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EFFECTS OF SCHOOL RESOURCES ON STUDENT LEARNING ACHIEVEMENT IN CAMBODIA: EVIDENCE FROM PISA-D

Introduction

Education spending accounts for a significant share of government expenditure around the world. In 2016, the global average educational expenditure as the share of total government spending was around 15 percent, while the Cambodian government allocates between 15 percent and 20 percent of its total recurrent budget to the education sector (UNESCO 2017; World Bank 2020). A question researchers and policymakers alike are keen to know, is how effective education interventions or investments on school resources (e.g. class size, teacher education, provision of textbooks, and school facilities) are. However, it seems there is no clear answer to this question or one-size-fit-all program intervention, as existing literature on the effects of school resources on student learning has been ambiguous, producing inconclusive results (Glewwe et al. 2011; Filmer and Pritchett 1999; Checchi 2005). Therefore, there is still considerable disagreement over what kind of school resources are effective in improving student learning.

Some studies suggest that small class size is more suitable for student learning, January 2020

As with many other developing countries, a substantial proportion of students in Cambodia fail to learn what they are supposed to acquire at schools. Results from the Cambodian national assessment conducted in 2013 revealed that half of the students could not obtain basic proficiency in Khmer language and mathematics (MoEYS 2015). Furthermore, when the new Minister of Education Youth and Sports reformed grade 12 national examination in 2014 by attempting to eradicate cheating in the exams, the pass rate plummeted from around 80 percent to merely 43 percent (Chhinh 2016). To address these issues, educational reforms in Cambodia have shifted focus from access to the quality of education. These reforms include the implementation of the teacher policy action

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plan, enhancing inspection to ensure the quality of education, and strengthening student's learning assessment (MoEYS 2019b).

Nevertheless, the effects of school resources on Cambodian student learning are still less explored. A few studies have examined the effects of school resources on student learning in Cambodia (Song 2012; Marshall and Fukao 2019), but these studies were drawn from small sample sizes or non-national representative surveys. This study intends to investigate the relationships between a wide range of school resources and student learning achievements using large-scale Programme for International Student Assessment for Development (PISA-D) survey data, the first international student learning assessment Cambodia participated in 2017.

Literature Review

A body of literature on a broad range of school resources associated with the student learning achievement provides information on commonly examined factors including class size, school infrastructure, school meals, student textbooks, teacher-pupil ratio, teacher experience, and teacher education (Greenwald, Hedges, and Laine 1996; Glewwe et al. 2011). One of the most influential studies on the effects of school resources on student learning by Coleman et al. (1966), found that the effects of school resources on student learning was positive but weaker than anticipated; yet, family background appeared to be far more influential in determining student' learning outcomes.

More than 60 years after the Coleman report, debates on the effects of school resources on student learning continue as findings from later studies yield inconsistent results (Chowa et al. 2015; Case and Deaton 1999; Fuchs and Wößmann 2008). For instance, it is believed that small class size is more suitable for student learning; however, empirical studies on the effect of class size on student learning have produced mixed results. Studies in 11 countries using TIMSS data detected the effect of class size only in some countries where teachers are not well paid (Wößmann and West 2006). In Angrist and Lavy (1999)'s study in Israel, positive effects of smaller class sizes on student learning were found only among students in grades 4 and 5, but not students in grade 3. Moreover, school infrastructure seems to be strongly associated with student learning outcomes in developing countries, but has little or no effect on student learning in developed countries (Glewwe et al., 2011).

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Method

This study follows the education production function, commonly used in studies investigating the effects of educational inputs on student learning outcomes. In the education production function, student learning outputs are determined by school and family inputs as well as student characteristics, including their innate abilities (Hanushek 1979; Glewwe and Lambert 2010).

Our main interests are the effects of school and teacher factors on student learning achievement; however, we also incorporate family characteristics (mother education, father education, and household socioeconomic status), and child characteristics (gender, attending grade, grade repetition, absenteeism, and child work). Student's innate abilities are not included in our models as there is no suitable variable to proxy these innate abilities in our dataset. As recommended by the OECD, this study employed multilevel models, also known as hierarchical linear models (HLM) for the estimation of the effects of school resources on student learning.

The data in this study comes from the Programme for International Student Assessment for Development (PISA-D), the first international standardised test conducted in Cambodia. First 170 schools were selected from the list of eligible secondary schools, from which 5,162 15-year-old students in grades 7 and higher were selected in the second-stage sampling (OECD 2018; MoEYS

Table 1: Variable definitions and summary statistics

Variable	Definition	Mean	Std. Dev.	Min	Max
Student learning achievement					
Reading score	Average plausible values of reading score.	331.79	53.04	142.55	520.41
Mathematics score	Average plausible values of mathematics score.	338.92	64.51	102.49	569.20
Science score	Average plausible values of science score.	339.19	41.35	144.09	508.36
School resources					
Urban school	Dummy variable taking the value 1 if school located in urban area, otherwise 0.	0.80	0.40	0.00	1.00
Public school	Dummy variable taking the value 1 if school is public school, otherwise 0.	0.91	0.29	0.00	1.00
Class size	Average number of students per class.	44.40	12.67	13.00	53.00
School infrastructure	An index constructed based on school's basic and advanced infrastructural features and facilities.	4.19	0.99	2.86	10.00
Textbook	Dummy variable taking the value 1 if every student has textbooks, otherwise 0.	0.52	0.50	0.00	1.00
Ability grouping	Dummy variable taking the value 1 if school organizes instruction differently based on student's abilities, otherwise 0.	0.37	0.48	0.00	1.00
Remedial class	Dummy variable taking the value 1 if school offers remedial classes to slow learners, otherwise 0.	0.62	0.49	0.00	1.00
Teaching experience	Average teachers' teaching experience.	14.73	4.75	4.83	28.57
Teachers with bachelor	Percentage of teachers with bachelor's degrees.	0.61	0.22	0.00	1.00
Teachers conducting private tutoring	Percentage of teachers conducting private tutoring.	0.60	0.19	0.00	0.92
Teachers with second job	Percentage of teachers having secondary jobs.	0.35	0.18	0.00	1.00
Student and family's characteristics					
Female	Dummy variable taking the value of 1 if student is female, otherwise 0.	0.54	0.50	0.00	1.00
Grade	Grade student attended at the time of survey.	9.75	1.11	7.00	12.00
Repeat	Dummy variable taking the value of 1 if student repeated grade one year or more, otherwise 0.	0.28	0.45	0.00	1.00
Long absence	Dummy variable taking the value 1 if student missed class more than three months, otherwise 0.	0.07	0.25	0.00	1.00
Paid work	Dummy variable taking the value of 1 if student was involved in paid work, otherwise 0.	0.19	0.39	0.00	1.00
Family work	Dummy variable taking the value of 1 if student was involved in family work, otherwise 0.	0.43	0.49	0.00	1.00
Literate mother	Dummy variable taking the value of 1if student's mother is literate, otherwise 0.	0.62	0.49	0.00	1.00
Literate father	Dummy variable taking the value of 1 if student's father is literate, otherwise 0.	0.78	0.42	0.00	1.00
Household resource	An index constructed based on household possessions (e.g., such as shared toilet, books at home, television, washer, computer, and car, etc.).	5.25	0.84	2.60	8.93

Source: Created by the authors based on PISA-D Cambodia data (2018)

2018). Two-hour school-based tests in reading, mathematics, and science were administered in late 2017 at the sampled schools. After dropping observations with missing values or non-applicable values, only 3,184 students from 121 schools are used for the primary analysis in the study. Student learning achievement in this study is measured by the test scores in reading, mathematics, and science. Table 1 presents the definitions of variables used in this study, along with its summary statistics.

Results

The study finds that good predictors of student learning achievement in Cambodia include the type of school, school infrastructure, and location of school. Even after controlling for student and family characteristics, students enrolled in private schools are likely to score higher than their peers at public schools by 16 score points, 19 score points, and 12 score points in reading, mathematics, and science, respectively. Moreover, an increase in one unit of the school infrastructure index leads to a rise of 6 score points in reading, 5 score points in mathematics, and 3 score points in science. Although it is weaker in terms of significant level, the study also confirms the positive correlations between urban schools and test scores in reading and mathematics. Positive correlations between class size and student learning achievements are found only in the models without the student and family factors. These correlations disappear when the student and family factors are incorporated into the models. The results also reveal that textbook availability and the practice of grouping students by their abilities are not associated with student learning achievement. The relationship between the provision of remedial classes and student learning achievement is inconsistent and insignificant in most models. Its coefficient is found to be negative and significant at 5 percent level in the reading model, and only when student and family characteristic factors are controlled for.

Regarding teacher-related factors, none of the examined factors indicate any significant association with student learning achievement when student and family factors are controlled for. Without controlling for student and family factors, the average teacher's teaching experiences, percentage of teachers with bachelor's degrees, and percentage of teachers offering private tutoring are found to have positive effects on student learning achievement. The rate of teachers having second jobs is negatively correlated with student reading test scores at 10 percent significant level when student and family factors are not controlled for.

Conclusion

The positive effect of school infrastructure, constructed based on a list of school's physical facilities, on student learning achievement, is in line with the findings from Glewwe et al. (2011)'s systematic review arguing that physical infrastructure plays a vital role in student learning in developing countries. As more than 65 percent of rural schools in Cambodia do not even have rooms for libraries (MoEYS 2019a), the results suggest that the government should invest more in disadvantaged schools to narrow regional learning disparities. Although textbooks are found to be positively and strongly associated with student learning in many studies reviewed by Glewwe et al. (2011), we did not find any evidence of this effect on student performance in this study. Yet, this finding is consistent with Song (2012)'s study conducted in two districts in Cambodia. Identifying the underlying reasons behind the ineffectiveness of textbooks is beyond the scope of this study. Still, the results imply that the availability of textbooks is perhaps far less critical than how the textbooks are used. Decades after the introduction of student-centred pedagogy to Cambodia, teachers in Cambodia continue to rely heavily on blackboards for their classroom instruction, while students listen to teachers passively, copying what teachers wrote on the blackboards (Song 2015; Tandon and Fukao 2014). The effects of teacher factors on student learning is much weaker than anticipated, as none are statistically significant when student and family factors are controlled for. Future studies should explore deeper into the weak linkages between teacher characteristics and student learning. Lastly, it should be recalled that the determinants of student learning detected in this study are merely correlational; therefore, it should be interpreted with caution.

