

JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)

MINISTRY OF COMMERCE
ROYAL GOVERNMENT OF CAMBODIA

**THE STUDY
ON
REGIONAL DEVELOPMENT
OF
THE PHNOM PENH – SIHANOUKVILLE
GROWTH CORRIDOR
IN THE KINGDOM OF CAMBODIA**

FINAL REPORT

VOLUME 2: MAIN REPORT



JUNE 2003

**NIPPON KOEI CO., LTD.
INTERNATIONAL DEVELOPMENT CENTER OF JAPAN
KRI INTERNATIONAL CORPORATION**

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PREFACE

In response to a request from the Royal Government of the Kingdom of Cambodia, the Government of Japan decided to conduct the Study on Regional Development of the Phnom Penh – Sihanoukville Growth Corridor in the Kingdom of Cambodia, and entrusted the study to the Japan International Cooperation Agency (JICA).

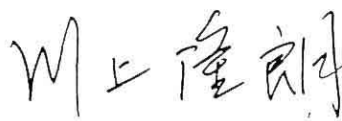
JICA selected and dispatched a study team to the Kingdom of Cambodia over the period of one year from February 2002 to February 2003. The Study team consists of Nippon Koei Co., Ltd., the International Development Center of Japan, and KRI International Corporation, and is headed by Mr. Koji Yamada of Nippon Koei Co., Ltd.

The team held discussions with the officials concerned of the Royal Government of Cambodia, and conducted field surveys in the study area. Upon returning to Japan, the team conducted further studies and prepared this final report.

I am confident that this report will not only contribute to the economic development of Cambodia, but also to the enhancement of friendly relationship between our two nations.

Finally, I wish to express my sincere appreciation to the officials concerned of the Royal Government of Cambodia for their cooperation and friendship extended to the study.

June, 2003



Takao Kawakami

President

Japan International Cooperation Agency

June, 2003

Mr. Takao Kawakami
President
Japan International Cooperation Agency
Tokyo, Japan

Subject: Letter of Transmittal

Dear Sir,

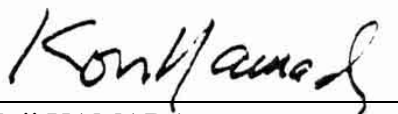
We are pleased to submit herewith the Final Report of the “The Study on Regional Development of the Phnom Penh – Sihanoukville Growth Corridor in the Kingdom of Cambodia”. This study was entrusted to Nippon Koei Co., Ltd. in association with International Development Center of Japan, and KRI International Corporation, under a contract with Japan International Cooperation Agency (JICA), during the period from February 2002 to June 2003. The Report consists of Executive Summary, Main Report and Appendix.

This Study presents the goals and strategies necessary to improve the economic condition of the Growth Corridor area, encompassing the areas of Phnom Penh, Sihanoukville and five provinces in between. The Growth Corridor area is expected to play the role of the engine of economic development of Cambodia. As one of the urgent project, the Study proposed a special promotion zone in Sihanoukville to attract foreign investment and promote domestic enterprises in parallel. This will be a first step to the diversification of export industries, leading to better use of locally available resources for sustainable development of Cambodia.

We would like to take this occasion to express our sincere gratitude to JICA and the Ministry of Foreign Affairs for providing an opportunity to conduct this Study. We are also the most grateful for the cooperation, guidance and assistance of the Steering Committee and the Working Group in the Royal Government of the Kingdom of Cambodia, the JICA Cambodia office, the Embassy of Japan in Cambodia and the international donors represented in Cambodia that share the same goal of improving the economic condition of Cambodia. The Final Report is a fruit of excellent collaboration of all stakeholders in this Study.

We hope that this report will contribute to improve the economic conditions in the Growth Corridor and all over Cambodia.

