

## Chapter 16 Angkor Product Fair 2005

### 16.1 Outline of the Project

#### 16.1.1 Outline of Angkor Product Fair 2005

##### (1) Purpose:

The city center of Siem Reap receives many international tourists, which makes it one of the highest potential outlets for local products of Siem Reap Province and the whole Cambodia at large. The Angkor Product Fair was the first attempt of its kind to exhibit selected local products of Siem Reap that may have potentials of international marketability.

The goal of exhibition was to promote local and community industries by creating opportunities for networking information, incentives and motivation for design and technical upgrading, and opportunities for public relations and sales promotion. The final target in the near future would be the development of local products and new local brand.

##### (2) Description of the Fair:

The overall description of the Fair, expected "buyers-sellers" matching, and a summary profile of exhibitors are shown in the following tables.

**Table III.16.1 Description of Formulated Project of "Angkor Product Fair 2005"**

Item	Description
Participants (Exhibitors)	Exhibitors are /producers/ designers of attractive specialty local products. The local products consist of handicrafts, souvenir, agricultural products based on local native culture, tradition, nature and resources. Around 60 exhibitors are expected.. See Table
Venue:	Angkor Century Resort & Spa, Siem Reap City (Indoor and outdoor exhibiting zone including 60 booth)
Dates	December 9 <sup>th</sup> to 11 <sup>th</sup> 2005 (9:00am to 9:00pm everyday) 9 <sup>th</sup> : business day, Angkor Quality Products Fair, 10-11 <sup>th</sup> ---open to the public
Admission Fee/ Booth Fee:	Free
Organizer:	Siem Reap Provincial Government Chaired by the Governor, CEO=Vice Governor, Operation Director = Task force team leader (Co-organizer) APSARA, JICA (Supporter) Ministry of Commerce, Ministry of Tourism, Ministry of Industry mine and Energy, Ministry of Culture and Fine Arts, Ministry of Agriculture, Siem Reap Chamber of Commerce, Phnom Phnh Chamber of Commerce, Cambodia Hotel Association, Cambodia Association of Travel Agents
Task Force Team (Administrative and Operation Office)	Task Force Team consists of Provincial Government and Counterpart Team. CEOs of the team were assigned to the 2 Vice Governors and Operation Director was selected as the team leader. The team was in charge of selection of Angkor Products and the whole operation of the Fair. JICA study team support the Team as advisor and sponsor. Local assistants are hired as supporting and operational body of the Task Force Team.
Evaluation Group:	The study team held "Angkor quality Products Contest" during the Fair period. Outstanding products will be selected for awarding prize. Evaluation group consisted of the study team, task force team, specialist on handicrafts and agricultural products was organized for commendation. The evaluation team reviewed the originality and special features of the displaying products. The evaluation criteria included material, design, production process and quality of the products. The evaluation group offers Angkor Quality Product Prize for selected excellent products.

### **(3) Potential Products (Exhibitors)**

The following groups of items were identified as potential products.

#### **Handicraft and Souvenir (40 groups)**

- Silk
- Cotton
- Stone carving
- Wood-carving
- Pottery
- Basketry
- Lacquer ware
- Painting
- Leather carving
- Silver ware

#### **Agricultural Products (20 groups)**

- Rice
- Food (processed)
- Mushroom
- Vegetable (organic)
- Fruits
- Flower and trees
- Fish (processed)
- Poultry

### **(4) Schedule and Preparatory Works of the Angkor Product Fair 2005**

Schedule and major preparatory works of the Angkor Product Fair 2005 are as follows.

#### **June-July 2005**

- Formation of task force team
- Settle on basic plan and schedule of the Fair
- Plan for directory and inventory survey of potential exhibitors

#### **August 2005**

- Directory and inventory survey of potential exhibitors

#### **September 2005**

- Screening of potential exhibitors
- Targeting buyers and tourist for the Fair
- Layout plan, Ceremony and event plan
- Poster and leaflet design, website design
- Coordination among organizers and supporters

#### **October-November 2005**

- Invitation of exhibitors
- Settle on layout and event plan
- Distributing poster and leaflet

- Opening website
- Sending invitation letter to the guest and buyers
- Staffing for the Fair management and operation

## December 2005

- Setout Booth and display products
- Angkor product fair 2005 (9-11<sup>th</sup>)

### 16.1.2 Outline and Works of Task Force Team (APPC)

#### (1) Organization

- CEO Vice Governor
- Operation Director (team leader)
- Staff members (counterpart team members)
- Angkor Products Promotion Center (APPC) is selected as the Task Force Team name

#### (2) Assignment

- Formation of Advisory Committee, Task Force Team and Evaluation Committee
- Formation of the outline of Exhibition
- Start public relation and promotional activities
- Making directories and inventories of local exhibition applicants (Making Data Base, about 150 groups. Groups =(a) Private company, (b) NGO, (c) village, farmers' group and individual)
- Identify recommendable products for the Fair
- Making selection criteria: final selection of exhibitors
- Final formation of evaluation and commendation system
- Identify and invite buyers and tourist to the Fair
- Exhibition (9-11th) management
- Review the Fair and feed back for future development

#### (3) Outline of Major Works

##### 1) Making Directories and Inventories of Local Exhibition Applicants

Reviewing supporting measures: interviewing related government agencies and NGOs (about 30 organizations).

**Table III.16.2 Target Number of Groups for Directory and Inventory Survey**

NGO	30 groups
Handicraft and souvenirs	60 groups
Agricultural products	60 groups

Making directories and inventories (about 150 groups)

- Making questionnaire sheet;  
Business type, product, area, starting year, supporter, management, scale, market, material, quality, development potential, management problems, request to supporting measures, request to Angkor Product Fair.

- Reviewing and classifying (analyzing) questionnaire sheet=making “Angkor Products Data Base”;  
Classification: 1) Business type---NGOs, Private company, Community business) 2) Products category ---Handicraft and souvenir (Designers and producers groups, Social work groups), Agricultural products.
- Preparing selection criteria: select appropriate and model Angkor local products and potential products= making directories of “Angkor Products Groups”
- Making final invitation to Angkor Product Fair
- Making directory of 150 groups and making inventory of 100 groups

## **2) Formation of the Outline of Exhibition**

- Date, place, floor plan, schedule, exhibition plan, stage and demonstration plan.

## **3) Start Public Relation and Promotional Activities**

- Poster, leaflet design,
- Newspaper, TV, radio promotional activities,
- Website design.

## **(4) Selection Criteria of Angkor Products (Exhibitors) for the Fair**

The study team and the counter part team selected following selection criteria of Angkor products (exhibitors) for the Fair in consideration of production area, marketability, locality, quality, growth potential and social contribution.

Each potential products (exhibitors) for the Fair are classified "Yes= A", "Yes= B(lower than A)", and "No=C" by each selection criteria and add up to make a comprehensive appraisal. This selection criteria also shows the special features of the applied products (or exhibitors).

The followings are the selection criteria and the constituent percentage (%) by the analysis of 46 handicraft groups. Total constituent percentage of A 38%, B 29% and C 33% respectively. Trough this analysis 46 handicraft groups were divided into 3 groups namely A (high score group), B (middle score group) and C (low score group) and A and B groups were recommended as suitable products for the Fair.

**Table III.16.3 Angkor Products Selection Criteria (Special Features of the applied product)**

(%, Analysis of 46 handicraft groups)

Selection criteria	Yes	No	Remarks
Produced in Siem Reap	S	----	= Angkor (Siem Reap) products
Produced in Cambodia	P	----	= Potential Angkor products
Marketability	A B	C	
(Good sales channel to--)	---	----	
Export (international)	12%, 14%	74%	
Nationwide	16%, 29%	56%	
Local and tourist	76%, 17%	7%	
Locality	A B	C	
Local material use	59%, 26%	15%	
Local tradition, Skill	70%, 15%	15%	
Local work force	67%, 16%	18%	
Local consumption	24%, 60%	16%	
Quality	A B	C	
Brand products	36%, 11%	53%	
Quality products	56%, 44%	0%	
Good design, taste	53%, 44%	2%	
Growth Potential	A B	C	
Strong demand	18%, 64%	18%	
Unique (only one)	31%, 7%	62%	
Eco -product	22%, 29%	49%	
Social Contribution	A B	C	
Village work	36%, 36%	29%	
Social work	22%, 36%	42%	
Natural resource base	27%, 33%	40%	
Pro-environment	18%, 24%	58%	
Total Appraisal	A38% B29%	C 33%	

**Scope of Identified Products by Selection Criteria**

The selection procedures are divided into 3 steps of work. As a result the study team selected 55groups for the Fair.