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Appendix 1: Effects of School Resources on Student Learning Achievement

Variables	(1)	(2)	(3)	(4)	(5)	(6)
	Reading		Mathematics		Science	
School resources						
Urban school	7.284	6.899*	12.407**	9.585**	2.189	1.764
	(4.649)	(3.900)	(5.734)	(4.810)	(3.731)	(3.351)
Public school	-24.189***	-16.048***	-31.205***	-19.198***	-18.103***	-12.101**
	(7.062)	(5.861)	(8.716)	(7.237)	(5.668)	(5.051)
Class size	0.324**	0.015	0.502***	0.137	0.290***	0.044
	(0.140)	(0.117)	(0.173)	(0.144)	(0.113)	(0.100)
School infrastructure	6.413***	5.790***	4.792*	4.735**	3.299*	3.294**
	(2.140)	(1.771)	(2.641)	(2.187)	(1.718)	(1.526)
Textbook	-0.798	0.688	2.339	3.548	0.007	1.241
	(3.631)	(3.006)	(4.480)	(3.711)	(2.914)	(2.589)
Ability grouping	0.658	-0.227	1.377	0.926	0.675	0.421
	(3.500)	(2.897)	(4.318)	(3.576)	(2.809)	(2.494)
Remedial class	-2.339	-6.468**	4.743	0.447	3.002	-0.274
	(3.528)	(2.926)	(4.351)	(3.611)	(2.831)	(2.517)
Teaching experience	1.307***	0.395	1.227**	0.118	0.883***	0.111
	(0.388)	(0.324)	(0.479)	(0.400)	(0.312)	(0.278)
Teachers with bachelor	0.488***	0.064	0.596***	0.092	0.318***	-0.029
	(0.085)	(0.072)	(0.105)	(0.089)	(0.068)	(0.062)
Teachers conducting	0.075	-0.084	0.238**	0.050	0.155**	0.021
private tutoring	(0.098)	(0.082)	(0.121)	(0.101)	(0.079)	(0.070)
Teachers with second jobs	-0.174*	-0.010	-0.183	-0.001	-0.119	0.004
	(0.092)	(0.077)	(0.114)	(0.095)	(0.074)	(0.066)
Student and family's characteristics						
Female		10.827***		-7.470***		-1.733
		(1.462)		(1.764)		(1.175)
Grade		17.129***		21.290***		14.723***
		(0.855)		(1.033)		(0.690)
Repeat		-9.133***		-4.586**		-5.255***
		(1.714)		(2.068)		(1.378)
Long absence		-17.191***		-18.316***		-12.627***
		(2.917)		(3.520)		(2.346)
Paid work		-10.123***		-7.096***		-9.474***
		(2.007)		(2.422)		(1.614)
Family work		-4.886***		-4.264**		-4.040***
		(1.590)		(1.919)		(1.278)
Literate mother		6.465***		10.060***		6.092***
		(1.704)		(2.056)		(1.370)
Literate father		7.987***		15.359***		7.748***
		(1.941)		(2.342)		(1.561)
Household resource		4.219***		7.651***		2.098**
		(1.138)		(1.374)		(0.916)
Random effects						
School level	218.921	336.559	136.16	122.426	194.359	100.789
	(42.566)	(63.900)	(26.053)	(25.782)	(39.613)	(19.187)
Student level	2012.516	2897.223	1294.406	1549.807	2264.052	1009.826
	(52.919)	(76.163)	(34.001)	(40.724)	(59.479)	(26.505)
ICC	0.098	0.104	0.095	0.073	0.079	0.09
	(0.017)	(0.018)	(0.016)	(0.014)	(0.015)	(0.015)
Constant	264.122***	121.193***	253.903***	58.878***	288.575***	174.650***
	(14.286)	(14.387)	(17.629)	(17.638)	(11.466)	(12.140)
Observations	3184	3184	3184	3184	3184	3184
Number of groups	121	121	121	121	121	121

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.10

UNDERSTANDING POLITICAL KNOWLEDGE AND PARTICIPATION OF CAMBODIAN YOUTH

Introduction

Political participation refers to activities which directly or indirectly support or influence policies concerning governance and how it affects people's lives (Milbrath and Goel 1977). In the political literature, political participation is closely linked to political knowledge, or their scope of factual information about politics and government, for example, political institutions and players. Research has argued that people's engagement in political activities is shaped by how politically well-informed they are (Delli Carpini and Keeter 1996; Stithorn 2012). Studies focusing on young people in particular attribute quantity of political participation to levels of political knowledge, namely, that low levels of political knowledge among young voters can lead to a lack of political participation (Niemi and Junn 2005; Milner 2005).

Cambodia has a large young population, with about 65 percent of citizens aged under 30 (UNDP 2020), and around 33 percent (MoEYS 2011) of those aged between 15 and 30, which we call 'youth' in this report. They play a crucial role in the country's politics, and development can progress only when their political participation alongside adults, those aged above 30, is meaningful (Heng et al. 2014). Cambodian youth, however, have long been overlooked and marginalised in politics. But their significant political involvement in the last decade is changing the country's political landscape and thus deserves serious attention from scholars and policy makers. With increased internet access and social media usage, youth become better informed, more vocal, and more engaged in politics. The 2013 elections marked their unprecedented political participation, and since then, youth have been at the center of the government and many non-governmental organisations' agendas (OECD Development Center 2017).

This paper aims to offer an initial investigation of political knowledge among Cambodian youth through comparison to adults, and then explore the relationship between their political knowledge and participation. Results will shed light on how Cambodian youth get involved in politics, as well as what factors affect their political knowledge and participation. A number of relevant policies can be derived based on these findings, and address issues that currently might prevent youth from being well-informed citizens with active political lives.

To achieve the research objectives mentioned above, the paper uses a nationally representative survey conducted by CDRI from October 2017 until January 2018. The stratified-multistage sample consists of 1,600 randomly selected respondents from Phnom Penh and five provinces (Battambang, Kampot, Stung Treng, Svay Rieng, and Kampong Cham). Respondents were 40.2 percent male, 59.8 percent female, 24.9 percent youth, 75.1 percent adult, 26.5 percent urban, and 73.5 percent rural. The questionnaire contained 101 questions that touched upon the respondents' demographics, identity and values, trust and respect, outlook, political participation, and media consumption (Eng et al. 2019).

Political knowledge of Cambodian youth

Bivariate analysis of the quantified primary survey data is used to compare political knowledge between youth and adults. The analysis specifically looks into the mean difference in the knowledge of both age groups, with a Two-Sample T-Test. In the survey, the respondents were asked two questions to test their knowledge of politicians (name at least three national politicians, excluding the prime minister) and their knowledge of institutions (list all the three branches of government). For each question, a correct answer scores 2, a partially correct answer scores 1, and an incorrect answer scores 0. The sum of the two questions is treated as a proxy for the respondents' political knowledge, with a higher total score being interpreted as better political knowledge, as shown in Table 1 (see Appendix 1) and visualised in Figure 1.

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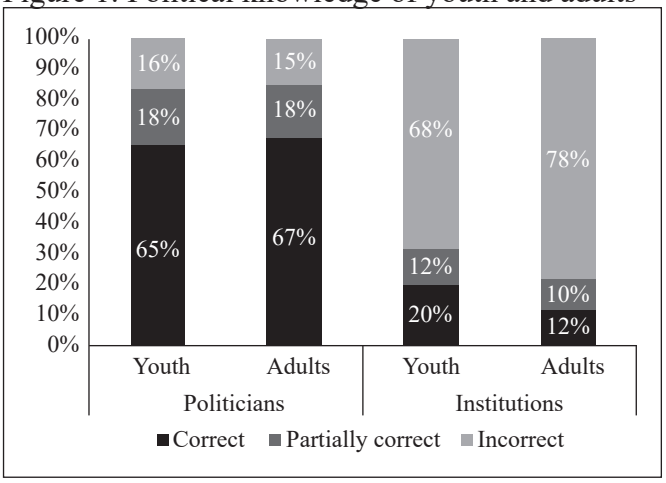
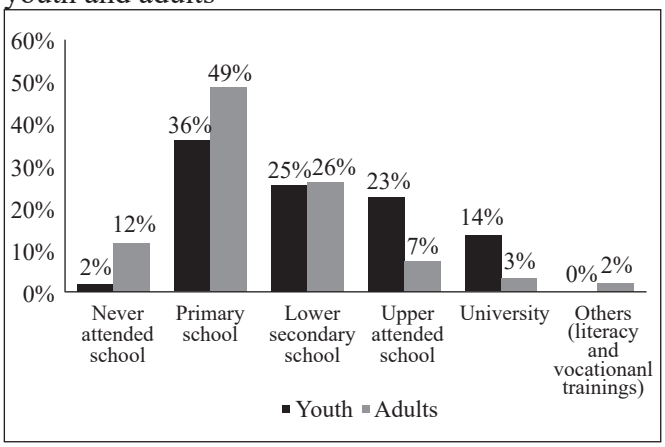
Figure 1: Political knowledge of youth and adults



Note: Number of observations = 1,600

Figure 2: Education (completed) disparity between youth and adults

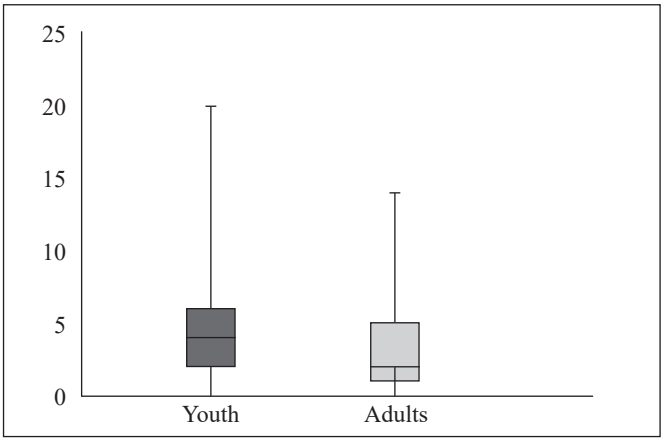


Note: Number of observations = 1,600

The results show that there is no significant mean difference in respondents' knowledge of politicians, but there is with their knowledge of institutions. On average, youth tend to have better political knowledge than adults. Although this finding for youth sounds satisfying, there is still room for improvement regarding their political knowledge, as only 65 percent and 20 percent of youth provided correct answers to the two political knowledge questions on politicians and institutions, respectively.