Yours Faithfully,



Koji YAMADA
Team Leader, JICA Study Team for
the Study on Regional Development of
the Phnom Penh – Sihanoukville Growth Corridor
in the Kingdom of Cambodia



The Study on Regional Development of The Phnom Penh-Sihanoukville Growth Corridor in The Kingdom of Cambodia

Japan International Cooperation Agency

Location Map of the Study Area

**THE STUDY ON
REGIONAL DEVELOPMENT OF
THE PHNOM PENH-SIHANOUKVILLE GROWTH CORRIDOR
IN THE KINGDOM OF CAMBODIA**

FINAL REPORT: MAIN REPORT

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ABBREVIATIONS

AADT	Annual Average Daily Traffic
ADB	Asian Development Bank
AFTA	ASEAN Free Trade Area
AHTN	ASEAN Harmonized Tariff Nomenclature
AIA	ASEAN Investment Area
ASEAN	Association of South East Asian Nations
ASYCTAD	Automated System to the Customs Data
B/C	Benefit and Cost Ratio
B-C	Benefit and Cost Differential
BAU	Bureau for Urban Affairs
BOD	Biochemical Oxygen Demand
BOT	Build Own Transfer
CAPZA	Cambodian Special Promotion Zone Authority
CCD	Committee for Community Development
CDC	Council for the Development of Cambodia
CED	The Customs and Excise Department
CEPT	Common Effective Preferential Tariff Scheme
CIB	Cambodian Investment Board
CIDA	The Canadian International Development Agency
CIF	Cost, Insurance, and Freight
CIZ	Council for Industrial Zone of Cambodia
CNC	Cambodia National Committee
CNCMD	Cambodia National Mekong Development Committee
CNMC	Cambodia National Mekong Committee
COD	Chemical Oxygen Demand
CRC	Conditional Registration Certificate
CRDB	Cambodian Rehabilitation and Development Board
CSES	Cambodia Socio-Economic Survey
DANIDA	Danish International Development Agency
DIP	Ductile Crest Iron Pipe with internal mortar lining
BOD	Biochemical Oxygen Demand
DOE	Department of Environment
DoF	Department of Fisheries
DOPWT	Department of Public Work and Transportation
EBA	Everything-But-Arms
EDC	Electricité Du Cambodge
EIA	Environment Impact Assessment
EIZ	Export Industrial Zone
ELVIS	Electronic Visa Identification System
EPZ	Export Processing Zone
EU	European Union
F/O	Optical Fiber
FAO	Food and Agricultural Organization
FDI	Foreign Direct Investment
FIRR	Financial Internal Rate of Return
FMV	Fair Market Value
FTA	Free Trade Area
FTB	Foreign Trade Bank
FTZ	Free Trade Zone
FZ	Free Zone
GCA	Greater Capital Area
GDP	Gross Domestic Production
GIE	General Industrial Estate
GIZ	General Industrial Zone
GMAC	Garment Manufacturing Association of Cambodia
GMS	Greater Mekong Subregion
GOJ	Government of Japan