**Step 1 (Target groups of research, 150 groups for directory making)** ---Handicraft, Souvenir Producers & shops, Agricultural producers, NGOs

**Step 2 (Selected100 potential groups from Category 1 for inventory making)**  
---Made in Siem Reap or Cambodia Products, Designing and/or Producing, not just retailing = (Potential groups for the Fair)

**Step 3 (Selected 60groups)**--- Identified Products by Selection Criteria, Made in Siem Reap or Cambodia Products, Designing and/or Producing  
= Recommended Products as Angkor Products (Suitable for the Fair)

- Handicraft and souvenirs (designers and producers) 30groups
- Agricultural products 20 groups
- Social work and village producers 10 group

### 16.1.3 Target Buyers and Target Tourists

#### (1) Target Buyers List

The study team will distribute the fair leaflets and invitation letters to the following target potential buyers such as hotels, restaurants, souvenir shops, travel agents, member companies of chamber of commerce, airline companies and etc.

**Table III.16.4 Target Buyers**

Siem Reap	No of Companies
Hotels and boutique shops (higher class hotels and shops 20, middle class hotels and shops 40)	60
Restaurants (major restaurants)	35
Souvenir shops (major shops 10, minor shops 30)	40
Chamber of commerce (member company, traders and exporters)	30
Travel agents	
Airlines	30
	5
Phnom Penh	No of Companies
Hotels and boutique shops (higher class hotels and shops 20, middle class hotels and shops 30)	50
Restaurants (major restaurants)	30
Souvenir shops (major shops)	20
Chamber of commerce (member company, traders and exporters)	30
Foreign companies (traders and exporters)	30
Travel agents	20
Airlines	10
Newspaper, TV	5
Overseas	No of Companies
Traders networking with Siem Reap Chamber of Commerce (Thailand, Singapore, Malaysia, Korea, Taiwan, Hong Kong and Japan)	50

**Table III.16.5 The Category of Target Buyers for the Fair Exhibitors (by Sellers Type)**

Types of Sellers		(1) Designers initiative Type		(2) Producers initiative Type		(2) Social work-oriented Type
Characteristics of sellers	Owenship	Foreign owners in the majority		Local owners in the majority		Village initiative
	Workshop type	In-house and village workshop		In-house workshop		In-house and village workshop
	Major products	Silk products, Stone & wood carving, and Lacquer ware		Stone & wood carving, pottery, silver ware, paintings, and cotton products		Basketary, silk products, and leather carving
	Quality of Products	High	Middle	High	Middle	Middle-low
Potential for marketing: by business type	Higher class hotels & shops	A	B	A	B	
	Middle class hotels & shops		A	B	A	A
	Major traders & exporters	A	A	A	B	
	Restaurants	B	B	B	B	B
	Souvenir shops (major)		B	B	A	A
	Souvenir shops (minor)				B	B
Promising Target		Higher class hotels, shops, and exporters	Middle class, hotels, shops and exporters	Higher class hotels, shops, and exporters	Middle class, hotels, shops and souvenir shops	Middle class, hotels, shops and souvenir shops

Notes: A: Major target buyer; B: Target buyer

**(2) Target Tourists List**

The study team will distribute the fair posters and leaflets to the following target tourist related hotels, restaurants, souvenir shops and travel agents.

Siem Reap	No of Companies
Hotels	50
Restaurants	30
Exhibitors shops	40
Travel agents	15
<b>Airlines</b>	5
Phnom Penh	No of Companies
Hotels	20
Restaurants	20
Souvenir shops	20
Travel agents	20
Airlines	10

**16.1.4 Entry Conditions of Exhibitors****(1) Exhibitor Registration Form**

Name	
Original product	
Location	
Contact person	
Phone	
E-mail	

**(2) Entry Conditions for Exhibitors**

- 1) Participate in Angkor Quality Products Contest (Dec9th),
- 2) Prepare your original high-quality products for the Contest,
- 3) Display the products for 3days in the Contest booth,
- 4) Explain your products for buyers and business persons (Dec9th),
- 5) Products except for the Contest Prize are tradable,
- 6) Registration and booth fees are free of charge.

**(3) Contest Prize (Prize Winner and Product)**

Angkor Quality Products Contest was arranged on the first day of the fair. The contest was planned to encourage product and design improvement through the product competition among exhibitors. Prepared contest awards (prize winner and product) were as follows.

- Minister of Commerce Prize (Artisan D' Angkor, silk products)
- Minister of Tourism Prize (Khmer Angkor Art, stone and wood carving)
- Minister of Industry Mine and Energy Prize (Khmer Leather Carving, leather carving)
- Minister of Culture and Fine Arts Prize (IKTT, silk products)
- Minister of Agriculture Forestry and Fisheries Prize (READA, vegetables)
- Ambassador of Japan Prize (Khmer Ancient Carving, stone and wood carving)
- President of APSARA Prize (Rice Association, quality rice)

(Visitors awards)

- Governor of Siem Reap Province Prize (ADRA, vegetables)

#### Selection Criteria and process for “The Best Angkor Products” (Products for Awards)

##### (Step1) Appraisal of Each Booth(by Products)

The selection committee members evaluate the product of each booth based on the following 4 selection criteria. In this evaluation S,A sign signify superior products.

- 1) Siem Reap Material: A, B, or C=non Angkor product
- 2) Made in Siem Reap: A, B, or C=non Angkor product
- 3) Good Design (Looking: S, A, B, C)
- 4) High Quality: S, A, B, C

Remarks

A=yes, B=partly yes, C=no, S=excellent

AASS=Best Product (Booth)

##### (Step2) Selection of the best products (booths)

Each committee member recommend (vote) the best products (booths) based on the following rule.

- 1) Zone A ---Select best 3 booths
- 2) Zone B ---Select best 2 booths
- 3) Zone C ---Select best 2 booths

##### (Step3) Arranging the 6 Awards for the selected best 6 booths

The selection committee add up the each member’s votes (recommended products of the Step 2). The committee finally arrange 6 awards (except Governor of Siem Reap Province Prize) to upper ranking products (booths) of the votes.

##### (Step4) Selection of the best visitors award (Governor of Siem Reap Province Prize)

The night of first day of the fair, the committee asked 500 visitors for voting to select best visitors award.

#### **(4) Explanatory Sheet for Originality and Special Features of Displaying Products**

The study team requests the exhibitors of the fair to prepare explanatory sheet for originality and special features of displaying products. The explanatory sheet describes displaying products’ originality and special features on their material, design, production process and quality to judges, buyers and tourists.



<b>Explanatory Sheet of Displaying Products</b> Originality and Special features of our products
<b>Material:</b>
<b>Design:</b>
<b>Production process:</b>
<b>Quality:</b>

**(5) Management Work of the Angkor Products Fair 2005**

The task force team (APPC) organize two working groups for the fair operation and management. Followings are their major works.

A. Exhibition, Event and Ceremony Management Group

- 1) Exhibition and display
- 2) Opening ceremony (Dec9)
- 3) Angkor quality products contest (Dec8-9)
- 4) Visitors award contest (Dec10-11)
- 5) Closing ceremony (Dec12)
- 6) Event (APSARA dance, fashion show, shadow puppet, music)

B. Reception and Visitor Service Group

- 1) Reception and registration
- 2) VIP guide service (Dec9)
- 3) Business and invited guests guide service (Dec9)
- 4) Tourists and residents guide service
- 5) Exhibitors list, guide map and event schedule (Dec9)
- 6) Information service
- 7) Security management