To understand what lies behind such political knowledge disparity between youth and adults, political knowledge is further regressed on a number of factors which in previous studies have been found to be its significant predictors, such as age (Delli Carpini and Keeter 1996), gender (Mondak and Anderson 2004), location (Pereira 2011), income (Lind 2011), education (Delli Carpini and Keeter 1996; Niemi and Junn 2005), and media consumption (Pasek et al. 2006). Age ranges from 16 to 30. Gender takes a value of 1 for female and 0 for male. Location is coded 1 for urban and 0 for rural. Income varies from 0 to 1,200 in 10 thousand Cambodian riel, and its inverse hyperbolic sine is used for this study to lower its variance. Education takes a value of 0 for primary school or lower, 1 for high school, and 2 for university. Media consumption is the total number of hours that each person spends on reading printed newspapers, watching TV, and using the internet in a typical day. The paper employs Ordinary Least Squares (OLS) to conduct the regression, and results are reported in Table 2 (see Appendix 2).

Figure 3: Media consumption disparity between youth and adults

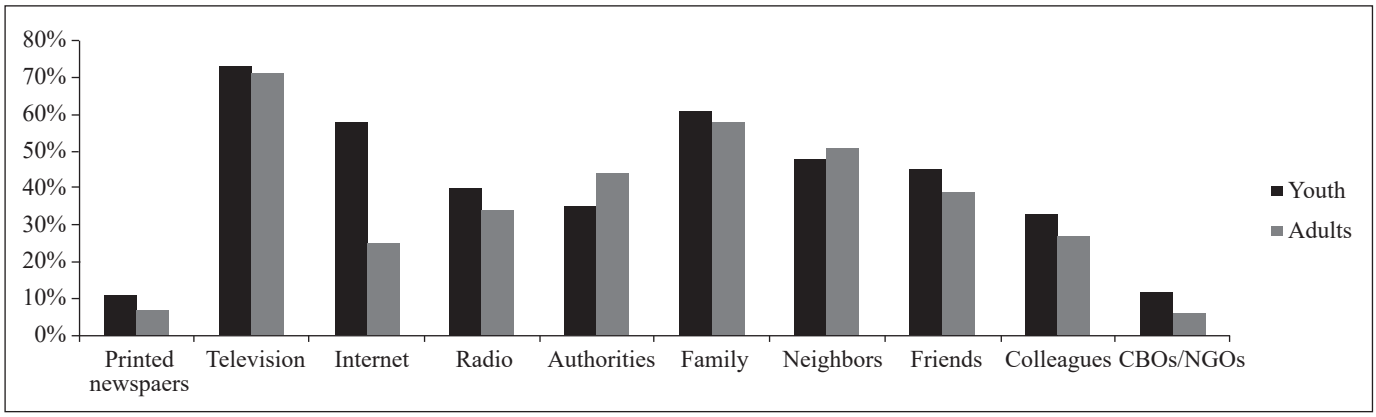


Note: Number of observations = 1,600

Similar to those aforementioned previous studies, the results show that political knowledge has a strong significant positive relationship with education and media consumption. These results help explain the difference in political knowledge between youth and adults discussed earlier, such that youth tend to have better political knowledge because they tend to pursue higher education (see Figure 2) and use more media (see Figure 3)[1]. Education is a means to expose people to, stimulate their interest in, and improve their cognitive ability to learn about politics (Delli Carpini and Keeter 1996). In addition, both youth and adults reported that media is their most important source of political information besides close circles of people, the authorities, and other organisations, with internet

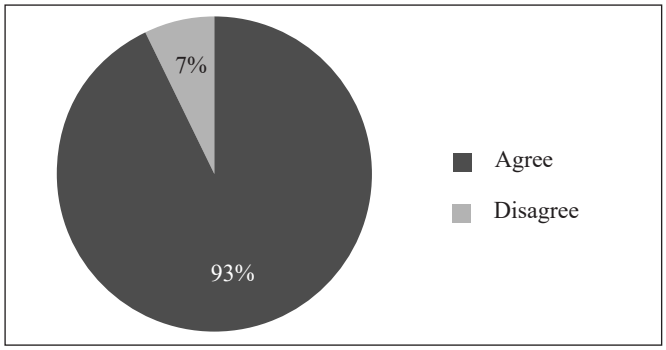
1 The infamous Pol Pot genocide and the civil war have disrupted education in Cambodia (IIEP-UNESCO 2011). With the continued rise of technology and media, it is understandable that youth, as a new generation, tend to have better education and higher media usage.

Figure 4: Sources of political information for youth and adults



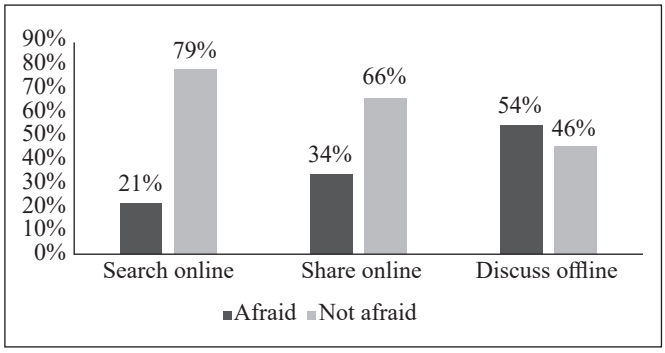
Note: Number of observations = 1,600

Figure 5: Youth views on importance of having independent political opinions



Note: Number of observations = 398

Figure 6: Youth perceived online and offline political freedom



Note: Number of observations = 398

appearing to be more popular among youth (see Figure 4). Spending more time consuming media increases the tendency of exposure to a variety of political content and therefore obtaining political knowledge.

Many responding youth, however, reported feeling limitations on their online and offline political freedom which can potentially hinder their acquisition of political knowledge. While 93 percent of youth responded that it is important to have their own political opinions, 21 percent expressed fear towards searching political news online, 34 percent towards sharing political views online, and 54 percent towards discussing political views offline (see Figure 5 and 6).

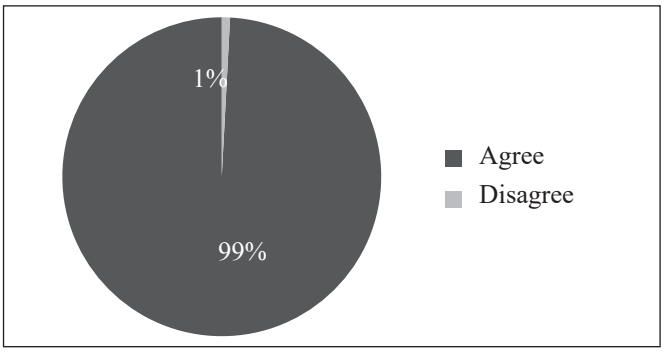
In Cambodia, the political system remains restricted. Political discussion and meetings are forbidden in schools (Yong 2005), and there have also been documented cases of violent oppression and crackdowns on peaceful protests and demonstrations (Henke 2011; Department of State 2012; COMFREL 2013; LICADHO 2014). Even though the widespread use of the internet now has made social media an effective tool for political news updates, dialogue and mobilisation, users are often threatened with legal charges over claims of abusing their freedom of expression (Sok 2015; Sun 2019). All of these induce and perpetuate fear among youth, distancing them from politics (Heng et al. 2014).

Political participation of Cambodian youth

Youth in Cambodia actively engage in voting in national elections, but significantly less so concerning local level governance, specifically engagement in the commune-level development planning process[2]. Ninety-nine percent of young respondents acknowledged that they see voting as more than just a civil right, but rather they feel obliged to vote (see Figure 7). Among eligible youth voters, 49 percent voted in the 2013 national election, 71 percent in the 2017 commune election, and up to 93 percent planned to vote in the contentious 2018 national election (which saw

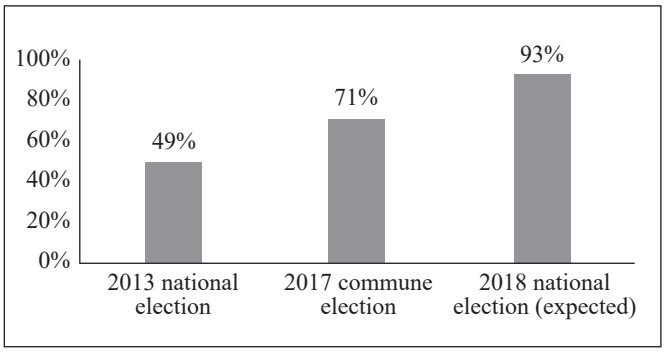
2 For further reading on commune development planning process, read "Decentralization" by CDC-CRDB and "Guideline on C/S Development Plan and C/S Investment Program" by Inter-ministerial Working Group.

Figure 7: Youth felt obligation to vote



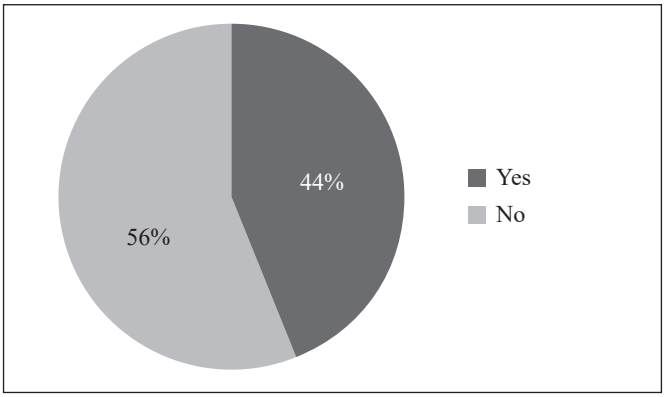
Note: Number of observations = 398

Figure 8: Youth voter turnout (voting age: 18)



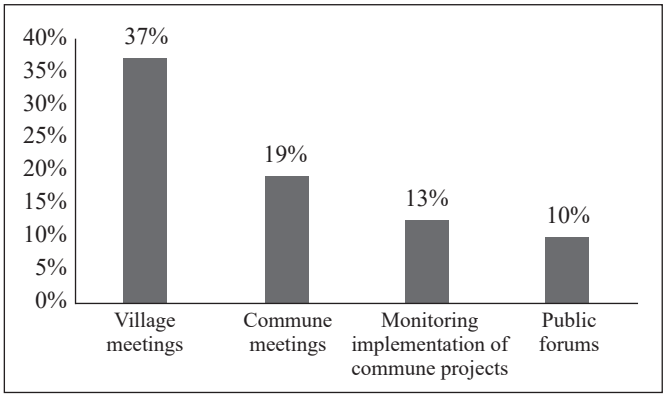
Note: Number of eligible youth voters = 352 out of 398