GRDP	Gross Regional Domestic Production
GRET	Group de Recherche et d' Enchanges Technologique
GSP	Generalized System of Preferences
GTC	Garment Training Center
GTZ	Deutsche Gesellschaft fur Technische Zusammenarbeit
HCMC	Ho Chi Minh City
HDI	Human Development Index
HIV	Human Immunodeficiency Virus
HEPZA	HCMC Export Processing and Industrial Zone
HRD	Human Resources Development
IA	Industrial Area
ICD	Inland Container Depot
ICS	Institute per la Cooperazione ALLO Sviluppo
ICD	Integration and Competitiveness Study
ICT	Information and Telecommunications Technologies
IEAT	Industrial Estate Authority of Thailand
IEE	Initial Environment Examination
IFC	International Finance Corporation
ILO	International Labor Organization
IMF	International Monetary Fund
IP	Internet Protocol
IPP	Independent Power Plant
ISIC	International Standard Industrial Classification
ISP	Internet Service Provider
IT	Information Technology
ITC	Cambodian Institute of Technology
ITC	Information and Telecommunication Technologies
IZ	Industrial Zone
JBIC	Japan Bank for International Corporation
JETRO	Japan External Trade Organization
JICA	Japan International Cooperation Agency
JOCV	Japanese Overseas Cooperation Volunteer
JST	JICA Study Team
JVC	Japan International Volunteer Center
KAMFIMEX	Kampuchea Fish Import and Export Company
KMITL	King Mongkut's Institute of Technology Ladkrabang
Lao PDR	Lao People's Democratic Republic
LIZ	Law on Industrial Zone
LNC	Letter of Non-Compliance
LOI	Law on Investment
LSPZ	Low on Special Promotion Zone
LTU	Large Taxpayer Unit
MAFF	Ministry of Agriculture, Forestry and Fisheries
MEF	Ministry of Economy and Finance
MFN	Most Favor Nation
MIME	Ministry of Industry, Mines and Energy
MLMUPC	Ministry of Land Management, Urban Planning and Construction
MOC	Ministry of Commerce
MOE	Ministry of Environment
MoEYS	Ministry of Education, Youth and Sports
MOP	Ministry of Planning
MoSALVY	Ministry of Social Affairs, Labor, Vocational Training and Youth Rehabilitation
MOT	Ministry of Tourism
MOWRAM	Ministry of Water Resources and Meteorology
MPDF	Mekong Project Development Facilities
MPP	Phnom Penh Municipality
MPTC	Ministry of Posts and Telecommunication
MPWT	Ministry of Public Works and Transport
MRC	Mekong River Commission

MRD	Ministry of Rural Development
MWC	Maximum Water Consumption
NBC	National Bank of Cambodia
NCDM	The National Committee for Disaster Management
NESDB	National Economic and Social Development Board
NGO	Non Governmental Organization
NMF	Cambodian National Mekong Committee
NPVB	Net Present Value of Benefit
NPVC	Net Present Value of Cost
NR	National Route
NTF	National Training Fund
NTFP	Non-Timber Forest Products
NUOL	National University of Laos
ODA	Official Development Assistance
O/M	Operation and Maintenance
PAS	Port Authority of Sihanoukville
PCA	Post Clearance Audit
PDRD	Provincial Department of Rural Development
PFI	Private Finance Initiative
PPWSA	Phnom Penh Water Supply Authority
PRD	Participatory Rural Development
PRSP	Poverty Reduction Strategy Paper
PSI	Pre-shipment Inspection
PTC	Provincial Training Center
PVC	Pplyvinyl-Chloride Pipe
PZ	Promotion Zone
QIP	Qualified Investment Project
QR	Quick Response
RA	Residential Area
RC	Reinforced Concreate
REE	Rural Electricity Enterprise
RGC	Royal Government of the Kingdom of Cambodia
ROO	Rules of Origin
RMU	Ring Main Unit
RRA	Rapid Rural Appraisal
RRC	Royal Railways of Cambodia
RSP	Remote Service Unit
RUPP	Royal University of Phnom Penh
SA	Service Area
SBEZ	Special Boarder Economic Zone
SEDP	Socio-Economic Development Plan
SEZ	Special Economic Zone
SGS	Société Général du Surveillance
SME	Small and Micro Enterprise
SNV	Sihanoukville
SPS	Sanitary and Phytosanitary Measure
SPFZ	Sihanoulville Port Free Zone
SPM	Small Particulate Matters
SPZ	Special Promotion Zone
SS	Suspended Solid
SWSA	Sihanoukville Water Supply Authority
TCAP	Technical Cooperation Action Plan
TEU	Twenty-feet Equivalent Unit
TSL	Two Step Loan
TVET	Technical and Vocational Education and Training
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNESCO	United Nations Education, Scientific and Cultural Organization
UNICEF	United Nations Children’s Fund

UNIDO	United Nations Industrial Development Organization
USA	United States of America
VAT	Value Added Tax
WB	The World Bank
WFP	World Food Program
WTO	World Trade Organization
WWTP	Waste Water Treatment Plant

Exchange Rate

US \$ 1.0 = C Riel 3924 = J Yen 120.9, as of 2001