction workers, street vendors) • Rural poor (farmers, IDPoor cardholders, migrant returnees) • Urban poor (IDPoor cardholders, people living with HIV, female entertainment workers, LGBTQI+ community members, people who use or inject drugs) • Indigenous persons |
| 2 | The Royal Government of Cambodia (line ministries and institutions) |
| 3 | Private sector (Chamber of Commerce, small- and medium-sized enterprises (SME) associations, young entrepreneurs) |
| 4 | Development partners and international financial institutions (IFIs) |
| 5 | Civil society organizations (CSOs) |
| 6 | Academia, research institutes and think tanks |

CHAPTER 2: Country Context

Cambodia was hit hard by the COVID-19 pandemic in 2020–2021. As the country fell into economic recession in 2020, it was further set back in terms of social and economic developments in 2021 due to community virus infection, lockdowns and mobility restrictions. Given the swift and successful rollout of the vaccination campaign and virus containment measures, the country lifted mobility restrictions, re-opened the borders, and resumed its socioeconomic activity, including the re-opening of schools for in-class study in late 2021. This has allowed the country to recover from the pandemic.

2.1 Political Situation and Governance Trends

In June 2022, Cambodia held commune elections, during which 7,394,427 voters (80.3% of the country's registered voters) cast ballots to elect commune councillors from 17 registered parties (86,902 candidates, 53% women) across 1,652 communes. Of the total 11,622 councillor seats up for grabs, the ruling Cambodian People's Party (CPP) won 9,376 commune councillor seats (80.7%), as well as 99.8% of commune chief positions (1,648 out of 1,652). The Candlelight Party (CLP) won the second-most with four commune chiefs and 2,195 commune council seats. Seven other parties won under 20 seats each. Women represent 22% of the commune council seats, an improvement compared to previous results. However, overall representation remains low.

Ahead of the 2022 commune elections, there were repeated calls for electoral reform from opposition groups, including amendments to legislation that currently permits the dissolution or suspension of political parties, and calls to strengthen the independence of the National Election Committee. Around 300 opposition candidates were removed from candidate lists by the National Election Committee (comprised of nine members but the majority were nominated by the CPP after the former opposition Cambodia National Rescue Party (CNRP) was dissolved in 2017) with no avenue for appeal. Almost all (99.7%) registered non-party aligned election observers were provided by organizations affiliated with, or run by, CPP members. Subsequently, five opposition parties urged the CPP to make electoral reforms to enable genuine political participation prior to the 2023 national elections.

Notwithstanding the victory by the CPP, Prime Minister Hun Sen signalled his intention to hand over power to a new generation of leaders. In December 2021, the CPP endorsed Hun Manet, the eldest son of the Prime Minister, as sole candidate for Prime Minister and successor to replace his father. In July 2022, the RGC approved the 10th amendment to the Constitution to provide power to the party with the most seats to propose a Prime Minister candidate, and for the King (instead of the elected National Assembly) to appoint the President and Vice President of the National Assembly. These amendments follow similar measures that have been viewed by commentators as seemingly curtailing the effective and meaningful participation of opposition voices in public affairs.

Leaders, members and supporters of opposition parties also face intimidation and marginalisation. Many advocates and opposition groups have denounced the use of litigation and prosecution through the courts as a measure aimed at silencing or disrupting political and media voices. After winning nearly 44% of the popular vote in the commune election in 2017, the opposition CNRP was dissolved by the Supreme Court in November of that year. Of the party's elected officials, including senior leaders, 118 were stripped of their political rights for five years, including the right to stand for office. The rights of 32 of these individuals were reinstated in February 2022 by Royal Decrees. Many of those charged have been named in mass trials, despite concerns about a lack of evidence linking them with crimes. While observing the mass trials involving 88 members and supporters of the opposition and 10 human rights and environmental activists, the UN Secretary-General report (A/HRC/51/63) documented procedural violations in most cases including some violations that

demonstrated a lack of respect for fair trial rights, in particular the guarantees of presumption of innocence, the requirement of factual and conclusive evidence and the right to be tried without undue delay.

Approximately 60 other former CNRP members and supporters remain in detention. The charges brought against the two leaders of the former CNRP inhibit their political participation ahead of the 2023 national election: Sam Rainsy is in exile and Kem Sokha remains on trial since his arrest in 2017, following a year in prison and a year under de facto house arrest.

2.2 Human Rights Situation

Civil, labour and political rights continue to be pared away as the RGC adopts increasing measures to limit freedoms of expression, press, access to information, and peaceful assembly and enacts restrictive, punitive legislation under the pretext of strengthening the rule of law and maintaining public order. In 2016, the United Nations Office of the High Commissioner for Human Rights (OHCHR) documented 50 cases related to human rights defenders, community activists and journalists and their arbitrary arrest, detention, harassment, threats, and violations of fundamental freedoms. In 2021, the number rose to 176 cases involving the same groups experiencing physical attacks (including extrajudicial killings), as well as threats, intimidation, harassment, surveillance, and other violations of fair trial rights and fundamental freedoms. Women human rights defenders, community activists and journalists have been disproportionately affected. Criminal law is being used to limit press freedoms and censor the media. In fact, these cases documented by OHCHR exclude over 4,323 Naga World strikers, who had advocated for their labour rights and were arbitrarily detained (December 2021–May 2022), including with reports of violence used by authorities against them. The leaders of the strikes remain subject to criminal charges, following arrests and pre-trial detention. In addition, the arbitrary closure of independent media outlets (e.g. Cambodia Daily, Radio Free Asia), coupled with self-censorship have limited the willingness of outlets to criticise the authorities and left few operating independent media actors.

Citizens in Cambodia remain subject to limitations on freedom of expression, notably social media users. In 2020, the Law on the Management of the Nation in State of Emergency was adopted, granting extensive powers to the RGC, including for surveillance and bans on the distribution of information. OHCHR documented seven incidents in which social media users were targeted for online criticism of the RGC, including an individual sentenced to two years of imprisonment for incitement and obstruction charges under the Law on Preventative Measures Against the Spread of COVID-19 and Other Severe, Dangerous, Contagious Diseases (COVID-19 Law). Enacted in 2021, the COVID-19 Law led to the arrest of at least 1,341 individuals between July and December 2021. There are concerns that enactment of the 2021 Sub-Decree on the Establishment of the National Internet Gateway, establishing a single government-run channel for all Internet traffic, could further curtail the right to freedom of expression. Article 6 of the Sub-Decree enables authorities to widely censor online content via arbitrary mass surveillance of private communications, raising concerns over the right to privacy, particularly for marginalised groups facing stigma and discrimination (LGBTQI+ people, people living with HIV, female entertainment workers, people who use and inject drugs, persons with disabilities). The Sub-Decree was due to enter into force in February 2022 but has been postponed.

Efforts to advance gender equality (SDG5), food security (SDG2), decent work and economic growth (SDG8), life on land (SDG15) and other development goals have been undermined by the limitations on fundamental freedoms and civil society actors holding the RGC and private sector accountable for these goals. The RGC has been slow to adopt, revise or repeal laws that would improve human rights. Treaty bodies (including, the Committee on the Elimination of Discrimination against Women) have

raised concerns about the impact of harassment, surveillance and undue restrictions on civil society actors and vulnerable groups and recommended measures to guarantee their rights and freedoms (*CEDAW/C/KHM/CO/6*). Despite longstanding calls from CSOs, echoed by the UN Human Rights Committee and other human rights mechanisms (*CCPR/C/KHM/CO/3*), the RGC has not amended the Law on Associations and Non-Governmental Organizations to strengthen freedom of association, while the Law on Access to Information has been under development since 2015 and the Legal Aid Policy since 2018. Neither have yet been adopted.

Reports of corruption, impunity and a lack of judicial independence continue, undermining human rights. In 2022, the Human Rights Committee (*CCPR/C/KHM/CO/3*) expressed concern about the “persistent lack of an independent and impartial judiciary and about the high number of allegations of corruption within the judiciary”, the “lack of independent and effective investigations by the Anti-Corruption Unit”, and impunity for human rights violations. These followed repeated calls by the Human Rights Council to urgently investigate and prosecute those behind the killings of union leaders, human rights defenders, and environmental and political activists (*Human Rights Council resolution 48/23; and CCPR/C/KHM/CO/3*).

There has been slow progress towards economic and social rights, which impact the lives and livelihoods of all Cambodian citizens and undermine efforts towards the achievement of the CSDGs. The social sector proportional allocation of the public budget has also declined over the past years from 28% in 2015 to 23% in 2022. A lack of transparency mechanisms exclude participation in the budget preparation and implementation processes, hampering people’s right to access information and participate in public affairs. Average debt per household was KHR 21346 (approx. USD 5,206) in 2021 and is predicted to continue to grow (Cambodia Socioeconomic Survey, 2021, page 121.)

Reports of coercive land seizures continue, predominantly impacting already vulnerable low-income communities. According to a study on the eviction and resettlement of 645 households across 17 sites in Phnom Penh and eight other provinces, 63% describe the moves as forced evictions, entailing physical force on the day of eviction. Community activists advocating for land or housing rights endure physical force and unjust judicial measures. For example, the Cambodian Armed Forces shot at families protesting against land-clearing in Ang Snuol, Kandal province, and 30 people were arrested following a clash between officials and villagers protesting the construction of Techo Takhmao International Airport, both in 2021.

Human trafficking is also an issue in Cambodia. A variety of factors (e.g. a clampdown on online casinos resulting in a gap in the market, stalled developments in Cambodia’s special economic and coastal zone of Sihanoukville, and insufficient policing of heavy Chinese investment) have transformed Cambodia into a destination country for human trafficking. Human trafficking for various forms of online scams (gambling, cryptocurrency trading, online gaming) has been on the rise since 2019. While the scale of the issue in Cambodia is unknown, reports suggest tens of thousands (*AL KHM 2/2022*) of people have fallen victim to human traffickers in Phnom Penh, Kandal, Koh Kong, Preah Sihanouk and Svay Rieng provinces. In 2022, the US Department of State downgraded the status of Cambodia’s anti-trafficking efforts from Tier 2 to Tier 3, citing the lack of significant efforts to eliminate trafficking, endemic corruption, which impedes law enforcement operations, and inadequate protection services for victims domestically or overseas. Workers have reported heightened risks of human trafficking and contemporary forms of slavery, as well as physical and sexual abuse, cruel and degrading treatment and punishment, and inhumane and unfavourable living and working conditions. Chinese nationals are the primary victims coerced into scamming compounds and deprived of their freedom of movement. Other victims include Burmese, Egyptian, Indonesian, Malaysian, Pakistani, Thai and

Vietnamese citizens. Embassies are reportedly overwhelmed with requests for rescue or repatriation, due to the scale of the issue.

The official response to human trafficking reports has appeared ad hoc and inconsistent, with few prosecutions and reports of corruption and ineffective policing (U.S. Department of State, 2022). In addition to human trafficking, Cambodia has also become a destination for organized criminals and others in transnational networks that smuggle opiates and methamphetamines, illegal timber products, and counterfeit goods and medicines. Destinations, such as Sihanoukville, reportedly provide limited regulation and oversight of such activities. Cambodia continues to be a hot spot for money laundering, with a 2022 Basel Anti-Money Laundering (AML) Index score of 7.36, ranking Cambodia 7th on the list of most risky countries and second most risky in Southeast Asia (after Myanmar) for money laundering and terrorist financing. Since 2019, the Financial Action Task Force (FATF) has included Cambodia in its “grey list”. Per a 2019 United Nations Office on Drugs and Crime (UNODC) report, “extensive casino complexes in Cambodia’s border areas and in Phnom Penh have also been identified as locations for bulk cash smuggling and the laundering of organized crime revenues”.

Furthermore, the weakening human rights situation has had macroeconomic consequences. In 2020, the European Union (EU) partially withdrew Cambodia’s “Everything But Arms” (EBA) status (over human rights concerns, impacting 20% of Cambodia’s total exports to the EU or equivalent to more than USD one billion annually. In May 2022, the European Parliament adopted a resolution highlighting the continued crackdown on political opposition in Cambodia, and calling on the European Commission to include consideration of Cambodia’s EBA status in future interactions with the Cambodian Government. This included stating that in the context of the 2022 elections that the Commission should “be prepared to use all tools available, including a complete suspension of Cambodia’s EBA status and other sanctions” if the 2022 elections were deemed to be “unfair”.

It was not possible by the end of 2022 to calculate the economic impact of the EBA partial withdrawal alone, as the economy was concurrently devastated by the COVID-19 pandemic. Nonetheless, trade unions have expressed their concerns about the loss of EBA benefits. Based on the economic setting before the COVID-19 pandemic, the IMF’s simulation indicated that Cambodia could lose three percentage points in gross domestic product (GDP) growth in the first year if the EBA was fully withdrawn.

In 2021, the US Congress introduced two bills (H.R.4686 - *Cambodia Democracy Act of 2021*; S.3052 - *Cambodia Democracy and Human Rights Act of 2022*) that called on the US Government to urge the RGC to take steps to address human rights and other issues, and proposed the imposition of economic sanctions on government and military officials in Cambodia who undermined democracy, violated human rights, or engaged in corruption associated with undermining democracy. Citing concerns over the deterioration of the human rights situation, the US has not reauthorized Cambodia’s trade preference status since it expired in late 2020.

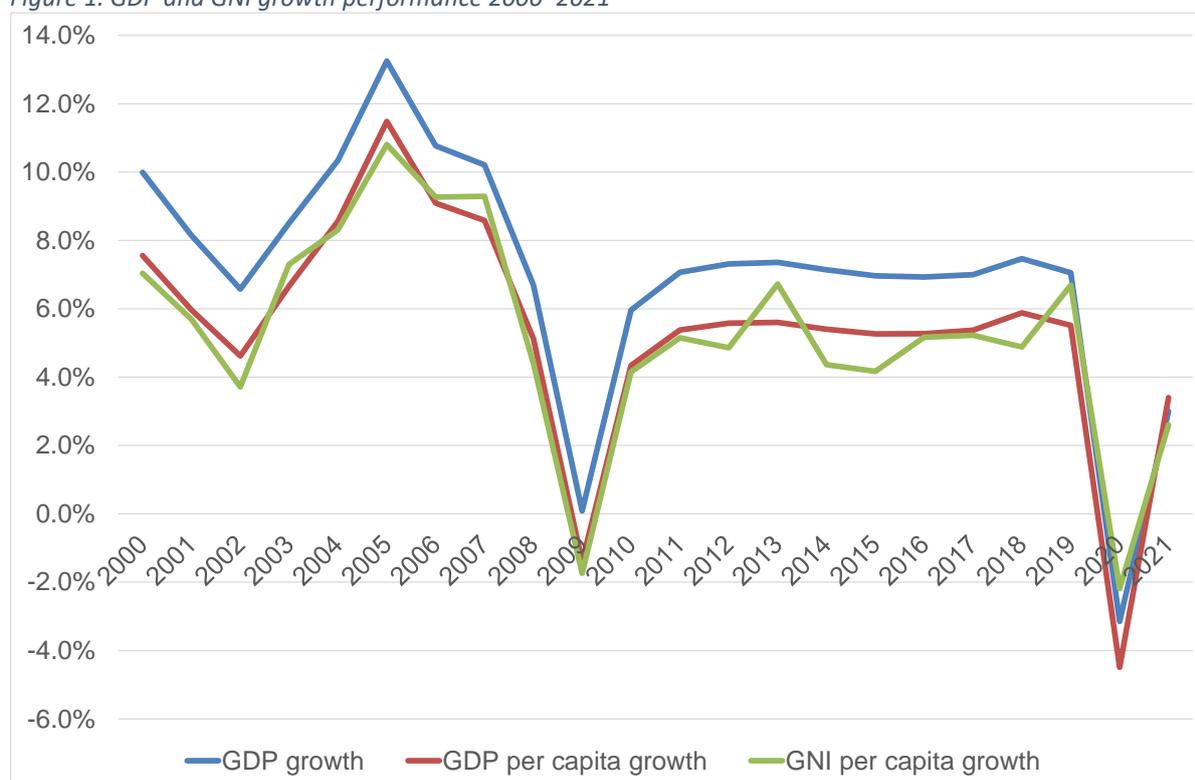
2.3 Overview of Economic Performance

Cambodia is facing a new phase of economic development, with an average 7% economic growth for two decades pre-pandemic, due to its openness, low-wage strategy and trade preferential access (EU Everything but Arms, US Generalized System of Preferences). Given liberalised trade and investment, the garment, footwear and travel goods sector has blossomed and absorbed millions of workers (76% women) in the formal labour market. Cambodia, thus, advanced, becoming a lower-middle-income

country in 2015 and met the criteria to graduate from least developed country (LDC) status for the first time in 2021.

Nonetheless, the economy is hindered by shallow-rooted production (limited upstream activity and linkages with domestic enterprises), low productivity, limited diversification, poor quality infrastructure, and a lack of innovation, making it highly vulnerable to shocks. Current food and oil price shocks (more than many countries in East Asia and the Pacific) downgraded economic growth projections in 2022 from over 5% to 4.5%. There are signs of diversification of export products (bicycle, electrical and electronic products) and markets (China, other Asian markets). Yet, manufacturing and agricultural production remains concentrated on low value-added activities without robust backward or forward linkages with domestic micro-, small- and medium-sized enterprises (MSMEs) dominating the informal economy and accounting for a large share of labour force with limited labour protection. The low skill level of the workforce is a key challenge for businesses and the manufacturing sector. Low wage, which has helped attract foreign investments and established the manufacturing sector, is no longer a viable strategy with rising wages. Further, real wages or real income have recently declined, affecting household livelihoods, particularly women. Improving productivity and competitiveness is needed to promote inclusive, sustainable economic development.

Figure 1. GDP and GNI growth performance 2000–2021



Source: World Development Indicators and MEF's Macroeconomic Framework for 2023 National Budget.

Economic openness has also caused economic volatility and vulnerability, as evidenced by the 2008–2009 global financial crisis and the ongoing COVID-19 pandemic. The economy did not grow during the global financial crisis in 2009 and contracted by 3.1% during the COVID-19 pandemic in 2020, one of the highest contractions in the Asia-Pacific region. Beyond economic contraction, the COVID-19 pandemic has led to a loss of jobs and income for thousands of workers, notably those in the garment, footwear and travel and tourism sectors, women-owned enterprises, and those living on the margin

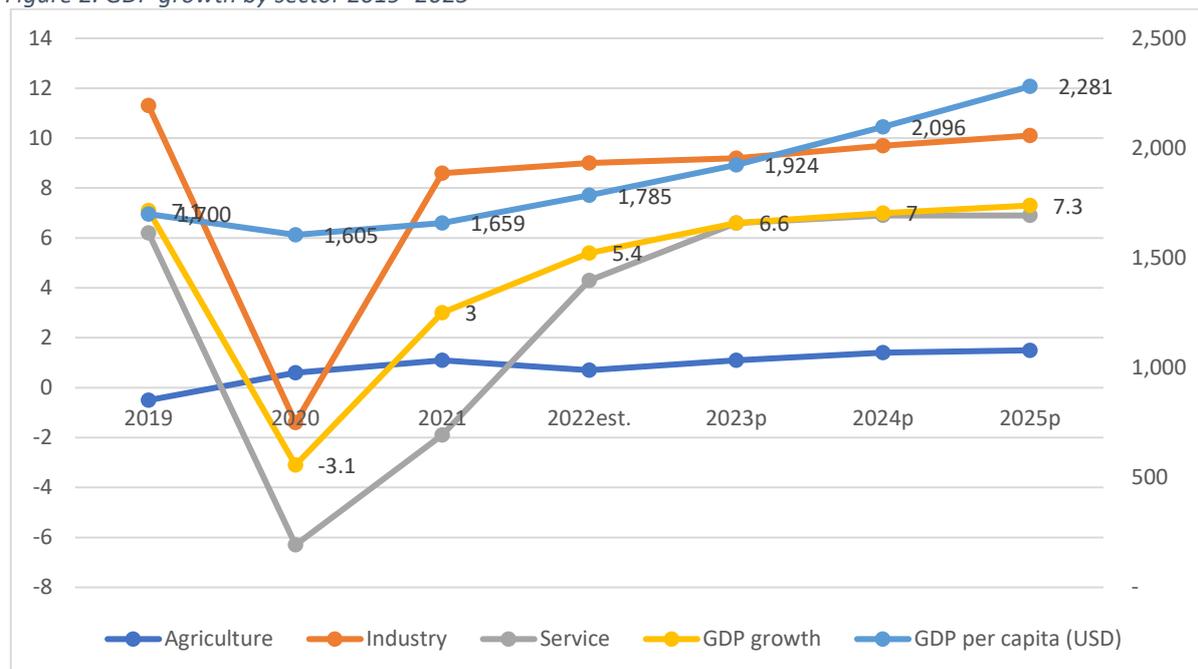
and below the national poverty line. Women were most affected due to their prevalence in these sectors and cultural norms making them responsible for domestic care and household chores, requiring them to care for sick family members and home-school during the pandemic, pushing many women out of the labour force. As a result of the pandemic, poverty is estimated to have risen to 17.8% in 2020.

Women contribute significantly to the economy: They own 62% of microenterprises and 26% of small- and medium-sized enterprises (SMEs). Yet, they still face barriers, including access to finance and business registration. Moreover, with a labour force participation rate of 80% in 2019, women are overrepresented in lower paid jobs but underrepresented in senior and high-paid jobs. This pattern is worse in male-dominated sectors (construction, agriculture), where women account for over 40% of waged workers but are almost entirely absent from managerial or professional roles. Education and experience only minimally explain the wage difference; gender discrimination is the leading factor.

Cambodia's cultural heritage and vibrant culture contributed significantly to the tourism sector, a key driver of recent growth. Pre-pandemic, the tourism sector contributed 21% to GDP and attracted nearly 7 million tourists to Cambodia (2019). The sector directly employed over 620,000 people (2020) and indirectly employed more in related sectors (transportation, handicrafts, textiles, silk production).

While rapid economic growth in recent decades elevated the income growth and living standards of most people, the benefits of the growth were distributed unevenly across population groups. The bottom percentiles of the population obtained meagre benefits from the trickle-down economic growth as evidenced by the shares of their income and consumption, revealing inequality. This is illustrated by the poor performance of the agriculture sector, the main source of livelihoods for 70% of the population. With formal institutions rebuilt in the aftermath of civil war and conflict, political power has been concentrated and the patronage system mainstreamed across governance. With economic openness, domestic political patronage networks have benefited markedly from the inflows of foreign capitals and goods. This has been reinforced by access to natural resources, the extraction of which has generated substantial economic benefits, possibly at the expenses of society, particularly the poor and vulnerable groups affected by the erosion of natural resources and land conflicts.

Figure 2. GDP growth by sector 2019–2025



Source: MEF (2022): Macroeconomic Framework for 2023 Budget Formulation (Medium Term Fiscal Framework 2023–2025).

Cambodia’s economy is heavily dollarised, as measured by the share of foreign currencies in broad money supply (M2): consistently above 80% in the last decade. Despite efforts to promote the local currency, Khmer Riel (KHR), and recent development of inter-bank markets, the discretionary power of monetary policy is lacking, leading to less discretionary power over the exchange rate management policy and hindering monetary authorities from making adjustments. Hence, it cannot effectively promote the country’s exports and growth, notably in periods of real exchange rate misalignments, impeding efforts to spur post-pandemic economic recovery amidst rising global interest rates and an appreciating USD. This places Cambodia in an unfavourable position next to its neighbours and key trading partners (Vietnam, Thailand) whose currencies depreciate against the USD.

Macroeconomic management has relied on fiscal policy. A resource mobilisation strategy has resulted in significantly increased tax revenue in recent decade, resulting in a government savings of over USD 3 billion in 2019. Indirect tax, especially special excise tax on petroleum and other products, accounted for the largest share of tax revenue, at 56% of the total tax revenue, while direct and international trade taxes contributed 32.3% and 11.7%, respectively. There is room to make tax more progressive via policy options, by expanding the tax base and tax rate, especially direct tax on the wealthy (e.g. income tax) and indirect tax on tobacco, alcohol and energy drinks. Further, increasing tax rates on tobacco, to achieve the rate of 75% of retail price, alcohol and energy drinks, as recommended by the World Health Organization Framework Convention on Tobacco Control (WHO FCTC), also directly benefits people’s well-being and reduces public health expenditure.

Nonetheless, the fiscal space has drastically shrunk due to the need to increase spending in order to mitigate the socioeconomic impact of the pandemic, support economic recovery and decrease tax revenue to finance the stimulus package and health measures. In 2021, the RGC nearly depleted its savings, having spent over USD 2 billion of USD 3 billion. As Cambodia is now a lower-middle-income country, official development assistance (ODA) and concessional financing are declining, at the same time in which development assistance is reoriented towards, for example, the war in Ukraine.

2.4 Overview of Human and Social Development

Fiscal policy, via the national budget, has focused more on investment in hard infrastructure than in social sectors. The share of the national budget allocated to human and social development (education, health care, gender equality and social affairs), has stagnated in recent years, slowing social development despite rapid economic growth. In 2020, the human development index declined by an estimated 3.93%, equivalent to the last four years of progress and worsened in 2021 with prolonged school closures, due to the pandemic.

Education and skills development – like other social and economic sectors – are not prepared for, or resilient to, shocks such as the pandemic. School closures disrupted learning in all of the estimated 13,681 schools nationwide, affecting nearly 3.3 million students of which female students account for 50.4%. Despite distance and online learning support provided, learning declined and dropouts rose, with children from remote areas, children from socioeconomically marginalised households, and children with disabilities most impacted. Even prior to the pandemic, low learning quality, and high dropout and low retention rates, especially at higher education levels, remain persistent challenges. The completion rate in lower secondary education is 48.1% and the survival rate at upper secondary reduces to 24.7%. These statistics indicate that a high percentage of Cambodia’s human capital is currently outside the formal education sector and require alternative pathways to access education and skills development.

Access to affordable and quality health care remains far from universally accessible to the people, especially the near-poor and vulnerable groups living on the margin of poverty, and populations who are stigmatized or marginalized, such as populations living with and/or affected by HIV. Public health expenditure dropped from 6.4% of the total national budget (2020) to an estimated 4.8% (2021) (excluding allocations to fight COVID-19). Over three out of five first and second visits for health care are in the private sector, despite lower cost and more social health insurance coverage of public services. Patients’ out-of-pocket expenditure is exceptionally high – 60% of total health expenditure, a burden for Cambodians. The proportion of households experiencing high health expenditure (over 10% of total consumption) improved in 2009–2014 but has since reversed, rising from 13% in 2014 to 18% in 2019, with rural households most affected (over 20% versus ~13% for urban households). The loss of income and livelihoods due to the pandemic has amplified risk and vulnerability in health-care protection. The pandemic overstretched the health system, leading to low utilization of health services, including sexual reproductive and maternal services. Outpatient visits declined by over 25% (2019–2021), indicating a need to expand social health insurance coverage.

The pandemic, coupled with rising pressures on the environmental ecosystem due to economic development, natural resource exploitation, rapid climate change and other environmental challenges, have compromised progress in food security and nutrition. Food availability has not been a critical issue at the macro level and agricultural production, a backbone of national food security, vastly expanded during the pandemic with increasing production of crops, poultry, animal raising, fisheries and other agricultural activities; however, rapidly changing climate and other environmental challenges have adversely affected agriculture and food systems, jeopardising food security and nutrition. Cambodia is ranked as one of the countries most vulnerable to climate change as it is prone to climate hazards, including floods and droughts. Much of the population relies on climate-dependent agriculture for livelihoods, lives in areas geographically susceptible to floods, and depends on a single crop production (rice).

Malnutrition, already high in pre-pandemic times, is aggravated due to the socioeconomic impacts of the pandemic. Whereas child stunting (low height-for-age) or chronic malnutrition significantly improved from a prevalence rate of 34% in 2014 to 22% in 2021, child wasting (low weight-for-height) or acute malnutrition remained unchanged at around 10%. Only 10% of children under five suffering from wasting in Cambodia currently access treatment. It is worth noting that malnutrition varies across provinces. Overall, 22% of the population cannot afford a healthy diet. With 17.8% of the population living in poverty, rising energy and food prices are likely to exacerbate food insecurity and malnutrition. Meanwhile, non-communicable diseases (NCDs) are one of the main causes of death in Cambodia. NCDs accounted for more than half of deaths, and it is estimated that NCDs cost Cambodia about USD 1.5 billion in health care and productivity loss, equivalent to 6.6% of GDP in 2018.