Figure 9: Youth participation in local level governance



Note: Number of observations = 398

Figure 10: Consultative meetings at village and commune level

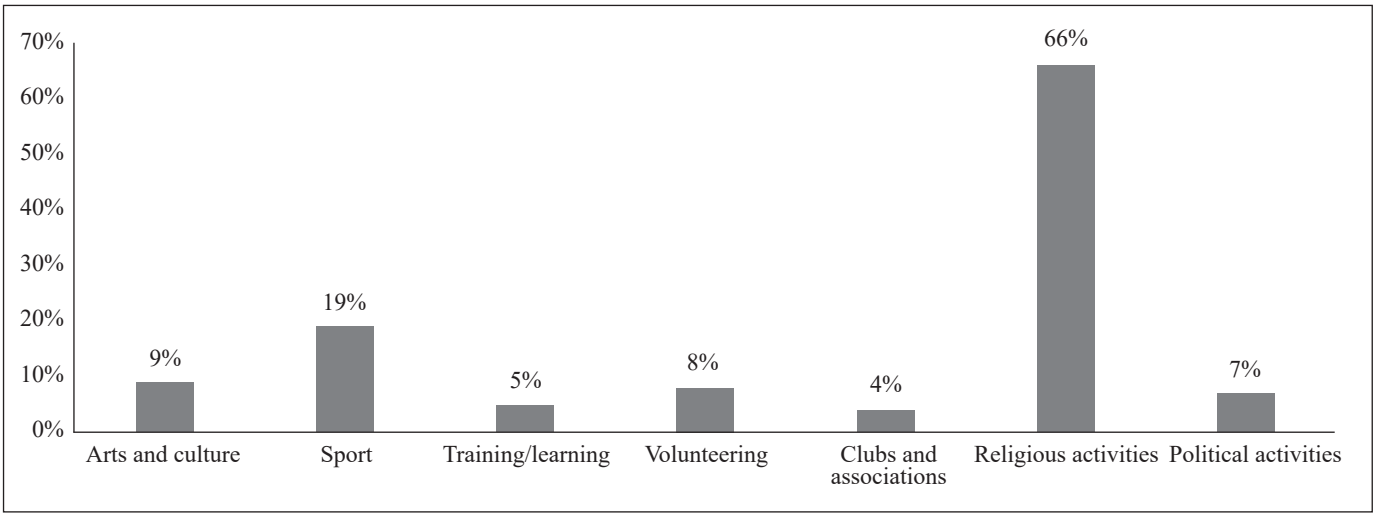


Note: Number of observations = 398

the main opposition party banned) (see Figure 8). Regarding participation in local level governance, 44 percent of youth had been involved in some kinds of consultative meetings at village and commune level (see Figure 9). In particular, 37 percent had been involved in village meetings, 19 percent in commune meetings, 13 percent in monitoring implementation of commune projects, and 10 percent in public forums (see Figure 10). Figure 11 illustrates that youth participation in political activities is generally infrequent. Only 7 percent of youth reported to have participated in political activities in the last month.

Multivariate regression models of youth voting in elections and their participation in local level governance are used in order to explain the

Figure 11: Youth participation in the last month



Note: Number of observations = 398

relationship between their political knowledge and participation. All patterns of youth voting and participation at village and commune level are the dependent variables, and each one is studied separately. The variables are measured by their answers to the corresponding questions in the survey, taking a value of 1 for participation and 0 for no participation. The models include political knowledge as the main independent variable and control for age, gender, location, income, education, and media consumption as suggested by previous literature as possibly exerting some effects on individual political participation (Stithorn 2012; Adegbola and Gearhart 2019). Because all the dependent variables are binary variables, the paper employs logistic regression method to estimate all the models, as shown in Table 3 (see Appendix 3).

The results show that political knowledge has significant positive coefficients for all the patterns of political participation, except for voting in the national elections and monitoring implementation of commune projects. That means youth with higher political knowledge are more likely to vote in the commune election and participate in those consultative meetings at village and commune level other than monitoring implementation of commune projects; simply, more politically informed youth tend to participate more in politics. However, the causal relationship between political knowledge and participation is not clear-cut. The causality can go both directions, as more political knowledge can encourage youth to participate more in politics, but they can also acquire more of the knowledge in the process of their political participation. Despite such complexity in determining the causal relationship between youth political knowledge and participation, a basic knowledge of politics is required for them to participate meaningfully in Cambodia's political space (Milner 2002).

Conclusion

From the bivariate and multivariate analysis, this paper finds that Cambodian youth tend to be better informed about politics compared to adults. Their greater political knowledge is related to their higher education and media consumption through which they can acquire a large variety of political facts. Such results serve as an encouraging sign for political development in the country. Youth, when grouped together as a major political demographic, are interested and consciously participative in politics, as we found that the more political knowledge they have, the more likely they are to participate in politics. Nevertheless, a substantial number of youth still lack political knowledge, which along with their political participation can be considerably constrained by their perception of limited political freedom. The Cambodian government and relevant civil society organisations should therefore collaborate side by side to build a favourable political environment where youth can feel empowered instead of fearful in seeking political information and meaningfully participating in politics.

The paper faces some limitations that future studies need to address. Political knowledge is a broad concept that captures various kinds of factual political information, but the political knowledge indicator used in this analysis is based on just two political knowledge questions. That is why the proxy may not accurately measure their overall political knowledge. The survey data are also not current, dating back to late 2017 and early 2018. As socio-economic changes have continued to develop since then, as well as the political and media space alongside, this may have somehow altered the current political attitudes and actions of Cambodian youth in 2020.

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Appendices

Appendix 1

Table 1: Political knowledge disparity between youth and adults

Variable	Youth	Adults	Absolute difference
Political knowledge			
Politicians	1.49	1.5241	0.0342
	(0.0381)	(0.0214)	(0.0437)
Institutions	0.5151	0.3353	0.1798***
	(0.0404)	(0.0196)	(0.0448)
Total	2.005	1.8594	0.1456**
	(0.0623)	(0.0328)	(0.0705)

Note: Number of observations = 1,600
Standard errors are reported in brackets.
*** denotes P-value < 0.01, ** denotes P-value < 0.05.

Appendix 2

Table 2: OLS regression results on factors affecting political knowledge

Variable	Coefficient
Age	0.0038**
	(0.0019)
Gender/Female	-0.4898***
	(0.0552)
Location/Urban	0.1154*
	(0.0614)
Income	0.0106
	(0.0124)
Education	0.6888***
	(0.0502)
Media consumption	0.0487***
	(0.01)

Note: Number of observations = 1,594
Missing observations are due to incomplete information.
Robust standard errors are reported in brackets.
*** denotes P-value < 0.01, ** denotes P-value < 0.05, *denotes P-value <0.1.

Appendix 3

Table 3: Logistic regression results on relationship between youth political knowledge and participation

Variable	Voting in election			Participation at village and commune level			
	2013 national	2017 commune	2018 national (expected)	Village meetings	Commune meetings	Monitoring implementation of commune projects	Public forums
Political knowledge	0.2052	0.2087**	0.1917	0.2913***	0.2792**	0.0155	0.2896*
	(0.1555)	(0.1065)	(0.148)	(0.107)	(0.116)	(0.1351)	(0.1801)
Age	0.485***	0.2633***	0.2464***	0.1456***	0.0926***	0.0388	0.1154**
	(0.0457)	(0.0327)	(0.0495)	(0.0285)	(0.0328)	(0.0411)	(0.0487)
Gender/Female	0.4054	0.3297	-0.0398	-0.1138	-0.0143	-0.2931	-0.0431
	(0.3158)	(0.2616)	(0.3493)	(0.2416)	(0.2786)	(0.3073)	(0.3403)
Location/Urban	0.3933	0.0358	-0.0357	-0.6127*	-0.1156	-0.1293	-0.3662
	(0.4171)	(0.3286)	(0.4716)	(0.321)	(0.3734)	(0.4544)	(0.4731)
Income	0.1058*	0.1012*	0.0949	-0.1039*	0.048	0.0341	0.0087
	(0.0662)	(0.0586)	(0.0673)	(0.0572)	(0.0706)	(0.0728)	(0.0867)
Education	0.5178*	0.6667***	0.0658	-0.7142***	-0.3942*	-0.166	-0.1438
	(0.275)	(0.232)	(0.3318)	(0.2206)	(0.2675)	(0.3203)	(0.3372)
Media consumption	-0.01	-0.0015	0.0796	0.0044	-0.0063	-0.0456	0.0596
	(0.0537)	(0.0455)	(0.071)	(0.0398)	(0.0467)	(0.0586)	(0.057)
N	398	398	398	398	398	398	398
Pseudo R-squared	0.4386	0.2434	0.1809	0.1116	0.0474	0.0167	0.0477
Wald Chi-square	129.82	98.38	31.09	49.87	19.83	6.08	9.8
P-value	0.0000	0.0000	0.0001	0.0000	0.0059	0.5308	0.1999

Note: N denotes number of observations.
Robust standard errors are reported in brackets.
*** denotes P-value < 0.01, ** denotes P-value < 0.05, * denotes P-value < 0.1.

Economy Watch—External Environment

This section presents economic indicators of major world economies and economies in Southeast Asia during the fourth quarter of 2019.

Year on year, real GDP decreased in the five selected ASEAN countries. Indonesia decreased by 0.2 percentage points, Malaysia by 1.1 percentage points, Singapore by 1.4 percentage points, Thailand by 2.1 percentage points and Vietnam by 0.6 percent. Compared to the preceding quarter, Indonesia's GDP remained stable at 5.0 percent, Singapore's increased by 0.3 percentage points to 0.8 percent, and the other two countries declined: Malaysia by 0.8 percentage points and Thailand by 0.8 percentage points. It is also notable that although there was a decline compared to the preceding quarter, Vietnam's GDP growth was still the highest compared to others in the selected group, followed by Indonesia which remained stable for three quarters after a slight drop from the first quarter.

Among the four selected other Asian countries, year-on-year GDP growth of China and Hong Kong declined, while South Korea and Taiwan increased. China's growth dropped by 0.4 percentage points to 6.0 percent and Hong Kong by 4.2 percentage points to -2.9 percent. South Korea's growth increased by 0.2 percentage points to 3.4 and Taiwan by 1.5 percentage points to 3.3 percent. Compared to the preceding quarter, only Hong Kong's GDP had a drop (of 5.8 percentage points). China's remained stable, South Korea's increased by 1.4 percentage points, and Taiwan increased by 0.3 percentage points.