## 16.1.5 Exhibitors, Ceremony and Events in Angkor Products Fair 2005

## "Angkor Products Fair 2005 " Exhibitors List December 9-11, 2005

Zone	Product Type	Booth No	Name of Exhibitors	Kind of Products	Remarks		
Zone A Designers and Producers Group	Silk products	A-1	IKTT	Silk products			
		A-2	Artisan D'Angkor	Silk,stone&wood carving			
		A-3	Amatak Angkor	Silk products			
		A-4	Tabitha	Silk products			
		A-5	Khmer Silk Style	Silk products			
		A-6	Authenti Khmer	Silk products			
		A-7	Orange River FCC	Silk products			
		A-8	Hagar Design	Silk products			
		A-9	APSARA Silk	Silk products			
		A-10	Neang Miss ( COC) PP	Silk products			
	Various Handicraft and Souvenir	A-11	Melano Gallery	Modern ceramics			
		A-12	Opanisai	Artwork Candles			
		A-13	Angkor Candles	Artwork Candles			
		A-14	Rajana	Silk and carving			
		A-15	Sao Mao	Cotton,ceramics			
		A-16	Senteur'Angkor	Tea,Spice,Scents			
		A-17	Kokoon	Tea,Spice,Scents			
		A-18	Net Sam Ourn	Silver products			
		A-19	Madam Sachiko	Angkor cookie			
		A-20	Angkor Shoes making	Handmade Shoes			
	Stone, Wood Carving and Painting	A-23	Atipol Gallery	Modern painting			
		A-24	Banteay Srey Art	Stone carving			
		A-25	Khmer Angkor Art	wood carving			
		A-26	Khmer Ancient Carving	Stone&Wood carving			
		A-27	Cultural village	Stone&Wood carving			
		A-28	Ing Sareourn	wood carving			
		A-29	Angkor Art painting	Oil painting			
		A-30	Rachana Morodak Khmer	wood carving			
		A-31	Krum Vichet kor	Water color painting			
		A-32	Beaux Painting	Angkor painting			
		A-33	LO-YUYU	Ceramics			
		Zone B Social work and Village producers Group	Silk products	B-1	Prolerng Khmer/JST	Cotton,Clothes	
				B-2	ILO	Silk products	
B-3	Rehab Craft Cambodia			Silk products			
B-4	CHA			Silk products			
B-5	A.F.S(CH A)			Various Handicraft			
Leather Carving	B-6		House of Peace	Leather carving			
	B-7		Khmer Leather Carving	Leather carving			
Basketry	B-8		APDO	Basketry			
	B-9		Pradak	Basketry			
Artificial Flower	B-10		KARITAS Cambodia	Artificial flower			
Cotton & Others	B-11		Colours of Cambodia II	Various Handicraft			
Zone C Agricultural Producers Group	Food processing	C-1	Angkor Fresh Water	Drinking Water			
		C-2	Khmer Nature	Palm beer, Palm vinegar			
		C-3	Sen Ry	Chili sauce,Fish sauce			
	Vegetable	C-4	SR Vegetable Association	Lettuce,Cabbage			
		C-5	ILO-HURREDO	Sweet pepper, Honey			
		C-6	READA	Eggplant,mushroom			
		C-7	ADRA	Lettuce,Cabbage			
	Animal raising	C-8	Chicken Raiser Community	Chicken meat and Egg			
		C-9	Crocodile Farm Association	Crocodile leather			
	Fruit	C-10	Fruit Community	Jackfruit, Mango			
	Rice	C-11	Rice Association	Quality rice			

**Ceremony and Events in Angkor Products Fair 2005**  
**On 9-11 December 2005 (9:00 am-9:00 pm) at Angkor Century Resort & Spa, Siem Reap**

**AGENDA**

**December 9 (Friday) Business Day**

<b>Time</b>	<b>Description</b>	<b>Remark</b>
8:00-9:00	Arrival & Registration	
9:00-9:05	National Anthem	
9:05-9:20	Welcome APSARA Dance	
9:20-10:00	Opening Ceremony	1. Opening Speeches by: H.E. Soem Son, Governor of Siem Reap, H.E. Susumu Inoue, Minister, Embassy of Japan, and H.E. Seng Lim Nov, State Secretary of the Council of Ministers 2. Ribbon Cutting by: H.E. Soem Son, Governor of Siem Reap, H.E. Susumu Inoue, Minister, Embassy of Japan, H.R.H. Rattana Devi Norodom, and H.E. Seng Lim Nov, State Secretary of the Council of Ministers
10:00-11:00	Angkor Quality Products Contest	Selection of Excellent Products for Prize
11:00-11:30	Commendation (Prize) Ceremony	Minister of Tourism Prize by H.R.H. Rattana Devi Norodom Special Prize by H.E. Susumu Inoue, Minister, Embassy of Japan Minister of Culture and Fine Arts Prize by H.E. Khem Sarith, Secretary of State, Ministry of Culture and Fine Arts Minister of Agriculture Forestry and Fisheries Prize by H.E. Ouk Sokhon, Undersecretary of State, Ministry of Agriculture, Forestry, and Fisheries Minister of Industry Mine and Energy Prize by H.E. Nguon Nouv, Director General, Ministry of Industry Mines & Energy Minister of Commerce Prize by Mr. Sam Sambath, Deputy General Director, Ministry of Commerce
11:30-13:00	Lunch (VIPs only)	
13:30-18:00	Music	Department of Culture and Fine Arts
18:30-19:30	Traditional Dance	1.Moni Mekhala Dance 2.Pailin Peacock Dance 3.Kous Ang Kraeng Dance 4.APSARA Dance
19:30-20:30	Shadow Puppet	1.Comedy (Peacock Fighting) 2.Sang Sala Chhey (SangSala Chhey Magic)

**December 10 (Saturday) Open to the Public**

13:30-18:00	Music	Department of Culture and Fine Arts
18:30-19:30	Traditional Dance	1.Coconut Shells Dance 2.Sovann Macha 3.Rice Harvest Dance 4.APSARA Dance
19:45-20:10	Fashion Show	Sponsored by IKTT

**December 11 (Sunday) Open to the Public**

13:30-18:00	Music	Department of Culture and Fine Arts
18:30-19:30	Traditional Dance	1.Wishing Dance 2.Fishing Dance 3.APSARA Dance
19:30-20:20	Shadow Puppet	1.Comedy (Buffalo Fighting) 2.Reamke-Ream Leak Dance
20:20-21:00	Visitors Choice Awarding & Closing Ceremony	H.E. Soem Son, Provincial Governor

Schedule is changeable.  
 Contact: APPC Office  
 Address: c/o Siem Reap Provincial Hall, Phum Mondul 1  
 Khum Svay Dangkm, Siem Reap, Cambodia  
 H/P: 011 71 02 71,012 822 479,012 612121

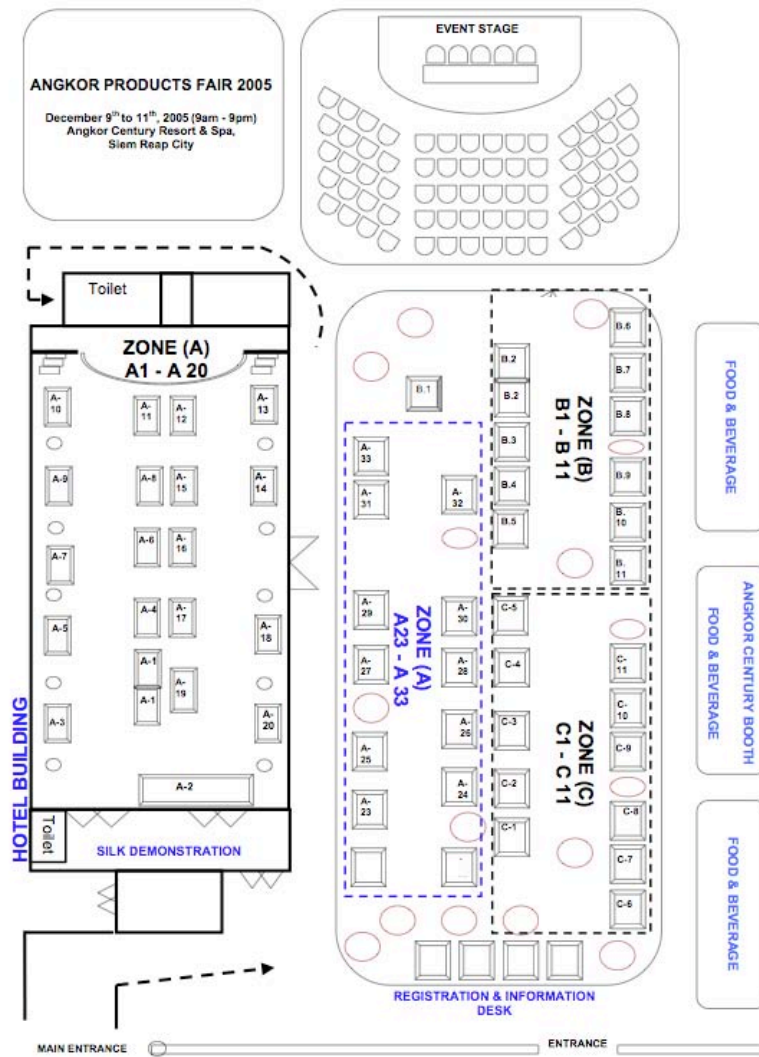


Figure III.16.1 Layout Plan of the Fair



Outdoor Exhibition



Indoor Exhibition



Commendation ceremony

## 16.2 Result of Pilot Project

### 16.2.1 PDM0 of the Pilot Project “Angkor Products Fair 2005”

A Project Design Matrix (PDM) for the Pilot Project “Angkor Products Fair 2005” is as shown in the following matrix.