Mine action is also high on the country's leadership agenda; an additional SDG, CSDG 18, related to clearance of landmines and ERW was added to the localized version of the 2030 Agenda and its SDGs. Cambodia still faces multiple consequences resulting from landmine contamination which is the result of a protracted sequence of internal and regional conflicts that affected the country from the mid-1960s until the end of 1998. The north-western region bordering Thailand has some of the densest global concentrations of anti-personnel mines (APM) while other areas of the country, mainly in the east, have been impacted primarily by the presence of explosive remnants of war (ERW), including cluster munitions. Mines and ERW have killed and injured over 65,000 people in Cambodia since 1979. Although, the number of annual casualties has been brought down from 4,320 in 1996 to 44 in 2021, Cambodia has some of the highest numbers of casualties in the world. Mines and ERW continue to kill, injure, and traumatize people and communities, and severely impede humanitarian responses, peacebuilding and stabilization efforts, social and economic recovery, and sustainable development.

At this critical juncture, stronger investments in social sectors and human development are vital to ensure the success of Cambodia's economy in the longer term. Moreover, more investment in gender equality and women's rights is needed to bridge the gender wage gap and remove barriers to enter and/or be a part of the formal labour force. With a population of 15.6 million, the median age is 27 years and people under 35 years comprise 64.2% of the population. The young population offers an opportunity for a socioeconomic transformation with an abundant labour force, entrepreneurship and economic innovation if given access to education and skills development which equips them with 21st century skills. At the same time, new entrants to the labour force require better employment, social services and governance. This is also an opportunity to expand and strengthen the tax base and revenue to cope with projected rising demands for social protection during times when the labour force is shrinking. While there is a window of opportunity, Cambodia is shifting to a more intermediate age structure given a steady increase in people over 30 years and a steady increase expected of those over 60 years, reflecting a reduction in adult mortality.

To ensure sustainable, inclusive development, investment in human capital development (quality education, health care, food system, nutrition, social protection) is vital. Addressing these supply-side challenges also helps strengthen socioeconomic resilience and tackle inequalities within urban areas and between urban and rural areas. In tandem with larger investments in the social sector (e.g. expansion of social protection coverage for the poor and vulnerable), economic openness needs to be better managed to support sustainable growth in which the benefits are shared across population groups.

CHAPTER 3: Progress and Challenges of Sustainable Development

3.1 Overview of Population Groups at Risk of Being Left Behind

This report considers the transformative potential of poverty eradication and human rights-based programming. In identifying vulnerable groups, the below analysis relies on population statistics to identify trends and seeks to identify unquantified patterns of exclusion, structural constraints, and unequal power relations that contribute to inequality.

Vulnerability in the Cambodian population

Cambodia is young, with 46.6% of the population under 24 years in 2019, and growing quickly amidst rapid urbanization. According to the 2019 General Population Census, the population is just over 15.5 million, representing a 16% increase in the last decade. Urban population distribution has climbed to nearly 40%, with Phnom Penh exhibiting a high annual growth rate (4.9%). Women of Reproductive Age represented nearly one third (27%) of the total population in 2019.

Despite rapid economic growth, recent calculations reveal a high level of multidimensional poverty, based on standards of living beyond wage, which account for disparities (ethnicity, caste, gender). According to the World Bank, the drivers of Cambodia's recent economic success will not be sufficient to continue increasing standards of living for most Cambodians; without targeted action, some groups will be left behind. The analysis below identifies those most at risk of being left behind as Cambodia develops, including people vulnerable to economic shocks, climate change, environmental disasters, and political upheaval, as well as those prone to income inequality and health and education gaps.

Cross-cutting indicators of vulnerability

It is critical to examine cross-cutting characteristics of vulnerability that exist within each community. Multisectoral characteristics include gender, LGBTQI+ identity, dis/ability status, ethnicity and age.

Gender and sexual orientation. Women in Cambodia are vulnerable across all categories. Although Cambodia's current sex ratio is nearly equal (94.9 males per 100 females), there are evident differences between rural and urban areas. The 2019 Census suggested a possibility of more males migrating than females, translating to a heightened burden on females in rural areas left to care single-handedly for children and aging relatives. As Cambodian women face heightened vulnerability to economic shocks, largely due to limited economic opportunities, they risk being left behind.

Root causes of their vulnerability include persistent gendered stereotypes, normalised male superiority, few economic opportunities and corresponding poverty especially in rural and remote areas. Patriarchal social norms discriminating against women and girls affect all aspects of their lives. Historically, Cambodian girls had unequal educational opportunities, but this trend is shifting; boys now face a 2% higher risk of dropping out at the lower secondary level nationwide compared to girls. The factors are multi-dimensional, but one factor is that boys are more likely to leave school to seek employment opportunities to support their families, as adolescent boys have higher paying and more work opportunities available to them. At the same time, fewer girls and women have access to higher education. Despite more equal school enrolment, on average, women are still 5% less likely to be literate and, for all age groups over 25 years, women are less likely to have completed school and to be literate in Khmer and English, lending to unequal job opportunities and less economic mobility and stability.

Women in Cambodia also experience unequal power dynamics within the family. In 2018, it was estimated that Cambodian husbands perform a mere one tenth of their families' household services per day. Women are also more likely to be married early in life. These factors influence a woman's ability to contribute equally to the society outside the home. One in five Cambodian women report facing gender-based violence (GBV) in their lifetime; however, one in three Cambodian men report perpetrating physical / sexual-based violence. There is a high rate of acceptance of intimate partner violence (IPV), leading to generally low reporting levels. These inequities lend to health disparities. Maternal mortality rates are a key indicator of quality of care, with six targets related to maternal mortality included in SDG3.

Based on the 2020–2021 Cambodia Demographic and Health Survey (CDHS), the unmet needs for family planning among Cambodian women of reproductive age 15–49 is particularly high at 59.7%. The unmet need for family planning among currently married women remains stagnant at 11.8% (versus 11.9% in 2014). It is important to note the disparities in unmet needs among women in rural areas, particularly in the Northeast region (12.2%), compared to the national average (11.8%), and women with no education compared to those with higher education (14.6% vs 8.7%). While the modern contraceptive prevalence rate among married women keeps increasing, from 38.8% in 2014 to 44.7% in 2021 and among women of reproductive age from 26.6% in 2014 to 28.8% in 2021, disparities remain. The modern contraceptive prevalence rate among women in rural areas, particularly in the Northeast region (38.6%), continues to lag behind the national average (44.7%). Thus, there is an urgent need to increase access and demand for rights-based family planning, especially among the furthest left behind.

Teenage childbearing (linked to early marriage) also remains a major health concern, with women in rural areas with limited education most vulnerable. In Cambodia, 12% of 15–19-year-old girls have begun childbearing. Mothers under 19 years face higher risks of eclampsia, puerperal endometritis, and systemic infections, while their babies face higher risks of low birth weight, preterm delivery, and severe neonatal conditions. The social consequences of teenage childbearing can curtail a woman's educational and employment opportunities.

Similar to the vulnerability experienced by women, LGBTQI+ persons face risks due to the lack of acceptance of non-binary gender designation, gendered stereotypes and a patriarchal society, leading to unequal access to services for social protection, health, and legal redress. The LGBTQI+ community faces the added burden of high rates of employment discrimination, vulnerability to health risks (e.g. HIV and sexually transmitted infections), and marriage inequality. Despite a relatively open atmosphere to LGBTQI+ groups, Cambodian laws are mostly silent on LGBTQI+ people's rights and protections, leaving them vulnerable to stigmatisation. Recent studies show that discrimination, violence, and abuse towards the LGBTQI+ community are common, and include home incarceration, forced separation from partners, and forced marriage. Many LGBTQI+ Cambodians must choose either to hide their identity or to experience challenges gaining or keeping employment. The stigma within the community as well as in health-care settings also hampers their access to essential health services, including sexual and reproductive health.

Dependent populations. Cambodia's age-dependency ratio describes the proportion of the country's population presumed to be economically dependent on others based on age. Between 2008 and 2019, the dependency burden declined but remains relatively high, with the highest rates in rural areas (69.9 per 100) and the lowest in urban areas (51.2 per 100). Higher ratios reflect greater financial stress on working people and can impact national financial stability.

Children are extremely vulnerable to economic shocks as there is a lack of state-wide schemes or programmes that support the health, nutrition and education of all children. Current schemes only target the bottom 20% of households, leaving children in households just above the poverty line especially vulnerable to shocks. Dependent adults are also vulnerable and often receive less attention. Adults who are economically, physically, and/or socially dependent on other adults and/or government services include persons with disabilities and aging adults. Persons with disabilities are generally vulnerable across all factors. Experts believe the cost of disability in Cambodia may raise poverty rates by 34% for households with at least one family member with a disability. In 2019, 4.9% of the total population over five years old reported some form of disability. Persons with disabilities face challenges that increase their vulnerability, including insufficient efforts to identify them, unawareness of their rights, the need for a comprehensive law preventing discrimination, and insufficient implementation of national strategies, plans and laws in line with the Convention on the Rights of Persons with Disabilities (CRPD). Despite efforts to improve access to services, few benefit from the disability identity card designed to provide access to government benefits.

The vulnerabilities they face are compounded with age. Despite an overall decrease in Cambodia's age-dependency ratio at the national level, dependency burdens remain relatively high in rural areas. Higher ratios reflect greater financial stress on working people and potential impact on national financial stability. Higher dependency in rural areas translates to geographic susceptibility across all population groups, suggesting heightened vulnerability to environmental and climate-related shocks.

In 2019, 8.86% of the population was 60 years of age or older. This is relatively low, but the steady increase will have multisectoral implications, including a need to develop stronger social protections and health care. Older persons are a largely forgotten group in development debates, presumed to be under the care of their families. However, poverty and financial vulnerabilities render many families unable to provide familial or community support for older persons, and social services are limited.

Indigenous and minority groups. Cambodia's 2019 census reported that 4.2% of the population has a mother tongue other than Khmer. While the census does not cite indigenous groups – despite being home to 455 indigenous communities (179,000 people) – it reports that 2.9% of the population speak a “minority” mother tongue. Neither ethnicity nor race is cited. This is important given the vulnerability of Cambodia's indigenous people, who are often isolated geographically, leaving them vulnerable to infrastructure, education, and health-care gaps, and increasingly vulnerable to economic disparity due to land loss.

Based on the CDHS 2021–2022, the percentage of teenage pregnancy among girls aged 15–19 years who have ever had a live birth in the Northeast region, including Ratanakiri (17.1%), Stung Treng (17.3), MondulKiri (9.2%), and Kratie (11.9%), is higher than the national rate (6.6%). The report also reveals that the percentage of married women and sexually active unmarried women aged 15–49 years with unmet needs for family planning in Ratanakiri (12.2%), Kratie (12.3%) and Stung Treng (17.4) is still higher than the national rate (6.6%).

According to the Thematic Report of the 2019 Population Census on Ethnic Minorities, fertility was higher within the ethnic minority population than the Cambodian population overall. In 2019, the ethnic minority Total Fertility Rate was 3.3 per woman, compared to 2.5 per woman for the general population. As in the general population, the ethnic minority total fertility rate was lower for urban areas than rural areas (2.5 and 3.5 per woman respectively). Accidents accounted for 9.1% of deaths in the general population and 10% in the ethnic minority population. The leading causes of death in the ethnic minority population were fever, diarrhoea, dengue fever, malaria, and other diseases.

Within the general population, dengue fever, tuberculosis (TB), diarrhoea, and other diseases were predominant. The disability rate for ethnic minority people aged 5 years and above for any level of disability was 4.7%. The percentage of the ethnic minority population that reported a severe disability was 0.8%.

Persons of ethnic Vietnamese descent also face political and socioeconomic challenges. Most live in extreme poverty, remain marginalised and are categorised as foreign nationals or immigrants, even if born in Cambodia. As a result, most face challenges with birth registration and identity cards, hindering access to basic social services and making it difficult to estimate the population size, which ranges from ~78,000 (2019 census) to over 700,000. In addition, these people experience difficulty accessing basic economic, political and social rights, including a right to a legal identity, and face an array of disadvantages, including limited freedom of movement, being unable to own land and access employment, education, health care and legal protection. Few non-governmental organizations (NGOs) work regularly with Vietnamese minority groups, unlike other vulnerable groups. Efforts are needed to assess their vulnerability and integrate them into development programming.

Another minority group, the “*Khmer Krom*”, are also vulnerable. The RGC declares this community an ethnic group of Cambodian citizens, who moved to Cambodia from southern Vietnam, which was historically known as ‘lower’ Cambodian territory before the French colonial period. Based on a NGO survey report, the number of Khmer Krom population living in Cambodia is estimated to be between 82,000 and 1.2 million. Many members of this community face discrimination as they are viewed as Vietnamese and lack legal identification in Cambodia, thus obstructing their access to basic services, despite recognition of them as Cambodians within the legal framework. The NGO survey found that members of the Khmer Krom who lack identity cards continue to face difficulties living in Cambodia, including discrimination, lack of housing, and lack of recognition by the authorities.

“*Cham*” or popularly known as “*Khmer Islam*” is another minority group living in Cambodia. The World Population (2016) estimates that 300,000 Cham population are living in Cambodia. They are mostly living in Kampong Cham, Battambang, Kandal, Kampong Chhnang, Kampot and Phnom Penh. Compared to other ethnicities, the Cham population faces fewer difficulties as they are provided Cambodian citizenship and identification cards. Moreover, the Khmer Islam communities appear to have made provisions for religious education, and their school education programmes are supported by the Ministry of Education, Youth and Sport. Nonetheless, they also face a number of challenges and fear losing their cultural identity, including their language.

Other vulnerable population groups

In addition to those facing vulnerability due to fundamental social drivers, some population groups face structural inequalities. The analysis below differentiates between groups by employment status to illustrate how income impacts vulnerability in Cambodia, arguably more than any other factor.

People living in poverty. Cambodia has made strides towards alleviating poverty. Increased earnings and wages helped decrease the poverty rate from 47% (2007) to a low of 13.5% (2014), resulting in achievement of low-middle-income status in 2015. However, the national poverty line increased to KHR 10,951 (USD ~2.7) in 2020, raising the poverty level to 17.8%. No sex-disaggregated data on the under-poverty-line among the Cambodian population is available; however, it could be assumed that more women live under the poverty line than men because more women are unemployed and in family unpaid work than men, based on the Census 2019.

Poverty in Cambodia largely results from underemployment rather than unemployment, due in part to a lack of employable skills. Poverty levels vary widely by area, with the least in Phnom Penh (4.2%) and the most in rural areas (22.8%), where employment is centred on agriculture or migration for manufacturing. In 2019, most Cambodians worked in agriculture, forestry or fishing (53.4%), with the majority in rural areas working in agriculture (74.1%). Landowners often perform small-scale farming and are dependent on the weather and subject to environmental and economic shocks (see section 3.5). Those without land who work in agriculture do so as day labourers or agribusiness workers. While data on those in agriculture who own and work their own land is unavailable, civil society actors have noted decreased small-scale land ownership in recent decades, due to various reasons, including migration and land grabs. This is politically contentious, with many factors at play, and indigenous persons are most at risk (see section 3.4).

Rural families who have lost land have also lost access to potential economic mobility. Coupled with already low levels of access to education and health care, they are at heightened risk. More rural households have fallen into debt, with many citing land loss as both a cause and effect. Among Cambodia's 3.6 million total households, 1.25 million were in debt in 2019, and the average debt per household had increased by 85%, from KHR 9.6 million (USD 2,400) to KHR 17.7 million (USD 4,400). These households often face pressure to collateralise land titles and struggle to access basic needs. Civil society cites land depreciation and loss, and debt as key push factors for economic migration.

Migrant workers. Cambodia's porous borders, poverty, indebtedness, urbanization, and vulnerability to climate change-related disaster have increased migration. In 2020, over 1.1 million Cambodians (40% females) were estimated to live abroad, driven by the prospect of better wages and employment opportunities. Approximately two thirds of international migrants leave via irregular channels, with Thailand the top destination. Despite investment in safe migration education, regular modes of migration often require migrants to take on high debt and forego income while waiting long periods for approvals. A study found migrant workers spend, on average, USD 123 for irregular channels versus USD 548 for regular channels.

Despite the low cost, irregular modes of migration increase risks of exploitation, debt bondage, wage theft and trafficking, while limiting access to sexual and reproductive health and rights (SRHR), with women and children at heightened risk. Migrant workers with irregular status also face more difficulty resolving challenges and accessing services (education, health care). Migrants without legal documentation may fear seeking support due to their status. Further, without access to Cambodia's formal administrative migrant worker complaint mechanism, they lack a channel for remedy.

Domestic rural-to-urban migration is high and young (64% aged 20–34 years). Young migrants are generally unskilled, with limited vocational training and/or marketable skills and tend to work in low-paying jobs with limited upward mobility or stability (e.g. garment, construction, service industries), making them vulnerable to economic shocks. Female migrants typically hold the lowest paid employment. Domestic migrants and Cambodian youth, in general, face risks of few economic opportunities, limited access to high quality education, and strong competition for high-paying jobs.

The pandemic presented additional challenges for migrant workers. In 2020–2021, 260,000 labour migrants returned to Cambodia (mainly from Thailand) in response to related job loss, exposing a critical need for increased coverage and better monitoring of implementation of the National Social Security Fund (NSSF) and IDPoor system. These gaps were generally caused by administrative and logistical issues: Return migrants face challenges accessing IDPoor documentation, many do not know how to access the online system, and the requirements are often too demanding to meet. The Ministry

of Planning recently expanded access to include more beneficiaries and to extend geographic coverage, with reported investments exceeding USD 100 million in the past two years.

Minimum wage workers. In Cambodia, the only industry regulated by a minimum wage is the garment and footwear manufacturing industry, which employs over 1 million people, 80–90% of whom are women. Garment workers are often very young (80% below 35 years of age), domestic migrants from rural areas, and low-skilled with limited education. Recently, the industry positively responded to years of criticism from civil society and unions, granting workers a minimum wage alongside other benefits. However, these workers are unlikely to move up in socioeconomic status through their employment, have limited alternatives, and are highly vulnerable to economic shocks. The pandemic amplified these vulnerabilities, with wage losses due to sudden closures, thousands of workers cut off from access to medical care, and many without access to social protection services and/or food to endure lockdowns. Apparel workers are at a high risk of exclusion from the NSSF, mainly due to limited NSSF capacity to monitor compliance. A recent report analysing the coverage gap estimated that up to 27% of garment workers are likely unregistered with the NSSF, despite regulations. The ILO has recommended that the RGC develop stronger data-sharing and cooperation between ministries to encourage higher levels of compliance and reduce vulnerabilities in times of crisis.

The vulnerability of garment workers shows the need to examine the intersectionality of gender, education and geographical areas vis-à-vis the structural transformation of Cambodia's economy. Women from rural areas remain over-represented in low-paid and low-skilled occupations, including the garment industry, and face higher risks of job loss due to digitalisation and automation, especially those with lower levels of education and skills. With Cambodia's ambition to transition to Industry 4.0, the adoption of new technologies and automation of jobs in the garment industry are expected. Female garment workers, notably those with low literacy and skills, will be disproportionately impacted by job displacement unless supported by efforts to reskill and/or upskill these workers.

Workers in the informal economy. Approximately 88.3% of Cambodians work in the informal sector, which encompasses agricultural day labourers, street vendors, domestic workers, tuk tuk and motodop drivers, and service workers. Informal workers are mostly female (75%), older, homeless, and/or disabled. The lack of social protection lends to high levels of vulnerability among them. In 2020, the RGC expanded the NSSF to informal workers (e.g. provision of health care and maternity support), but registration requires a national identification card (ID), certificate of occupation, and certificate of residence, which many informal workers lack.

Economic shocks caused by the pandemic hit informal workers particularly hard, leading to substantial increases in debt, as many were omitted from social protection programmes and from COVID-19 emergency response programmes. At least 35% of informal workers did not have sufficient access to food, with only one tenth receiving support from the RGC, NGOs or the private sector. Informal businesses (restaurants, street food vendors, beauty salons, souvenir shops) are mostly women-owned and, although women-owned businesses generally perform well, they are less likely to be registered, are underserved by banks and, due to a lack of collateral and gender stereotypes, face barriers to financing. As a result, women business owners faced increased risk.

The vulnerability of informal workers derives mainly from their exclusion from labour and social protection in the legal and policy framework. The current social protection system is based on employment-related contributory schemes, which have limited reach as the social assistance targets only the poorest of the poor. As a consequence, many informal workers belong to the “missing middle” group, which is vulnerable to being just above the poverty line but overlooked.

Entertainment and sex workers. Entertainment workers, who sell and exchange sex for money or goods are the most marginalised workers in the informal economy, and the most vulnerable to sexually transmitted infections, particularly HIV, and other reproductive health issues, such as unsafe and induced abortions. Entertainment workers report very high rates of GBV: In 2018, 37.5% of women working in the entertainment industry had experienced GBV in the previous six months. Reports included forced sex, physical abuse and emotional abuse from clients, intimate partners, family members and establishment owners. Entertainment and sex workers face among the highest levels of health risks in Cambodia, including exploitative working conditions, forced substance abuse, and exposure to HIV/AIDS, TB and other transmissible diseases.

Despite the risk, low wages in the formal sector drive young women to this sector. Yet, as a highly concealed sector, the most recent census does not account for sex work at all. In 2019, the industry was estimated to comprise at least 66,288 women workers aged 15 years and above in Phnom Penh, not including freelance or street-based sex workers. A 2019 survey of entertainment workers in Phnom Penh found 36.7% had previously worked in the garment industry, suggesting that many young women may be susceptible to this vulnerable sector. Few Cambodian laws or policies target women and underage girls in sex work, despite their high vulnerability, lending to a significant gap needing substantial work to address.

Unpaid workers. Restrictive gender norms are reflected in the vastly unequal distribution of unpaid domestic and care work, with women performing, on average, 90% of that work. Although the time spent on domestic and care work increased for both men and women during the pandemic, almost 30% of employed women reported that their partners did not provide any additional assistance. Female adolescents and women were mainly responsible for household chores and taking care of the children. In the absence of other support, unpaid work may be transferred to older women in the family or to girls, often adversely impacting their education. The need to balance livelihoods with unpaid responsibilities keeps many women in vulnerable work, and is a barrier to women expanding businesses, advancing their careers, or taking leadership roles. Time poverty affects women's health and reduces opportunities for further education, community involvement or leisure. Although the burden of unpaid care and domestic work is one of the greatest obstacles to gender equality in Cambodia, it is seldom addressed by public policies or development efforts. There is limited childcare and pre-primary education system nationwide, and there is no obligation for large employers to provide childcare facilities or funding, leaving few options for families with children to manage work and family responsibilities and pushing women out of the workforce. Yet, care investments could generate jobs, help close gender gaps at work, and further Cambodia's progress towards sustainable development.

Mine affected population. From 1992 to June 2022, 2,431km² of contaminated land has been cleared and released, on which over 1.1 million APM, more than 26,000 anti-tank mines, and over 3 million ERW were found and destroyed. However, mines and ERW are still present across 1,992 km² of contaminated land, of which 716 km² is contaminated by landmines, which continue to hinder the country's reconstruction and development and constrain livelihood activities of rural communities. Throughout Cambodia, almost 1,000,000 people still live and work in areas contaminated by mines and ERW, including cluster munitions. As the result, mine action has been added as an additional SDG Goal in the Cambodian SDGs.

3.2 SOCIAL DEVELOPMENT AND EXCLUSION ANALYSIS

Moving beyond the pandemic and building resilient health systems for the future

Cambodia was one of the top 10 countries globally to have the highest vaccination rates against COVID-19, with over 99% of adults and 90% of the targeted population (including children three years and above) fully vaccinated. These efforts reopened schools, travel, and businesses at the end of 2021. Despite a surge of Omicron cases in February–March 2022, most were mild, likely a result of high vaccination coverage, and did not overwhelm the health system. At the same time, however coverage of essential routine health services declined due to pandemic-related factors (reduced uptake of services by target populations for fear of transmission, movement restrictions and reduced capacity due to overstretched health workers). SRHR, including family planning, maternal, child and newborn health services, such as antenatal care, postnatal care, HIV testing and treatment, nutrition screening and disease detection (e.g. TB) were most impacted. While the threat of new COVID-19 variants remains, essential health services must be prioritized alongside the COVID-19 response.

Preliminary findings from the CDHS 2021–2022 show that, compared to 2014, overall child mortality and maternal mortality have vastly improved, with substantial reductions in under-5 mortality (decreasing from 35 to 16 deaths/1,000 live births), infant mortality (from 28 to 12 deaths/1,000 live births) and neonatal mortality (from 18 to 8 deaths/1,000 live births). Maternal mortality showed a slight decline (from 170 to 154/100,000 live births) from 2014 to 2021, albeit short of the 130 target for 2020. Communicable diseases (TB, malaria, HIV, acute respiratory infections) have all declined considerably, and the country is on track to achieve malaria and TB elimination by 2025 and 2030, respectively. However, comprehensive knowledge among young people has declined; only 23% of young women and 27% of young men have thorough knowledge of HIV prevention methods.

Since 2014, Cambodia has greatly improved coverage of antenatal care (with 86% of women completing four antenatal care visits or more), assistance during delivery (with 98% of live births taking place at a health facility) and postnatal care (with 85% of women with a live birth receiving a postnatal care check within two days of delivery), likely contributing to improvements in mortality. The unmet need for family planning among currently married women is stagnant at 11.8% (11.9% in 2014). There are disparities in unmet needs among women in rural areas, particularly in the Northeast region, compared to the national average (12.18% versus 11.8%), and women with no education compared to those with higher education (14.6% versus 8.7%). The modern contraceptive prevalence rate is gradually increasing among married women (38.8% in 2014, 44.7% in 2021) and among the overall population of women of reproductive age (26.6% in 2014, 28.8% in 2021), but disparities remain. While teenage pregnancy decreased to 9% (12% in 2014), it is high (35%) among girls with no education. According to the 2020 situation analysis, knowledge of SRHR is limited among young people (15–24 years): 35% had basic knowledge of the menstrual cycle and possibility of pregnancy; 22% had heard of contraceptive methods but could not explain any benefits; and 25% knew of HIV prevention. Further, only 76% of children 12–23 months are fully vaccinated against all basic antigens, a slight improvement from 2014, but children with no vaccinations (3%) increased, highlighting persistent access barriers and inequity issues, likely affecting vulnerable groups most.

NCDs in Cambodia represent six of the 10 most common causes of death due to changing risk factors (lifestyle changes, the environment), accounting for an estimated 64% of deaths in Cambodia, especially among older persons. Global Burden of Disease data indicate that NCDs have increased disability-adjusted life years (DALYs) in the past decade (50% of DALYs lost in 2010, 60% in 2019). Risk factors include air pollution, exposure to toxic materials and waste, tobacco, high blood glucose levels, and blood pressure. Primary health care, central to universal health coverage (UHC) and prevention efforts, must be prioritised. An estimated 40% of children and adolescents suffer from violence,

physical and sexual abuse, and bullying. Recent reports highlight concerning environmental health risks to children in Cambodia, particularly lead exposure and household air pollution. Cambodia's estimated DALYs of lead exposure is 40.89 per 100,000, the highest in the Southeast Asia region, while DALYs for household air pollution is 2,422 per 100,000, the third highest in the region. Such environmental health impacts undermine Cambodia's progress to reduce child mortality, morbidity and malnutrition and need to be addressed urgently. Increased NCD investments could avert over 10,000 deaths and 45,000 DALYs returning as much as 10 times the investment to the society and economy.

Each year, tobacco use causes KHR 2.71 trillion in total economic losses, the equivalent of 3.0% of GDP. According to the WHO FCTC Investment Case for Cambodia, launched in 2019, tobacco use causes KHR 2.71 trillion in total economic losses each year, equivalent to 3.0% of the 2017 GDP. Tobacco control is pro-poor. Investing in the country's five priority tobacco control measures, namely higher tobacco taxes, smoking bans in public places and workplaces, plain packaging, mass media campaigns and advertising ban, would save 57,000 lives and provide a return of KHR 178 for every KHR invested (i.e. saving KHR 7.9 trillion [USD 1.9 billion] in health costs and economic losses by 2033). This requires strengthening implementation of the National Law on Tobacco Control and the Strategic Plan for Education and Reduction of Tobacco Use 2021–2026 in line with WHO FCTC provisions, with support from the Inter-Ministerial Ministerial Committee chaired by the Minister of Health.