Year on year, the three selected industrial countries – Euro-12, Japan and the US – had a drop in real GDP growth. Euro-12's GDP decreased by 0.1 percentage points to 1.0 percent, Japan's by 1.1 percentage points to -0.7 percent and the US's by 0.8 percentage points to 2.3 percent. Compared to the preceding quarter, only the US had an increase in GDP, by 0.2 percentage points. Euro-12's GDP fell by 0.2 percentage points and Japan's by 2.4 percentage points.

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World inflation

Compared to the same quarter last year, Cambodia, Indonesia and Thailand had a drop in inflation, whereas Malaysia, Singapore and Vietnam increased; the inflation rate in Cambodia decreased by 0.3 percentage points to 2.1 percent, in Indonesia by 0.3 percentage points to 2.9 percent, and in Thailand by 0.4 percentage points to 0.4 percent. The inflation rate in Malaysia increased by 0.7 percentage points to 1.0 percent, in Singapore by 0.1 percentage points to 0.6 percent and in Vietnam by 0.3 percentage points to 3.7 percent. In comparison with the preceding quarter, the inflation rate increased by 0.1 percentage points in Cambodia, by 0.1 percentage points in Singapore and by 1.5 percentage points in Vietnam, while there was a drop in inflation in Indonesia (by 0.5 percentage points), in Malaysia (by 0.3 percentage points) and in Thailand (by 0.2 percentage points).

In the selected other Asian countries, compared to the same quarter last year, China had an increase in inflation rate by 2.1 percentage points to 4.3 percent and Hong Kong by 0.4 percentage points to 3.0 percent. The inflation rate in South Korea decreased by 0.9 percentage points to 0.3 percent and in Taiwan by 0.2 percentage points to 0.7 percent. Compared to the preceding quarter, only Hong Kong's inflation rate decreased by 0.4 percentage points. Inflation in China increased by 1.4 percentage points, in South Korea by 0.2 percentage points and in Taiwan by 0.3 percentage points.

Year on year, the inflation rate in all three selected industrial countries decreased. The Euro-12 dropped by 0.9 percentage points to 1.0 percent, in Japan by 0.4 percentage points to 0.5 percent and in the US by 0.1 percentage points to 2.1 percent. However, in comparison with a quarter earlier, the inflation rate in Euro-12 remained stable at 1.0 percent, in Japan increased by 0.2 percentage points and in the US by 0.4 percentage points.

Exchange rate

Compared to the same quarter last year, the riel depreciated 0.4 percent against the US dollar to KHR4,063.7/USD. The Singapore SD remained stable at SD1.4/USD since the third quarter of 2018. The Thai baht appreciated 0.7 percent against

the US dollar to THB30.3/USD. The Vietnamese dong depreciated 2.1 percent against the US dollar to VND23,217.3/USD. Compared the preceding quarter, the riel appreciated 0.6 percent, the Thai baht appreciated 1.3 percent and the Vietnamese dong appreciated 0.2 percent against the US dollar.

Commodity prices

In comparison with the same quarter last year, the price of maize increased by 2.5 percent, palm oil by 22.6 percent, rubber by 8.2 percent, rice by 3.8 percent and gasoline by 0.93 percent. There was a drop in prices of soybeans (by 5.9 percent), crude oil (by 10.3 percent) and diesel (by 5.4 percent). Compared to the preceding quarter, the price of palm oil increased by 19.3 percent, rubber by 1.5 percent, rice by 0.7 percent, soybeans by 2.2 percent and crude oil by 1.0 percent. The price of maize dropped by 1.9 percent and gasoline by 5.8 percent. Notably, the price of maize and gasoline continued to drop since the second quarter of 2019, while others fluctuated.

Table 1: Real GDP growth of selected trading partners, 2014–19 (percentage increase over previous year)

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Selected ASEAN countries												
Cambodia	7.1	7.0	7.0	7.0	-	-	-	-	-	-	-	-
Indonesia	5.2	4.8	5.0	5.1	5.1	5.3	5.2	5.2	5.1	5.0	5.0	5.0
Malaysia	6.0	4.9	4.3	5.9	5.4	4.5	4.4	4.7	4.5	4.9	4.4	3.6
Singapore	3.0	2.0	2.0	3.8	4.4	3.9	2.2	2.2	1.3	0.1	0.5	0.8
Thailand	1.6	2.8	3.2	3.8	4.8	4.6	3.3	3.7	2.8	2.3	2.4	1.6
Vietnam	5.9	6.6	6.1	6.6	7.4	6.8	6.9	7.6	6.8	6.7	7.3	7.0
Selected other Asian countries												
China	7.3	7.0	6.7	6.9	6.8	6.7	6.5	6.4	6.4	6.2	6.0	6.0
Hong Kong	2.3	2.3	1.7	2.8	4.7	3.5	2.9	1.3	0.6	0.5	2.9	-2.9
South Korea	3.4	2.6	2.6	3.0	2.8	2.9	3.2	3.2	1.8	2.1	2.0	3.4
Taiwan	3.5	0.6	1.2	2.8	3.0	3.3	2.3	1.8	1.7	2.4	3.0	3.3
Selected industrial countries												
Euro-12	0.7	1.3	1.6	2.3	2.5	2.2	1.6	1.1	1.2	1.1	1.2	1.0
Japan	0.6	0.3	0.9	1.8	1.1	1.0	0	0.4	0.9	1.2	1.7	-0.7
United States	2.4	2.3	1.6	2.3	2.8	2.9	3.0	3.1	3.2	2.3	2.1	2.3

Sources: International Monetary Fund; Economist; countries' statistics offices

Table 2: Inflation rates of selected trading partners, 2014–19 (percentage price increase over previous year – period averages)

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Selected ASEAN countries												
Cambodia	3.9	1.2	3.0	2.9	2.2	2.7	2.5	2.4	1.9	1.8	2.0	2.1
Indonesia	6.4	6.4	3.5	3.8	3.3	3.2	3.1	3.2	2.6	3.1	3.4	2.9
Malaysia	3.2	2.1	2.1	3.9	1.8	1.3	0.4	0.3	-0.3	0.6	1.3	1.0
Singapore	1.0	-0.5	-0.8	0.6	0.2	0.4	0.7	0.5	0.5	0.8	0.5	0.6
Thailand	1.9	-0.9	0.2	0.7	0.6	1.3	1.5	0.8	0.7	1.1	0.6	0.4
Vietnam	4.8	0.6	2.7	3.4	2.8	3.8	4.5	3.4	2.6	2.7	2.2	3.7
Selected other Asian countries												
China	2.0	1.4	2.0	1.6	2.2	1.8	2.3	2.2	1.8	2.6	2.9	4.3
Hong Kong	4.4	3.1	2.5	1.7	2.4	2.1	2.3	2.6	2.2	2.7	3.4	3.0
South Korea	1.3	0.7	0.8	2.0	1.2	1.5	1.6	1.2	0.6	0.7	0.1	0.3
Taiwan	1.5	0.6	1.4	0.6	1.6	1.6	1.6	0.9	0.3	0.8	0.4	0.7
Selected industrial countries												
Euro-12	0.4	0.0	0.3	1.5	1.3	1.7	2.1	1.9	1.4	1.4	1.0	1.0
Japan	2.8	0.9	-0.1	0.6	1.3	0.6	1.1	0.9	0.3	0.7	0.3	0.5
United States	1.6	0.0	1.2	2.1	2.2	2.7	2.6	2.2	1.7	1.8	1.7	2.1

Sources: International Monetary Fund; Economist; National Institute of Statistics

Table 3: Exchange rates against the US dollar of selected trading partners, 2014–19 (period averages)

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Selected ASEAN countries												
Cambodia (riel)	4037.6	4060.4	4053.6	4047.0	4012.4	4047.0	4073.7	4046.7	4006.6	4052.1	4086.8	4063.7
Indonesia (rupiah)	11850.2	13394.8	13338.3	13379.8	13576.1	13944.6	14600.2	14789.7	14127.8	14246.8	14117.6	14060.5
Malaysia (ringgit)	3.3	3.9	4.1	4.3	3.9	3.9	4.1	4.2	4.1	4.1	4.2	4.2
Singapore (Singapore dollar)	1.3	1.4	1.4	1.4	1.3	1.3	1.4	1.4	1.4	1.4	1.4	1.4
Thailand (baht)	32.5	34.2	35.3	33.9	31.6	31.9	33.0	32.8	31.6	31.6	30.7	30.3
Vietnam (dong)	21138.2	21917.7	22507.5	22645.9	22749.5	22483.9	22675.7	22744.1	22902.9	23255.5	23258.3	23217.3
Selected other Asian countries												
China (yuan)	6.2	6.3	6.6	6.8	6.4	6.4	6.8	6.9	6.7	6.8	7.0	7.0
Hong Kong (Hong Kong dollar)	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8
South Korea (won)	1053.6	1131.9	1161.0	1130.5	1072.0	1079.0	1120.9	1127.7	1125.0	1165.4	1193.4	1174.7
Taiwan (New Taiwan dollar)	30.3	31.8	32.3	30.4	29.3	29.8	30.7	30.8	30.8	31.1	31.2	30.5
Selected industrial countries												
Euro-12 (euro)	0.8	0.9	0.9	0.9	0.8	0.8	0.9	0.9	0.9	0.9	0.9	0.9
Japan (yen)	105.9	121.0	108.8	112.1	108.4	109.1	111.4	112.8	110.1	109.9	107.3	108.7

Sources: International Monetary Fund; Economist; National Bank of Cambodia

Table 4: Selected commodity prices on world market, 2014–19 (period averages)

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Maize (US No. 2) – USA (USD/tonne)	192.9	169.8	159.2	154.5	163.7	173.3	157.9	162.8	167.5	175.9	170.1	166.8
Palm oil – NW Europe (USD/t)	821.4	622.7	643.6	714.7	673.7	601.0	612.0	554.8	586.9	568.1	570.1	680.2
Rubber SMR 5 (USD/tonne)	1755.6	1392.7	1416.1	1688.3	1504.0	1433.3	1365.2	1303.1	1436.6	1549.5	1389.7	1410.1
Rice (Thai 100% B) – Bangkok (USD/tonne)	434.9	395.5	406.7	452.3	459.3	451.0	424.7	426.7	426.7	430.0	439.7	442.7
Soybeans (US No.1) – USA (USD/tonne)	491.8	390.4	405.7	400.6	418.3	435.6	390.6	368.9	353.3	347.8	339.7	347.3
Crude oil – OPEC spot (USD/barrel)	96.2	49.6	40.7	52.6	64.7	71.9	74.2	67.2	60.5	65.1	59.7	60.3
Gasoline US – Gulf Coast (cents/litre)	65.6	41.0	35.2	42.4	47.9	53.3	54.1	42.9	40.9	49.4	46.0	43.3
Diesel (low sulphur No.2) – US Gulf Coast (cents/litre)	71.5	41.7	34.8	42.9	51.0	55.6	56.6	52.2	49.5	51.1	48.9	49.4

Sources: Food and Agriculture Organisation; US Energy Information Administration

Economy Watch—Domestic Performance

Main economic activities

In the fourth quarter of 2019, year-on-year total fixed asset investment approvals increased by 29.4 percent to USD2,387.8 m and by 107.0 percent compared to the preceding quarter. Year on year, fixed asset investment approvals for industry increased by 183.0 percent, driven by a 40.3 percent increase in approvals for garments. Year-on-year approvals for agriculture decrease by 31.0 percent and for services by 2.7 percent. The approvals for hotels and tourism increased by 27.7 percent. Compared to the preceding quarter, the fixed asset investment approvals increased for all sectors: agriculture by 1,339.3 percent, industry by 204.6 percent, and services by 69.5 percent.