Pilot Project : Angkor Products Fair 2005, Date:Dec.9-11, 2005

Target Group : Local Government(APPC) and Local Producers December6,2005

Narrative Summary	Verifiable Indicators	Means of Verification	Important Assumption
Overall Goal: Creating Angkor Brand Products			
Project Purpose Demonstrate a model of local products promotional measures			
Outputs a) Accumulating information b) Recognizing Angkor products c) Marketing and sales promotion d) Recognizing quality improvement needs e) Recognizing APPC activities f) Strengthen supporting network g) Planning and implementation ability	a) Making directory and inventory b) No of visitor and reaction c) Reaction of sellers, No of visitors d) Reaction of sellers e) No of visitors and reaction f) Reaction of supporters g) Planning for the next fair	a) APPC working data b) Counting and interview survey c) Interview survey d) Interview survey e) Counting and interview survey f) Interview survey, review meeting g) APPC work review	
Activities 1. Preparatory works of the Fair a) Formation of the task force team (APPC) b) Settle on basic plan and schedule c) Directory and inventory survey of potential products d) Screening of exhibitors e) Targeting buyers and tourists f) Lay out plan and event plan g) Poster and leaflet design h) Coordination among organizers and supporters i) Invitation of exhibitors j) PR for buyers, tourists and residents k) Staffing for the Fair 2. Hosting Angkor Products Fair a) Managing exhibition and events b) Reception of visitors	JICA Study Team Human resources • Study team member  Equipment • Floor and space: Hotel space • Exhibition booths: 60 • Poster and leaflet: 7000 • Website and radio PR: • Banner: 15 • Prize for quality products: 7	Inputs Local government Human resources • Local government staff • Counterpart team staff	Preconditions

## 16.2.2 Evaluation Interview and Evaluation Meeting

### (1) Visitors Record of the Fair

During the 3-day period of the Fair, there were around 10,000 visitors of which 15% were tourists, 7% were business related visitors, and 79% were local residents.

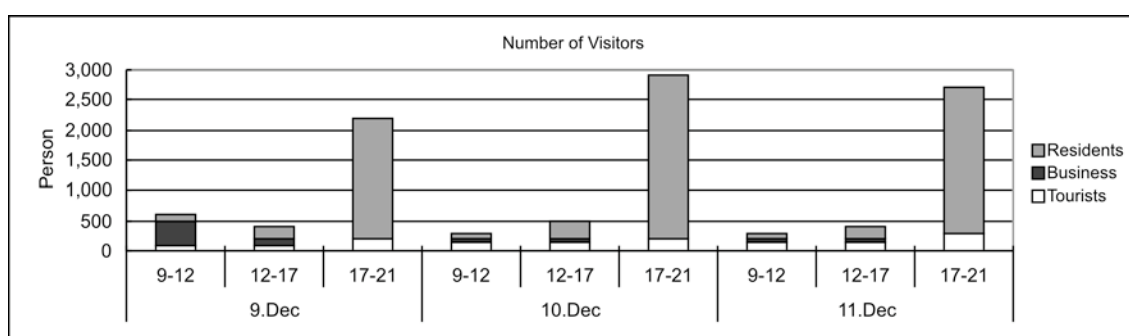


Figure III.16.2 Number of Visitors in the Fair

### (2) Evaluation Interview for Exhibitors and Visitors based on PDM0

During the fair evaluation interviews were carried by a sample survey. The major results of the survey and comments are summarized as follows.

#### Interview result A (for Exhibitors, 26 samples)

##### Recognized the merit of joining this Fair (yes100%, no0%)

Detailed items	Yes	No
1) Marketing promotion	100%	0%
2) Get buyers' information and needs	88%	12%
3) Meet with buyers	88%	12%
hotel, restaurant,	88%	12%
shop	65%	35%
trader	58%	42%
4) Meet with tourists	100%	0%
5) Meet with local residents	100%	0%
6) Get quality improvement needs	85%	15%
7) Feel sense of rivalry	96%	4%
8) Need cooperation among local producers	73%	27%
9) Need cooperation with local government	50%	50%
10) Join the next fair	100%	0%

#### Other Comments

- Public space will be better than hotel as an exhibition site
- More food booth with tasting service
- More advertising for tourists
- Not to hold the fair on same date with other event
- Relation and communication with the local government is rather weak
- More frequent regular exhibition (every three month)
- Need bigger exhibition booth

**Interview sheet B (for Buyers (hotel, restaurant, shop, trader)(11samples)****Impression of the Fair (good100%, no0%)****Recognized the merit of joining the Fair (yes100%, no0%)**

Detailed items	Yes	No
1) Find out new products	91%	9%
2) Meet with new producers	82%	18%
3) Find out quality products	100%	0%
4) Recognize Angkor products (local products)	91%	9%
5) Get Products and Producers information	91%	9%
6) Enjoying Exhibition, Events, Foods	exhibition most 91%	event most 9%
7) Join the next fair	100%	0%

**Other Comments**

- More frequent exhibition (2-4 times a year)
- More parking space

**Interview result C (for Tourists, 10 samples)****Impression of the Fair (good100%, no0%)****Recognized the merit of joining the Fair (yes100%, no0%)**

(Detailed items)	Yes	No
1) Find out new products	90%	10%
2) Meet with new producers	90%	10%
3) Find out quality products	90%	10%
4) Recognize Angkor products (local products)	80%	20%
5) Get Products and Producers information	70%	30%
6) Enjoying Exhibition, Events, Foods	exhibition most 100%	event most 0%
7) Join the next fair	100%	0%

**Other Comments**

- More information and explanation service on each booth
- Improve to find out the booth easily
- Japanese Advertisement and guide map/explanation

**Interview result D (for Residents)(23samples)****Impression of the Fair (good100%, no0%)****Recognized the merit of joining the Fair (yes100%, no0%)**

(Detailed items)	Yes	No
1) Find out new products	100%	0%
2) Meet with new producers	78%	12%
3) Find out quality products	100%	0%
4) Recognize Angkor products (local products)	96%	4%
5) Get Products and Producers information	96%	4%
6) Enjoying Exhibition, Events, Foods	exhibition most 96%	event most 4%
7) Join the next fair	100%	0%

**Other Comments**

- More frequent exhibition (3-5 times a year)
- More agricultural products
- Need high quality but cheaper price products

- Not sufficient parking space
- Bigger exhibition
- More local food and restaurants
- Need food for taste
- More music and event

### **(3) Evaluation Meeting**

#### **Counterparts Evaluation Meeting**

The fair task force team (APPC) held evaluation and review meeting after the fair. The major comments were summed up as follows.

#### **(Arranging and hosting the fair)**

- a) 55 quality products producers and so many visitors were joined the fair.
- b) The evaluation result of exhibitors, buyers, and tourists was very positive.
- c) The fair was the first attempt of its type in Siem Reap. Provincial government extended public relations effectively to show their will to promote local products.
- d) The fair arranged the opportunity of interchange among various sectors and groups such as producers, buyers, tourism and residents.
- e) The fair promoted the recognition and identity of local products among producers, buyers, tourism and residents.
- f) Most of exhibitors and APPC recognized the scope for product improvement in quality and design.
- g) Many buyers found out new products and producers.
- h) Almost all visitors interested in the exhibitors' booths rather than events.
- i) Many local residents not just visited the fair but purchased quality but rather low priced products. This proved that new local residents' market for local products are emerging.
- j) Foreign tourists' schedule in Siem Reap were already decided 6 month before their arrival and they had not enough free time to visit the fair.
- k) Nightly event such as APSARA dance and shadow puppet gained large 400 to 500 audience.
- l) Top booth sales for 3 days amounted to 2000 us dollar. Average booth sales for 3 days estimated to 400-500 dollar range.
- m) Booths of the award winners' of the quality product contest had favorable effect in public relations and sales promotion.

#### **(Preparation, organization and management)**

- a) APPC carried the directory and inventory survey and accumulated information on around 120 production groups.
- b) APPC accumulated information on potential buyers (hotel, restaurants, souvenir shops and traders) of local products.
- c) APPC could extend cooperation network with related Ministries, departments, associations and chamber of commerce.
- d) APPC could extend cooperation network with NGOs, ILO and big private companies.
- e) APPC recognized the scope of improvement in exhibitors marketing and customer service.



**(Sustainability of the next fair)**

- a) Almost of all exhibitors expressed the will to join the next fair.
- b) Siem Reap Chamber of commerce, NGOs, ILO and several big companies expressed the will to support the next fair.
- c) Most of the exhibitors felt the sense of rivalry but recognized the importance of cooperation among exhibitors in the process of marketing.
- d) Half of the exhibitors recognized the importance of cooperation with provincial government.
- e) APPC learned the planning, preparation, public relations and management of the fair.
- f) The products fair was effective promotional measure of local products in marketing and public relations.
- g) The products fair was found to be effective measure for business matching, information exchange, sales promotion and interchange of personnel among public sector, private business and residents.
- h) The big scale fair attracts attention of buyers, tourist and residents rather than permanent showroom or display place. There are already so many shops or private showrooms of local products in Siem Reap town area.