Mental health declined in the pandemic: Teenagers and adults reported anxiety and depression due to COVID-19. Among adolescents aged 15–19 years, 18% were very anxious or depressed (with 15% reporting this during the pandemic), while 13% of those aged 10–14 years were very anxious or depressed (with 11% reporting this during the pandemic).

Although the UHC service coverage index (SDG 3.8.1, computed as the geometric mean of 14 tracer indicators of health service coverage) has increased substantially in Cambodia in recent years (by 42 points 2000–2019), it remains far below the regional average. Between 2016 and 2019, RGC expenditure on health as a percentage of GDP remained largely unchanged (1.3%–1.5%). Catastrophic health spending in Cambodia improved from 2009 to 2014 but has been rising since 2014 and out-of-pocket (OOP) for health remains over 60%. Key challenges for the health sector include financial sustainability, health workforce skills gaps, limited strategic purchasing of medicine and equipment, limited regulation, compliance and enforcement by the private sector, and limited coordination between health facilities, hospitals and communities.

As Cambodia moves forward from the pandemic, key imperatives include ensuring that the health system is resilient to future infectious disease outbreaks and pandemics, provides affordable quality, equitable essential health services, and is fit for purpose in the changing context of emerging health issues and the burden of disease. It is important for Cambodia to build on its COVID-19 experience – with respect to strong government leadership, interministerial coordination, capacity development for health service provision in pandemics, sufficient human resources to ensure uninterrupted essential health services, use of digital innovation, strong community engagement and behaviour change communication – as part of continued health systems strengthening, transformation and future investments. The RGC has already committed to develop a new UHC Roadmap and to strengthen primary health care, as part of the next National Health Strategic Plan (HSP4) 2022–2030. As the country moves into pandemic recovery, efforts to reach those most vulnerable and impacted by the pandemic need specific efforts to access relevant health-care services and recover from the pandemic, safer, healthier, and happier, as per the RGC 2030 vision.

Risk of rising food insecurity and increased childhood malnutrition

There has been a substantial reduction in childhood stunting (low height-for-age) from 32% in 2014 to 22% in 2021, however the prevalence of childhood wasting (low weight-for-height), or acute malnutrition, has remained unchanged at around 10%. Some provinces even have wasting rates that exceed emergency levels over 15%, and disparities in malnutrition rates remain across geographical areas, wealth quintiles and mother's education levels. Micronutrient deficiencies also remain persistent, especially for children and women of reproductive age. For instance, an estimated 55% of Cambodian pregnant women are anaemic, increasing the risk of premature birth, haemorrhage during delivery, and post-partum depression. Preliminary CDHS 2021–2022 findings suggest that the percentage of overweight children has doubled from 2% to 4% since 2014, with implications for NCDs. These developments are causing a “triple burden” of malnutrition in Cambodia (persistent undernutrition and micronutrient deficiencies coinciding with over-nutrition).

During the pandemic, households coped by switching to cheaper food, with over one half of households cutting the size of meals and reducing intake of foods rich in protein, vitamin A, and iron. A high-frequency phone survey that the United Nations Children's Fund (UNICEF) and World Food Programme (WFP) have conducted since the onset of the pandemic suggests that household food security and nutrition deteriorated in 2022 due to food price increases, with 7% of urban households having insufficient (poor or borderline) food consumption in April 2022, compared to 0% in December 2021. Household intake of important nutrients (protein, heme iron) also worsened in 2022, and was lowest among urban populations and households with persons with disabilities. In April 2022, 37% of women (44% in households classified as IDPoor, 41% in households residing in rural areas) were unable to consume a diet meeting minimum dietary diversity indicating that coping strategies may have disproportionately impacted female household members. Among children aged 6–23 months, the diet of one in four (24%) met the standards for minimum dietary diversity (five or more food groups) in 2021/2022; one in five (21%) consumed unhealthy food.

Despite the high return on investment of good nutrition during the first 1,000 days of life for optimal growth and development, exclusive breastfeeding practices have continuously declined in children under six months (75% [2010], 52% [2021]). Increasing consumption of formula milk among children aged six months to two years is the result of aggressive marketing of breastmilk substitutes alongside limited enforcement of regulations and insufficient knowledge and capacity among caregivers to exclusively breastfeed. As more women (around 80%) join the workforce, they leave their young children with other family members and lack the time to breastfeed and prepare healthy complementary foods. Inadequate water, sanitation and hygiene (WASH) conditions and practices also impact childhood malnutrition through high rates of diarrhoeal disease and infection.

Healthy diets are one of the key determinants for good nutrition; however, the typical diet and poor food consumption patterns in Cambodia are substantial contributors to malnutrition. Across the country, diets are largely monotonous and characterized by high rice intake with some fish and vegetables, but low consumption of micronutrient-rich foods, such as beans, nuts, dairy, eggs, and vitamin-A/iron-rich fruits and vegetables. While progress has been made to build in-country capacity to fortify rice with essential micronutrients, to date, fortified rice remains unavailable in Cambodia. Increasing food prices may lead to higher consumption of unhealthy, ultra-processed foods, which are less expensive, more convenient, and better marketed than other foods.

Pandemic-related income and demand shocks have likely increased poverty, with the share of households living below the updated national poverty rate at 17.8% in 2019/20 and 22.8% in rural areas, and deteriorated household food security and nutrition. The war in Ukraine has exacerbated

the affordability of food, increasing global prices of food, fuel and fertilizer. The global food crisis is expected to cause, in this order: households to struggle to access food due to sustained food inflation; and both local food production and availability to decline due to price hikes for fuel and agricultural fertilizer, amplifying food access issues experienced in the first wave.

Food inflation in Cambodia (measured by the Consumer Price Index) reached 6.3% in April 2022. The cost of a balanced food basket (measured by WFP) was 6.5% higher in May 2022 compared to the same period in the previous year, with food price hikes disproportionately affecting rural areas where most of the poor reside. Cambodian households spend, on average, almost half (48.7%) of their income on food, while poor and vulnerable households spend considerably more (58.9%); their food security is thus contingent on stable food prices and may rapidly deteriorate with price shocks.

While households adopting negative coping strategies diminished in 2022 with economic recovery efforts, nearly 30% in urban areas rely on at least one livelihood-based coping strategy, with 10% utilizing harmful and potentially irreversible coping mechanisms at a crisis or emergency level to meet their essential needs. Households with a member with a disability are more likely to engage in negative coping strategies.

In early 2022, prices for gasoline (regular) and diesel soared, up 67% and 45% respectively, compared to the same period in 2021, with potentially adverse effects on local food production, fuel-run farms, and food costs due to rising transportation costs. Global prices of agricultural fertilizers, which Cambodia mostly imports from neighbouring countries, increased considerably. Wetter conditions in the dry season in 2021/2022 translated into favourable growing environments for dry-season paddy with yields expected to be higher than the previous year. In May 2022, the average yield of dry-season paddy was 4.6 tonnes per hectare, slightly above the 2021 average (4.5 tonnes/hectare). However, the cultivation area for wet-season paddy was lower than the same period in 2021, as sowing activities in some areas were delayed due to heavy rainfall. Other factors reducing cultivation likely include rising costs of fuel and agricultural fertilizer (nitrogen, phosphate, potash). Lower agricultural output, particularly for rice (Cambodia's staple food), will negatively impact food security.

Continued investment in child health and development is critical beyond the first 1,000 days for early gains to be sustained. Data on the nutritional status of school-age children are scarce and the data available suggests that school-aged children (5–19 years) have concerning nutrition and are affected by malnutrition, resulting in stunting, wasting, micronutrient deficiencies, and overweight/obesity. Although children are still more likely to be underweight than overweight, the rapid proliferation of processed foods high in fat, sugar, and salt impact diet quality and future risk of obesity for children, lending to the triple burden of malnutrition, including micronutrient deficiencies. Schools are a cost-effective forum for school health and nutrition programmes (school feeding, healthy diet and WASH behaviour change interventions) to instil lifelong habits and improve health and nutrition outcomes.

Good nutrition is vital to the rights to health and food and to boost long-term economic development and recovery, in favour of human capital development. The annual cost of malnutrition in Cambodia ranges from 1.5 to 2.5% of overall GDP. National multisectoral plans are in place for Food Security and Nutrition under high-level government leadership: 2nd National Food Security for Nutrition (NSFSN 2019–2023); Nutrition for Growth (N4G) commitments 2021–2030; and the three-year national Global Action Plan (GAP) roadmap for prevention and treatment of wasting (2022–2024). However, these plans and commitments need to be operationalised. Currently, the National Nutrition Program (NNP) only reaches 10% of the estimated 60,000 children with severe wasting who need lifesaving

treatment. The GAP roadmap estimates that USD 25 million is needed over the next three years to address acute malnutrition, but just 31% of the funds have been made available.

Cambodia is one of the countries most susceptible to the effects of climate change, notably natural disasters (floods, drought) and erratic rainfall patterns, with potential adverse effects on agriculture, livelihoods, food security and nutrition. High vulnerability is linked to the population's general reliance on rain-fed subsistence farming and labour-intensive and/or low-skilled jobs in manufacturing and services, lending to low adaptive capacity to face natural disasters. The 2019 Consolidated Livelihood Exercise for Analyzing Resilience (CLEAR) revealed changes in agricultural land use since 2013 – expansion of rice paddies into former fishing grounds (Tonle Sap), transition from rice production to cash crops (Otdar Meanchey, Ratanakiri), conversion of wet lowland paddy to vegetable (Takeo, Svay Rieng), and encroachment of industrial crops on forests (Koh Kong, Preah Vihear), with potential effects on food production (decreased soil fertility due to increased use of chemical fertilizer/pesticide, reduced forest land, increased monocropping, intensive land use), food security (less household access to wild food and non-timber forest products) and nutrition (replacement of nutrient-dense food sources from capture fisheries with staple crop production around Tonle Sap).

Disparities in access to safe water, sanitation, and hygiene

Despite increases in WASH coverage – 65% of rural Cambodians have access to basic water supply, 61% to basic sanitation, and 71% to basic hygiene, and Cambodia's first open defecation-free province (Svay Rieng) verified in 2022 – Cambodia is off-track to achieve universal basic water supply and sanitation by 2030 based on annual changes achieved in 2000–2020 and remaining gaps, exclusions and inequities. Further, risks of exclusion in WASH are exacerbated by the vulnerability of WASH services to climate-related hazards. The General Population Census of Cambodia 2019 provided updated data on these gaps and on those at risk of being left behind. Although gaps in the use of basic drinking water between urban and rural areas have narrowed, rural areas (68% with access) remain behind urban areas (86%), and disparities in basic water access by socioeconomic status remain with a 44% difference between the richest quintile (94% use) and the poorest (50%). Gaps also remain between geographical areas, with a 61% difference between provinces (97% access to basic water in Svay Rieng, 36% in Stung Treng). Around 40% of those who use water from surface water sources reside in 20 high-burden districts due to high population and low coverage use of basic water supply.

Although the urban and rural gap in basic sanitation has narrowed, rural areas (57%) remain behind urban (73%). Basic sanitation services also vary between the richest (81% use) and the poorest (32%), and between geographical areas by 48% between provinces (79% access in Phnom Penh, 31% in Ratanakiri). Around 25% of those who practice open defecation reside in 20 districts, increasing risks to child health and growth; nearly 50% in four northeastern provinces still practice open defecation.

Schools with basic handwashing facilities (available water and soap) have increased (47% [2019], 68% [2021]). Still, 24% of schools lack a basic water supply, 68% lack basic sanitation, and 32% lack basic hygiene facilities. Rural and pre-primary schools are below national averages for all indicators. In health facilities, reliable national WASH data is unavailable, and Cambodia's reporting on this to global mechanisms (UNICEF-WHO Joint Monitoring Programme for WASH) is outdated and incomplete.

Recovery from learning loss and renewed commitment to the education system

Under the Education Strategic Plan 2019–2023, the Ministry of Education, Youth and Sports (MoEYS) set goals to improve education quality and equity at all levels. The Education Strategic Plan 2019–2023 visions, targets and strategies align with those of SDG4. RGC priorities focus on ensuring inclusive,

equitable quality education via effective leadership and management of education services at all levels.

The pandemic caused students to fall further behind with school closures. The Grade 6 National Learning Assessment confirmed significant learning loss: Students failing to meet basic proficiency increased in Khmer (34% [2016], 45% [2021]) and mathematics (49% [2016], 74% [2021]).

While school enrolment increased significantly in the past decade, ~360,000 children and adolescents of primary and lower secondary school age remained out of school in 2020. While concrete evidence is not yet available, the number of out-of-school children and youth likely increased due to the pandemic. As a result, and because of geographical disparities, adolescents of lower secondary school age in Svay Rieng were twice as likely to be enrolled in school than in Monduliri. Even prior to the pandemic, dropout rates were elevated, especially at the lower secondary level where 18.2% of students leave school early. Recent studies highlight that gender also aggravates disparities in that male students are 2% more likely to drop out than female students. Furthermore, the pandemic learning disruptions increased dropout rates due to inequitable access to learning, caused by various factors – household income, parental/caretaker education level, and access to information and communications technology (ICT) equipment and Internet. While Cambodia has existing equivalency programmes and strategies to re-engage out-of-school youth in education, there is still room to scale up these interventions to ensure equitable participation in and completion of basic education, so that all youth have equitable access to decent and productive employment opportunities. Overall, the Lifelong Learning Policy, launched in 2019, affirms Cambodia’s commitment to provide lifelong, inclusive, equitable learning opportunities to all, and prioritise early school leavers, out-of-school children and youth, ethnic minority groups, and vulnerable and marginalised groups to gain literacy and technical and vocational skills.

Many children who attend school struggle to acquire basic academic skills. The 2018 Programme for International Student Assessment for Development (PISA-D) revealed that only 8% of 15-year-olds in Cambodia reached minimum proficiency in reading and 10% minimum proficiency in mathematics. Student learning achievements at higher levels of education rely on skills acquired in the early grades (1–3); however, learning assessments using a national sample in the past decade show that students are already facing difficulties in acquiring basic competencies in Khmer language and mathematics, even in early grades. Significant socioeconomic and geographic disparities are evident: Adolescents of the poorest households (lowest quintile) are three times more likely to perform below minimum proficiency in all domains of reading, mathematics and science than children of higher socioeconomic status; students who speak a minority language at home are over twice as likely to perform poorly in reading and mathematics than students who speak Khmer at home; and female children from families in the lowest income quartiles in Siem Reap province are four times less likely to advance beyond primary education than children from the highest-income families in Takeo province.

A key factor contributing to poor student learning outcomes is inadequate qualifications and limited capacity of teachers, a priority area identified by MoEYS to improve quality of education in Cambodia. While the educational level of teachers has improved in the last decade, many teachers still need to update and upgrade their qualifications to meet the standards outlined in Cambodia’s Teacher Policy and Teacher Policy Action Plan. According to 2021/2022 MoEYS data, almost one quarter of primary education teachers had an education level below upper secondary, while nearly half of all secondary education teachers had yet to obtain a bachelor’s degree with a specialisation in subjects they teach. Once they enter the teaching profession, moreover, there are few opportunities for professional development to update their knowledge and pedagogical skills.

Teacher educators at teacher training institutions play a critical role in preparing a high-quality, motivated teaching workforce. Yet, the capacity of Teacher Education Institutions to provide quality teacher education in accordance with the current Teacher Education Provider Standards is limited. At Provincial Teacher Training Centres that offer teacher training programmes for primary school teachers, 50% of staff lack a bachelor's degree. Upgrading qualifications of teacher educators as a recognised measure to improve quality of teacher education is ongoing and will need further investments to meet the requirement for the provision of quality education. Likewise, 13% of all staff at Regional Teacher Training Centres preparing lower secondary teachers lack a bachelor's degree. Teachers and educational staff were also strongly affected by the pandemic. Within a short time, they had to adapt to new ways of teaching, shifting from in-person to online platforms, often with limited digital tools and training. Despite the challenges, teachers adopted innovative approaches to continue delivering quality, inclusive and equitable education. Lessons learned from the pandemic should inform strategies and policies to build the resilience of the education system and minimize future disruptions, including by harnessing digital technology and strengthening digital competencies of teachers and education staff.

Early childhood education (ECE) is critical to children's learning outcomes. Yet, many young children are still not receiving quality ECE services in Cambodia. According to Education Management Information System (EMIS) data, the ECE participation rate among 5-year-olds (one year before primary education [SDG 4.2.2]) was 61% in 2020/21 at the national level with significant geographical disparities (32% in Pailin, 81% in Prey Veng). While ECE centres, including state and community preschools, have steadily increased, the quality of ECE services requires further upgrading, particularly among community preschools. Only 40% of teachers have received formal training and 41% of community preschools have met the national quality standards.

RGC investment in education, including Comprehensive Sexual Education, steadily increased until 2020 but declined in 2021. The allocation to MoEYS doubled (KHR 1,814 billion [2015], KHR 3,738 billion [2020]). Due to the pandemic, however, the 2021 MoEYS budget was cut by 12% (KHR 3,302 billion) compared to 2020. The construction and investment budget (capital budget) was cut by 48%, and the programme budget (mission, training, workshops) was cut by 6%, impacting access to, and quality of, education. In 2022, the MoEYS budget remained around KHR 3,248 billion.

Limited capacity has led to increasing privatisation of the education system, resulting in further education inequality and inequity. Learners of higher socioeconomic status in urban settings benefit most while others cannot afford a better education. Decreased enrolment and retention are also evident in higher education, with a 13.3% Gross Enrolment Ratio reported in 2020–2021 and low participation of female students in STEM. This further jeopardises Cambodia's human capital development as well as its transition towards an industrial economy and upper-middle income country by 2030.

Commitment to scale up social protection systems

Cambodia's social protection system has expanded rapidly in recent years, building on its National Social Protection Policy Framework (NSPPF) 2016–2025, with social protection used as a strategy to mitigate the socioeconomic impacts of the pandemic. Significant gains were made in expansion and integration of the social assistance programmes: COVID-19 Cash Transfer programme, covering an estimated 2.8 million IDPoor; routine cash transfer programmes (e.g. Cash Transfer Programme for Pregnant Women and Children Under 2 covering 240,000 beneficiaries); Family Package integrating the cash transfer programmes for pregnant women, children, older persons, persons with disabilities, and persons living with HIV; and the launch of the national school-feeding programme in 2020 to

address poverty, health and education outcomes, with an estimated coverage of 1 million individuals. Additionally, an estimated 19% of the most vulnerable IDPoor households are protected under the COVID-19 cash transfer programme and the health equity fund (HEF), with almost one quarter of children under two years and pregnant women covered by cash transfer programmes and other benefits. Under employment-based social security, social insurance (health, injury, and pension schemes) was expanded with the UHC agenda. One fifth of employed women enjoy maternity benefits under the NSSF, with 14% of workers insured against work injuries and 15% of persons with disability receiving (contributory and non-contributory) benefits. The social protection (SRSP) framework also systematises the RGC approach to assist people affected by natural disasters.

Nonetheless, the social protection system remains fragmented, and coverage is a challenge. Social assistance programmes are limited by a rigid poverty targeting framework which, despite improvements, allows for potential exclusion of vulnerable, hard-to-reach populations. Development partners estimate that the daily per capita consumption of an additional 30.3% of the population may be between the poverty line and 1.5 times of the poverty line. Social protection programmes targeting vulnerable groups (children, GBV survivors, persons with disabilities, older persons) are sub-optimal, with benefits insufficient to meet human development outcomes, particularly for children. Employment-based social security schemes, now under accelerated development, serve a minority of the eligible population (12%), due to the slow formalisation of informal work. Further, 53% of Cambodians lack access to social health protection coverage while patients' out-of-pocket health expenditure is around 60% of the total health expenditure.

RGC investment in the social protection sector is gradually expanding, notably during the pandemic. According to the General Secretariat of the National Social Protection Council, spending on social protection increased to 2.5% of GDP versus 1.3% (1.8% including government, donor, and private contributions) in 2019 primarily due to increased investment in pandemic social protection schemes. The allocations in 2022 were slightly lower than in 2021, given the investment under the COVID-19 stimulus package subsequently diminished. Still, investment in social assistance greatly increased (1.0% [2019], 1.2% [2021]), while budget trends in social security remained relatively stagnant at 1.0% of nominal GDP in 2019 and 1.1% in 2021 (1.4% and 1.3% including private contributions, respectively). In 2022, the budget has reflected the RGC commitment to social protection, with budget allocations at 2.5% of nominal GDP, or 8.7% of the total budget (0.738 billion). The RGC has shown commitment with continued support for pandemic measures for the poor until the next national elections in 2023 and USD 110 million reserved for one-off cash support targeting the near-poor. The two-pronged approach to formalise informal workers while progressively increasing coverage for the near-poor would expand coverage and increase the poverty reduction impacts of the social protection system.

Strengthening gender-based violence prevention, response and recovery

Gender inequality, violence against women, and GBV and harassment at work remain pervasive human rights violations and are viewed as global public health and clinical problems of epidemic proportions. These issues have prevented women and girls from accessing economic, educational and social resources, and from exercising SRHR and living free of violence. Social norms and beliefs that restrict women's rights and privileges and give higher value and power to men remain prevalent. Increased violence against women and children during the pandemic has been cited globally. In Cambodia, the number of calls to violence hotlines after the lockdown (March 2021) increased seven times compared to before November 2020. Internet searches on information for survivors increased 52%, searches for mental health increased 39% from August 2020–December 2020 to January 2021–July 2021, and searches on mental health symptomatology (e.g. depression or anxiety) increased 19% during these time periods. Help-seeking searches (“how to heal from trauma” or “counselling near

me”) increased 17%. Women and girls, notably those with additional vulnerabilities (youth, out-of-school, unemployed, women with disabilities, migrant workers) may have experienced higher exposure to violence throughout the pandemic. Although they sought information and services, few online resources and systems are reliable, provide actionable steps and coordinate support.

IPV is one of the most widespread forms of GBV. Around 21% of working age women in Cambodia have experienced IPV at some point in their lives; for three quarters of them, the IPV was severe. IPV is seldom a one-off occurrence; over 80% of women reported that the acts of violence they experienced occurred multiple times. The impacts of emotional abuse may be less visible but equally devastating; almost 32% of women have experienced emotional abuse from a partner. Rural women faced higher rates of IPV than urban women, and women in their late twenties or thirties reported higher rates than older women. Reports from men confirm the pervasiveness of IPV in Cambodia. Over 36% of ever-partnered men reported perpetrating physical and/or sexual violence against a female partner in their lifetime; this was true across ages, regions, and income levels.

Women with disabilities face similar levels of violence as those without disabilities. However, women with disabilities reported more emotional, physical (25.4% of those surveyed) and sexual violence (5.7% of those surveyed). LGBTQI+ persons experience high rates of violence by family members and significantly higher rates of IPV. Research with trans women across Cambodia found that almost 40% had been sexually abused and almost one quarter had been physically abused. Female entertainment workers experience a high level of violence. Based on a survey conducted in 2022, 1 in 10 female entertainment workers had experienced physical and/or sexual violence in the previous 12 months, 1 in 10 had experienced physical violence by a sexual partner in the previous 12 months, and 1 in 20 had ever been physically forced to have sex. Moreover, only 56% would be comfortable seeking assistance if they experienced violence.

Based on the Adolescent and Youth Situation Analysis in Cambodia, 17% of youth respondents had experienced verbal abuse at their workplace, all of whom were female. Around 50% of them experienced it more than once and only 10% reported it to local authorities. No employed youth respondents reported having experienced physical or sexual abuse at their workplace.

Although there is no national prevalence data on sexual harassment, studies show evidence of it in Cambodia. CARE found that 28.6% of female garment factory workers had been sexually harassed the previous year and 16.5% of women and 7.6% of men experienced sexual harassment outside the factory. The harassment faced by men was different, primarily pressure to accept or participate in the harassment of women. Public spaces and public transport are common sites of sexual harassment. The Cambodian Center for Human Rights (CCHR) and partners found that over 90% of transwomen experienced some form of harassment in public spaces, in most cases multiple times in the previous year. There is currently no clear legal definition of sexual harassment in law; many types of harassment are not covered (e.g. harassment by a co-worker or outside a workplace) and the only recourse for victims is via a police report.

A legal framework exists to address GBV, but substantial gaps remain between legislation, its implementation and enforceability, with significant capacity needs in the police, judiciary and other accountability mechanisms. While sexual harassment is the most widely documented form of GBV at work, manifestations of violence and harassment at work are diverse and multifaceted and require an integrated, inclusive and gender-responsive approach that utilizes entry points (social dialogue, occupational safety and health) to ensure protection from and prevention of workplace violence and harassment.

Reforms in child protection systems

The child protection sector is experiencing significant legislative, policy and institutional reforms, with the establishment of a fully functioning comprehensive child protection system, a key priority to prevent and respond to all forms of child protection risks and violations at all levels. Key frameworks guiding this process include the law on child protection (final stage), standard operating procedures on child protection (under development), a child protection sector strategic implementation plan 2022–2026, a strategic plan for training the social service workforce (SSW) focusing on child protection 2021–2025, a strategic plan on SSW 2022–2031, a business case on investing in SSW in Cambodia 2021, a law on juvenile justice 2016, and other sub-sectoral plans on preventing and responding to violence against children 2024–2028, a child protection information management system (CPIMS), an action plan to prevent and respond to online child sexual exploitation (2021–2025) and care reform.

These reforms are critical because, despite significant improvements in child protection, violence, and unnecessary family separation impact many. The United Nations Committee on the Rights of the Child 2022 concluding observations highlight several areas of concern around child protection, including child sexual exploitation and abuse. The CDHS 2021 found that children aged 1–14 years experience high rates of violent discipline; 68% of boys and 65% of girls experienced some form of violent discipline in the prior month, while 28% of fathers and 27% of mothers believe physical punishment is necessary to discipline a child. Additionally, 45% of children reported emotional abuse in 2017. Despite a significant decline in the number of institutionalised children (59% fewer from 2016 to 2019), there are still 9,500 children in residential care, although most have at least one living parent. In 2021, 1,422 children lived in detention, many of whom could reside in a non-stigmatised environment if non-judicial measures (e.g. diversion) were expanded. The 2022 Disrupting Harm study found that over 80% of 12–17-year-old children have Internet access, which comes with grave risks; 11% of Internet-using Cambodian youth suffered serious cases of online sexual exploitation and abuse.

These issues reveal the need to scale up child protection case management services (e.g. Primero, which is already in operation), online child protection, programmes to change social norms around the acceptability of violence against children (e.g. PROTECT), and parenting programmes that promote non-violent discipline and nurturing environments. Cambodia's child protection case management system is in a nascent state; while child protection-related social work functions are being added to administrative mechanisms (e.g. via Sub-decrees 182, 183, 184), the sub-national civil service is not adequately trained to carry out its functions, indicating the need for long-term capacity-building.

In 2022, the Committee on the Rights of the Child urged the following: effectively investigate and intervene in all cases of sexual exploitation and abuse of children; establish a comprehensive legal framework for the referral and delivery of child protection services; define roles and responsibilities of each government entity; define the role of social workers; prioritise family-based care for children, supported by more social workers in all provinces, and diversion measures; and address the long-standing issue of an insufficient budget by increasing the allocation of financial, human and technical resources for qualified social workers and other child protection professionals.

3.3 ECONOMIC TRANSFORMATION ANALYSIS

Economic transformation

The Cambodian economy has expanded rapidly since 1995, except the years of the 2009 global financial crisis and the 2020 COVID-19 crisis. Supported by steady FDI inflows and export demands, the economy grew hastily at an average real rate of 7.1% per annum (1995–2021), lending to a GDP of USD 27 billion in 2021, equivalent to Purchasing Power Parity (PPP) constant 2017 international prices of USD 72.2 billion. Rapid economic growth was accompanied by strong capital accumulation

reaching USD 210.4 billion in 2019 and job creation with the total labour force increasing from 4.7 million in 1995 to 9.3 million in 2021. Labour productivity, measured as the 2017 constant PPP GDP per worker, increased from USD 3,232 in 2000 to USD 8,147 in 2021.