Total international tourist arrivals decreased by 1.6 percent to 1,299,082 compared to the same quarter last year. There was a decrease in tourist arrivals from China by 14.9 percent, South Korea by 13.5 percent, Japan by 10.7 percent, France by 13.4 percent and Malaysia by 1.8 percent. The tourist arrivals from Vietnam increased by 25.8 percent, Thailand by 21.4 percent, the US by 2.4 percent and the UK by 2.6 percent. However, compared to the preceding quarter, total international tourist arrivals expanded by 21.7 percent due to increases in arrivals from most destinations, except a 13.2 percent decrease from China.

Compared to the same quarter last year, total exports grew by 12.4 percent to USD3524.9 m. This was driven by increases in exports of garments (9.9 percent), electronics (48.6 percent), agriculture (8.5 percent), other agriculture (97.9 percent) and others (30.0 percent). Garment exports to the US increased by 35.2 percent, to ASEAN by 29.4 percent and to the rest of the world by 7.1 percent. There was a 6.2 percent drop in garment exports to the EU and 0.4 percent to the UK. Compared to the preceding quarter, total exports decreased by 17.3 percent due to the drops in exports of all major sectors, except agriculture. Garment exports decreased by 19.5 percent due to drops of exports to the US (15.7 percent), to the EU (25.8 percent), to Japan (18.7 percent), to the UK (26.6 percent) and to the rest of the world (14.9 percent). The garment exports increased to only one destination, ASEAN by 10.2 percent. Agriculture exports increased by 36.6 percent, driven by the increase in exports of rubber (22.1 percent), wood (12.1 percent), fish (37.5 percent), rice (66.1 percent) and other agriculture (11.7 percent).

Compared to the same quarter last year, total imports increased by 27.1 percent due to the increase in imports of gasoline (13.1 percent), diesel (16.8 percent), construction materials (38.1 percent) and others (27.7 percent). Compared to the preceding quarter, total imports increased by 4.6 percent due to a 2.8 percent increase in imports of gasoline, 49.6 percent in imports of diesel and 4.4 percent in imports of others. The imports of construction materials decreased by 17.3 percent from a quarter earlier.

Public finance

Year on year, total government revenue in the fourth quarter of 2019 increased by 23.0 percent due to the growth in current revenue (23.9 percent), tax revenue (30.7 percent), domestic tax (33.6 percent), taxes on international trade (14.2 percent) and other non-tax revenue (8.2 percent). Non-tax revenue decreased by 8.1 percent, property income by 50.6 percent, sales of goods and services by 8.3 percent and capital revenue by 33.4 percent. Compared to the preceding quarter, total government revenue increased by 8.9 percent. Current revenue increased by 8.9 percent, tax revenue by 11.0 percent, domestic tax revenue by 12.6 percent, taxes on international trade by 1.7 percent, other non-tax revenue by 33.0 percent and capital revenue by 9.6 percent. Non-tax revenue decreased by 3.8 percent, property income by 24.2 percent and sales of goods and services by 6.1 percent.

Year on year, total expenditure increased by 57.4 percent to KHR7,676.8 bn in the fourth quarter of 2019. This was due to increases in capital expenditure by 124.8 percent, current expenditure by 29.7 percent, wages by 8.3 percent and subsidies and social assistance by 98.3 percent and the other current expenditure by 51.3 percent. Compared to the preceding quarter, total expenditure increased

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by 42.5 percent driven by increases in all types of expenditure, except wages that contracted by 10.4 percent.

The overall balance was in deficit, at KHR746.5 bn, a 198.4 percent negative compared to the overall balance in the same quarter last year, or 176.3 percent less than the preceding quarter. Noticeably, this deficit balance in the fourth quarter of 2019 followed a similar occurrence in the third quarter of 2018 throughout the two-year period.

Inflation and foreign exchange rates

The overall consumer price index in Phnom Penh was 2.0 percent, 0.4 percentage points lower than the same quarter of the previous year, but 0.2 percentage points higher than the preceding quarter. Consumer price index of food and non-alcoholic was 0.3 percentage points lower than the same quarter of last year, but 0.6 percentage points higher than the preceding quarter. The price index of transportation was -2.5 percent, 3.9 percentage points lower than the same quarter last year and 0.1 lower than the preceding quarter.

Compared to the previous quarter, the riel appreciated 0.6 percent against the US dollar to KHR4,063.7 per dollar and 0.6 percent against the Vietnamese dong to KHR17.6 per 100 dong. The riel depreciated 0.9 percent against the Thai baht to KHR134.9 per baht. The price of gold increased by 1.4 percent to USD178.1 per chi. Diesel prices increased by 5.3 percent to KHR3,685.9 per litre, while gasoline prices dropped by 3.6 percent to KHR3,499.5 per litre.

Real average daily earnings of vulnerable workers

This section briefly describes the situation of vulnerable workers based on a survey of 480 workers (120 garment workers) in February 2019. Compared to the same month last year, daily earnings decreased for only two types of vulnerable workers: cyclo drivers and small vegetable sellers, whereas others increased.

Year on year, daily earnings of cyclo drivers decreased by 6.5 percent to KHR10,997 and small vegetable sellers by 19.6 percent to KHR15,207. Daily earnings of porters increased by 14.9 percent, scavengers by 14.0 percent, waitresses by 4.9 percent, ricefield workers by 11.5 percent, garment workers by 2.6 percent, motorcycle taxi drivers by 20.7 percent, unskilled construction workers by 15.6 percent and skilled construction workers by 3.4 percent. Average daily earnings of skilled construction workers were the highest, at KHR27,164, followed by unskilled construction workers (KHR22,916), whereas the daily earnings of ricefield workers were the lowest, at KHR8,706, followed by waitresses/waiters, the second lowest, at KHR9,154.

Among 360 workers of nine types of jobs excluding garment workers, the vast majority of them (81.6 percent) came from big families which have from four to eight members. Only 14.4 percent of them reported that they were not the main income earner in their family. Mostly, (69.4 percent) they migrated alone to Phnom Penh or Siem Reap and the rest migrated with their family. Almost half of them (49.4 percent) reported that they do not work beside their current job, 46.9 percent said they work at home, e.g. do farm work, raise animals or are public servants, and the rest had extra jobs like selling labour in the village (0.6 percent), selling labour outside the village (1.4 percent), collecting and selling common local resources, e.g. braid leaves (0.3 percent), or be a small vendor (0.83 percent). Responding to a question, “can your income support your family?”, the majority (91.4 percent) said “some”, 6.9 percent said “yes” and 1.7 percent said “no”. All of them raised concern about a rise in food prices that have direct impact on their livelihood. Their income was mainly spent on food (98.4 percent).

With regard to 120 garment workers included in the survey, the majority of them (72.5 percent) came from a family with between four to six members. They reported that their monthly income was mainly spent on food (68.7 percent), accommodation (19.7 percent), health (0.2 percent) and others (11.7 percent). Responding to a question, “do you want to work in factory for long time?”, 55.0 percent said “don’t know”, 39.5 percent said “no” and the rest (12.5 percent) said “yes”.

Table 1: Private investment projects approved, 2014–2019

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	fixed assets (USD m)											
Agriculture	56.5	169.8	117.1	62.9	99.5	30.4	45.2	39.8	17.2	48.2	1.9	27.5
Industry	1002.5	1014.7	1436.4	982.2	259.6	193.4	408.2	325.0	292.9	113.7	302.0	919.9
. *Garments*	393.5	225.2	380.7	211.1	53.2	31.4	49.9	52.8	73.9	34.4	47.3	74.1
Services	622.6	2734.4	1664.3	3858.6	110.2	2156.2	605.5	1479.8	1625.6	2518.2	849.7	1440.4
. *Hotels and tourism*	446.9	98.6	1366.9	2759.6	75.2	106.6	68.3	1333.9	1618.8	2518.2	808.7	1703.8
Total	1583.9	3918.9	3217.7	4903.7	469.3	2380.0	1058.9	1844.7	1935.6	2680.1	1153.5	2387.8
	percentage change from previous quarter											
Total	-	-	-	-	310.5	407.2	-55.5	74.2	4.9	38.5	-57.0	107.0
	percentage change from previous year											
Total	-63.4	147.4	-17.9	52.4	257.2	44.0	-64.8	1513.7	312.5	12.6	8.9	29.4

Note: Including expansion project approvals.