**(How to improve the next fair)**

- a) Earlier start up of public relations (at least 4 months before the fair),
- b) Clearer division of work among task force team members,
- c) Closer communication and relationship between exhibitors and task force members,
- d) More agricultural products display and tasting,
- e) Advising more discounted pricing and product explanation service to exhibitors,
- f) Improve service for visitors in guiding and parking,
- g) Advising more low priced quality goods development for local residents market,
- h) Arranging quality, design and price contest with exhibitors from other production area,
- i) More entertainment service for residents, such as food and music,
- j) Extending closing time from 9pm to 10pm,
- k) Select public space rather than hotel space for the fair due to visitors' accessibility.

**16.2.3 Evaluation Items****Efficiency**

- a) Small staff member of APPC (the fair task force)..... +
- b) Self direction and management of APPC ..... +
- c) Apply local network of private sector and NGOs..... +
- d) Entrusted implementation work ..... +

**Effectiveness**

- a) Directory and inventory of 120 groups ..... +
- b) More than 10000 visitors, 56 exhibitors..... +
- c) Exhibitors met with buyers (88%), tourists(100%) and residents(100%)..... +
- d) Exhibitors recognized improvement needs (85%) ..... +
- e) More than 10000 visitors, 56 exhibitors, all exhibitor have will to join the next fair. +

- f) Siem Reap chamber of commerce, NGOs, ILO private companies will to join the next fair.....+

**Impact**

- a) Visited residents number doubled the original estimation .....
- b) Visited residents purchased a large amount of cheap but quality goods.....+
- c) Private sector started to plan similar local product fair.....+

**Relevance**

- a) Consistent with M/P .....
- b) Consistent with local government development needs .....
- c) Cooperation work between APPC and JICA study team .....
- d) Seller and buyers participation and consistency with their needs .....
- e) Residents participation and consistency with their needs .....

**Sustainability**

- a) Local government will establish permanent APPC .....
- b) APPC members have basic idea for planning the next fair .....
- c) APPC has capable, independent and active leader .....
- d) Siem Reap chamber of commerce, NGO, ILO and big companies will support the next fair .....
- e) Ministry of commerce and Ministry of tourism will support the next fair .....
- f) Almost all exhibitors will join the next fair .....
- g) APPC reviewed the fair and found out how to improve the fair .....

**16.2.3 Evaluation**

The fair exhibited wide range of quality goods produced/ designed in Siem Reap for the first time organized by public sector. The fair has a room for improvement, however, serious negative evaluation factor is not found on the whole.

Based on the actual result of 5 evaluation items, the study team concluded as follows.

- Efficiency ..... high**
- Effectiveness ..... high**
- Impact ..... high**
- Relevance ..... high**
- Sustainability ..... high**

**16.3 Feed Back, Lessons and Sustainability**

**(1) Angkor Products Fair Became A Sustainable Model**

- The pilot project “Angkor Products fair 2005” was successfully demonstrated a model of promotional measures for local products.
- The fair task force team (APPC) was formulated with capable local leaders and with good teamwork. APPC applied local cooperation network of private sector and NGOs to organize and prepare the fair.
- APPC has been supported not only by various provincial departments but also

ministries of central government, such as commerce, industry, culture and fine arts, agriculture and tourism.

- Almost all of exhibitors and visitors evaluated the fair quite positive and showed the expectation for the next fair. They are ready to do it again.
- APPC gained several supporters/sponsors of the next fair, such as Siem Reap Chamber of Commerce, ILO, NGOs and big private companies.

**(2) Necessity of APPC as the Permanent Guiding Core Organization**

- The Provincial government does not have a comprehensive coordinating or core guiding organization for promoting local products. In considering the present situation, the task force team for the fair (APPC) could such functions in the future.
- APPC carried the directory and inventory survey and accumulated information on producers. Also, they accumulated information on potential buyers of local products and sales promotion. Such information could be further used for promotion activities.
- APPC extended cooperation network with ministries, departments, chamber of commerce, NGOs, international organization and major private companies through the fair organizing work. This network should be maintained.
- APPC has not only accumulated information but also studied and recognized the scope of improvement and development on local products. Such information could be further used for promotion activities.
- Through the fair organizing and management activities, APPC demonstrated a model of core organization for the local products promotion.

**(3) Emerging New Mid-Range Market for Local Residents**

- Through the fair, it was found that new local residents market was emerging. The number of local resident visitors reached 8000 that was twice as much as the expected estimation. They also purchased a large amount of goods in the fair that were not expensive but not the cheapest.
- In addition to growing tourism related market, emerging local residents market will be more important for local producers as a new market in the future. It is indispensable to develop mid-range quality products targeting this market (See Figure )
- Angkor Products Fair will be an effective means to connect and promote/diversify local products to both tourism and local residents markets.

**(4) Demonstration Effect and Technology Transfer through the Fair**

- 56 exhibitors in wide range of products and more than 10000 visitors were joined the fair. Almost all of these people evaluated the fair affirmatively. This fact proved the fair has good demonstration effect as a local products promotional measure.
- However, only 50% of interviewed exhibitors reacted affirmatively to the cooperation needs with local government. This shows infiltration of the provincial government's promotional policy and measures are not enough.
- The fair task force team, APPC, with a capable leader proved the technology transfer from the JICA study team was effective.

- APPC reviewed the fair and already found out how to improve the fair. They have basic idea for planning the next fair.

# **PLANNING FRAMEWORK**

## Chapter 17 Socioeconomic Framework

### 17.1 Present Conditions

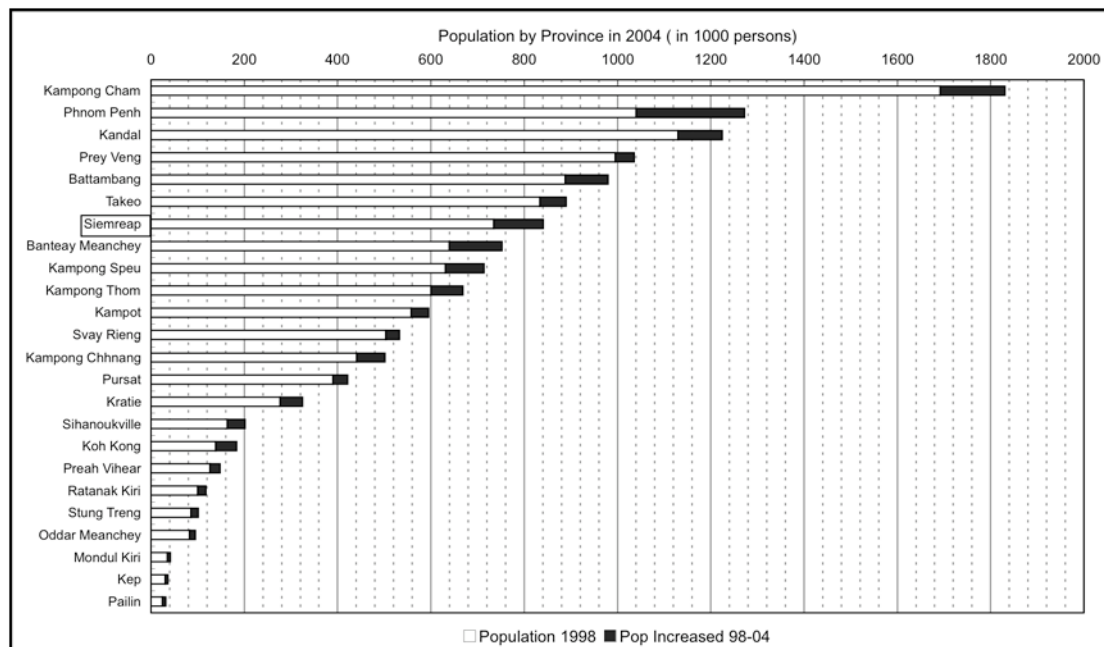
Siem Reap/ Angkor Town area is now experiencing quick economic growth mostly led by the expanding tourism sector. In the short run, construction activities are creating non-farm job opportunities for the local population. It is quite visible that many new hotels are under construction along the National Road No 6 on the way from the urban center to Siem Reap airport. In the area near by the Old Market, quite a few old French colonial style buildings are converted to new cafes or restaurants. The number of tourists have been growing at very impressive rate for last several years.