The economy shifted from dependence on agriculture to industry, with the latter expanding steadily to 36.5% of GDP in 2019, while agriculture shrank to 22.1% and services remained at 41.4%. The expansion of industry was driven by drastic growth of construction (16.3% of GDP in 2019) and mining and quarrying (2.2%), while garment, footwear and travel goods remained flat (11.4%). The composition of services has remained stable; trade, transport and communications and real estate represent the largest shares.

Table 2 shows employment by gender and economic activity in 2012 and 2019, based on the Labour Force Surveys. Of the 7.883 million people employed in 2019, 52% were male and 48% female. The highest share of the employed population was in services (40%), followed by agriculture (33%) and industry (27%). From 2012 to 2019, employment in all sectors increased, with industry representing the largest increase.

Table 2. Employment by sex and economic activity

| | Thousands of people | | | | | | Share of Total (%) | | | | | |
|--------------------|---------------------|-------|-------|-------|--------|-------|--------------------|------|------|------|--------|------|
| | Total | | Male | | Female | | Total | | Male | | Female | |
| | 2012 | 2019 | 2012 | 2019 | 2012 | 2019 | 2012 | 2019 | 2012 | 2019 | 2012 | 2019 |
| Total | 7,197 | 7,883 | 3,798 | 4,117 | 3,400 | 3,766 | 100 | 100 | 53 | 52 | 47 | 48 |
| Agriculture | 2,393 | 2,613 | 1,282 | 1,386 | 1,112 | 1,226 | 33 | 33 | 18 | 18 | 15 | 16 |
| Industry | 1,816 | 2,132 | 935 | 1,154 | 881 | 978 | 25 | 27 | 13 | 15 | 12 | 12 |
| Services | 2,988 | 3,138 | 1,581 | 1,577 | 1,407 | 1,561 | 42 | 40 | 22 | 20 | 20 | 20 |

Source: Report on the Cambodian Labour Force Survey 2019 and Cambodia Labour Force and Child Labour Force Survey, 2012.

Table 3 shows average monthly earnings of employees by gender and economic activity in 2017 PPP USD. Between 2010 and 2019, earning increased in all activities, with an average increase of USD 476 (169%) for male workers and USD 445 (203%) for female workers. The average wage ratio of women to men grew (78% [2010], 88% [2019]). Average monthly earnings vary across economic activities and gender.

Table 3. Average monthly earnings of employees by sex and economic activity in 2017 PPP USD

| Economic activity | 2010 in 2017 PPP USD | | | 2019 in 2017 PPP USD | | | Difference 2019–2010 in 2017 PPP USD | | | Female / Male in per cent | |
|---|-------------------------|------|--------|-------------------------|------|--------|---|------|--------|------------------------------|------|
| | Total | Male | Female | Total | Male | Female | Total | Male | Female | 2010 | 2019 |
| Total | 256 | 282 | 219 | 717 | 758 | 664 | 461 | 476 | 445 | 78 | 88 |
| A. Agriculture; forestry and fishing | 145 | 164 | 125 | 467 | 504 | 425 | 322 | 340 | 300 | 76 | 84 |
| B. Mining and quarrying | - | - | - | 649 | 704 | 430 | - | - | - | - | 61 |
| C. Manufacturing | 239 | 254 | 232 | 687 | 706 | 678 | 448 | 452 | 446 | 91 | 96 |
| D. Electricity; gas, steam and air conditioning supply | 415 | 415 | - | 706 | 777 | 457 | 291 | 362 | - | - | 59 |
| E. Water supply; sewerage, waste | - | - | - | 464 | 476 | 423 | - | - | - | - | 89 |

| | | | | | | | | | | | |
|---|-----|-----|-----|-------|-------|-------|-----|-----|-----|-----|-----|
| management and remediation | | | | | | | | | | | |
| F. Construction | 259 | 261 | 217 | 650 | 665 | 577 | 392 | 404 | 359 | 83 | 87 |
| G. Wholesale and retail trade; repair of motor vehicles and motorcycles | 236 | 311 | 171 | 677 | 766 | 574 | 441 | 455 | 403 | 55 | 75 |
| H. Transportation and storage | 275 | 292 | 153 | 698 | 702 | 655 | 423 | 411 | 502 | 53 | 93 |
| I. Accommodation and food service | 241 | 307 | 202 | 569 | 672 | 505 | 328 | 365 | 302 | 66 | 75 |
| J. Information and communication | 567 | 604 | 423 | 900 | 832 | 1,078 | 333 | 228 | 655 | 70 | 130 |
| K. Financial and insurance | 641 | 648 | 626 | 965 | 984 | 932 | 325 | 336 | 306 | 97 | 95 |
| L. Real estate | - | - | - | 1,321 | 1,294 | 1,350 | - | - | - | - | 104 |
| M. Professional, scientific and technical | 855 | 836 | 897 | 1,138 | 1,272 | 1,023 | 283 | 435 | 127 | 107 | 80 |
| N. Administrative and support service | 363 | 405 | 311 | 689 | 714 | 657 | 325 | 308 | 346 | 77 | 92 |
| O. Public administration and defence; compulsory social security | 265 | 274 | 199 | 1,096 | 1,132 | 940 | 831 | 858 | 741 | 73 | 83 |
| P. Education | 271 | 278 | 258 | 886 | 935 | 831 | 615 | 657 | 573 | 93 | 89 |
| Q. Human health and social work | 601 | 712 | 443 | 1,062 | 1,091 | 1,032 | 460 | 379 | 589 | 62 | 95 |
| R. Arts, entertainment and recreation | 546 | 300 | 707 | 919 | 894 | 938 | 373 | 594 | 231 | 236 | 105 |
| S. Other service | 191 | 233 | 173 | 570 | 812 | 366 | 379 | 579 | 192 | 74 | 45 |
| T. Households as employers; undifferentiated goods- and service-producing activities for own use | - | - | - | 1,260 | 2,035 | 778 | - | - | - | - | 38 |
| U. Extraterritorial organizations and bodies | 689 | 773 | 534 | 866 | 884 | 842 | 177 | 461 | 308 | 69 | 95 |

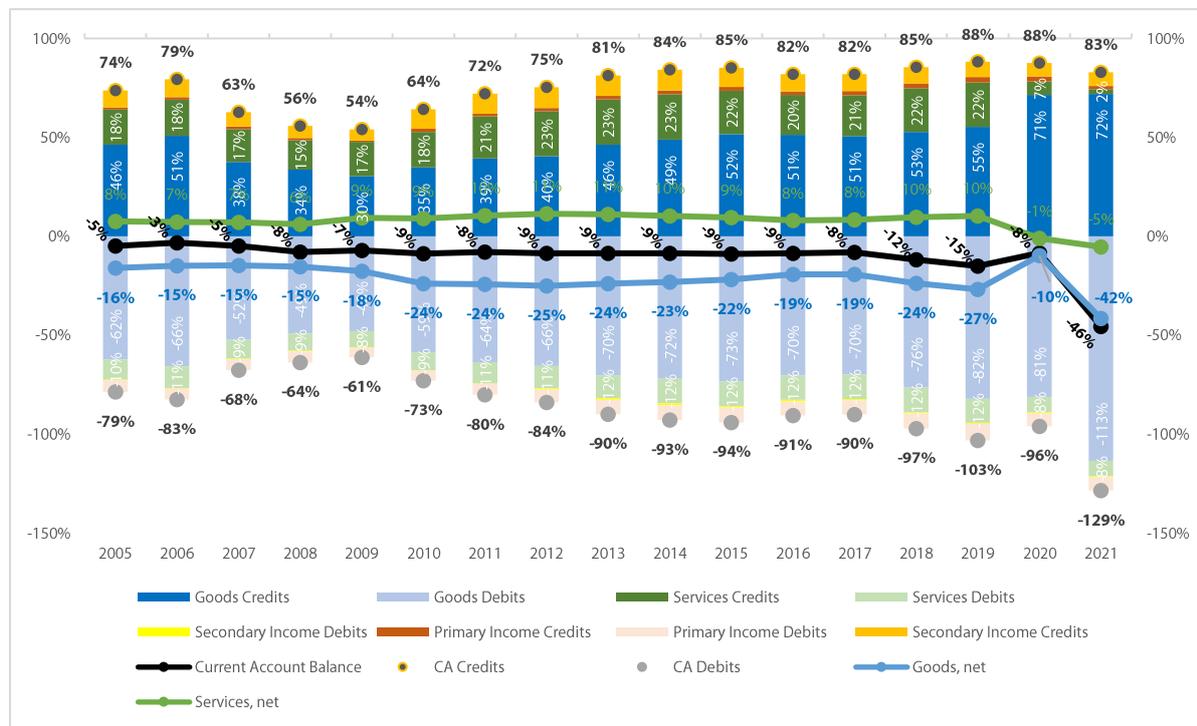
Source: Labour Force Survey reported by the International Labour Organization.

Sectoral reallocation has helped increase GDP, employment and wages, but the benefits have been unevenly distributed across sectors, regions, and social groups, against industrialisation, urbanization and migration. For example, the sectoral shifts in output, where industry is increasing its share relative to agriculture, and the sectoral shifts in employment, where the number and share of workers in agriculture have been stable, show that sectoral reallocation has increased the return to owners in the industry sector and contributed less to compensation of small-scale agricultural farmers.

International trade and exports and imports have grown faster than the economy. Cambodia has a net deficit in goods and primary income and a surplus in services and secondary income. Figure 3 shows the evolution of the current account as a share of GDP (with the blue and black lines showing consistent trade and current account deficits). In this growing economy, current account deficits reflect large domestic absorption by households, firms and the government. In 2021, the economy

had abnormally high imports, leading to a trade deficit of 42% of GDP and a current account deficit of 46% of GDP. These large trade and current account deficits translate into a decumulation of net assets and, if persistent under a managed exchange rate regime, could require an exchange rate adjustment.

Figure 3. Current account and its components as a share of GDP



Source: National Bank of Cambodia.

In 2019, primary export destinations were: United States (29.8% share); Japan (7.7%); Germany (7.3%); China (6.8%); and United Kingdom (6.6%). Main import sources in 2019 were: China (37.4% share); Thailand (15.9%); Vietnam (13.4%); Japan (4.4%); and other Asian countries (3.9%). The low and lower-middle-income classification has granted Cambodia preferential access via the Everything but Arms duty-free quota-free access to the EU market and to the US under trade preference status. However, this preferential access to both markets is suspended over human rights concerns. As Cambodia graduates from LDC status, it will need to negotiate bilateral and multilateral trade agreements to keep preferential access as it will lose LDC-specific preferences and special and differential treatment under WTO agreements. Cambodia has 17 free trade agreements (FTAs): 10 are signed and in effect; negotiations are launched for one; and six are proposed or under consultation and study.

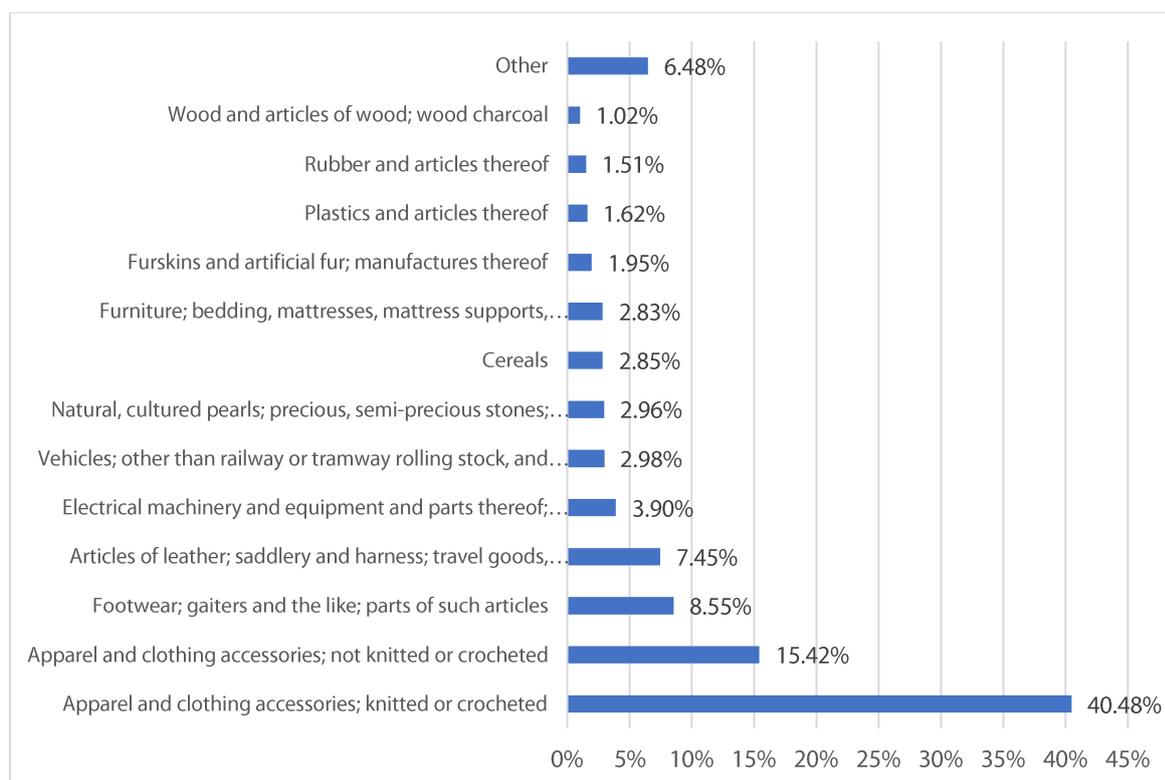
Of the FTAs currently in effect, three were enacted in 2022 and are important given current and expected trade volumes with its partners: Cambodia-China FTA (CCFTA); Cambodia-Korea FTA; and Regional Comprehensive Economic Partnership (RCEP). The RCEP comprises 15 Asian-Pacific countries accounting for 30% of the global population, 30% of global GDP, 29% of global trade, and 32.5% of global investment. RCEP zero-tariff products exceed 92% of trade in goods, and RCEP opens at least 65% of service sectors, while it harmonises rules of origin and increases regional content requirements for products. The RCEP may impact: manufacturing exports in global value chains, via simplification of the rules of origin; structural transformation and export diversification in textile and garment exports and agri-processing; enhanced trade facilitation and technical standards; structural transformation of the economy's service activities to more digital and technology-based services trade; investment

facilitation via the protection of foreign investment, liberalisation and promotion; development of SMEs; and development of e-commerce.

Figure 4 looks at Cambodia’s key exports in 2019: knitted apparel and clothing accessories (40.48% of total exports); no knitted apparel and clothing accessories (15.42%); footwear (8.55%); leather goods (7.45%); and electric machinery and equipment (3.90%). Manufacturing goods grew from 45% in 1995 to consistently over 90% since 1998, with medium and high technology of manufactured exports gaining recent importance. According to the Atlas of Economic Complexity, the economy became more complex in the last decade due to increasing export diversification, led by the previously cited goods, travel and tourism and precious metals and stones.

Economic growth has been fuelled by the export-led strategy in which textiles and garments continue expanding its global market share. More export products (trunks/cases, bicycles, tanned furskins, insulated wire, plastic building ware) have also been added rapidly. Despite increasing diversification, the product space centres on few products and the Strategic Bets Approach calls for coordinated measures to enter areas with future diversification potential. According to the Economic Complexity analysis, sectors with high potential for new diversification include manufactured articles, industrial machinery, and electronic machinery and equipment. The Trade Integration Strategy of Cambodia identified the following subsectors for export diversification: legal services; information technology and information technology-enabled services; animation; banking; entertainment; and tourism.

Figure 4. Main exports of Cambodia in 2019 as a share of total exports



Source: United Nations Comtrade Database.

Economic transformation and inequality

Table 4 shows average disposable income per capita per month, based on the Cambodia Socio-Economic Survey (CSES). In 2009, average disposable income of the highest quintile group was 25.7

times the lowest; in 2017, it was 9.9 times. A similar decline is observed when comparing the relative average disposable income of the highest quintile with the bottom 40% income earners: In 2009, the ratio was 14.4 times; by 2017, it was 6.3 times. Income convergence has not been constant; both ratios increased as income of the lowest quintile dropped and all other income quintiles increased in 2014, 2016 and in the 2019/2020 CSES.

Table 4. Disposable income per capita by quintile groups, average per month (thousand KHR), 2009–2019/20

| Quintile group | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2019/2020 |
|---------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------------|-------------|
| Lowest | 19 | 28 | 41 | 49 | 67 | 46 | 82 | 59 | 110 | 81 |
| Second | 49 | 69 | 89 | 106 | 135 | 162 | 190 | 191 | 238 | 251 |
| Middle | 88 | 113 | 142 | 165 | 204 | 246 | 284 | 303 | 363 | 392 |
| Fourth | 148 | 180 | 213 | 248 | 298 | 359 | 406 | 449 | 521 | 582 |
| Highest | 488 | 595 | 506 | 571 | 744 | 838 | 890 | 1,074 | 1,090 | 1,309 |
| Top 20% relative to Bottom 20% | 25.7 | 21.6 | 12.3 | 11.8 | 11.1 | 18.2 | 10.9 | 18.2 | 9.9 | 16.2 |
| Top 20% relative to Bottom 40% | 14.4 | 12.4 | 7.8 | 7.4 | 7.4 | 8.1 | 6.5 | 8.6 | 6.3 | 7.9 |

Source: National Institute of Statistics, Cambodia Socio Economic Survey Tables.

Inequality in consumption is relatively modest. The Gini coefficient, the indicator used to measure poverty in Cambodia, is 32.5, slightly lower than neighbouring countries reporting the Gini coefficient in the Human Development Report (HDR). In Thailand and Laos, it is 36.4; in Vietnam, it is 35.7. The Palma index, or the ratio of the top 10% over the bottom 40% is 1.02 for Cambodia, based on CSES 2019/2020. In Laos, Thailand and Vietnam, it is 1.56, 1.54 and 1.48 respectively, based on the HDR.

Table 5. Theil inequality index by region in Cambodia, based on CESES 2019/2020

| Region | Theil | Share | Within groups inequality |
|-----------------------|--------------|------------|--------------------------|
| Phnom Penh | 21.44 | 22.28 | 4.78 |
| Plains | 17.05 | 32.73 | 5.58 |
| Tonle Sap | 14.74 | 24.30 | 3.58 |
| Coastal | 15.94 | 07.04 | 1.12 |
| Plateau and Mountains | 19.50 | 13.65 | 2.66 |
| National | 20.02 | 100 | 17.72 |

Source: UNDP estimations based on CSES 2019/2020.

Table 5 shows regional disparities. According to the Theil index, the most unequal region is Phnom Penh at 21.44, above the national index of 20.02. The plains region is most unequal (32.7%); Tonle Sap is least unequal (14.74). Of all inequality, 88.5% is generated within regions, 11.5% is between regions.

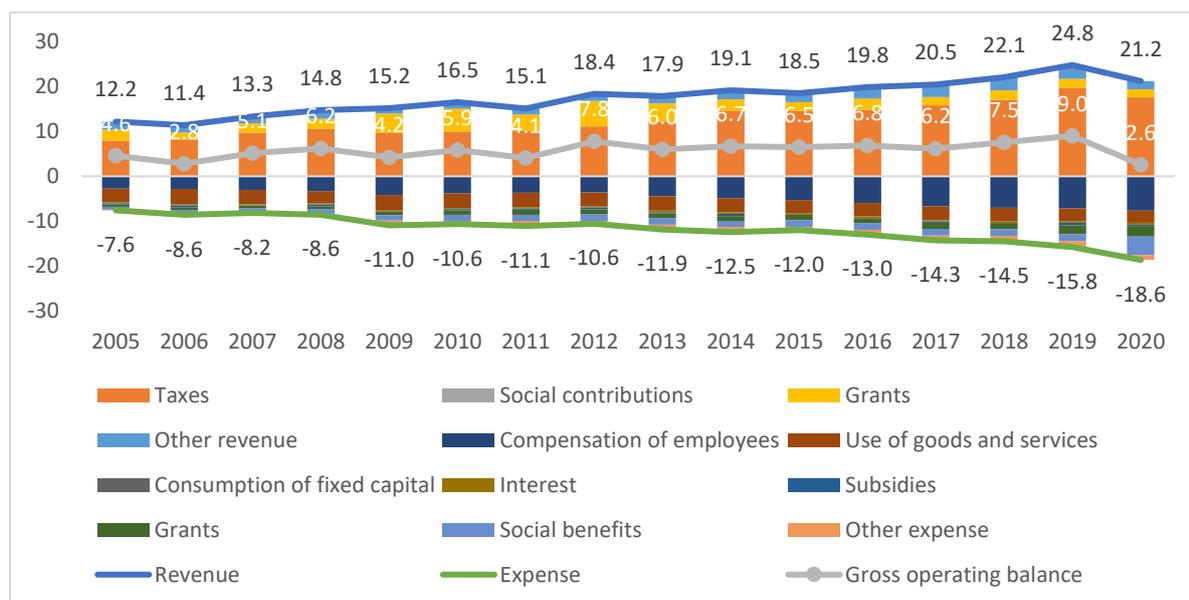
Gender inequality is measured in the Gender Wage Gap in Cambodia report, which uses 2019–2020 CSES data. This report shows a 19% wage gap between women and men, a decrease from 24% in 2017. This gender wage gap can be explained by gender disparities in education (6%) and experience (14%), and overrepresentation of women in low-skilled occupations (4%). Women employed by foreign firms, NGOs and international organizations with equal pay structures reduce the gender gap by 25%, and women employed in services and manufacturing reduce it by 5%. Together, these observable characteristics reduce the wage gap by 5%. In contrast, the unobservable characteristics, which are generally interpreted as evidence of labour market discrimination, contribute 105% of the gap. Women represent 38.8% of the self-employed (versus men [36.8%]) and 20% of unpaid domestic workers (versus men [9.3%]). Among unpaid family workers, both sexes are concentrated in agriculture, at 67.4% for women and 64.9% for men. Women are overrepresented in low-paid, low-skilled occupations and, despite improvements, just 2% of managerial roles, 8.7% of professional roles, and 3.4% of technical roles are held by women. Married women are 38% less likely to have paid employment, and increased family size and a head of household’s low education level each increase the likelihood that women will become wage workers.

Nonetheless, data to measure income/consumption inequality are limited in Cambodia and numbers cannot fully account for economic disparities. According to the HDR, while the income inequality parameter for the inequality adjusted human development index is only 14.3, the life expectancy inequality parameter is 18.1 and education inequality is 27.3 in Cambodia.

Fiscal policies and social spending

As Cambodia has experienced rapid economic growth, the public sector’s share in the economy has been increasing (Figure 5). The government’s revenue represented 12.2% of GDP (2005) and grew to 24.8% (2019), mainly due to a spike in taxes. Expenditure represented 7.6% of GDP (2005) and grew to 15.8% (2019), driven by increases in employee compensation and, to a lesser extent, increases in grants and social benefits. The negative effect of the pandemic on economic activity caused a significant drop in revenue, while expenditure increased with the expansion of social benefits that grew from KHR 1,717 billion (1.52% of GDP) in 2019 to KHR 4,363 billion (4.12% of GDP) in 2020.

Figure 5. Government’s revenue, expenditure and gross operating balance as a share of GDP



Source: International Financial Statistics.

The pandemic shock-responsive social protection programmes have been vital in response to the resultant health and economic crises. The COVID-19 Economic and Social Impact Assessment 2020/2021 shows that social protection proved effective to prevent poverty and stimulate economic growth. COVID-19 emergency cash transfers helped contain a larger surge of poverty on the 20% of households with the lowest income.

Economic informality creates a significant coverage gap in the social protection system as only 15% of the workers are covered with social security, 20% with different social assistance schemes, and routine cash transfer programmes for pregnant women and young children and children in primary and secondary schools were maintained. Thus, most households and workers are not covered by essential social protection programmes. An integrated framework, promoting business registration and formalisation, expanding coverage, and maintaining sustainability, with effective governance and coherency, is essential to effective social protection.

Digital transformation and Industry 4.0 opportunities

According to a United Nations Development Programme (UNDP) report on Industry 4.0, the pandemic accelerated adoption of digital technologies globally by three years and the rate at which digital products and services are developed by seven years. With digital transformation underway, digital technologies are cheaper, more widely available and easier to use. Cambodia's strategic move towards the digital economy and Industry 4.0 is prioritised in its national agenda in the Rectangular Strategy IV, with the adoption of national policies and strategies across trade, e-commerce, socioeconomic development, and e-government.

In Cambodia, digital banking is widespread in urban centres, the use of transport and delivery apps are common, and entrepreneurs are increasingly adopting online platforms to sell their products and connect to suppliers. According to a UNDP survey, up to 11% of MSMEs in Cambodia began selling products or services online to cope with the pandemic. The RGC is adopting digital technologies, for example, to facilitate payment under the existing cash transfer programme. Digital transformation offers an opportunity to advance in socioeconomic development, increase competitiveness, attract new investments, create job opportunities, build a more inclusive and resilient society, and foster a greener, more sustainable development model. For specific industries, the report suggests the use of Industry 4.0 technologies in garments, agro-processing, and emerging industries. However, the report also highlights the importance of adequate strategies, planning and coordination among industrial players and a variety of stakeholders, to mitigate potential negative effects, avoid deepening existing social and economic inequalities and ensure no one will be left behind in industrial transformation.

Despite the high rate of digital adoption, Cambodia ranks 102nd of 141 countries in digital readiness, and an estimated 30% of Cambodians have basic digital skills to use digital systems for Internet searches, communications and information-sharing. There is a notable urban-rural divide in access to the Internet: Internet and mobile phone subscriptions are mostly in urban centres. As access to the Internet was critical in the pandemic for learning opportunities and for basic services and accurate information, many Cambodian households, notably the most vulnerable, thus likely fell behind.

Recommended policy actions to take advantage of information technologies include: upskill and reskill employees with a gender-sensitive approach; adopt lifelong learning approaches in vocational training and education; put in place safety-net and social protection schemes; comply with labour regulations; reformulate FDI attraction strategies based on international trends; put in place an effective digital education strategy and increase the system-wide capacity to use digital technology to improve the quality of education; and equip teachers, learners and other education stakeholders with digital skills

and knowledge. An assessment of the Industry 4.0 Readiness and Competitiveness in Cambodia's Garment, Footwear, and Travel Goods Sectors recommends green production, occupational, safety and health compliance, alongside improvements in understanding and technical knowledge on the use of Industry 4.0 in production processes.

The impact of economic transformation on vulnerable groups: risks of exclusion

Fast economic growth has been increasing average income and improving key socioeconomic indicators for Cambodia in recent decades. However, the LNOB principle demands progress beyond averages. To reach remote geographical areas and traditionally excluded social groups, and to guarantee pro-poor growth, economic transformation needs to be accompanied by policies grounded in a conceptualisation of progress that goes beyond the usual income measures.

Economic growth has also substantially increased fiscal capacity and, thus, the RGC's ability to implement stronger income redistribution policies and social protection expansion. In addition to a multidimensional perspective of progress and a strong social protection system, it will be important to design and implement mechanisms to support economic participants in the low-growth agricultural sector and ensure heightened sensitivity to gender equality and the LNOB principle, in order to guarantee the inclusion of vulnerable groups in all diversity and their unhindered access to the benefits created by the economic transformation underway. Promoting formality could support the expansion of social programmes and increase economic compensation to workers, as a share of GDP.

3.4 ENVIRONMENT AND CLIMATE CHANGE ANALYSIS: PROGRESS ON COMMITMENTS

Ecosystems and biodiversity

The rich biodiversity and ecosystems of Cambodia are critical to rural livelihoods and provide crucial ecological and economic value to the country's development. However, Cambodia's rapid economic growth and transition to a market-oriented economy are increasingly straining its natural resources. The forest coverage of terrestrial ecosystems has been declining for decades and shrank from 57% to less than 47% of national territory from 2010 to 2018. The soil typology in the country is particularly susceptible to erosion and land degradation when not under vegetation cover. According to the Global Mechanism of UN Convention to Combat Desertification (UNCCD) (2018), the annual cost of land degradation due to change in land cover and decline of ecosystem services provision is estimated at 677 million USD (2.8% of GDP).