Source: Cambodian Investment Board

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

	2009	2010	2011	2012	2013	2014				2015		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	USD m											
Villas, houses and flats	213.9	220.1	405.1	547.3	658.9	133.6	84.0	33.1	20.4	122.3	-	637.6
Other	227.3	217.8	199.9	463.6	859.6	190.0	141.7	105.6	11.7	49.8	-	252.6
Total	441.2	489.8	605.0	1010.9	1518.5	323.6	225.7	138.7	32.1	172.0	-	897.4
	percentage change from previous quarter											
Total	-	-	-	-	-	34.3	-30.2	-38.5	-77.8	437.3	-	-
	percentage change from previous year											
Total	-60.5	11.0	23.5	67.1	28.1	8.0	-9.2	-64.2	-86.7	-46.8	-	-

Source: Department of Cadastre and Geography of Phnom Penh municipality

Table 3: Foreign visitor arrivals, 2014–2019

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	thousands											
China	560.3	694.7	830.0	1210.8	505.9	425.8	509.0	583.7	683.4	609.1	572.5	496.9
Vietnam	905.8	987.8	959.7	835.4	186.8	199.9	197.7	215.9	186.9	214.8	235.7	271.5
Korea	424.4	395.3	357.2	345.0	126.1	48.5	483.9	78.8	95.7	43.6	47.4	68.1
Thailand	279.5	349.9	398.1	394.9	83.7	76.1	75.5	147.0	97.9	76.3	113.9	178.4
US	191.4	217.5	238.7	256.5	79.1	54.6	47.7	69.5	79.0	53.2	45.5	71.2
Japan	215.8	193.3	191.6	203.4	59.0	38.7	47.7	65.1	60.2	40.4	48.9	58.2
France	141.1	145.7	150.3	166.4	56.6	29.4	33.5	51.4	59.4	27.3	32.9	44.5
UK	133.3	154.3	159.5	171.2	51.2	33.7	33.0	44.5	59.4	29.7	28.5	45.6
Malaysia	144.4	149.4	152.8	179.3	44.8	41.0	49.4	65.8	48.7	43.2	46.5	64.6
By air	2273.5	2476.0	2778.0	3312.7	1157.6	846.5	954.8	1137.9	1299.1	1054.8	1039.9	1010.2
By land or water	2229.3	2299.2	2331.4	2289.4	553.6	443.9	419.6	687.1	578.7	405.8	436.0	786.1
Total	4502.8	4775.2	4980.4	5602.2	1711.3	1290.4	1374.4	1825.0	1877.9	1460.6	1475.8	1796.3
	percentage change from previous quarter											
Total	-	-	-	-	1.3	-24.6	6.5	32.8	2.9	-22.2	1.0	21.7
	percentage change from previous year											
Total	7.0	6.1	4.3	12.5	129.3	-158.8	9.9	8.0	9.7	13.2	7.4	-1.6

Source: Ministry of Tourism

Table 4: Exports and imports, 2014–2019*

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	USD m											
Total exports	8106.0	9256.4	10043.3	10772.9	2834.6	3000.2	3813.7	3135.4	3222.7	3379.0	4263.9	3524.9
Garments	5960.5	6827.0	7308.0	8020.3	2092.1	2240.6	2871.0	2302.3	2463.4	2526.3	3143.8	2530.9
. To US	1963.6	2009.4	1831.5	1923.8	538.4	573.9	743.5	627.4	739.8	802.9	1006.5	848.0
. To EU	2403.7	2903.9	2928.7	2782.2	670.1	805.2	916.7	763.4	719.2	801.1	965.4	716.2
. To ASEAN	83.3	103.4	98.4	106.9	28.6	32.7	33.0	41.1	38.1	41.3	48.2	53.1
. To Japan	383.1	524.2	655.5	701.2	224.7	165.2	276.6	224.3	262.9	175.8	291.2	236.8
. To UK	-	-	439.8	904.0	219.5	203.9	382.5	201.1	211.5	197.7	272.9	200.3
. To rest of the world	1126.8	1286.3	1354.2	1602.2	410.9	459.7	518.8	445.0	491.7	507.5	559.7	476.4
Electronics	-	-	-	380.0	76.2	90.9	83.4	78.3	71.9	123.8	142.3	116.3
Automotives	-	-	-	11.6	11.9	13.1	15.3	54.1	20.4	18.2	22.7	24.1
Agriculture	624.4	548.8	534.1	706.4	205.9	166.0	213.6	265.5	210.4	177.7	211.0	288.1
. Rubber	153.9	165.4	165.3	273.5	52.4	36.5	59.7	69.1	43.8	42.2	60.0	73.3
. Wood	132.0	46.3	47.2	100.5	30.0	34.0	42.0	36.3	22.2	35.2	42.4	47.5
. Fish	0.8	0.5	0.6	0.6	1.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1
. Rice	248.5	315.3	300.8	255.1	106.7	71.8	88.7	146.4	122.4	72.2	84.5	140.2
. Other agriculture	89.1	21.3	20.2	76.7	15.8	23.6	23.2	13.6	21.9	28.1	24.1	26.9
Others	1520.1	1880.2	2201.2	1654.7	448.6	489.6	630.4	435.2	456.6	532.9	744.0	565.6
Total imports	10295.4	11494.5	15013.4	16815.4	4244.5	4496.0	3976.5	4187.6	4437.7	5328.6	5091.4	5324.3
Gasoline	334.7	377.3	384.8	256.7	64.9	60.8	87.0	107.8	121.1	117.1	118.6	121.9
Diesel	602.3	607.8	709.1	472.9	102.0	116.9	162.0	213.2	228.2	250.2	166.4	248.9
Construction materials	117.6	164.4	253.2	304.3	100.7	138.7	162.7	162.5	170.8	231.4	271.2	224.4
Other	9240.7	10345.1	13666.3	15781.6	3976.9	4179.7	3564.8	3704.2	3917.7	4729.9	4535.2	4729.1
Trade balance	-2184.3	-2238.1	-4970.0	-5974.1	-1409,9	-1495.9	-162.8	-1052.3	-1215.0	-1990.6	-827.5	-1799.4
	Percentage change from previous quarter											
Total garment exports	-	-	-		4.6	7.1	28.1	-19.8	7.0	2.6	24.4	-19.5
Total exports	-	-	-		0.3	5.8	27.1	-17.8	2.8	7.8	26.2	-17.3
Total imports	-	-	-		24.0	5.9	-11.6	5.3	6.0	27.2	-4.5	4.6
	Percentage change from previous year											
Total garment exports	10.7	14.5	7.0	9.7	12.7	19.6	25.4	15.1	17.7	12.8	9.5	9.9
Total exports	16.1	14.2	8.5	7.9	23.7	14.2	23.1	11.0	13.7	12.6	11.8	12.4
Total imports	19.7	11.7	30.6	12.0	33.8	-24.0	-7.6	22.3	4.6	18.5	28.0	27.1

Note: * Import data include tax-exempt imports.

Sources: Department of Trade Preference Systems; MOC and Customs and Excise Department; MEF (website)

Table 5: National budget operations on cash basis, 2014–2019 (billion riels)

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Total revenue	10543.4	11879.9	14201.5	16582.0	4357.6	5080.6	4670.3	5634.6	5097.5	6357.1	6364.5	6930.3
Current revenue	10359.4	11759.0	14088.7	16481.4	4344.8	5035.2	4625.6	5543.5	5066.8	6322.2	6309.2	6869.7
Tax revenue	8995.2	10502.4	12196.5	14314.3	3984.9	4425.4	4010.2	4598.7	4524.3	5663.5	5415.1	6009.8
Domestic tax	7226.5	8591.7	10185.8	12338.7	3469.8	3850.4	3424.9	3903.2	3904.9	4944.9	4634.1	5215.9
Taxes on international trade	1822.7	1910.7	2010.7	1875.6	515.2	575.0	585.2	695.4	619.4	718.6	781.0	793.9
Non-tax revenue	1310.3	1256.6	1892.2	2167.2	359.8	609.8	615.4	935.8	542.5	658.7	894.1	859.9
Property income	88.5	77.3	116.0	127.2	7.7	130.5	12.6	46.4	177.4	34.0	30.2	22.9
Sale of goods and services	871.2	1047.1	1248.3	1517.0	341.0	388.9	527.8	817.9	330.7	531.2	798.5	750.0
Other non-tax revenue	350.5	132.2	528.0	523.1	11.1	87.4	75.0	80.5	34.5	93.5	65.5	87.1
Capital revenue	184.0	121.0	113.4	100.5	12.9	45.4	44.7	91.1	30.7	35.0	55.4	60.7
Total expenditure	13306.5	13849.5	13775.4	17251.0	3583.2	4706.2	5861.4	4876.3	4150.4	4997.6	5386.5	7676.8
Capital expenditure	5590.7	5290.3	3785.3	5207.2	812.9	1517.8	1978.3	1421.2	1025.0	1392.7	1358.6	3195.4
Current expenditure	7715.8	8544.6	9990.1	12043.7	2770.3	3188.5	3883.1	3455.1	3125.4	3604.9	4027.9	4481.3
Wages	3755.5	4271.9	5381.7	6647.4	1760.3	1911.1	2148.8	1738.3	1820.2	1911.1	2102.0	1883.3
Subsidies and social assistance	1627.0	1742.9	1774.9	2314.8	469.9	621.1	597.2	817.2	729.2	1061.9	855.5	1620.3
Other current expenditure	2333.4	2529.8	2833.5	5394.3	1010.0	1277.4	1734.4	1716.9	1305.2	1693.8	1925.8	2598.1
Overall balance	-2763.1	-1969.6	426.1	-669.1	774.5	374.4	-1191.1	758.3	947.1	1359.6	978.0	-746.4
Foreign financing	3972.1	3729.4	1878.9	3358.1	401.6	1064.4	413.1	634.4	652.8	895.5	608.8	1383.3
Domestic financing	-1428.7	-2034.9	-1858.7	-2454.1	101.7	90.5	-36.3	66.7	-44.4	-7.6	11.9	-18.0

Source: MEF website

Table 6: Consumer price index, exchange rates and gold prices (period averages), 2014–2019

	2014	2015	2016	2017	2018				2019			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	Consumer price index (percentage change from previous year)											
Phnom Penh - All Items	3.9	1.2	3.1	2.9	2.3	2.7	2.5	2.4	1.9	1.9	1.8	2.0
- Food and non-alcoholic beverages	4.9	4.0	5.6	3.4	1.9	2.9	2.5	2.5	2.1	2.1	1.6	2.2
- Transportation	-1.0	-9.2	-6.9	4.1	3.1	3.9	3.3	1.4	-3.8	-3.8	-1.5	-2.5
	Exchange rates, gold and oil prices (Phnom Penh market rates)											
Riels per US dollar	4036.2	4060.4	4053.7	4047.5	4012.4	4047.0	4073.7	4046.7	4006.6	4052.1	4086.8	4063.7
Riels per Thai baht	124.9	119.4	115.5	120.0	127.7	127.4	124.2	124.2	127.4	128.9	133.7	134.9
Riels per 100 Vietnamese dong	19.1	18.7	18.2	17.9	17.8	17.9	17.7	17.5	17.4	17.5	17.7	17.6
Gold (US dollars per chi)	152.3	140.6	151.2	151.5	160.3	157.6	146.1	147.3	156.6	157.1	175.7	178.1
Diesel (riels/litre)	4852.1	3771.3	3004.0	3385.8	3679	3915.7	3784.3	3856.3	3413.9	3595.4	3499.7	3685.9
Gasoline (riels/litre)	5083.3	3951.7	3336.8	3716.0	3914	4120.3	4003.0	3893.0	3405.7	3770.2	3629.3	3499.5

Sources: NIS; NBC; CDRI

Table 7: Monetary survey, 2013–2019 (end of period)