In the medium to long-run, however, it is quite probable to face the limit in this sort of "hotel booming" and could over run into the state of over-supply of hotel rooms. Even now, hotel room occupancy rate is considerably low during "low season" (rainy season). It is also a common observation among many people that growing tourism and urban demand for consumable goods is not fully linked with the local economy.

#### 17.1.1 Population

##### (1) Ranking of Siem Reap Province in Cambodia

Siem Reap Province is the 7th largest province in terms of population. In 1998, the population was estimated to be 734 thousands. In 2004, it became 841 thousands with an increase of 107 thousand persons during the period of 1998-2004.

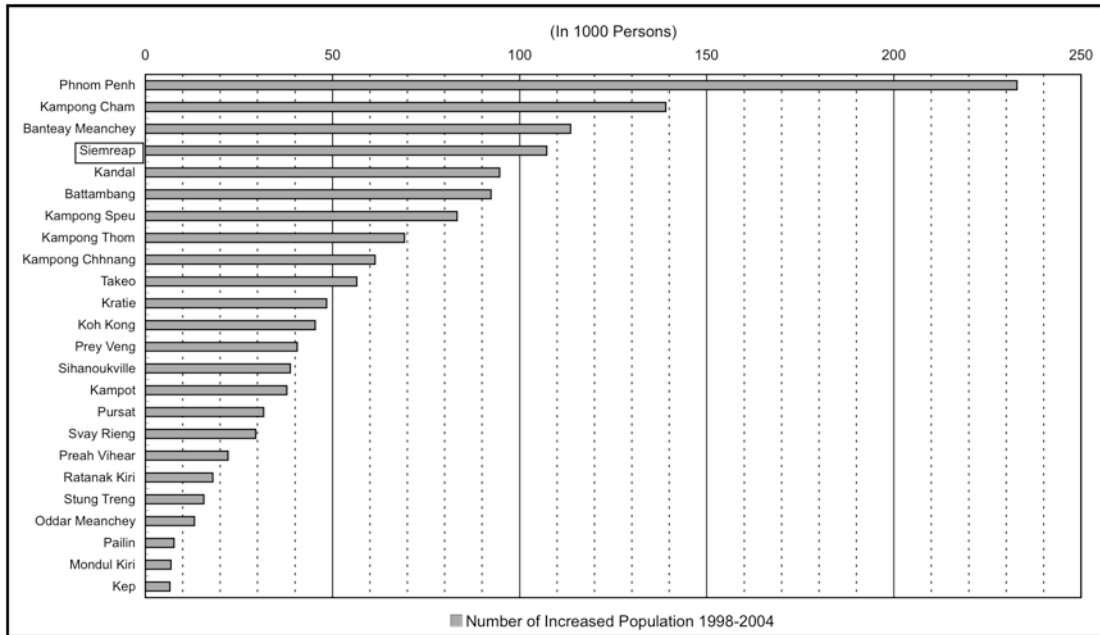


Source: First Revision, Population Projections for Cambodia 1998-2020, June 2004, NIS, Ministry of Planning, RGC.

**Figure III.17.1 Population by Province in Cambodia in 2004**

This 107 thousand increase of population is estimated to be the fourth largest increase

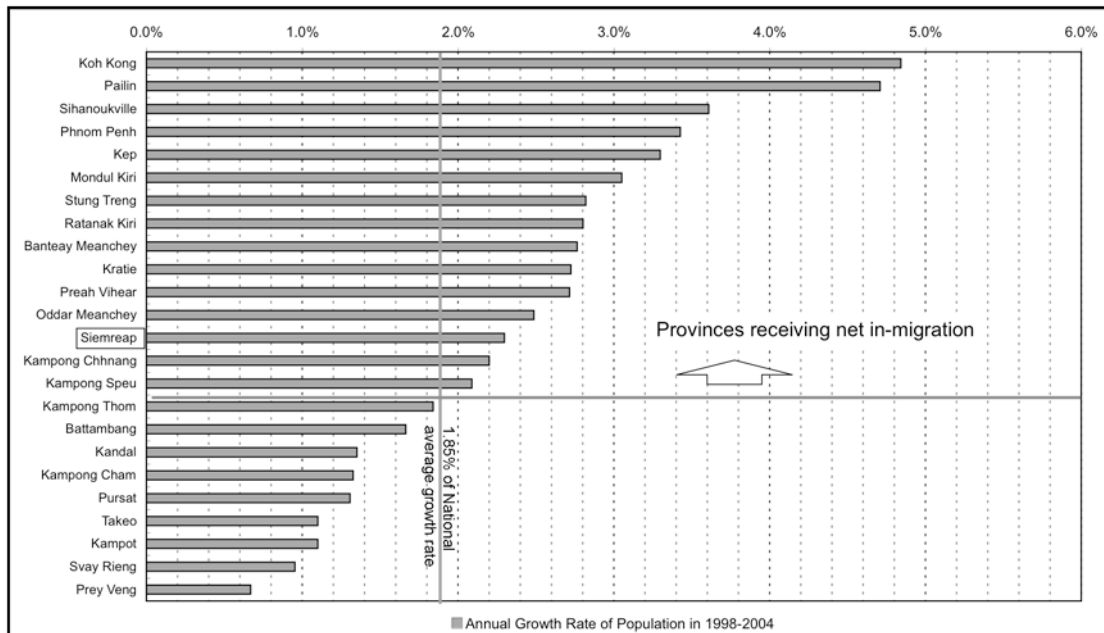
margin among all 24 provinces and municipalities in Cambodia.



Source: ibid

**Figure III.17.2 Number of Increased Population by Province During 1998-2004**

Annual growth rates of population in different provinces are as shown in the following figure. Siem Reap has 2.3% of annual growth rate. Given the national annual population growth rate at the level of 1.85%, Siem Reap is one of the provinces receiving net in-migrating population.

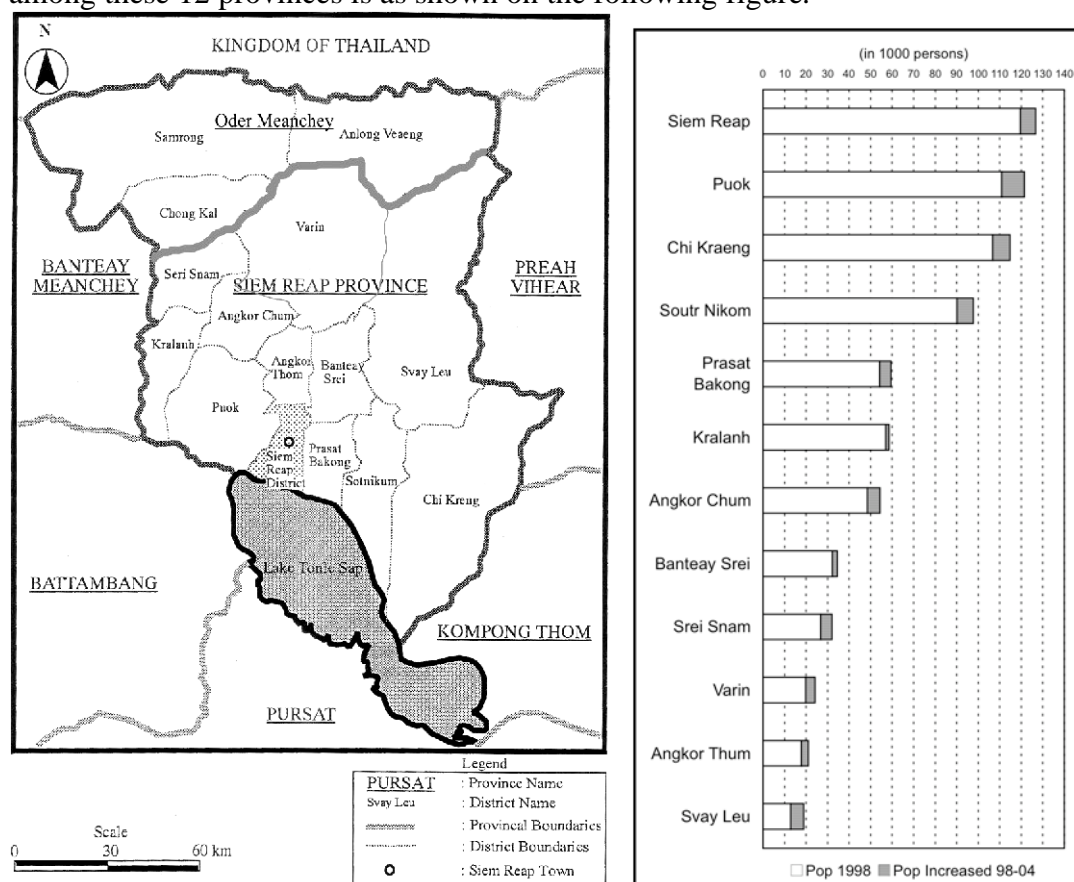


Source: ibid

**Figure III.17.3 Annual Population Growth Rates in 1998-2004**

## (2) Provincial Characteristics

There are 12 districts within Siem Reap Province. Distribution of the population among these 12 provinces is as shown on the following figure.