River ecosystems, fisheries and water supply are at increasing risk due to competing demands and natural disasters (e.g. droughts). Construction of dams on the Mekong River and its tributaries causes environmental and social harm by submerging agricultural land and blocking nutrient-rich sediment flows and species migration, resulting in habitat change and reduced productivity. These changes impact food security, as Tonle Sap Lake provides over 60% of the population's protein intake.

Cambodia is part of the Indo-Burma biodiversity hotspot and is one of the most biodiverse countries in Southeast Asia, with as many as 8,260 plant species (10% of which may be endemic) and over 250 amphibian and reptile species, 874 fish species and over 500 bird species. However, the populations of some species are declining, particularly marine mammals (dugong, river dolphin). Some larger mammals (e.g. tiger, kouprey) have largely disappeared. Key direct drivers of ecosystems degradation and biodiversity loss in Cambodia include:

- land-use changes leading to loss of natural habitats (rapid expansion of agriculture land into forest lands; large-scale infrastructure development and increased land clearance for settlements; weak land management planning and limited related law enforcement and monitoring; unclear land

tenure system; unsustainable agricultural practices; increasing demand for raw materials such as rubber; sand dredging; urbanization);

- over-exploitation of natural resources (logging and unsustainable harvesting of forests and non-timber products; illegal hunting and trade for wildlife species of high commercial value);
- pollution (plastic pollution and increasing levels of pesticides or chemical wastes from agricultural and industrial development affecting water quality and resulting in ecosystem losses); and
- land degradation, climate change and natural disasters.

The RGC is implementing environmental policies and governance reforms to transform the current mode of economic development into one that is more sustainable and better equipped to simultaneously ensure the needs of people and ecosystems, recognising that the two are not mutually exclusive. However, the country still faces challenges in fully attaining this ambition.

Limited institutional capacity and collaboration in and among key institutions to address pressures on biodiversity and natural resources are compounded by insufficient human and financial resources and low legislative enforcement capacities. According to the Ministry of Environment, over 7 million hectares of protected landscapes are managed by just 1,260 rangers. While Cambodia is increasingly engaging communities in managing natural resources, less than 10% of its forests and protected areas are under community management. In 2018, public biodiversity expenditure was USD 112 million (2% of the national budget), which is low considering protected areas comprise 41% of the country. There are also gaps in capacity and in data and information for evidence-based decision-making and policy enforcement towards national development priorities and CSDG implementation.

There are challenges to fully realise community rights to access natural resources. The pervasive practice of leasing land to private companies strips local community access to natural resources. This is exacerbated by flaws in Cambodia's land registration system, which leaves people without secure land tenure. As a result of widespread land insecurity, conflicts over land are common. Communities, individuals and environmental defenders who seek to protect natural resources and advocate for equitable access to natural resources, have frequently been harassed, criminalised and intimidated. Since 2003, 60% of Phnom Penh's lakes and 40% of its wetland areas have been filled by developers, resulting in the eviction of thousands of families. It is estimated that from 2000 to 2014, over 400,000 people in Cambodia were adversely impacted by land grabbing (e.g. through decreased food security or loss of land). This is particularly severe for indigenous communities, who are more vulnerable to these challenges as their traditional livelihoods depend on natural resources and they have been historically marginalised with often no legal title to their traditional land. This limits the vital role of indigenous peoples in the conservation of nature and protection of biodiversity.

Climate change

Decarbonisation. Although Cambodia is a relatively small greenhouse gas (GHG) emitter, GHG emissions are accelerating alongside rapid economic growth. According to the updated Nationally Determined Contribution (NDC), in the Business-as-Usual scenario, the overall GHG emissions in 2030 are expected to increase to 155 million tCo_{2e}/year. Around 49% of emissions are due to the Forestry and Land Use sector, followed by energy (22%) agriculture (18%), industry (9%) and waste (2%). In response, through the NDC, Long-Term Strategy for Carbon Neutrality (2021), and other sectoral strategies and plans, Cambodia has demonstrated a strong commitment to climate action and to its vision for a low carbon, resilient society. The Forestry and Land Use sector is expected to play a key role to reduce 50% of historical emissions by 2030 by improving governance, interministerial coordination, and the land use policy. It is also expected to play a crucial role as a carbon sink to achieve carbon neutrality by 2050.

In the energy sector, the installed capacity of electricity generation has significantly increased (584 MW [2010], 3,033 MW [2021]). Hydropower contributed most (44%) to electricity generation in 2021, followed by coal (22%), fuel oil (20.5%), solar PV (12.5%) and biomass (1%). Both coal and fuel oil-based power plants cause severe environmental externalities (biodiversity loss, GHG emissions, air pollutants). In 2020, Cambodia announced a moratorium on the construction of large hydroelectric dams on the main stream of the Mekong River and, in 2021, halted development of new coal-fired power plants, except for projects approved through 2019 and stressed continued investment in clean energy to respond to climate change. The transportation system is carbon-intensive; the modal share in urban collective transportation (public and private) is under 2%. The peak power demand is projected to increase to 10,794 MW by 2040, mainly due to the construction boom and industrial growth. Accordingly, the updated NDC identified energy efficiency and renewable energy as key mitigation measures to achieve a GHG emission reduction target of 40% in the energy sector by 2030.

In the agricultural sector, the country aims to diminish carbon emissions by 15,6 MtCO₂e by 2050 via reduced methane-intensive livestock-raising and rice practices, direct seeding, alternating wetting and drying, use of organic fertiliser, use of feed additives for cattle and improved fodder management, promotion of biogas captured in livestock management and the introduction of composting technology. In the industry sector, initiatives are being implemented to reduce emissions via the transfer of environmentally sound technologies, green industrial programmes, and awards.

According to the Long Term-Strategy for Carbon Neutrality, climate change mitigation actions have the potential to create 449,000 jobs by 2050. This will require investments in skilling, reskilling and upskilling of youth and workers, efforts which are still at an early stage.

Climate change vulnerability and risks. Cambodia is among the countries most vulnerable to climate change (149 of 182 countries in the 2020 ND-GAIN Index), partly due to its dependence on rain-fed agriculture to sustain livelihoods, vulnerability to floods and impacts of rising temperatures on human health and productivity, with low adaptive capacity. Since 1960, average annual temperatures have increased 0.8 degrees, a trend projected to accelerate. Rainfall patterns are changing, with less predictable, more pronounced seasonal variations; more rain occurs in a shorter time in the wet season and longer, more arid conditions occur in the dry season. These changes are leading to increased incidences of extreme weather events (flooding, drought). The World Risk Index indicates a very high risk of disaster due to extreme natural events. The large-scale flash floods in 2020 and 2021, which affected ~175,900 and ~28,500 families respectively, offer examples of this risk.

Climate variability and climate-induced disasters are drastically impacting local communities, resulting in economic losses, food insecurity and loss of life, with agriculture, infrastructure, forestry and human health the most vulnerable, affected sectors. It is estimated that climate change may reduce annual average GDP growth by 10% by 2050, if no additional adaptation measures are taken. The incidence of permanent (chronic) heat stress is likely to increase significantly, producing conditions dangerous for human health. Food security and nutrition issues are likely to be exacerbated in the future due to decreased agricultural production (e.g. rice yield losses of 10–15%, natural water stress, low labour productivity, and health problems driven by vector/waterborne diseases). Prolonged drought will impact surface water levels and exacerbate groundwater depletion and habitat loss. Climate change will also disrupt the complex hydrological cycle between the Tonle Sap and the Mekong River. Communities will be forced to migrate from affected areas to other countries or within the country seeking new livelihoods or economic activities. Climate-induced internal displacement is already evident, notably around the Tonle Sap Lake and provinces (Ratanakiri, Mondulakiri). Climate change impacts, coupled with environmental degradation, can exacerbate risks of conflict and social divisions.

Communities living on the coastline face added risks due to sea level rise. In addition to the inundation of coastal lands, sea level rise is expected to increase the frequency and intensity of coastal typhoons. Saline intrusion impacts drinking water and crops, and declining fresh-water fish stocks is an issue in all coastal provinces. Challenges in access to year-round safe drinking water, especially in rural areas and the poorest households, present a water security issue, increasing water purchase costs in the dry season and leading to health risks for households that switch to less safe sources.

In response to each of these issues, the NDC and key national plans and strategies prioritise climate change adaptation, including increased investments in favour of economic and societal resilience.

Impacts of climate change on women and youth. Climate change is not gender-neutral. Women living in poverty bear a disproportionate burden of the impacts of climate change as their domestic responsibilities rely on local natural resources. Gender-based inequalities rooted in stereotypes, harmful social norms, discrimination, GBV and harassment limit women's access to alternative sources of income, education, credit, and other productive resources and services. As a result, women have less capacity to adopt adaptation measures in the face of climate change. In Cambodia, women account for 60–90% of wholesale and retail traders of agricultural products, and climate change will pose operational challenges to supply chains (e.g. road viability) and impact food safety requirements and the shelf life of food, requiring the adoption of new food safety strategies. Recognising the distinct impact of climate change on women, as well as their potential contribution to combat climate change, the NDC emphasises the need to mainstream gender in climate action; most NDC priority actions target women's participation.

The climate crisis is also a child rights crisis: Cambodia is ranked 46th in the world for children most at risk of the impacts of climate change. The NDC recognises the critical role young people can play in the development, implementation, monitoring and enforcement of climate actions across sectors; youth engagement is included in 55 of 86 (64%) of the NDC adaptation actions. For example, NDC mentions the role of youth as community volunteers in agriculture, community-based and climate risk management programmes, conservation, village development, water supply and sanitation.

Waste and air pollution

Economic and population growth have resulted in new environmental challenges, including increased waste and air pollution. Growing waste volume has become an acute issue, particularly in larger cities. In Phnom Penh, the disposal of solid waste in municipal landfills increased (250,000 tonnes [2014], 1,058,500 tonnes [2019]). Burning and untreated waste cause health and environmental issues, increasing air, water and soil pollution and contaminating river and marine ecosystems. Plastic waste is a growing problem. When discarded, plastic can clog sewage and drainage infrastructure amplifying the risk of localised flash flooding and negatively impacting sensitive ecosystems, including the marine environment. In Sihanoukville, rapid development downtown is causing unprecedented flooding. Inadequate waste management has severely impacted tourism destinations.

A significant amount of wastewater in rural Cambodia is not contained within closed systems but, instead, released directly into the environment due to minimal sewerage coverage and limited connection to sewerage (less than 5%, Water Environment Partnership in Asia [WEPA]) outside core urban areas of Phnom Penh, and to low technical awareness. Poor and vulnerable populations are most impacted by inadequate sanitation due to improper fecal sludge and solid waste management. These challenges are exacerbated by climate change and natural disasters, as people living in flood prone areas may use unsafe practices (pit piercing, opening pit lids during floods to release fecal sludge

into the open environment), jeopardising public health by increasing the risk of exposure to fecal pathogens.

Air pollution is rapidly increasing and urban areas are experiencing decreased air quality due to combustion processes (motor vehicles, industrial processes, agricultural land burning, waste burning, charcoal making, household activities). Coal and heavy fuel oil are major contributors, as well as the rapid increase in motorisation, due to the high import of used vehicles (usually over 10 years old).

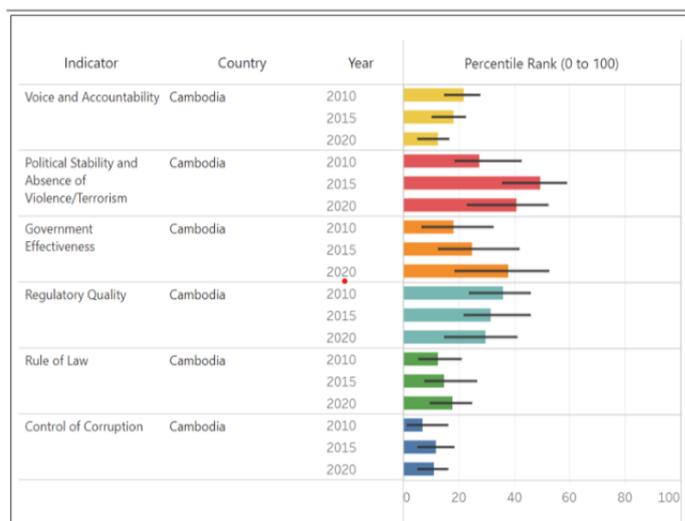
Recent reports cite concerning environmental health risks (lead exposure, household air pollution) to children. An estimated 3,171,259 children (over 50% of children under 18 years) have high blood lead levels (over 5 ug/dL). Such environmental impacts undermine areas of progress (reduced child mortality, morbidity, malnutrition).

3.5 GOVERNANCE AND POLITICAL ANALYSIS

Since emerging from conflict with the Paris Peace Agreements of 1991, Cambodia has achieved significant economic development in recent decades. However, establishing democracy has been challenging and the political environment remains contentious.

The Constitution enshrines liberal principles (democracy, human rights, rule of law, separation of power), with an elected legislature overseeing the Executive and an independent judiciary. However, the functioning of the government – as envisioned by the Constitution – has been hampered by the politicisation of the judiciary and other state institutions and the concentration of power in a single party, thereby deepening one-party dominance. At the same time, Cambodia has ratified 13 international human rights instruments, including eight of the nine core human rights treaties. Despite these strong legal and political commitments, significant gaps remain in implementation.

Figure 6. Performance of Cambodia on governance indicators



Source: World Bank, Worldwide Governance Indicators

effectiveness. All WGIs for Cambodia fall below the 50th percentile, indicating significant room for improvement. The lowest-rated WGIs are **rule of law**, **voice and accountability** and **control of corruption**. In 2021, Cambodia ranked 134 of 167 countries on the Democracy index, which captured

Trends in governance and democracy

Good governance is crucial to foster economic growth, preserve peace, dismantle inequalities and create effective, accountable and inclusive institutions that adequately respond to the needs of the people. Figure 6 compares the Worldwide Governance Indicators (WGI) for Cambodia since 2010, showing its performance on voice and accountability, political instability and violence, government effectiveness, regulatory quality, rule of law, and control of corruption, each of which has declined, stagnated or minimally improved, with a slim exception of government

regressions in civil and political rights and the monopolisation of power by the ruling party. The human rights mechanisms also noted these trends.

Governance priorities

The link between the quality of governance and socioeconomic development is recognised by the RGC in its Rectangular Strategy Phase IV (2018–2023), and governance reforms – at least at the policy level – are promoted to ensure Cambodia can achieve its Vision 2050 of becoming an upper-middle-income country by 2030 and a high-income country by 2050. The overarching policy focuses on accelerating governance reforms and modernising governance systems through public administration reform; public financial management reform; legal and judicial reform; fighting corruption; and decentralisation and de-concentration reform (or Sub-National Democratic Development Reform). Private sector governance and the maintenance of peace, political and public order, including respect for human rights, rule of law and multi-party democracy are also stated priorities.

In 2015, Cambodia endorsed the SDGs and moved to customise the CSDGs. While SDG16 (peace, justice, strong institutions) includes 12 targets and 24 indicators, CSDG16 only cites three targets. As a result, broader global governance targets have not been fully translated into national and local-level action, despite their relevance in the Cambodian context. Thus, there are significant gaps in national data to measure the full progress of SDG16, as both an end goal and an enabler for achievement of other SDGs. This has led to national prioritisation of certain governance and human rights issues over others, notably economic and social rights over civil and political rights, rather than a reaffirmation of their indivisibility and of the need for progress on all goals and all human rights to achieve sustainable development. Challenges in implementing a broader governance and human rights agenda are linked to lack of political will, corruption, and inadequate resources and capacities.

State effectiveness, accountability and transparency

Cambodia has invested significantly in increasing the effectiveness and efficiency of public service in support of current and future socioeconomic developments. WGI on government effectiveness shows notable improvements from 18% in 2010 to 38% in 2020 (Figure 6). Yet, Cambodia still ranks lower than most governments in Southeast Asia. Weak governance compromises public service delivery and adversely impacts those who most need services, particularly low- and middle-income households.

Public Administration Reform has taken place over many decades, lending to improved, more efficient service delivery, including via the opening of “one window service (OWS) offices”. Since 2015, the Social Accountability Framework has enabled citizens to monitor and provide feedback on services provided by local councils, primary schools and health centres in targeted areas. Long-term decentralisation and de-concentration reforms have produced incremental results and led to sub-national administrations, but some roles still need to be transferred, capacities built and public service delivery improved. Ombudspersons handle complaints on sub-national administrations outside the court system, but the ruling CPP dominate local councils lending to potential bias and exclusion of people perceived to have different political affiliations. Public Financial Management reform strengthened revenue management and increased the social services budget, but greater transparency and accountability are needed in financial governance, alongside an improved budgeting process (e.g. how resources are raised, allocated, utilized). For example, much of public spending is on defence and security, diverting needed funds away from health, education, housing and other sectors and resulting in a trust deficit towards the government from communities when their needs are not met via transparent, effective service delivery. More Cambodians are demanding better quality and more efficient public services as the economy grows and disposable incomes rise. The 10-year National Programme on Sub-National Democratic Development Phase 2 (2021–2030), approved

in December 2021, offers opportunities to boost public sector productivity, efficiency and accountability, which must be sustained over the long term to support Cambodia's development vision.

Fight against corruption

Corruption hinders sustained economic development, good governance and human rights, diverting resources from development and exacerbating inequality, injustice and imbalanced power. In 2021, Cambodia ranked 157 of 180 countries on the Corruption Perception Index, the third lowest in Asia-Pacific, above only Afghanistan and North Korea. Slight improvements in controlling petty corruption have been made, partly through improvements in public service, but grand corruption, including political corruption, remains largely unaddressed. As a priority in the National Strategic Development Plan (NSDP) 2019–2023, Cambodia enacted the Anti-Corruption Law, along with three National Anti-Corruption Strategic Plans and other policies, and it is strengthening the Anti-Corruption Unit, established in 2006. The RGC has undertaken citizen education, supporting their participation in monitoring implementation of public services, provided procurement oversight, enabled investigation of corruption cases and asset and liability declarations for some officials, and aims to build confidence via improved public service delivery and transparency. However, anti-corruption policies and integrity mechanisms are not judicially enforced or supervised. State resources (natural resources, assets) are used for personal gain. And, while asset declaration systems exist, some senior and public officials and their family members are not covered by the declaration requirements, undermining detection and prosecution of illicit enrichment, and few asset declaration forms have been unsealed. Fear, lack of protection and legal support, unfamiliarity with the reporting process, and perceptions of an ineffective reporting system limit reporting of corruption cases.

Rule of law and access to justice

Despite a constitutional provision establishing an independent judiciary, the justice system lacks independence. This includes the National Committee against Torture, established through a Royal decree in 2017, which lacks independence despite improvements in monitoring, personnel and institutions. In March 2022, the Human Rights Committee raised concerns over the “persistent lack of an independent and impartial judiciary and the high number of allegations of corruption”, adding that “judges are openly members of the ruling party, often holding leadership positions, which seriously undermines their independence”. Courts maintain the ruling party dominance and are used to intimidate and harass opposition, civil society and human rights defenders. The justice sector faces delays in the administration of justice, overuse of pre-trial detention (often for lengthy periods), underuse of alternative sentencing options, overcrowded prisons and recidivism, and unlawful and arbitrary detention. Although legal and justice reforms have sought to reduce backlogs and overcrowding in prisons, yielding some results, additional efforts are needed. Measures are also needed to improve response to GBV and violence against children. Women and girls face barriers, including a lack of gender sensitivity, especially in domestic violence and rape cases. A centralised system is needed to coordinate legal aid. The RGC has provided free, albeit limited and insufficient, legal assistance to the poor; more is needed. Improving access to justice is vital for women, children, the poor, minority groups and other disadvantaged people to be equal partners in development and decision-making.

Human rights mechanisms have recommended that the RGC safeguard the independence and impartiality of the court system and staff in adherence with international standards by repealing or amending relevant provisions of the Constitution and other laws and regulations that can be used to restrict freedoms. A process was initiated to form a National Human Rights Institution, led by the Cambodia Human Rights Committee (CHRC); a draft law was developed in 2021 and is being reviewed

by stakeholders. However, efforts are needed to put this new institution in place in line with the Paris Principles, especially with respect to its independence and competence.

Representation, inclusion and participation

Prime Minister Hun Sen has governed Cambodia for over 37 years; there has been no change in power since regular elections began in 1993. The CPP won in the 2018 national election, rendering Cambodia a de facto one-party system and eroded the National Assembly's ability to oversee the Executive and undertake accountable legislative policymaking, raising concerns on the Assembly's representative nature. In 2022, there were 45 registered political parties. While national authorities often use this number to imply multiparty democracy, 17 political parties took part in the 2022 elections, the majority are inactive or hold no seats at local or national levels, and few are presumed proxies of the ruling party. While opposition parties won seats in the 2022 commune elections, they are unlikely to markedly influence commune councils and policies, as they are under control of the ruling party.

Citizen participation and inclusion are critical to sustainable development. But Cambodia is restricting freedom of association, expression and assembly and limiting CSO activities. Globally, Cambodia ranks in the bottom 13% for WGI on voice and accountability. UN human rights experts have repeatedly highlighted cases of intimidation, arbitrary arrest and prosecution of human rights defenders, environmental activists, journalists, and civil society actors, and flagged constraints on civic space and citizen participation by laws, policies and judicial and administrative practices that restrict free association, peaceful protest, and expressions of (critical) opinions online and offline. Civil society development groups (e.g. health, education) have had more space to operate than human rights CSOs or those working on political issues, and views on participation and inclusion in the policy process depends on line ministries.

The World Press Freedom Index 2022 shows a downward trend in Cambodia (142 of 180 countries), citing threats to independent and free press (use of laws/other means to silence journalists and revoke licenses of independent media outlets) since 2017. Efforts are needed to institutionalise citizen participation and inclusive decision-making processes. As most of the population is under 30 years old with high Internet penetration and social media use, this is urgent.

The national law does not prohibit all forms of discrimination, and discrimination is not defined the same across laws, policies and regulations, constraining effective implementation and application of anti-discrimination measures, potentially marginalising certain groups, and hindering equal access to rights and development. Gender equality is a priority of the RGC. Women's representation has improved at different levels of governance, but more is needed. In 2020, women represented 21% of the National Assembly and 16% of senators. Women hold ~16% of senior government positions (Under Secretary of State, Deputy Prime Minister) and 41% of civil service (in 2018). While their representation at local levels has improved, it remains very low overall. One of 25 Provincial Governors is a woman, as are 8% of Commune Chiefs. Women hold 17% of seats on provincial, municipal and district/Khan councils and 14% of commune/sangkat seats.

Peace and security

Social, economic and political exclusion and inequalities fuel tension and conflicts, erode trust in public institutions and weaken the social order, hindering peace and security. Exclusion and inequalities are aggravated by poor labour conditions, displacement, environmental degradation, disputed development projects, impunity, economic shocks, and the pandemic. Government concessions are rare and there is swift, even violent repression of peaceful assembly by the authorities. With the

dismantling of independent human rights civil society, citizens have few avenues to voice grievances and raise legitimate concerns.

Once a host country of the United Nations Transitional Authority in Cambodia (UNTAC), since 2006, Cambodia has deployed 8,302 UN peacekeepers, including 580 women, to UN missions across nine countries, making Cambodia the second highest contributor of women peacekeepers among Association of Southeast Asian Nations (ASEAN). With plans to increase this number by 20% by 2024, Cambodia commits to advance gender equality and women's leadership, peace and security roles.

Implications of governance for sustainable development

Deficits in governance lie at the core of development challenges in Cambodia. While governance reforms are vital, sustainable development requires a commitment to reforms that address the root causes of systemic and structural issues, such as those that perpetuate inequality and imbalances in power and resources and that lead to conflict or societal tensions. Effectively targeting these requires political will, incentives for change, and strengthened national capacities to deliver reforms. More integrated and collective efforts are required in addressing governance reform priorities to engender sustainable change. Governance reform is a long-term endeavour, and the development trajectory must be grounded in human rights and the rule of law and based on the full, inclusive and equal participation of people of all diversity in society and public affairs, in policy and practice.

3.6 NATIONAL VISION AND DEVELOPMENT PLAN VIS-À-VIS THE 2030 AGENDA

Cambodia is committed to align its national policies and development planning with the 2030 Agenda. SDG localisation in the national framework is complete. Despite steps taken towards implementation, however, substantial gaps remain, particularly to measure progress (monitoring and evaluation [M&E]) and ensure financial investment in implementation mechanisms. If these gaps are not addressed in the next development plan (anticipated in 2023), Cambodia may not achieve several SDGs.

Cambodia's vision and development plan

Cambodia has localised the SDGs in the CSDG framework, which includes all 17 global SDGs and accompanying targets, as well as an additional goal related to mines/explosive remnants of war. The 18 CSDGs include 88 national targets and 148 (global and local) indicators, including 96 national indicators. Cambodia's NSDP encompasses the socioeconomic planning framework (Rectangular Strategy IV), designed after the CSDGs, for 2019–2023. The national vision for development (Cambodia Vision 2050) includes the ambitious goal of upper-middle-income status by 2030 and high-income status by 2050, largely through governance reform. The NSDP includes a four-pronged approach to achieve governance reform: human resource development; economic diversification; private sector and employment development; and inclusive and sustainable development. Although focused on economic growth, the NSDP includes concrete indicators and structured M&E targets, with strengthened public institutions at the core.

Key policy priorities and actions 2019–2023

The RGC identified four priorities to guide policy action through the current planning period: 1) ensure sustainable economic growth of 7% per year; 2) create jobs, with a focus on youth; 3) reduce poverty levels below 10%; and 4) strengthen the capacity of public institutions for public service delivery.

The RGC has introduced several strategic policy initiatives in line with its development goals:

- The National Social Protection Policy Framework 2016–2025 (NSPPF) aims to strengthen income security and reduce economic and financial vulnerability to shocks. It includes plans to build government capacity (emergency response, human capital development, vocational

training, welfare expansion, pensions, health insurance, employment injury insurance, unemployment insurance, disability insurance).

- Cambodia's Education 2030 Roadmap provides a vision to achieve CSDG4 by 2030 via the Education Strategic Plan 2019–2023. Two policies support SDG Target 4.c and 4.4: The Teacher Policy Action Plan aims to improve the quality of the teaching workforce; and the Policy and Strategy on Information and Communication Technology in Education (2018) aims to harness technology to support evidence-based policymaking in the education sector and to equip students with information and communications technology (ICT) knowledge and skills to meet the future demands of society.
- The National Policy on Lifelong Learning (2019) was developed to maximise human resource development to help sustainably meet Cambodia's 2050 goal of high-income-status. Lifelong learning (formal and informal) includes goals to skill, upskill and reskill youth and adults by promoting access to learning opportunities, particularly for vulnerable groups. The National Technical Vocational Education and Training Policy 2017–2025, aligned with SDG4 and SDG8, aims to equip the workforce to meet market demands and enhance Cambodia's competitiveness. The policy also calls on youth to volunteer and highlights job opportunities for those who have volunteered.
- National Statement of Commitment to Action Transforming Education Summit, presented by Cambodia during the Transformative Education Summit in New York on 19 September 2022, outlines Cambodia's national commitment to transform the education sector.
- The National Environment Strategy and Action Plan (2016–2023) aims to ensure the efficient management of environmental and natural resources, as part of the 2030 Agenda, and to mobilise resources for sustainable livelihoods with a focus on vulnerable groups (women, children, minority groups) disproportionately affected by climatic and other shocks.
- The Tourism Development Master Plan Siem Reap 2021–2035 aims to revive socioeconomic development, promote and protect national culture, and encourage effective environmental protection through: sustainable management of high-value heritage assets; and responsible, inclusive development with local socioeconomic benefits.
- The National Ageing Policy 2017–2030 aims to ensure assistance for younger family members supporting Cambodia's population as it ages.
- The Fifth National Strategic Plan for a Comprehensive and Multisectoral Response to HIV/AIDS (2019–2023) and the National Strategic Plan for HIV and STI Prevention and Care in Health Sector (2021–2025) aims to support SDG3 by moving towards the elimination of new HIV infections and ending the AIDS epidemic as a public health threat by 2025.