	2013	2014	2015	2016	2017	2018				2019		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	Billion riels											
Net foreign assets	21260.1	26699.7	26665.5	31814.5	42575.3	46707.0	49421.9	52669.4	55214.3	58148.8	62699.5	67081.5
Net domestic assets	11508.3	15859.8	22157.6	25802.3	28743.5	28457.0	29926.1	31941.8	33228.9	33997.2	33548.0	34814.3
Net claims on government	-2794.9	-4359.1	-6428.8	-8148.5	-11066.5	-12381.1	-12887.7	-12996.4	-14803.7	-17381.0	-18747.4	-20263.2
Credit to private sector	27608.8	36244.6	46071	56458.8	66922.6	68686.5	72464.2	77925.6	82419.3	86574.4	91568.6	98320.3
Total liquidity	32768.4	42559.5	48823.1	57616.6	71318.9	75164.0	79348.0	84611.3	88443.2	92146.0	96247.6	101895.8
Money	4878.2	6308.4	6741.4	7273.0	9428.4	9578.5	9553.9	10146.0	10226.8	10782.0	11274.5	13465.9
Quasi-money	21260.1	26699.7	42081.7	50343.8	61890.4	65585.5	69794.1	74465.2	78216.4	81364.0	84973.0	88429.9
	Percentage change from previous year											
Total liquidity	14.6	29.9	14.7	18.0	23.8	24.1	21.6	21.3	24.0	22.6	21.3	20.4
Money	20.6	29.3	6.9	7.9	29.6	27.3	16.7	13.7	8.5	12.6	18.0	32.7
Quasi-money	13.6	30.0	16.1	19.6	22.9	23.7	22.3	22.4	26.4	24.1	21.7	18.8

Source: National Bank of Cambodia

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

	Daily earnings (riels)									Percentage change from previous year		
	2015	2016	2017	2018	2019				2020	2019		2020
					Feb	May	Aug	Nov	Feb	Aug	Nov	Feb
Cyclo drivers	11667	11516	10793	10793	11764	10567	11114	12046	10997	8.2	14.7	-6.5
Porters	14628	14318	14942	14942	15882	17323	16560	18802	18246	4.2	21.7	14.9
Small vegetable sellers	15125	17177	17015	17015	18912	21472	19197	18651	15207	-4.7	-11.3	-19.6
Scavengers	11574	10299	11591	11591	12941	12685	13123	13099	14759	-1.2	4.2	14
Waitresses*	17772	20008	22901	22901	8299	8348	8564	8724	8706	7.8	4.5	4.9
Ricefield workers	14542	17365	17341	17341	8209	7909	9180	9376	9154	8.9	4.4	11.5
Garment workers	13847	14509	14231	14231	16073	15166	16076	16578	16483	5.0	5.1	2.6
Motorcycle taxi drivers	7,914	7989	8093	8093	14705	15104	14219	14904	17748	-7.0	1.8	20.7
Unskilled construction workers	8418	8088	8055	8055	19820	17987	18322	18814	22916	4.5	-0.5	15.6
Skilled construction workers	14404	13688	14093	14093	26265	24743	25235	27225	27164	8.4	2.4	3.4

Notes: * Waitresses' earnings do not include meals and accommodation provided by shop owners. Surveys on the revenue of waitresses, ricefield workers, garment workers, motorcycle taxi drivers and construction workers began in February 2000. November 2015 data are not available. **Not available.

Continued from page 24 **CDRI UPDATE**

Sim Sokcheng and Sarom Molideth is finalized and ready for editing and publishing.

Centre for Development Economics and Trade (CDET)

CDET has engaged in a variety of projects. In the MLC Framework, we received financial assistance to implement *"Agricultural Trade between China and the Mekong-Lancang Countries: Value Chain Analysis"*. Funds from the Swiss Programme for Research on Global Issues for Development (r4d) supported the implementation of the *Contribution of Vocational Skills and Development to Inclusive Industrial Growth and Transformation: An Analysis of Critical Factors in Cambodia since 2017*. We also continued the research of 1,500 households around the Tonle Sap area for the *"On the Salience of Memories"* project with the support from Ludwig-Maximilian's University of Munich, scheduled to be completed in April. In March we were responsible for the tri-annual panel household survey under the *Agriculture, Rural Development and Poverty Reduction Project.* The *Digital Skills Assessment Survey* was a new project in collaboration with the National Institute of Posts, Telecoms and Information and Communication Technology (NIPTICT) under the Capacity Building Research and Development Fund of the Ministry of Posts and Telecommunications (MPTC).

CDET took part in a public forum on Macroeconomic Management and Budget Law 2020, hosted by the Ministry of Economy and Finance (MEF). This elaborated on the macro economy with predictions for 2020 and new policies and laws. We also attended training sessions on Data Literacy by Open Development Cambodia in Phnom Penh and Siem Reap.

Centre for Educational Research and Innovation (CERI)

In the first quarter, the working paper *Cambodian Academics: Identities and Roles* was published in January by CDRI. This qualitative study was funded by Australia's Department of Foreign Affairs and Trade (DFAT) through the Asia Foundation (TAF), and aimed to explore four significant aspects, including developing the identities of Cambodian academics in terms of disciplinary, functional and social forms. Two other working papers on C*haracteristics and Issues of Internship at Cambodian Private Firms* also supported by DFAT, and *Understanding Cambodian Deans' Conceptions and Approaches to University Accountability* supported by the Swiss Agency for Development and Cooperation (SDC), are being edited and due to be released in May. In addition, DFAT supported three research studies: *Economic of Major Choice in STEM, Measuring Internationalization of Higher Education in Cambodia,* and *Typology of Cambodian Higher Education Institutions.*

Two research studies funded by the SDC: *The Development and Implementation of Competency-Based Education and Training in Cambodian TVET: Perspectives and Experiences from Three Stakeholders,* and *Education and Training Hybridization: Possibilities and Practices* have completed the data collection and write-up stages. The findings are expected to be published mid-June as CDRI working papers, with both studies examining the status quo of technical and vocational education and training (TVET) in Cambodia.

From 20 to 22 January, a Senior Research Fellow participated at the "2020 Speculative Design Seminar", held at Sunway University, Malaysia.

CERI also hosted a meeting with the Directorate General of Technical and Vocational Education and Training (DGTVET) of Ministry of Labour and Vocational Training (MLVT) on 5 March 2020.

Center for Natural Resources and Environment (CNRE)

CNRE continued activities in many projects, including three funded by Sida on: *Climate Change Adaptation and Disaster Risk Reduction; Gender-based Climate Change in Adaptation in Local Cambodia's Communities,* with preliminary field work in early March followed by creating the questionnaire accordingly; and *Valuation of Ecosystem Services in Community-based Eco-tourism for Forest Conservation and Livelihood Improvement.* Additionally, we engaged in the implementation of the UNDP-funded *Impact of Climate Change Programs in Cambodia: Vulnerability, Poverty, and Gender*, and the LMC-funded *Water Diplomacy of the Mekong Basin: Toward a Shared Basin for Prosperity*, scheduled for completion in May 2021. In February we also

concluded the *Contract Farming in the Lancang-Mekong Region* project, supported by LMC.

During this quarter, we also hosted a policy dialogue on "Contract Farming in Cambodia: Good practices, lessons learned, Issues, and Challenges."

A researcher from this centre also attended the International Training Program on Disaster Risk Management hosted by MSB-Sida in Kathmandu, Nepal, which shared knowledge in monitoring and Evaluation (M&E), and facilitating engagement in Disaster Risk Management.

Centre for Governance and Inclusive Society (CGIS)

In the 1st quarter of 2020, CGIS was involved in the implementation of four key projects. There are two on-going research studies which continue from 2019 under Sida funds, the *Impact of Generational Shift on State-Society Relations at Sub-National Level* and *Youth Civic Engagement with Civil Society Organizations*. After conducting field research in a number of provinces, the researchers are working on writing the reports for expected publication in June. Two new projects started early this year, the *"National Ownership and Local Participation"* project in collaboration with Gotenburg University, (funded by Swedish Research Council) is currently on the literature review stage, and is identifying key stakeholders to conduct field research from October. The second project, *Focusing a Gendered Lens on Climate Resilience, Credit, and Nutrition in Translocal Cambodia and South India,* is supported by the Global Challenges Research Fund, and is in the process of data collection in three rural villages in Cambodia. This is a team work project in cooperation with Royal Holloway, University of London, as well as Cambodian and Indian technical teams to study and integrate the interdisciplinary research on climate, gender and nutrition.

CDRI Update

Major events

Policy dialogue on **"Contract Farming in Cambodia: Good Practices, Learning, Issue, and Challenges"** on 7 February in Phnom Penh, to gather stakeholders to discuss primary research findings, issues, challenges and potential solutions to contract farming in Cambodia. There were about 30 participants including policy makers and representatives from the private sector, development partners, NGO representative, practitioners (farmers and agricultural cooperatives), scholars and academia. We were all able to collect a clear image of contract farming in Cambodia, as well as a set of suggestions and recommendations for improving contract farming schemes.

Policy conference, **"2020 Speculative Design Seminar"**, held at Sunway University, Malaysia, aimed to share speculative design as potential machinery for policy-making and research, and established connections and the exchange of fresh perspectives amongst local government agencies as well as ASEAN and Nepalese representatives involved in policy-making and research.

The collaborative meeting with **the Directorate General of Technical and Vocational Education and Training** (DGTVET) of the Ministry of Labour and Vocational Training (MLVT) on 5 March comprised researchers from the Education Unit and seven government officials. The purpose was to strengthen the cooperation on research and capacity building activities, and to acknowledge the positive contributions to the field of technical and vocational education and training.

Research highlights

Centre for Policy Research in Agriculture and Rural Development (CARD)

In the first quarter of 2020, we engaged in four projects. The SIDA-funded *"On-Farm Food Safety in Horticulture in Cambodia: The Case of Vegetable Farming"* project was completed, and the *"Current Situation of Agro-processing Industry"* began initital documentation and identification of potential for future investments The Sida-funded *"Mango Value Chain Analysis"*, and the IFAD-funded *"Network for Agriculture and Rural Development Think-tanks for Countries in Mekong Sub-region (NARDT)"* are both ongoing.

Two publications, the *"Effect of Parental Migration on the Schooling of Children Left Behind in Rural Cambodia"* by Marchetta, Francesca and Sim Sokcheng, was published by PEP. And *"On-farm Food Safety in Horticulture in Cambodia: The Case of Vegetable Farming"* by Keo Socheat,

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