Source: Provincial Hall based on registered population in the Commune Offices and Police Stations. Thus, the numbers of population are smaller than the Census base data that includes non-registered population.

**Figure III.17.4 12 Districts and Distribution of Population in Siem Reap Province**

**Table III.17.1 Land Area and Population Density by District 2004**

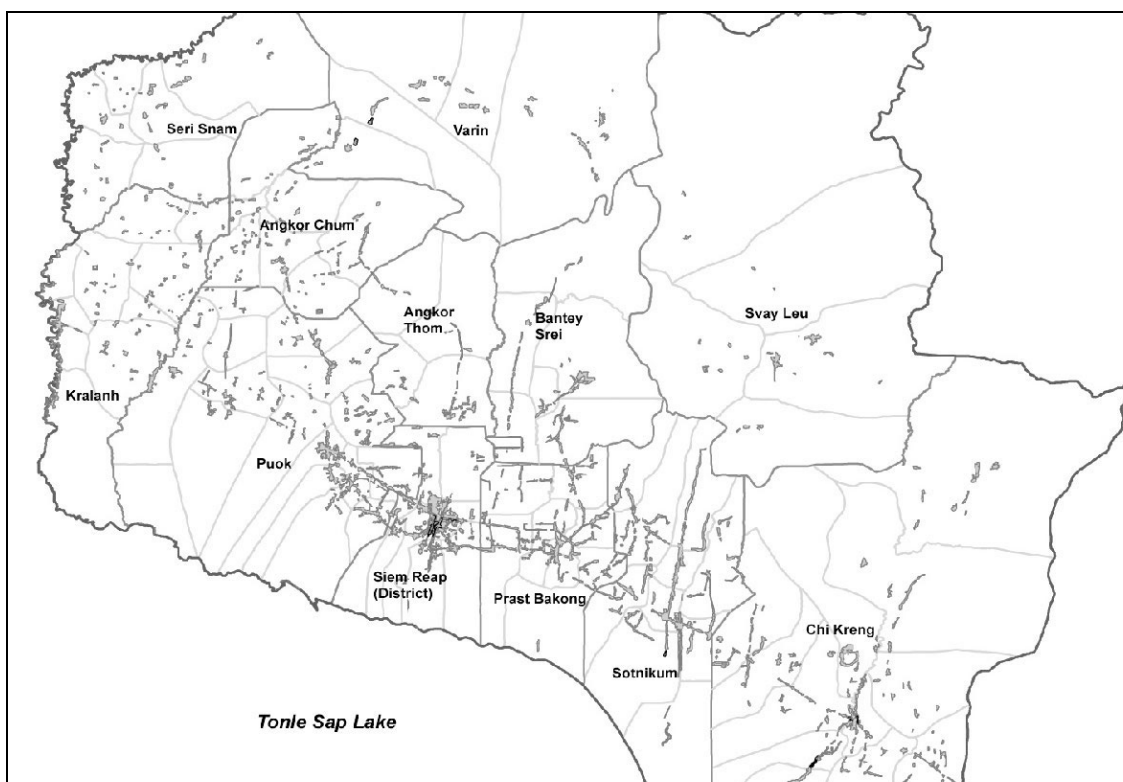
Name of Districts	(km <sup>2</sup> ) Land Area	(000) Population 2004	(Persons/km <sup>2</sup> ) Population Density
Siem Reap	292.8	126.6	432.5
Prasat Bakong	341.9	59.5	173.9
Soutr Nikom	671.2	97.8	145.7
Angkor Chum	412.2	54.3	131.7
Puok	935.5	121.4	129.7
Kralanh	488.7	58.6	119.8
Angkor Thum	307.5	21.0	68.3
Banteay Srei	517.1	34.5	66.7
Srei Snam	479.8	32.0	66.7
Chi Kraeng	2033.9	114.7	56.4
Varin	1569.8	24.1	15.4
Svay Leu	2248.5	18.9	8.4
<b>Total</b>	<b>10298.9</b>	<b>763.3</b>	<b>74.1</b>



Source: *ibid*

Siem Reap District that holds the town center area has the largest sum of population that accounts for around 127 thousand persons and the highest density of 432.5 persons/km<sup>2</sup> in 2004. Puok, the province in the west of Siem Reap district, has the second largest population having around 121 thousands of population. It is clearly seen that a large portion of the population is concentrated in the districts along the National Road 6, such as Prasat Bakong, Soutr Nikom, Puok, and Kralanh. Angkor Chum district, where rice yield is the highest in the province, is the only district that is not adjacent to NR6 and has a relatively high population density of 131.7 persons/km<sup>2</sup>.

Accordingly, major built-up areas and village centers are concentrated along the NR6. In the northern districts and the southern swamp areas adjacent to the Tonle Sap lake has very low population density and thus very limited non-farm activities.



Source: APSARA GIS data. Preliminary output

**Figure III.17.5 Distribution of Built-up Areas and Villages in Siem Reap Province**

### (3) Structure of Increasing Population

Recently increased population in Siem Reap Province has a clear tendency to have been absorbed in the districts along the NR6 as shown in the following table. Siem Reap district accommodated the largest sum of increased population. Puok and Prasat Bakong that are adjacent districts to Siem Reap district also accommodated large population increase and forming new urban built-up areas.

In cases of Svay Leu, Varin, and Bantey Srei, the causes of the large population increase are not thoroughly clear. There are, however, some explanations including

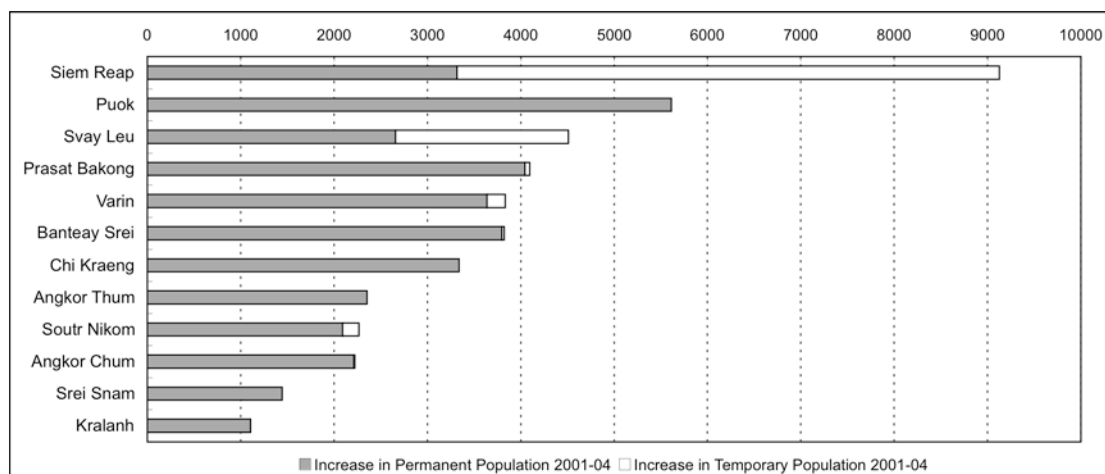
following points:

- Soil fertility in these hillside districts is better than in the southern districts and thus attracts more farming population;
- Birth rates are higher in these remote areas due to the fact that family planning is not prevailing;
- A propensity for out-migration is low partly due to low educational attainment and thus lower chance to have non-farm jobs in urban areas.

**Table III.17.2 Population By District in Siem Reap Province in 2001 and 2004**

Resistereed Name of Districts	(000) Population 2001	(000) Population 2004	(000 Persons)			% Share in increase
			Increase 2001-04	Increase in Permanent Population	Increase in Temporary Population	
Siem Reap	117.5	126.6	9.1	3.3	5.8	21.1%
Puok	115.8	121.4	5.6	5.6	0.0	12.9%
Svay Leu	14.4	18.9	4.5	2.7	1.9	10.4%
Prasat Bakong	55.4	59.5	4.1	4.0	0.1	9.5%
Varin	20.3	24.1	3.8	3.6	0.2	8.9%
Banteay Srei	30.7	34.5	3.8	3.8	0.0	8.8%
Chi Kraeng	111.8	114.7	2.9	3.3	-0.4	6.7%
Angkor Thum	18.7	21.0	2.3	2.4	0.0	5.4%
Soutr Nikom	95.5	97.8	2.3	2.1	0.2	5.2%
Angkor Chum	52.1	54.3	2.2	2.2	0.0	5.1%
Srei Snam	30.5	32.0	1.4	1.4	0.0	3.3%
Kralanh	57.5	58.6	1.1	1.1	0.0	2.4%
<b>Total</b>	<b>720.1</b>	<b>763.3</b>	<b>43.2</b>	<b>35.6</b>	<b>7.6</b>	<b>100.0%</b>

Source: Provincial Hall data.