In addition to the above policy initiatives, the pandemic introduced new challenges for all countries striving to meet the SDGs. The RGC effectively responded, implementing a wide-ranging social protection scheme to assist the most vulnerable. Policy responses included wage subsidies for workers whose jobs were suspended and expansion of the IDPoor cash transfer programme for those most in need, with emphasis on children and mothers.

Evaluating implementation

The 2030 Agenda guides countries towards attainment of the 17 SDGs, ensuring no one is left behind. Yet, seven years after its adoption, the Asia-Pacific region is notably off track and only expected to achieve the SDGs by 2065 – over three decades late. Less than 10% of the 112 measurable targets are on track for 2030 achievement, with most shortcomings under SDG6 (water and sanitation), SDG8 (decent work and economic growth), and SDG12 (responsible consumption and production).

The 2016 Rapid Integrated Assessment noted several SDGs needing attention: gender equality; equitable distribution of natural resources to vulnerable groups; urbanization challenges; and the inclusion of vulnerable groups in decision-making. In comparing the CSDG framework with the NSDP M&E Plan, only 40% of CSDG indicators have been adopted. SDG16 and related human-rights targets and indicators are weak or absent from the CSDG framework, leading to large gaps in SDG action and measurement on peace, justice and institutions, and scrutiny from civil society. The 2030 Agenda is strongly grounded in human rights, but human rights-related indicators are limited in the NSDP.

In the 2019 Voluntary National Review (VNR), the RGC confirmed that 40% of the CSDG indicators had been adopted but declared CSDG integration complete at the national level. The RGC designed the NSDP in line with the 2030 Agenda but certain targets (e.g. SDG26) are not prioritised. Factors hindering CSDG achievement include: the lack of a streamlined budget process to support successful implementation; the need for comprehensive financing strategies to mobilise resources and, thus, efforts to streamline the CSDGs with the national budget; and the need for targeted resource allocation and related public spending. In addition, M&E measures to assess progress towards the goals are limited. Without linking public expenditure with outcomes, tangible progress on the plan's implementation has been difficult to monitor. Further, despite including an M&E plan, the NSDP does not set out clear ministerial responsibility for M&E and lacks a concrete plan for data collection. Successful implementation of a complete M&E framework might include allocating national budgetary resources towards data improvement, as well as large-scale evaluation of recently introduced policies.

Cambodia's progress towards achievement of the sustainable development goals

Cambodia's SDG Index Score is 63.8, ranking Cambodia 107th of 163 countries. Still, Cambodia risks failing to meet several SDG indicators, including many CSDGs. Cambodia is significantly behind in meeting the SDG4 indicators (quality education) as well as those linked to gendered impacts of climate change and environmental hazards. Despite relatively stable rates of GDP growth and economic activity, moreover, regression in natural resource efficiency and equity and a lack of progress towards labour rights compliance have undermined progress. The pandemic has further obstructed CSDG implementation. The RGC may need to revise indicators in line with evaluation findings. First, a comprehensive, transparent, and complete evaluation of the NSDP is needed to gauge progress.

3.7 FINANCIAL LANDSCAPE ANALYSIS

The CSDGs are pursued through their reflection and operationalisation into actionable development milestones and programmes in the NSDP. The NSDP also outlines the financial allocations needed to achieve the CSDGs, and Cambodia's first VNR 2019 identifies financing as a key priority to accelerate achievement of the CSDGs by 2030.

Pre-pandemic analyses provide estimates of the investment required to achieve the CSDGs and their financing sources. Additional spending required to achieve the CSDGs was estimated at around 17% of GDP in 2018. To achieve the SDGs in five selected sectors (i.e. education, health, road, electricity, water and sanitation), Cambodia needs an additional estimated investment of 7.5% of GDP. As the socioeconomic impact of the COVID-19 pandemic was particularly dire, moreover, the related investment needs have surged. Given the ongoing overlapping crises (e.g. geopolitical tensions, tightened monetary policy), the growth prospect is less optimistic and development financing is more constrained, increasing financing gaps and related needs.

The development financing analysis below is split into four main categories of financing sources: external public (ODA, the government's international borrowing); domestic public (the government's domestic borrowing, government revenue, public private partnerships, credit guarantees); external

private resources (FDI, private sector borrowing, remittances); and domestic private (domestic private investments, financial sector and private credit, domestic securities market). Other financing sources, such as sustainable financing, are also analysed.

External Public Finance

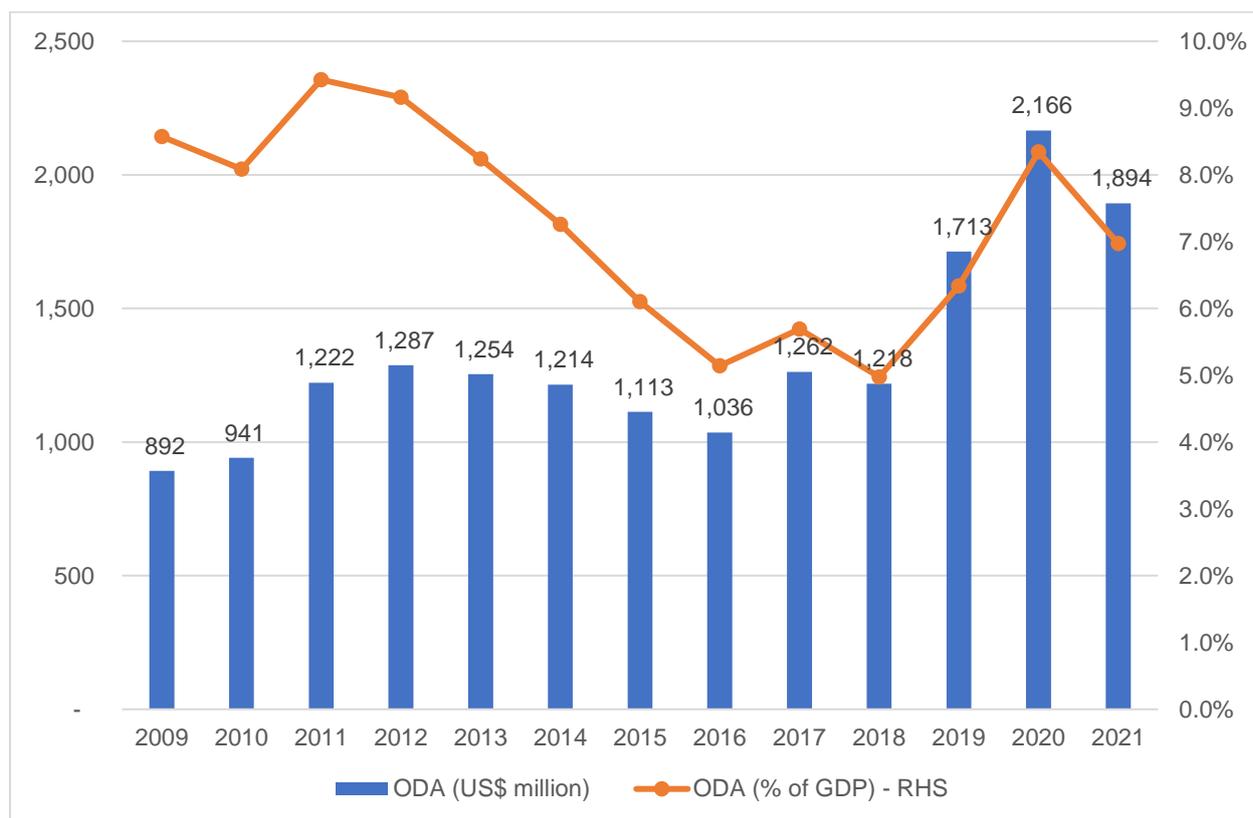
ODA flows. The Cambodian economy has gradually shifted from dependence on ODA to private investment. The reduction of ODA as a primary source of development financing underlines Cambodia's efforts and advancements in reducing aid dependency, improving public financial management, and attracting domestic and foreign investments. However, ODA continues to play an important role in supporting the country's sustainable development.

Prior to the pandemic, the absolute ODA in Cambodia was stable, fluctuating at around USD 1,144 million before reaching USD 1,713 million in 2019 (Figure 7). However, ODA as a share of the GDP was declining – from a peak of 9.4% of GDP in 2011 to 6.3% of GDP in 2019. As a result of significant support from development partners, in response to the COVID-19 pandemic, it increased significantly to 8.3% of GDP in 2020. The ODA increase in 2020 was mainly in response to COVID-19 health, social protection, and budgetary support. Prior to the pandemic, Cambodia had stopped receiving budgetary support in 2013.

Between 2009 and 2021, the sectors that received the largest ODA allocation included: transport; agriculture; health; education; energy; governance and administration; water and sanitation; and rural development. This was consistent with the government's development priorities, which focused on improvements in physical infrastructure, access to electricity, human resources, and agriculture and livelihoods. These targeted allocations also contributed towards achievement of the SDGs.

As Cambodia prepares to graduate from the LDC category, the ODA, particularly the ODA grant, is likely to decrease further. However, the loss of the LDC-linked ODA will be manageable given the expanding economic size and the increasing government capability. Many development partners do not rely on the LDC status in allocating development financing or lending to Cambodia.

Figure 7. ODA flows in Cambodia 2009–2021



Source: Council for the Development of Cambodia/Cambodia Rehabilitation and Development Committee (CDC/CRDB).

External public debt. Cambodia has shown strong fiscal discipline in the decade preceding the pandemic, maintaining public debt well below 40% and fiscal deficit below 5%. As a result, the RGC achieved an accumulated savings of around USD 3 billion, which has proven essential to respond to and effectively mitigate the socioeconomic impact of the COVID-19 crisis (e.g. health emergency response, vaccine procurement) and provide an economic stimulus (e.g. COVID-19 cash transfer programme, wage subsidies, cash for work) during the crisis.

Prior to 2022, Cambodia had only international borrowing. Its public debt is mainly in the form of concessional loans from bilateral partners and IFIs. As of the third quarter of 2022, the public debt increased to USD 9,474.2 million or about 35% of the GDP, which remained below the national ceiling of 40%. As such, Cambodia shows low risk of public debt distress. Considering the growth prospect and the current debt ceiling, debt financing remains a viable and sustainable option for Cambodia to finance essential development programmes if additional debts are not accumulated substantially and rapidly. Additional debt must be utilized effectively for priority development programmes.

Domestic Public Finance

Government securities and sovereign ratings. In the third quarter of 2022, the RGC issued the first government Khmer riel bonds worth KHR 41.8 billion or USD 10.15 million with one-year maturity. The RGC developed a legal framework to facilitate the issuance of government securities: Government Securities Act (adopted in 2020); government securities policy framework; and a sovereign rating framework.

The government bonds are the new public financing instrument to mobilise external and domestic resources to finance the public sector expenditures and investments. This new source of financing is expected to play a crucial role in diversifying the government's financing sources as well as to promote the efforts to de-dollarize the economy. The introduction of the government securities and necessary policy frameworks will pave the way for the RGC to introduce innovative debt financing tools, such as SDGs bonds and other thematic bonds (e.g. green and blue bonds, social impact bonds). This will be essential to increase financing for public investments that contribute to the attainment of the CSDGs.

Cambodia's sovereign credit rating is generally scored at the B2 level with a stable outlook. On 15 November 2022, Moody's downgraded RGC's long-term issuer rating of B2 with a negative outlook, reflecting Cambodia's exposure to a moderate external vulnerability risk. Moody's assigns local and foreign currency country ceilings for Cambodia of Ba3 and B1, respectively. The gap between the local country ceiling of Ba3 and the long-term issuer rating of B2 reflects: low economic diversification; weak institutional strength; and a strong government footprint.

In the short- and medium-term, the growth of financial flows associated with the government securities will be challenged by high inflation rates, monetary policy tightening, and rising global economic uncertainty. The current government securities, with a coupon rate of around 2%, may face difficulties in securing quick uptake by investors while the global interest rate is significantly higher (e.g. with Fed fund rates at 4.25%–4.5%). Nevertheless, the government securities are likely to play a more important role in the long term in financing public sector expenditures and investments, contributing to SDG achievement.

Being a heavily dollarized economy, Cambodia maintains a high level of foreign exchange reserve recorded at USD 20,747 million as of 2022 (8 months of import). While holding foreign exchange reserve is important for numerous reasons, the opportunity has been lost. Cambodia is unable to utilize the excess reserves to fund important development projects and fulfil social and economic investment needs, thus accelerating growth and sustainable development.

Government revenues. Resulting from robust economic performance prior to the pandemic, the government revenue increased steadily from 17.1% of GDP in 2010 to 26.8% of GDP in 2019. In the government's total revenue, tax revenue doubled from 10% of GDP in 2010 to 19.7% of GDP in 2019. This result makes Cambodia one of ASEAN's highest revenue collectors. The improved government revenue is attributable to the implementation of the domestic resource mobilisation strategy and the enhanced performance in tax revenue collection and administration. However, the pandemic's economic fallout has reversed the positive trend, causing the government revenue to drop by 4.6 percentage points to 22.2% of GDP in 2021.

As Cambodia's economy has steadily recovered, the government revenue, particularly tax revenue, is expected to return to its previous trend of positive growth. Nonetheless, the positive revenue trend is overshadowed by the increasingly high uncertainty of the global economy to which the Cambodian economy is highly exposed. Still, tax revenue can be further improved, particularly through the expansion of the tax base, including increased tax rates on tobacco, alcohol and gambling and reduced tax expenditures. Enhancing the progressiveness of taxation is imperative to improve the redistributive effects of the tax revenue and tackle inequality.

Public-private partnerships. The RGC has been engaging concession-based PPPs since the 1990s, outsourcing the management and maintenance of services (water and waste management), road

infrastructure, tourism sites, and industrial parks. However, the quantity and quality of its PPPs have been modest and tend to apply a PPP modality to existing structures or services rather than develop new ones. Improvements in service provision are not easy to discern; existing infrastructure is often maintained, not upgraded. PPPs have been applied to narrow investment segments of the economy and focused on large-scale national investments, illustrating: the RGC's reliance on concessional finance to support PPPs; the private sector's risk aversion to engage in PPPs unless risk is mitigated by third-party actors (in this case, IFIs); and Cambodia's limited accommodation of PPPs compared to other ASEAN member states.

With the expectation of diminishing access to concessional finance and slow development of domestic capital markets, PPPs are presumed to play an increasingly important role in financing investment projects. By the end of 2021, the PPP stock was estimated at 16.5% of GDP.

The investment architecture and PPP system have been updated (in the last three years) and provide an improved investment framework and system, and the RGC introduced a new investment architecture to utilize PPPs as development finance. With the adoption of the Law on PPP in 2021, the PPP is expected to be a key policy tool for the RGC to accelerate investments in key development sectors, such as physical infrastructure. PPP is one of the primary means of implementation of the RGC's post-COVID-19 Strategic Framework and Program for Economic Recovery 2021–2023.

Public credit guarantees. As part of its economic recovery policy, the RGC operationalised a new instrument to improve liquidity in the domestic financial sector. The Credit Guarantee Corporation of Cambodia (CGCC) was launched in 2021 with its first letter of guarantee (LoG) issued in May 2021. Within a year, the CGCC issued 223 LoGs unlocking USD 25.1 million in domestic finance, providing an average 80% guarantee-to-loan coverage. Overall, 24% of the LoGs issued by CGCC have supported women-owned enterprises.

CGCC plays a key role to support the RGC's indicative priority sectors. A high level of LoGs is issued to trading and wholesale firms, showing domestic MSMEs and SMEs transitioning into new drivers of economic growth. The limited domestic loans supported with LoGs align with the high levels of FDI in these areas. The CGCC helps unlock domestic finance, with a capitalisation of USD 200 million, and has the potential to free up an additional USD 1 billion in domestic finance through 2025.

External Private Finance

FDI. FDI has increasingly played an important role in propelling Cambodia's economic development and creating jobs and income. In terms of absolute value, FDI inflows nearly tripled from USD 1,404 million (12.5% of GDP) in 2010 to USD 3,663 million (13.5% of GDP) in 2019 before dropping to USD 3,483 million (12.9% of GDP) in 2021 during the pandemic. However, FDI inflows remained flat, oscillating around 12.5% of GDP in the 2010–2019 period. In 2022, FDI was estimated at 12.8% of GDP. FDI inflows mainly originate from regional investors. Top investing economies include China, Hong Kong (China), Japan, Taiwan (China) and South Korea. In 2019, China accounted for nearly 43.9% of the total FDI, followed by the British Virgin Islands (United Kingdom) (23.6%), Hong Kong (20.4%) and Japan (8.5%). It is of note that the FDI has yet to recover to the pre-pandemic level.

FDI inflows remain concentrated on a few economic sectors, including garments, tourism, construction and real estate. In 2019, the construction and real estate sector obtained the largest share of 51% of total FDI inflows, followed by tourism (24%), garments (16%) and other manufacturing

sectors (6%). The agricultural and food processing sector, which plays an essential role in economic self-sufficiency, received only 1% of total FDI inflows in 2019.

Low wages and preferential access for LDCs to OECD markets, such as the EU and US, are key features of FDI attraction in the garment and textile sector. Special economic zones have played a crucial role in attracting FDI due to streamlined and reduced procedures for export-oriented manufacturing sectors. However, FDI links with domestic SMEs are very limited, constraining local development of SMEs.

FDI has contributed substantially to the past decade of high economic growth and the creation of employment and income for the country's young population, especially low-skilled workers. However, the quality of FDI remains a critical challenge, which needs to be addressed to promote economic diversification and environmental sustainability, and to ensure that the benefits are proportionally shared across the population groups. The growing roles of FDI in the Cambodian economy underline the importance of aligning the FDI with SDG targets and promoting high impact investments that can accelerate progress towards the CSDGs.

Private sector borrowing. As of 2021, the private debt is estimated at USD 11 billion, accounting for more than half of the total external debt of Cambodia. Private debt has elevated dramatically, raising concerns about the potential debt overhang and a drag on economic growth. The risks stemming from the elevated private debt, the large amounts of restructured loans and real income pressures indicate potential stresses on the repayment capacity of some borrowers and resilience of financial institutions.

Remittances. Prior to the pandemic, remittances in terms of absolute value had increased steadily from nearly USD 1,190 million in 2015 to around USD 1,520 million in 2019. However, remittances as a share of GDP decreased from 6.6% of GDP in 2015 to 5.6% of GDP in 2019 due to the fast pace of GDP growth during the period. Then, it dropped drastically to about USD 1,270 million in 2020 (4.9% of GDP) and USD 1,150 million (4.3% of GDP) in 2021. More than half of Cambodia's remittance inflows come from Thailand where over one million Cambodians currently work.

As the economies where Cambodian migrants are located are recovering from the pandemic, remittance inflows are likely to bounce back gradually. Remittances have been an important source of foreign exchange earnings, fulfilling spending needs of migrant households, improving living standards, and contributing to a range of SDGs.

Domestic Private Finance

Domestic private investments. The private sector has been the key driver of Cambodia's economic development in the last decade. Domestic private investments have played a crucial role in tandem with FDI in generating employment, promoting exports and fostering GDP growth. Domestic private investments doubled from around 10% of GDP in 2010 to 20% of GDP in 2019. However, Cambodia's domestic private investments remain lower than other Southeast Asian peers. Importantly, the experience of newly developed economies, such as China, South Korea and Taiwan, shows that high levels of domestic investments are essential to sustain high growth and development.

As Cambodia expects to have less access to ODA, concessional financing, and especially in the current context of constrained government fiscal space, domestic private investments are vital to fill investment needs and cater to growing demands for decent jobs among the young Cambodian labour

force. Boosting domestic private investments together with FDI is the key for Cambodia to return to high economic growth and contribute to the attainment of the CSDGs.

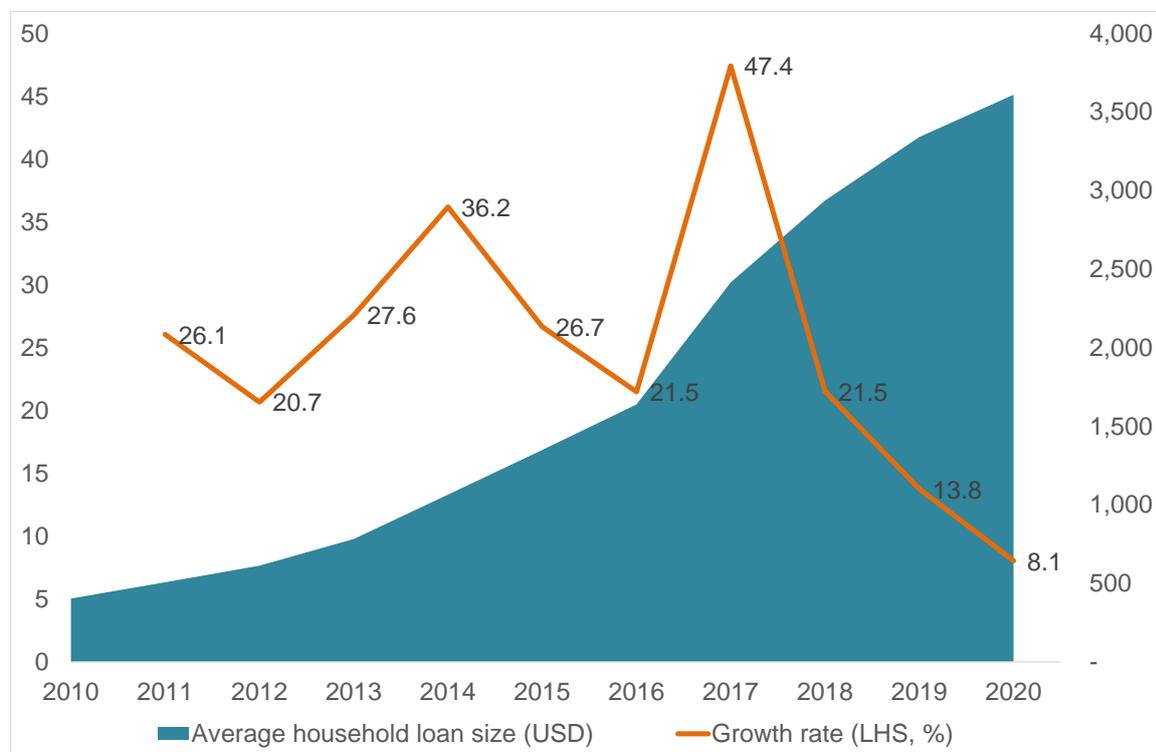
Financial sector and private credit.

Private debt: Between 2013 and 2019, private sector credit growth expanded by an average of 24% annually and slowed slightly during the pandemic. By the end of 2021, private sector credit reached 170% of GDP, significantly higher than Cambodia’s regional economic peers. This high level of private sector credit cannot be considered solely as increased financial deepening without the caution of growing financial risks. Private sector credit growth is distributed widely across sectors. Real estate, wholesale and retail trade and microfinance make the largest contributions to credit growth, thus accounting for the largest share of the total private sector credit. As the number of borrowers has increased at a slower rate than the number of loans, some borrowers have become more leveraged: the average loan size per borrower has increased.

Microcredit and personal loans: The level of household debt in Cambodia – USD 9.7 billion in March 2022 – is relatively high. This all-time high can be compared to a low of USD 210.6 million, recorded in 2008. There has been a considerable rise in household loans during the pandemic. Data shows an increase in new micro loans issued in October 2020, suggesting increased household debt during the pandemic. Late repayments, signalling higher defaults were recorded in June–October 2020, with late repayments increasing by 4% and by 16.7% overall.

There also has been a gradual increase in the level of household debt through microfinance. Average household loan sizes have increased fivefold over the last 10 years from USD 403 (2010) to USD 3,609 (2020), according to the Cambodian Microfinance Association (CMA) 2020.

Figure 8. Average household loan size 2010–2020



Source: Cambodian Microfinance Association (2020).

Domestic securities markets. The Cambodia Securities Exchange (CSX) is the only national stock market, established in July 2011 as a joint venture between the RGC and the Korean Stock Exchange (KRX). Since 2011, nine companies, including three state-owned enterprises, have been listed on the market. With the listing of private firms in the last three years, the CSX has become more active with increasing trading volume and activity. Total market capitalisation reached around USD 4.1 billion as of the fourth quarter 2022.

For over a decade, the CSX has listed only a small number of companies. As such, significant potential remains for the CSX to be a tool for firms to mobilise capital to promote investments and economic activity, thus supporting economic growth. Based on the existing market capitalisation, CSX has the potential to mobilise capital at scale and contribute to the SDG achievement.

In terms of bonds, six corporate bonds have been issued. However, these bonds are not for daily trading and remain static on the CSX. Three of the bonds are issued by financial service providers while the other three are by real estate, railway, and telecommunications firms.

The CSX offers a solution for domestic and joint venture firms registered in Cambodia to raise capital to finance business expansion and activity. When further developed through the issuance of government securities and a sovereign rating, this feature will expedite development of the market. The CSX updated its standard operating procedures, providing a focal point to ensure financial flows developed through the CSX market are Environmental, Social and Governance (ESG)-compliant and “green”. This will enable Cambodia to promote green, sustainable investments.

Sustainable Financing

Climate action is critical to reduce vulnerability of the economy and society to the impact of climate change, and to set a green and low-carbon growth trajectory. According to Cambodia’s NDC, USD 5.8 billion are required for mitigation actions by 2030, with forest, waste and energy requiring the most funding; about USD 2 billion are required for adaptation actions, with infrastructure, water and agriculture requiring the most funding. Implementation of the Long-Term Strategy for Carbon Neutrality will require one third public and two thirds private investments to increase from USD 500 million a year to USD 2.5 billion a year by 2050.

The RGC and partners are exploring climate finance options. Public finance allocated to climate action is gradually increasing (2.2% of GDP in 2020) and efforts are underway to mobilise grants and debt/equity instruments from bilateral/multilateral partners and global funds (e.g. Green Climate Fund). Cambodia is advancing its positioning in international carbon markets. After successfully mobilising carbon credits in the forest sector (REDD+), new opportunities are emerging (e.g. cooperative arrangements per Article 6 of the Paris Agreement). The role of the private sector is increasingly important for investments in climate action. While these investments have been concentrated in renewable energy (solar farms), there are opportunities to diversify them (e.g. promote energy efficiency and nature-based solutions). Embracing this green growth path could help attract higher quality investments and diversify the economic base.

Green bonds or other thematic bonds (e.g. SDG or social impact bonds) offer an opportunity for Cambodia to mobilise financial resources and to invest in accelerating SDG progress. ASEAN sustainability and green bonds is an avenue that can be tapped to finance green investments. ASEAN green bond issuances are increasing from USD 4,500 million in 2016 to USD 6,000 million in 2021.

3.8 STAKEHOLDER AND PARTNERSHIP ANALYSIS

The 2030 Agenda emphasises the critical role of partnerships in advancing the 2030 Agenda and SDG achievement. National development planning and SDG mainstreaming require strengthened multi-stakeholder engagement with the private sector, civil society and development partners.

Private sector

The private sector is the engine of Cambodia's economic growth. The National Strategic Development Plan 2019–2023 stresses that “the private sector plays a key role in promoting growth and socioeconomic development” through the diversification and expansion of production bases, technology development and transfer, innovation and job creation. This requires continuous implementation of the Government-Private Sector Forum (G-PSF) mechanism to address concerns raised by the private sector and assist the private sector to enhance entrepreneurship, productivity, and competitiveness.

However, “[t]he majority of private businesses are small and many of them are family-run”. SMEs employ ~70% of the workforce and contribute ~58% to GDP. Lack of access to capital, technology and knowledge, limited production capacity, lack of information on potential business and market opportunities, standards and compliance are key constraints facing SMEs.

Women play a vital role in MSME development. However, informality remains a challenge: ~99% of microenterprises (under 10 employees) are not registered. Women own ~62% of microenterprises, and many were severely impacted by the pandemic, illustrating the need to address gender equality to attain inclusive, sustainable growth. While these MSMEs form a large share of the economy and provide many opportunities, they tend to be less productive and connected than larger businesses.

The private sector is gaining policy and regulation support. The Industrial Development Policy (2015–2025) was launched to transform the economy from low-skilled to skill-, technology- and knowledge-based. It seeks to: attain a share of the industry sector at 30% of GDP and the manufacturing sector at 20%; diversify exports by increasing the non-garment export to 15% of all exports, and agro-processing to 12%; and increase the registration of small enterprises to 80% and medium businesses to 90%. Thus, the private sector plays a defining role in realising the industrial policy. The New Investment Law, adopted in 2021, provides incentives and increases Cambodia's competitiveness for foreign investors by modernising local industries and protecting investors' rights. Per tax regulations, investment initiatives related to environmental protection and green energy can benefit from either tax exemption for three to nine years from the first earning or the deduction of capital expenditure via special depreciation.

The private sector functions under the Cambodia Chamber of Commerce. Only large companies with established “Corporate Social Responsibility” (CSR) mechanisms are regularly engaged in discussions with the RGC, covering smart agriculture, green technology and investments. The CSR concept is in early stages and, thus, offers untapped potential to advocate, including in favour of Corporate Social Values (CSV), Environmental, Social and Governance (ESG) standards, and impact investments.

The private sector is driven by the “*Okhna*” system where tycoons invested in the ruling government's development schemes and were awarded titles, honorifics drawn from the monarchical past, and lucrative contracts, monopolies, land concessions and import/export licenses. The Okhna sponsored and financed the RGC budget shortage to support Cambodian Red Cross humanitarian activities, as well as mine clearance and pandemic response, via a public-private partnership. Chinese investment,

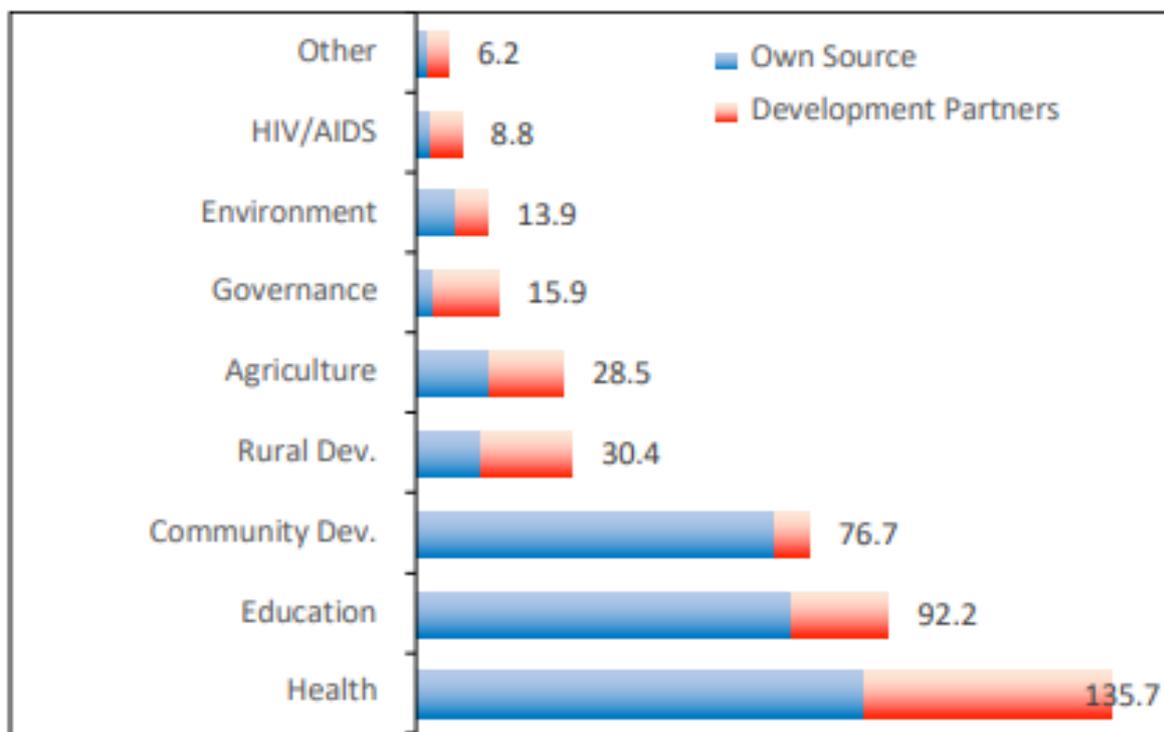
via private and public investors, has reinvigorated this system, “channeling aid and investment into Cambodia via the *Okhna* and in accordance with the Government’s development agenda”.

The Partnership and Financing for Sustainable Development in Cambodia Deep-Dive for CCA 2021 cited progress in making arrangements for multi-stakeholder engagement with the private sector. Still, alliances and coalitions need to be built to address emerging issues and advance the 2030 Agenda.

Civil society

In Cambodia, national and international CSOs represent or bring together women, youth, persons with disabilities, people living with HIV and key populations, older persons, professional associations, and trade unions, and are affiliated with RGC agencies or international organizations. The Cooperation Committee for Cambodia (CCC) and the NGO Forum (NGOF) engage Cambodia's CSOs in parallel with RGC line ministries/agencies. The NGOF and CCC engage in advocacy, research and capacity-building activities on the SDGs with their members and, as the largest NGO in Cambodia, have a direct working relationship with the RGC.

Figure 9. NGO sectoral support in 2019 (USD millions)



Source: CRDB/CDC database 2021.

Civil society in Cambodia consists mostly of NGOs registered at the Ministry of Interior. In 2021, there were 2,000 NGOs, over 60% of which are international. According to the UNDP Development Finance Assessment, since Cambodia’s first general election in 1993, NGOs have proliferated across sectors of development cooperation, largely due to the belief that they offer advantages over the public sector in aid effectiveness. NGO disbursement increased (2009–2015) but remained stable thereafter. Flows comprised only 0.9% of GDP in 2019, a share expected to decrease as GDP enlarges. The Analysis of Multi-Stakeholder Engagement for Sustainable Development in Cambodia found that, in 2021, UN partnerships with CSOs focused on: projects – building peace and institutions (CSD16); and grants – zero hunger (CSDG2), quality education (CSDG4), health and well-being (CSDG3). It also identified gaps

in the RGC engagement with, and inclusion of, CSOs in the SDG process, and challenges with the human rights-based approach (HRBA) and the LNOB principle. The RGC has allocated spaces for CSOs to participate, but broad consultation with all stakeholders, particularly human rights organizations, is lacking. Due to limited resources, moreover, SDG localisation has mostly taken place at the national level. Sub-national actors have not been consistently engaged. Development partners and large international organizations have more influence, given their capacity and resources, while small CSOs and community-based organizations (CBOs) are not directly engaged and, instead, are required to submit inputs via larger organizations.

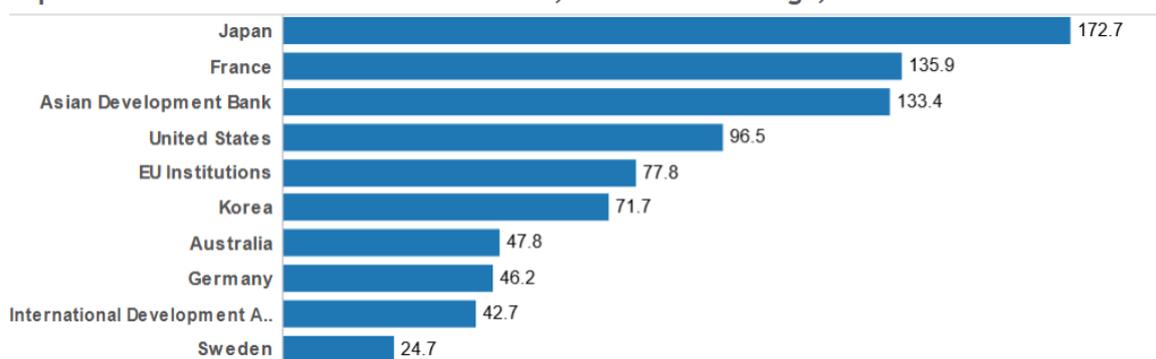
The UN’s engagement with CSOs has increased at the national level, especially in the context of the pandemic during which the UN held discussions with CSOs on issues of common interest (civic space and democratic space, human rights, the socioeconomic impacts of the pandemic, humanitarian response). Through these dialogues, the UN has been able to better understand the challenges encountered and raise them in advocacy efforts with the RGC. However, there are gaps in the UN’s engagement with CSOs, notably at the sub-national level, due to limited UN presence, programming and resources. There is a need to build trust and confidence, given the large number of CSOs.

Development cooperation

External forms of development financing, like ODA, are changing. Grant-funded ODA has fallen dramatically in the last decade, while domestic resources (i.e. tax and non-tax revenues), remittances and FDI continue to increase in order to finance rising investment demands for development.

Figure 10. Top 10 donors of gross ODA for Cambodia, 2018–2019 average (USD million)

Top Ten Donors of Gross ODA for Cambodia, 2018-2019 average, USD million



Source: OECD data, 2021.

Development partners – China, Japan, Korea, France, the World Bank and the Asian Development Bank (ADB) – made significant ODA contributions, with combined disbursements equal to 80% of total ODA in 2020 and estimated at 70% in 2021 and 2022. These partners aim to support Cambodia’s socioeconomic development while creating a favourable environment for investment as part of the economic diversification plan.

Although Cambodia is progressing towards LDC graduation, its per capita GDP remains the lowest among ASEAN nations. As a result, it remains dependent on grants and loans to support public spending. Loan disbursements supporting infrastructure development and cross-cutting sectors have increased overall ODA disbursement in recent years. Major development partners have provided loans in the form of investment projects to support the expansion of transportation networks, electricity and water supplies. In 2020, the infrastructure sector received USD 710 million in loans, while the

cross-cutting sector received USD 510 million. Projections of loan disbursements show a gradual increase at different levels among all sectors, especially the economic and infrastructure sectors. A futures scenario proposed by the Futures Forum of Cambodia shows that, by 2040, as a result of an improved “social protection floor”, donor relief and emergency response efforts could transition into targeted assistance, where aid would be highly clustered (e.g. in local remote areas).

CHAPTER 4: Development Risks and Transformation Opportunities

4.1 Multidimensional Risk Analysis

This section examines major risks that may affect Cambodia's sustainable development trajectory and progress towards the attainment of CSDGs by 2030. In line with the UN SDG-based risk framework, the multidimensional risk analysis has been conducted to underline key risks that should be considered with respect to strategic policy, programming and advocacy. The analysis covers all dimensions of risks pertinent to the country's context and their potential impact (*Table 6*).

Based on the analysis, major risks that are likely to most strongly affect Cambodia are clustered around three main categories: economic uncertainty and rising geopolitical tensions; shrinking democratic space together with a weak judicial system and rule of law; as well as environmental degradation, climate change and food security. Other risk areas with moderate levels, such as migration and public health, are also highlighted.

Economic stability. Despite a decade of stable and high economic growth since 2010 (with an average growth rate of 7% in 2010–2019), the combined impact of the COVID-19 pandemic and significant global economic disruptions saw the Cambodian economy impacted in 2020 (-3.1%) and 2021 (3%). Growth has recovered, but the economy remains highly vulnerable to external shocks due to its narrow economic base and limited capacity and policy options. This economic vulnerability is exacerbated by the fact that the economy is highly dollarized and relies heavily on fiscal policy to support economic development. Rising non-performing loans, which rose by an estimated 2.1% of GDP in 2020 to nearly 4.5% of GDP in 2022, due to the impact of the COVID-19 pandemic, coupled with high levels of private debt (140% of GDP in 2021) and household indebtedness (reaching a historic high of USD 10.4 billion in October 2022) pose critical risks to financial stability that may destabilize the economic conditions and erode investments, possibly resulting in a drag on GDP growth and people's livelihoods.

The overlapping crises, including rising inflation (particularly surging food and energy prices), tightening of global financial conditions and the prolonged war in Ukraine, may result in lower external demands, economic outputs and job opportunities, while simultaneously impacting people's living conditions, especially poor and vulnerable communities. The government's fiscal space has shrunk in the past few years due to the substantial impact of the pandemic, while rising interest rates globally have constrained credit provision for economic activity and, in 2022, put pressure on the government's issuance of Khmer riel sovereign bonds for the first time. Moreover, these overlapping crises, including the ongoing war in Ukraine, may further divert ODA from Cambodia as it is now a lower-middle-income country and, in 2021, met the criteria to graduate from the LDC category for the first time.

Regional and global influences. Alongside economic stability concerns, the rising geopolitical and geoeconomic tensions between superpowers, such as the US and China, and between Russia and the Western Bloc are likely to increase pressure on Cambodia, the economic growth and development of which relies on a narrow band of external markets (five products have accounted for 80% of total exports, and two markets have accounted for 69% of merchandise exports), high levels of external finance (driven by low domestic private savings and investment) and high levels of FDI. Cambodia currently faces a critical dilemma: depend on the US and EU for export markets, but on China and other Asian countries for foreign capital inflows. Cambodia's preferential status to access US and EU markets via the GSP and EBA, respectively, may be further jeopardised, depending on Cambodia's

progress in relation to democratic development and human rights and possibly its positioning in international geopolitics. In 2018, USD 6.1 billion of USD 6.4 billion in Cambodian exports to the EU entered the market under the EBA tariff preferences while, in 2020, nearly one third of Cambodia's USD 6.6 billion in exports to the US benefited from the GSP. Moreover, the prolonged war in Ukraine may pose threats to global economic growth, and supply chain disruptions are likely to continue, possibly resulting in rising energy and food prices and lower growth prospects for Cambodia, which depends on imports for energy and food supply as well as external demands for exports.

Democratic space. The RGC has made efforts to improve democratic and civic space in Cambodia by introducing several legal measures in recent years, including amendments to election-related laws to enable banned politicians to request political rehabilitation through the government and create new political parties. Further, the Commune Elections, held in June 2022, saw participation by several political parties, and amendments to the Law on Associations and Non-Governmental Organisations remain subject to ongoing dialogue with CSOs. Despite these developments, the democratic and civic space remains constrained. Following his mission to Cambodia in August 2022, the UN Special Rapporteur on the Human Rights Situation in Cambodia noted that “the stultification of political and democratic space contravenes the promises made by all parties at the Peace Accords” and, “(w)ith the forthcoming national elections in 2023, the country is challenged to open up that [democratic] space”. Further, he noted that, within Cambodia “many human rights and environmental defenders, media and related organisations voiced concern about the shrinking or shrunken civic and political space”, highlighting concerns about intimidation and harassment by the authorities as well as potential prosecution and criminal charges. This constriction of the political and civic space and discourse therefore leaves limited avenues for people to express their legitimate voices and concerns and fully participate in the democratic process in Cambodia.

As evidenced by the hundreds of political party leaders and members, especially those from the opposition, who have been barred from engagement in the political process due to legal action brought against them by the authorities, the risk of political and civic exclusion has been mounting. Lack of fair and transparent political processes inhibits effective representation of society, most markedly for those at risk of being left behind or those seeking to present a legitimate oppositional voice. Along with a narrower operating space for CSOs, especially human rights NGOs, the continued harassment and intimidation of human rights defenders poses a critical threat to the currently narrow democratic and civic space. The risk is also aggravated by the public perception of rising social and economic injustice, unfair or restrictive law enforcement against those critical of the government, lack of trust in the judicial system and continued reports of widespread corruption. Moreover, governance risks could limit the capacity to build multi-stakeholder partnerships, where the public sector pools financial resources, knowledge and expertise, together with private actors and civil society, to accelerate SDG attainment.

Social cohesion, equality and non-discrimination. Associated with democratic and civic space, there is a substantial threat to social cohesion, equality and non-discrimination. Critical concerns that need to be addressed include rising wealth gaps between the top and bottom population quintiles, gaps in access to income and economic opportunities and social services by populations in different regions, gender gaps in political participation and government institution leadership, and differentiated gender wage gaps. These issues remain compounded by a perceived lack of confidence in the judicial system and law enforcement which, in turn, have undermined trust in public institutions and eroded social capital and cohesion. In 2021, Transparency International ranked Cambodia 157 out of 180 states in

its annual Corruptions Perceptions Index – the lowest in the region, excluding the Democratic People’s Republic of Korea.

Women and girls face distinct disadvantages, rendering them at risk of being left behind. Disparities in women’s access to education and formal employment have contributed to persistent gender inequality. This includes a lack of child-care services to enable women with dependents to work. The impact of the COVID-19 pandemic on girls in education and women in unpaid care work compromised progress towards closing the gap in the labour market. Violence against women remains a widespread challenge which, coupled with limited access to legal and health services, heightens the risks women and girls face. Targeted measures are needed to address structural inequalities, ensure the economic, health, and political rights of all women and girls are fully guaranteed, and increase opportunities through nutrition, education, health, and child-care services.

Environment and climate. As one of the countries most vulnerable to climate change, Cambodia has already been susceptible to climate extremes, including floods and droughts. Climate change will likely put increasing pressure on Cambodia in a myriad of development areas (e.g. reduced economic competitiveness and productivity, impaired agriculture and food systems, degraded biodiversity and ecosystem, regular flooding of coastal areas, hindered access to clean water). Intensive use of natural resources to support economic growth in recent years has put tremendous pressures on environmental degradation and exacerbated vulnerability to climate change. Environmental degradation has stemmed from over-exploitation of resources, including deforestation, mining, and exploitation of freshwater resources. The most acute impacts of climate change will ultimately be borne by the most vulnerable population groups, especially those who rely on persistent agricultural activities for livelihoods (e.g. small-scale farmers and casual workers who may have limited coping capacity), thus leaving them at risk of being left behind. Despite significant progress made to prepare and respond to climate change and natural disasters, substantial challenges remain given the rising frequency and intensity of climate change. Addressing these urgent challenges is further constrained by ineffective governance and implementation of related laws and regulations, cumbersome government structures and coordination, limited national and sub-national capacity and budget, and challenges with stakeholder engagement and management.

Migration. Millions of Cambodians seek job opportunities abroad and may face numerous challenges, poor access to social services and difficult living conditions abroad. At home, children of Cambodians who work abroad may face difficulties accessing nutritious foods, education and health care. Meanwhile, the 2019 population census revealed that internal migrants represent 21.5% of the total population. Migration to urban areas from both rural and other urban locations is the most significant trend, accelerating the pace of urbanization. While migration is one of the key contributors to urban growth and diversity, it affects the rural development landscape through loss of labour for agricultural activities, community support and other social capital dimensions. Rising urbanization has also been propelled by structural change in Cambodia’s economy, which has transitioned from agriculture-based to manufacturing- and services-oriented, as well as people’s search for higher-paying jobs, economic opportunities and higher living standards. While urbanization carries promises of prosperity and improved well-being, rapidly unplanned urbanization can result in greater vulnerabilities, especially for poor and vulnerable groups, and inequalities within urban areas and between urban and rural areas.

Public health. The COVID-19 pandemic remains a persistent threat to socioeconomic resumption and recovery. A resurgence in COVID-19 cases, potentially including new COVID-19 variants seen in many countries, including China and other countries in the region, would have significant implications for the public health-care system and place increased strain upon health resources. While the risk remains low (based on daily reporting of cases), it could rapidly become a major health emergency if appropriate preventive health and containment measures are not effectively implemented.

Data availability and management. Even though data is not classified formally as part of the SDG Risk Framework, the availability and accessibility to data continues to be a challenge for measuring CSDG progress and other development results. According to the Ministry of Planning, there is no data for 20.45% of the CSDG indicators. Availability and accessibility to adequate, up-to-date and disaggregated data covering the social, economic and environmental aspects is essential for inclusive development planning, implementation of public and private investment programmes, monitoring and evaluation of development programmes, and measuring progress towards the achievement of the CSDGs. It is also required for informing the design of national and sectoral public policies and strategies to accelerate the country's development progress and for the formulation of targeted assistance programmes or policy measures to support the near-poor, poor and vulnerable groups. The capacity in the country's national statistical system, including generating and managing data and evidence and data operability, that takes into account emerging and mega trends (e.g. demographic change, climate change, digital transformation) and protects data privacy and security remains a critical challenge, especially in informing the LNOB agenda.

Table 6. Multidimensional SDG Risk Analysis

| SDGs | Risk Areas | Description of Risk Areas | Risk Factors | Likelihood of Risk | Impact of Risk | Overall Risk |
|--|-----------------------------------|--|--|--------------------|----------------|--------------|
|   | Democratic space | <p>Risks to democratic and human rights institutions, and to civil and political rights resulting from shrinking civic space, exclusion, repression and intimidation</p> | <ul style="list-style-type: none"> • Democratic space is increasingly constrained • Dissolution of formal political opposition • Ongoing reports of harassment and intimidation of civil society, human rights defenders, political actors and others • Constricted space for the exercise of human rights and fundamental freedoms • Constrained operating space for CSOs • Ongoing legal and judicial actions against emerging political oppositions | High | High | High |
|   | Displacement and migration | <p>Risks to the population and to the stability of the territory resulting from pressures associated with displacement and/or migration</p> | <ul style="list-style-type: none"> • Challenges for the millions of Cambodians who seek job opportunities abroad and for their families, especially children, including poor living conditions, education and health care • Vulnerability of some migrants to exploitation and human trafficking | Medium | Medium | Medium |

| | | | | | | |
|---|---------------------------------------|--|---|---------------|-------------|-------------|
|   | <p>Economic stability</p> | <p>Risks to the economic, financial and fiscal stability of the country which could impact governance, social cohesion, or people's ability to satisfy their needs</p> | <ul style="list-style-type: none"> • Narrow economic base with skill mismatch and growing labour force • Weak economic performance in terms of lower GDP growth due to slower global economy and declining external demands, particularly EU and US markets • Full withdrawal of the EU's EBA preferential trade scheme and non-reinstatement of the US's GSP • High inflation rate, especially rising food and energy prices • Financial instability driven by rising non-performing loans and a high level of private sector debt, including household indebtedness • Tightened financial resources (declining ODA and private investments) available for financing development | <p>Medium</p> | <p>High</p> | <p>High</p> |
|    | <p>Environment and climate</p> | <p>Risks to the ecology of natural resources, the territory, its ecosystem and its people, resulting from issues associated with</p> | <ul style="list-style-type: none"> • Climate change leading to more frequent and more severe natural disasters such as floods and droughts • Illegal logging and deforestation for agricultural plantations | <p>Medium</p> | <p>High</p> | <p>High</p> |

| | | | | | | |
|--|--|---|---|---------------|---------------|---------------|
|   | | <p>the environment, climate change, natural disaster and natural resource management</p> | <ul style="list-style-type: none"> • Ineffective governance and unpredictable implementation of the laws and regulations related to natural resource management | | | |
|   | <p>Food security, agriculture and land</p> | <p>Risks to people, agriculture, and/or food production in the territory resulting from crop, food production, livestock and land-related issues</p> | <ul style="list-style-type: none"> • Rising temperatures and more frequent and more severe natural disasters, such as floods and droughts, impacting agricultural production • Continued land-grabbing • Rapid and inadequately regulated expansion of large-scale plantations • Ineffective regulation and development of food systems, agricultural and agri-food value chains, and food safety | <p>Medium</p> | <p>Medium</p> | <p>Medium</p> |
|   | <p>Internal security</p> | <p>Risks to the security of the territory, its people and infrastructure, and to the ability of the international community to operate effectively as a result of security issues</p> | <ul style="list-style-type: none"> • Potential for protests following the general election in 2023 if the election process cannot be guaranteed free and fair and the election outcomes are not accepted by all participating parties | <p>Low</p> | <p>Low</p> | <p>Low</p> |

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|---|---|--|--|---------------|---------------|---------------|
|  | <p>Infrastructure and access to social services</p> | <p>Risks to society and the population resulting from a lack of availability or limitations on access to physical infrastructure, and/or basic social services</p> | <ul style="list-style-type: none"> • A significant gap in physical infrastructure, such as roads and bridges • A substantial gap in access to quality basic social services, such as education (e.g. low level of secondary school completion rates) and health care (e.g. high cost of out-of-pocket health expenditure), requiring further and more equitable investment | <p>Medium</p> | <p>Medium</p> | <p>Medium</p> |
|  | <p>Justice and rule of law</p> | <p>Risks to the fair, effective and comprehensive implementation and application of the principles of justice, rule of law and accountability from issues</p> | <ul style="list-style-type: none"> • Continued perceptions of impartiality in the judicial system and law enforcement, and continued reports of widespread corruption • Lack of confidence in the justice system | <p>High</p> | <p>High</p> | <p>High</p> |
|  | <p>Political stability</p> | <p>Risks to the stability of established political and government structures in the territory, resulting from politically-driven factors</p> | <ul style="list-style-type: none"> • Dissatisfaction with or dispute of election processes and outcomes | <p>Low</p> | <p>Medium</p> | <p>Low</p> |
|  | <p>Public health</p> | <p>Risks to the population, the economy and stability of the territory, resulting from actual and emerging</p> | <ul style="list-style-type: none"> • Significant outbreak and spread of COVID-19 • Capacity/willingness of authorities to implement appropriate health and administrative | <p>Low</p> | <p>High</p> | <p>Medium</p> |

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|--|--|---|---|--------|--------|--------|
| | | public health emergencies | measures to respond to another COVID-19 outbreak | | | |
|  | Regional and global influences | Risks to the integrity, stability, safety and prosperity of the territory and its people as a result of the actions of external actors, or the influence of external events | <ul style="list-style-type: none"> • Rising geopolitical and geoeconomic tensions between China and the US and between Russia and the West, which places pressure on the global economy and regional political dynamics • Continued or escalating tensions around Taiwan, the Democratic People’s Republic of Korea, and the South China Sea • Ongoing impacts of the war in Ukraine | Medium | Medium | Medium |
|  | Social cohesion, equality and non-discrimination | Risks to social unity and equality resulting from direct and indirect discrimination, income polarisation, horizontal inequalities and demographic trends | <ul style="list-style-type: none"> • Rising wealth gap between the top and bottom population quintiles • Gaps in access to income and economic opportunities and social services by different regions • Gaps in gender inequality in political participation and government institution leadership • Wage gaps between men and women | Medium | Medium | Medium |

4.2 United Nations Value Addition

As Cambodia advances towards higher middle-income status and prepares to graduate from its LDC status where private investment, particularly FDI, plays a more important role than ODA in economic growth and development, the UN’s role is evolving to reflect this new reality.

Given the UN’s continuous engagement in, and support to, Cambodia over the past 30 years, it has

the foundation needed to capitalise on the important development accomplishments made during this time, as well as the trusted relationship it has developed with the RGC and with the Cambodian people. The UN system has developed strategic, long-standing partnerships with the RGC and other development actors in Cambodia, including development partners, civil society actors, the private sector and others. The UN is, thus, positioned both to support the RGC to meet its international obligations at the policy level while, at the same time, having the flexibility to work with and through NGOs and civil society actors to improve the living conditions of the most vulnerable. In support of the LNOB, gender equality and human rights principles, moreover, the UN must play a key role in strengthening the relationship between the RGC and the community at the grassroots level by fostering the engagement of the people, especially the most vulnerable and marginalized, and amplifying their voices.

The UN's human rights-based approach, normative mandate, and expertise in human development represent areas of strength for the UN in Cambodia. By focusing on the rights and obligations of citizens and duty bearers and linking these to Cambodia's international obligations and conventions, the UN supports the RGC to act on the recommendations of these international bodies and engages and mobilises the RGC, and other development partners and stakeholders on these aims. The UN also supports Cambodia to expand partnerships with global and regional multilateral entities and emerging development partners, including South-South partnership, and to access innovative, emerging development knowledge and solutions, including development financing. The UN will continue to play a vital role in supporting Cambodia with best practices, technical expertise and development financing from its specialized and technical agencies, towards achievement of the 2030 Agenda.

CONCLUSION

The efforts that Cambodia has made towards the 2030 Agenda and graduation from LDC status are evident in its two decades of economic growth prior to the pandemic, shift from agriculture to industry, prioritisation of a digital economy in its national agenda, targeted programming to support vulnerable groups during the pandemic, establishment of a comprehensive child protection system, and efforts towards gender equality with representation of women in political leadership roles.

Despite this progress, the lingering impacts of the pandemic, coupled with global tension and the growing threat of climate change place Cambodia in a precarious situation. Attaining the CSDGs will depend on Cambodia's capacity and data evidence to ensure good governance, as well as transparency, accountability and human rights for all, while addressing the impacts of the pandemic and preparing for future threats, including those brought by climate change and geopolitical relations.

Measures that support improvements in rule of law, voice and accountability, and control of corruption are vital and must enable equitable participation of citizens in governance, including budget preparation and implementation, to increase transparency and trust in the government. Human rights protection, including the rights to freedoms of expression, press freedom, and peaceful assembly, are imperative and must include the protection of CSOs, human rights defenders, activists and journalists. The Law on Associations and Non-Governmental Organizations, Law on Access to Information, and Legal Aid Policy must be effected to foster democracy and sustainable development.

To attain upper-middle-income status by 2030 and high-income status by 2050, Cambodia must regain social and economic stability, in the aftermath of the pandemic and in response to the ongoing impacts of the war in Ukraine. This will require continued and augmented social protection and human resources development schemes, as implemented in response to the pandemic. Measures to boost the economy, notably in agriculture, tourism, FDI and merchandise exports, are needed to address the slowing economy, rising inflation, and the impacts on the livelihoods and well-being of the people, notably the poor and other vulnerable groups. With the global climate crisis accelerating and Cambodia facing elevated vulnerability to environmental and climatic hazards, climate adaptation and response measures are vital, including policies and programming that support the population to adapt to new realities in the face of climate change. All efforts must target groups at risk of being left behind, to ensure gender equality, human rights and sustainable development for all people in Cambodia.

Drawing on its human rights-based approach, normative mandate, and expertise in human development, the UN will support the RGC to implement measures in favour of: financial investment in mechanisms to support CSDG implementation and designation of ministries responsible for CSDG implementation. Targeted measures will support: good governance and transparency, including through improvements in rule of law, voice and accountability, control of corruption, electoral reform and human rights protection (e.g. formation of a national human rights institution in line with the Paris Principles); a centralised system to coordinate legal aid; strengthened economy, through increased productivity, diversification and innovation, and targeted measures to reduce the gender wage gap; prioritisation of youth in education, skills development, entrepreneurship and labour force; gender equality in education, training and employment, including in senior and high-level roles; increased allocation of national budget to human and social development, including improved social protection programmes and pro-poor policies that target vulnerable groups, particularly those in remote, hard-to-reach areas and traditionally excluded social groups; improved gender-based violence (GBV) prevention, response and recovery efforts, including capacity-building measures to support police, judiciary and other accountability mechanisms; scaled up child protection case management services

and programming to shift social norms and improve parenting skills; climate change adaptation and disaster risk reduction measures; and food security and nutrition.

ANNEXES

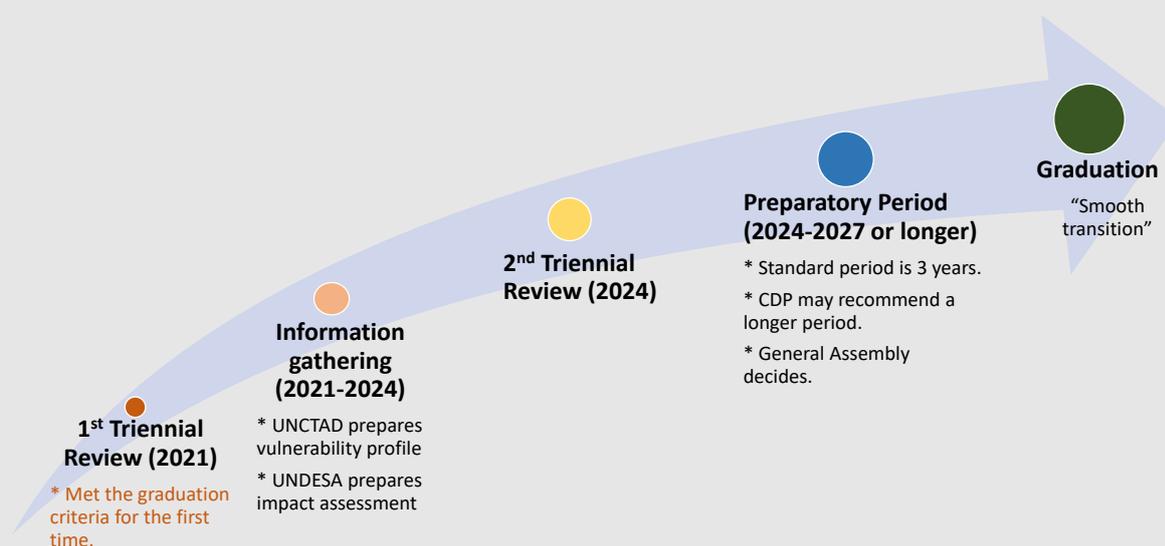
Annex 1: Cambodia: Pathways Towards Graduation from Least Developed Country Status

Cambodia met the criteria to graduate from least developed countries (LDC) status for the first time at the 2021 triennial review of the UN Committee for Development Policy (CDP). To graduate, Cambodia must meet the criteria again at the next triennial review in 2024 (i.e. fulfil the requirement of meeting the criteria in two consecutive triennial reviews). As such, the course of action is vital to ensure Cambodia is on track both to graduate and to achieve sustainable progress thereafter.

| LDC Criteria | 2021 Thresholds | Cambodia's value at the 2021 triennial review |
|--|--------------------|---|
| Gross national income (GNI) per capita | USD 1,222 or above | USD 1,377 |
| Human assets index (HAI) | 66.0 or above | 74.3 |
| Economic and environmental vulnerability index (EVI) | 32.0 or below | 30.6 |

Source: UN Committee for Development Policy.

Meanwhile, the 2021 triennial review did not take into account the impacts of the pandemic that have set the country back in its progress towards its development goals, in some cases even reversing previous gains. In 2020, Cambodia's economy witnessed a sharp contraction of 3.1%, and poverty is estimated to have risen to 17.8%, based on the results of the Ministry of Planning's 2019–2020 Cambodia Socio-Economic Survey. The GNI per capita recovered to the pre-pandemic level in 2021, at USD 1,550 per person. Low-level economic diversification, limited structural transformation and the intensifying climate crisis are likely to jeopardise graduation.



Source: Author's illustration.

Concrete benefits of LDC graduation are mainly attained in the process of graduation, with technical and financial assistance of development partners preparing Cambodia for graduation. With LDC status,

Cambodia is eligible for such assistance to focus on critical areas, enhance human resource capability, improve national capacity to absorb shocks, and reduce vulnerability and foster a smooth transition.

There are also intangible benefits of graduation. It is a remarkable development milestone, which would boost national pride for Cambodia. It may build the collective self-confidence of Cambodians to set a higher vision and accomplish a larger development ambition. Graduation also lends to higher income level, improved human capability and a more resilient economic structure, enabling Cambodia to be viewed more favourably by international investors and expanding access to international investments and finance for both public and private sectors. It may also better position Cambodia in international fora and negotiations with development financiers (e.g. multilateral development banks).

Phasing out benefits associated with LDC status could present challenges. Upon graduation, Cambodia will no longer benefit from LDC-specific international support measures (ISMs) and may face more challenges in driving its national development and integrating into the world economy once it enters a more competitive environment. However, as ODA has already been declining and most development partners do not limit development financing to those with LDC status, the impact may not be as drastic. Similarly, upon graduation, Cambodia would be required to make a contribution to the UN budget and be unable to obtain travel support for certain international meetings. Given the size of Cambodia's economy and national budget, however, this effect should be manageable.

The loss of trade preferential access appears to be the most significant challenge. After graduating, Cambodia will lose the EBA benefits of accessing EU markets, which represent major export destinations and account for 18.4% of Cambodia's total exports (2021). Similarly, additional benefits of the LDC-linked GSP from the US will be lost, while Cambodia may still benefit from the general GSP.

While considering policy solutions to cope with the lost benefits is important, optimising the existing benefits of LDC status is imperative to prepare for a smooth, sustainable graduation and beyond. Cambodia still has the opportunity to derive benefits from the existing trade preferential schemes and the LDC-specific special and differential treatments under WTO to promote new economic sectors, industrial value chain upgrading and export diversification for sustainable and inclusive growth.

A forward-looking perspective is critical to craft policy solutions and measures to tackle potentially adverse impacts post-graduation. The business and investment environment may be substantially different. After graduation, Cambodia will face fiercer competition with other countries in major markets (e.g. EU, US). For example, Cambodia is likely to face more difficulties in competing with major garment exporters to the EU markets (e.g. Bangladesh, Vietnam), as other exporters have higher productivity and Vietnam has a free-trade agreement with the EU to export at zero or low tariff rates.

In addition, it would be more challenging for Cambodia to attract FDI. Following graduation, foreign investors may prioritise investment in countries that still have LDC status. Evidence shows that Cambodia's exports to the EU markets, largely driven by firms owned by foreign investors, are attributable to Cambodia's access to the duty-free and quota-free EBA.

Graduation from LDC status will be an important milestone in the country's development path but not an end in itself. Cambodia may need to look beyond meeting the graduation criteria and establish grounds for sustainable development post-graduation. To prepare for a smooth graduation, a whole-of-government approach is critical and must include establishment of a national coordination

mechanism, institutional capacity-building and consultations with the private sector, CSOs and other stakeholders. Proactive policy options are needed to optimise the benefits of the existing LDC status and minimise the potentially adverse impact of graduation. Structural transformation, expansion of productive capacity, and diversification of the export base are necessary to mitigate the impact of graduation. Likewise, post-graduation investment climate and international trade rules and norms must be taken into account to minimise a negative impact on the country. Lastly, a national smooth transition strategy prepared in cooperation with other stakeholders, including development and trading partners, the private sector, and the UN system, is key to a successful transition ensuring that the loss of LDC-specific ISMs will not impair the country's development.

Annex 2: Environment- and Climate-related Policies, Strategies, Plans and Laws

TABLE 1: ENVIRONMENT AND CLIMATE RELATED POLICIES, STRATEGIES, PLANS AND LAWS

| Thematic area | Policies, strategies, plans, legislative instruments |
|----------------|--|
| General | <p><u>Policy/guidelines</u></p> <ul style="list-style-type: none"> • Policy on Environmental and Social Safeguards for Sub-National Democratic Development (2019) • Guideline for pilot testing Policy of Environmental and Social Safeguards and Policy on Promotion of gender Equality for Sub-national Democratic Development in Sub-National (2022) <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • Rectangular Strategy for Growth, Employment, Equity and Efficiency – Phase IV • National Strategic Development Plan (NSDP) 2019-2023 <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Environmental Code (draft) • Law on the Establishment of the Ministry of Environment, NS/RKM/0196/01, 24 January 1996 • Law on the Establishment of the Ministry of Agriculture, Forestry and Fishing, NS/RKM/0196/13, 24 Jan 1996 • Royal Decree on the Establishment of the Tonle Sap Basin Management Authority, NS/RKM/0907/412, 08 September 2007 • Sub-Decree on Organisation and Functioning of the Ministry of Environment, 55/OrNorKror.BorKor, 04 May 2015 • Royal Decree on establishment, roles and functioning of Ministry of Water Resources and Meteorology (23 Jun 1999) • Royal Decree on the establishment of Tonle Sap Authority (29 Jun 2009) • Sub-decree on Mekong River Commission (2 Feb 1999) • Sub-decree on the Organization and Functioning of the General Secretariat of Tonle Sap Authority (9 May 2008) • Law on the establishment of the Ministry of Industry, Science, Technology and Innovation (2020) • Royal decree establishment of NCDM 2002 • Royal decree on the organization and functioning of the national committee for disaster management (2015) |
| Climate change | <p><u>Policies/guidelines</u></p> <ul style="list-style-type: none"> • Guidelines for Integrating Climate Change Considerations into Commune Development Planning-General (2014) • Climate Resilient Irrigation Guidance Paper (2014) |

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| | <ul style="list-style-type: none"> • Technical Manual for Commune/Sangkat Small Scale Climate Resilient Infrastructure <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • Cambodia Climate Change Strategy (2014-2023) • Updated Nationally Determined Contributions (2020-2030) • Long-Term Strategy for Carbon Neutrality (2021-2050) • National Adaptation Programme of Action to Climate Change (NAPA), 2006 • Cambodia National REDD+ Strategy (2017-2026) • Action & Investment Plan for the implementation of the National REDD+ Strategy of Cambodia (2020) • Climate Change Financing Framework (2015) • Cambodia National Adaptation Plan Financing Framework and Implementation Plan (2017) • Climate Change Strategic Plan for Public Health: 2013-23 • Rural Development for Climate Change Adaptation in Cambodia: 2013-22 • Technology needs assessment and technology action plans for climate change adaptation (2013) • Climate Change Action Plan for Disaster Management Sector (2014-2018) • Climate Change Action Plan for Industry and Handicraft Sectors (2015-2018) • Climate Change Priorities Action Plan for Agriculture, Forestry, and Fisheries Sector (2014-2018) • Climate Change Action Plan for Education (2014-2018) • Gender and Climate Change Action Plan (2014-2018) • Climate Change Action Plan of in Land Management Sector (2015-2018) • Climate Change Action Plan for Mines and Energy Sectors (2015-2018) • Climate Change Action Plan of Ministry of Environment (2016-2018) • Climate Change Action Plan of Ministry of Information (2015-2018) • National Climate Change Action Plan for Public Health (2014-2018) • Climate Change Action Plan for Rural Development Sector (2014-2018) • Climate Change Action Plan in Tourism Sector (2015-2018) • Climate Change Action Plan for Transport Sector (2014-2018) • Climate Change Action Plan for Water Resources and Meteorology (2014-2018) <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • The National Council for Sustainable Development (NCSD), and its Secretariat (GSSD), (2015) (the Royal decree No. NorSor/RorKorTor/0515/403 and the sub-decree No. 59 OrNorKrar.BorKor) |
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| | <ul style="list-style-type: none"> • The Climate Change Technical Working Group (CCTWG) (2017) (Prakas NO.002 S.S.R NCSD) |
| Disaster risk reduction | <p><u>Policies/guidelines</u></p> <ul style="list-style-type: none"> • Policy Document of the National Committee for Disaster Management in Cambodia (2004) • Standard Operating Procedures for Multi Hazard Early Warning Systems • National Groundwater Management Strategy • Drought Management Manual for Cambodia • Guideline for mainstreaming gender inclusive in disaster management (2020) <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • National Action Plan for Disaster Risk Reduction (NAP-DRR) 2014–2018 • Plan for Action for DRR in Agriculture (2014-2018) • National Disaster Risk Reduction Framework 2019- 2030 • National Action Plan for Disaster Risk Reduction 2019-2023 • National Groundwater Management Strategy • National and sub-national contingency plan for flood 2022 <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Law on Disaster Risk Management, NS/RKM/0715/007, 8 June 2015 • Sub decree emergency food reserve 2012 • Sub decree for subnational disaster risk management • Sub decree on national coordination taskforce and emergency management system 2020 • Sub decree on national disaster day 2020 • Circular on establishment disaster management at ministry level 2020 • Law on state of emergency 2020 |
| Sustainable management of natural resources including land, forest, wetlands and water resources, biodiversity | <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • Natural Resource Management Plan (2008-2013) • National Environmental Strategy and Action Plan (2018) • National Protected Area Strategic Management Plan (2017-2031) • National Forest Programme (2009-2029) • National REDD+ Strategy and Action Plan (2017-2026) |

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| | <ul style="list-style-type: none"> • Production Forest Strategic Plan (draft) • National Biodiversity Strategy and Action Plan (2016) • Angkor Forest Rehabilitation and Landscape Enhancement plan (1997-1998) • Management Plan of the Preah Vihear Protected Forest for Plan and Wildlife Genetic Resources Conservation (2010-2024) • Zonation and Management Plan of Boeung Tonle Chhmar Ramsar Site (2022-2031) • National Action Program to Combat Land Degradation (2018-2027) <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Environmental Code (draft) • Law on Environmental Protection and Natural Resource Management, NS/RKM/1296/06, 24 December 1996 • Law on Forestry, NS/RKM/0802/016, 31 August 2002 • Law on Nature Protection Areas (Protected Areas Law), NS/RKM/0208/007, 15 February 2008 • Royal Decree on the Protection of Natural Areas, 01 November 1993 • Law on the management of water resources in Cambodia (29 Jun 2007) • Sub-Decree on Community Forestry Management, 79 ANK.BK, 02 December 2003 • Sub-ecree on the Rules of Authorizing the State Forest Land Utilization for Trees Planting, 26 ANK.BK, 25 March 2008 • Sub Decree on the procedures for the Establishment, Classification and Registration of Permanent Forest Estate 53 ANK.BK, 01 April 2005 • Sub-Decree on Forest Concessions Management, 05/ANK/BK, 7 February 2000 • Royal Decree on Tonle Sap Biosphere Reserve (10 April 2001) • SubDecree on the Establishment of Seima Protection Forest and Biodiversity Conservation Area, Mondulkiri and Kracheh Provinces, 143 OR NOR KROR.BOR KOR, 07 August 2009 • Sub-Decree on the demarcation of flooded forest areas of 647,406 hectares in 6 provinces around the Tonle Sap Lake (29 August 2009) • Prakas on Classification and List of Wildlife Species, 020, 2007 • Prakas on the Establishment and Management of Forestry Community Zone in Pailin Province, 102, 15 March 2010 (other prakas for other provinces) • Prakas on Protected Areas, 1033, 03 June 1994 • Prakas on establishment of Community Protected Areas, 2014 |
| Fisheries | <u>Legislative instruments</u> |

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| | <ul style="list-style-type: none"> • Law on Fisheries, NS/RKM/506/011, 2007 • Law on Fishery Management, NS/RKM/0506/011, 21 May 2006 • Royal Decree on Establishment of Community Fisheries, NS/RKT/240, 2005 • Royal Decree on Fishery Management, Kret-Chbab/33 K/C, 09 Mar 1987 • Sub-Decree Endangered Fisheries Products, 123 ANK.BK, 2009 • Sub-Decree on the Cancellations and Reduction of Fishing Lots to be Reserved for Family Scale Fishing in Takeo Province, 07 ANK.BK, 22 Jan 2001 (also individual sub-decrees for other provinces) • Sub-Decree on the Lease of Fresh Water and Sea Fishing Domains for Exploitation, 26 ANK, 09 May 1989 • Decision on the Establishment of the Inter-ministerial Committees to Prevent Anarchy of Fishery Crimes in Cambodia's Marine Fishing Areas, 04 Apr 2000 |
| Marine and coastal ecosystems and water | <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Law on Water Resources Management of the Kingdom of Cambodia, NS/RKM/0607/016, 29 June 2007 • Circular on the Development of Coastal Zones of the Kingdom of Cambodia, No. 01, 03 February 2012 |
| Sustainable consumption and production – circular economy/ Green growth | <p><u>Policies/guidelines</u></p> <ul style="list-style-type: none"> • National Policy on Green Growth 2013-2030 <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • National Circular Economy Strategy and Action Plan (2021-2035) • National Green Growth Roadmap 2009 • Cambodia National Strategic Plan on Green Growth (2013-2030) • National Strategic Development Plan (2014-2018) <ul style="list-style-type: none"> • Phnom Penh Sustainable City Plan 2018-2030. (2018) MoE • Sustainable City Strategic Plan 2020 - 2030 For Seven Secondary Cities. (2020) MoE • Policy on Urban Solid Waste Management 2020-2030. (2020) MoE • National Sustainable Consumption and Production Roadmap. (Forthcoming) MoE |
| Waste and pollution | <p><u>Policies/guidelines</u></p> |

- Phnom Penh Waste Management Strategy and Action Plan 2018 – 2035. (2018) PPCA
- Policy on Urban Solid Waste Management 2020-2030. (2020) MoE
- National Waste Management Strategy and Action Plan. (Forthcoming) MoE

Strategies/plans

- Phnom Penh Waste Management Strategy and Action Plan 2018 – 2035. (2018) PPCA
- Policy on Urban Solid Waste Management 2020-2030. (2020) MoE
- National Waste Management Strategy and Action Plan. (Forthcoming) MoE

Legislative instruments

- Sub-Decree #42 on the Control of Air Pollution and Noise Disturbance, 10 July 2000
- Sub-Decree #27 on Water Pollution Control, 06 April 1999
- Sub-decree #36 on solid waste management. (1999)
- Sub-decree #72 on environmental impact assessment process. (1999)
- Sub-decree #42 on the control of air pollution and noise disturbances. (2000)
- Sub Decree #39 on Borey Management. (2011)
- Sub-decree #113 on management of urban garbage and solid waste. (2015)
- Sub-decree #16 on e-waste management. (2016)
- Sub-decree #168 on plastic bags management. (2017)
- Clean Air Plan of Cambodia, November 2021
- Circular No.01 January 2022 “Measures to Prevent and Reduce the Ambient Air Pollution
- Instruction on the implementation of Sub-decree # 36. (1999)
- Guideline on Solid Waste Management at factories, enterprises and companies. (2003)
- Joint declaration #80 MoE, MOI on solid waste management in province/municipality. (2003)
- Joint declaration #73 MoE, MEF and MOI on environmental budget. (2015)
- Prakas #446 on the organisation and function of the Department of Hazardous Substance Management. (2015)
- Technical Guidance on MSW Management.MoE. (2016)
- Inter-ministerial instruction on municipal solid waste management. (2017)
- Determination of maximum tipping fee on municipal solid waste management service. (2018)

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| | <ul style="list-style-type: none"> • Declaration on Reforming of Management System and Fee Payment Procedure for Solid Waste Collection Service in Phnom Penh City during Transaction. (2019) • Decision #95 The Establishment of working group to lead and strengthen efficiency and capacity of environmental sector for sub national administration. (2020) • Decision #25 The Appointment of the Composition of The Urban Solid Waste Management Committee. (2021) |
| Sustainable agriculture | <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Law on Seed Management and Plant Breeders Rights, NS/RKM/0508/015, 13 May 2008 • Law on Biosafety, NS/RKM/0208/006, 18 February 2008 • Law on Farming Community, NS/RKM/0613/008, 09 Jun 2013 • Law on Community Agriculture, NS/RKM/0613/008, 09 May 2015 • Sub-Decree on the Classification of State Permanent Forest Reserve Land and the Granting of Economic Land Concessions to Private Companies for Agro-Industrial Investments in Battambang Province, 08 ANK.BK, 09 January 2009 • Sub-Decree on the Agricultural Census in Cambodia 2013, 226 ANK.BK, 04 Dec 2012 • Sub-Decree on the Establishment of Alternative Food Supplies System in Cambodia, 145 ANK.BK, 12 Sep 2012 • Sub-Decree on the Contract Farming Production, 36 ANK.BK, 24 Feb 2011 |
| Sustainable tourism and heritage management | <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • Angkor World Heritage Area Tourism Management Plan in 2012 • Tourism Development Plan for the Destination Siem Reap – Angkor, 2020-2030 • Tourism Development Master Plan for Siem reap 2020-2035 • Angkor Management Plan (2007) • Angkor Community Heritage and Economic Advancement Plan (2014-2019) |
| Sustainable industry | <p><u>Policies/guidelines</u></p> <ul style="list-style-type: none"> • Cambodia Industrial Development Policy (2015-2025) • National Policy on Science, Technology and Innovation (2020-2030) <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • Cambodia's Science, Technology & Innovation Roadmap 2030 |

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| | <ul style="list-style-type: none"> • Cambodia Trade Integration Strategy 2019 – 2023 • Draft Small and Medium Enterprise Development Policy 2021-2026 and Five-Year Implementation Plan 2020-2024 <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Law on Geographical Indications (2014) • Law on the Management of Quality and Safety of Products and Services (2000) • Consumer Protection Law (2019) • Royal Decree on National Council for Science, Technology and Innovation (08 September 2014) |
| Planning | <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Sub-Decree on Environmental Impact Assessment Process, 72 ANRK.BK, 11 August 1999 (Will be replaced by Draft Law on Environment Impact) • Prakas on General Guidelines for Developing Initial and Full Environmental Impact Assessment Reports, 376 BRK.BST, 02 September 2009 • Prakas on Establishment of Technical Working Group for Reviewing and Commenting on EIA Report, 063 PRK.MOE, 18 February 2014 • Prakas on Registration of Consulting Firm for Studying and Preparing Environmental and Social Impact Assessment Report, 215 BRK.MOE, 19 May 2014 • Prakas on public participation in EIA processes |
| Land | <p><u>Strategies/plans</u></p> <ul style="list-style-type: none"> • Phnom Penh Sustainable City Plan (2018-2030) <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Law on Concessions, NS/RKM/1007/027, 19 September 2007 • Law on Establishment of the Ministry of Land Management, Urban Planning and Construction, NS/RKM/0699/09, 06 May 1999 • Law on Land Management, Urban Planning and Constructions, Preah Reach Kram/04NS94/10Aug94, 24 May 1994 • Law on Land, NS/RKM/0801/14, 30 August 2001 • Law on Administrative Management of the Capital, Provinces, Municipalities, Districts and Khans (“Organic Law”). NS/RKM/0508/017. May 2008 • Law on administration management of communes and Sangkats (2001) • Sub-Decree on the Procedures to Establish Cadastral Index Map and Land Register, 46 ANK.BK, 31 May 2002 |

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|-------------|---|
| | <ul style="list-style-type: none"> • Sub-Decree on the Rules and Procedures for Reclassification of State Public Properties and Public Entities, 129 ANK.BK, 27 November 2006 • Sub-Decree on Sporadic Land Registration, 48 ANK.BK, 31 May 2002 • Sub-Decree on Social Land Concessions, 19 ANK.BK, 19 March 2003 • Sub-Decree on Economic Land Concessions, 146 ANK.BK, 27 December 2005 • Inter-Ministerial Proclamation on the Strengthening of Economic Land Concessions Management, MAFF No. 177 MoE No. 206, 09 May 2014 • Sub-Decree on the Management and Administration of Agricultural Lands, 06 ANK, 6 April 1985 • Sub-decree on State Land Management (2005) |
| Extractives | <p><u>Legislative instruments</u></p> <ul style="list-style-type: none"> • Law on Mineral Resource Management and Exploitation, NS/RKM/0701/09, 13 July 2001 • Sub-Decree on the Management of Mineral Resources Exploration and Exploitation Licenses, No. 72 ANKr.BK, 5 May 2016 • Inter-Ministerial Prakas on Classification of EIA for Projects of All Kinds of Construction Minerals Exploitation or Other Minerals with the Characteristic of Handicraft or Small-Scale Exploitation, 191, 26 April 2016 |

TABLE 2: STATUS OF CAMBODIA'S RATIFICATION OF MULTILATERAL ENVIRONMENTAL CONVENTIONS¹

| MEAs | Nested Protocols/ Agreements | Signature Date | Ratification/ Accession |
|---|---------------------------------|-------------------|---|
| Nature | | | |
| Convention on Biological Diversity (CBD) | | | 9 Feb 1995 - Accession |
| | Cartagena Protocol | | 17 Sep 2003 - Accession |
| | Nagoya Protocol | 1 Feb 2012 | 19 Jan 2015 - Ratification |
| Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) | | 4 July 1997 | 2 Oct 1997 - Ratification |
| World Heritage Convention | | | 28 Aug 1991 - Accession |
| Ramsar Convention | | 23 Oct 1999 | 23 Jun 1999 - Accession |
| UN Convention to Combat Desertification | | 15 Oct 1994 | 18 Aug 1997 - Ratification |
| <i>Agreement on Port State Measures (PSMA) to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing (*not a MEA)</i> | | 24 July 2017 | |
| Chemicals and Waste | | | |
| Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal | | | 2 Mar 2001 - Accession |
| Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade | | | 1 Mar 2013 - Accession |
| Stockholm Convention on Persistent Organic Pollutants | | 23 May 2001 | 25 Aug 2006 - Ratification |
| Minamata Convention on Mercury | | 10 Oct 2013 | 8 Apr 2021 - Ratification |
| UN Convention on the Law of the Sea | | 1 Jul 1983 | |
| Climate | | | |
| UN Framework Convention on Climate Change | | | 18 Dec 1995 - Accession |
| | Kyoto Agreement | | 22 Aug 2002 - Accession |
| | Paris Agreement | 22 Apr 2016 | 6 Feb 2017 - Ratification |
| | | | |
| Vienna Convention for the Protection of the Ozone Layer | | | 21 Jun 2001 - Accession |
| | Montreal Protocol | | 27 Jun 2001 - Accession |
| | Kigali Amendment | 8 Apr 2021 | |
| Regional Seas Conventions and Action Plans | | | |
| Coordinating Body on the Seas of East Asia (COBSEA) | | | Participating Country* Non-binding agreement |

¹ Source: <https://www.informea.org/en/countries>

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