Source: Provincial Hall data. Preliminary output

**Figure III.17.6 Structure of Increased Population during 2001-2004 by Districts**

The structure of increased population during 2001-2004 is as shown in the Figure 2.6. The most notable tendency is that in Siem Reap district a large proportion of increased population is registered as "temporary population". This is partly due to the fact that there are many workers for construction of hotels and shopping malls. In case of Svay Leu, the causes for large proportion of temporary population are not clear.

### 17.1.2 Employment

The employment structure of Siem Reap province is as shown in the following table. Unlike its well known tourism feature, employment in the province is vastly agriculture and fishery dependent. It is also notable that the employment share of secondary industry is 8.1% that is 2 percentage points lower than the national average level.

**Table III.17.3 Employment by Industry Sector in 2001**

Industry Sector	Siem Reap Province		Whole Country		Phnom Penh		Whole Country Except Phnom Penh	
Primary	328.8	78.2%	4384.3	70.2%	58.0	16.0%	4326.2	73.6%
Crops and Livestock	288.6	68.6%	4068.3	65.2%	56.7	15.6%	4011.7	68.2%
Fisheries	39.0	9.3%	261.1	4.2%	0.0	0.0%	261.1	4.4%
Forestry & Logging	1.2	0.3%	54.8	0.9%	1.4	0.4%	53.5	0.9%
Secondary	34.0	8.1%	656.2	10.5%	60.2	16.6%	596.0	10.1%
Tertiary	57.8	13.7%	1202.9	19.3%	244.4	67.4%	958.4	16.3%
Total	420.6	100.0%	6243.3	100.0%	362.6	100.0%	5880.7	100.0%

Source: Labor Force Survey 2001, NIS.

By looking at the level of districts, distribution of different elements of economy in the province is visible as shown in the following table. About a half of non-agricultural employment is concentrated in Siem Reap District.

**Table III.17.4 Employment by Industry Sector by Districts in 1998**

PROVINCE NAME	DISTRICT NAME	Employment by Sector in 1998 (000 persons)				Total	Share by Sector		
		Primary	Secondary	Tertiary	Primary		Secondary	Tertiary	
Siem Reap	Siem Reap	19.4	5.2	26.3	50.8	38%	10%	52%	
	Banteay Srei	15.0	0.1	4.3	19.4	77%	1%	22%	
	Varin	9.5	0.0	2.7	12.2	78%	0%	22%	
	Svay Leu	7.1	0.2	1.3	8.6	82%	2%	16%	
	Soutr Nikom	43.4	1.0	5.1	49.5	88%	2%	10%	
	Kralanh	20.4	0.5	2.3	23.1	88%	2%	10%	
	Angkor Thum	9.8	0.1	1.0	11.0	90%	1%	9%	
	Puok	52.9	0.9	5.3	59.1	89%	2%	9%	
	Prasat Bakong	28.0	0.4	2.3	30.6	91%	1%	7%	
	Chi Kraeng	54.8	0.5	3.3	58.6	94%	1%	6%	
	Angkor Chum	29.3	0.1	1.0	30.4	96%	0%	3%	
	Srei Snam	15.7	0.0	0.5	16.2	97%	0%	3%	
	Total		305.2	8.9	55.5	369.6	83%	2%	15%

Source: Census 1998, NIS. There is no newer general employment data at district level.

Tourism sector in particular has been growing very fast in last two to three years. The latest available data from Tourism Office in Siem Reap shows that employment in the sector has reached 4680 in September 2004.

**Table III.17.5 Employment and Numbers of Registered Hotel, Guesthouse, and Restaurants (September 2004)**

	Number of premises	Number of Rooms or Tables	Number of Staff	Share by Gender	
				Male	Female
Hotels	68	4312	3482	2087	1460
Guest House	153	1965	1075	413	662
Restaurant	76	1346	949	410	584
Total	-	-	5506	2910	2706

Source: Tourism Office in Siem Reap, Ministry of Tourism

The tourism sector had direct positive impacts on the local economy. One of the most notable fact is that newly created job opportunities in the tourism sector were filled mostly by the workers from Siem Reap province. According to the results of the sample survey of young generation workers (25 years old or less) in hotels and

guesthouses by ILO, 72% of them were from Siem Reap province (see the following table). Phnom Penh is the second largest source of workers accounting for 5.1%. It is probable that a major portion of the workers from Phnom Penh consists of skilled workers that fill assistant manager positions.

**Table III.17.6 Place of Origin of Hotel and Guesthouse Workers Younger Than 25 Years Old (January 2004)**

Province of Origin	Male Workers		Female Workers		Total	
	Persons	%	Persons	%	Persons	%
Siem Reap	116	63.7	150	79.4	266	71.7
Phnom Penh	11	6.0	8	4.2	19	5.1
Battanbang	8	4.4	7	3.7	15	4.0
Kandal	10	5.5	4	2.1	14	3.8
Kampon Cham	9	4.9	3	1.6	12	3.2
Banteay Meanchey	3	1.6	4	2.1	7	1.9
Takeo	6	3.3	-	-	6	1.6
Svay Rieng	2	1.1	3	1.6	5	1.3
Kampong Speu	4	2.2	-	-	4	1.1
Oddar Meanchey	3	1.6	1	0.5	4	1.1
Pursat	2	1.1	2	1.1	4	1.1
Other 8 provinces	8	4.6	7	3.7	15	4.1
Total	182	100.0	189	100.0	371	100.0

Source: "Research Report on Hotel & Guesthouse Workers, Siem Reap, Cambodia", ILO, September 2004.

The educational levels of the hotel and guesthouse workers are as summarized in the following table. 88% of the workers have "Lower Secondary" or higher education. Unlike the garment industry that is absorbing workers with little preference in the level of educational attainment, the hotels and the guesthouses appears to use educational attainment as a criterion in the entry of workers into the industry.

**Table III.17.7 Educational Level of Hotel and Guesthouse Workers (January 2004)**

Educational Level	Number of Workers	%
No formal education	5	1.4
Lower Primary (Grade 1-3)	7	1.9
Upper Primary (Grade 4-6)	32	8.6
Lower Secondary (Grade 7-9)	141	38.1
Upper Secondary (Grade 10-12)	148	40.0
Technical/Vocational	1	0.3
University/ Institutions	36	9.7
Total	370	100.0

Source: "Research Report on Hotel & Guesthouse Workers, Siem Reap, Cambodia", ILO, September 2004.

## 17.2 Potentials and Constraints

It is still premature to describe potentials and constraints in the economic settings. There are many data and information to be gathered and reviewed more thoroughly. Some preliminary findings are summarized below, however, in order to share views and to facilitate the planning process.

### **Constraint of Agriculture is Poor Soil Fertility**

Productivity of rice production is as low as 1.33 tons/ha in average. This is primarily due to low soil fertility that limits not only production of rice but also of the other

commercial crops.

There is an increasing urban demand for food products as the town center grows. Supply capacity within Siemreap province may be limited. In case of agricultural products for the hotel use, however, it was found to be quite difficult for the farms in Siem Reap to meet their demanding criteria. Some kinds of vegetables and fruits that hotel require do not fit to agronomical conditions in Siem Reap.

### **Inland Fishing**

Siemreap is the third largest inland fish producing province in Cambodia. Inland fish production accounts for 34 thousand tons or 9.4% of total production in Cambodia.

In-land fishing is growing as the urban demand is getting larger. The inland fish, however, is not for high-end consumption in the mid to high level hotels.

### **Poultry, Eggs, and Mushroom**

It is also a common observation among many people that growing tourism and urban demand for consumable goods is not fully linked with the local economy. Poultry, eggs, mushroom industries are some good examples that demonstrated good potentials. These products are not restricted with poor soil conditions. There are Producer Groups in Siemreap supported by the AFD. The difficult part is the fact that initial capital investments are needed.

### **The Tourism Sector Has the Largest Potential**

In terms of creating non-farm jobs in the region, the tourism sector may have the largest potential. There is an optimistic estimate which argues that tourism related incomes will reach 240 million US dollars in the year of 2006.

It is said to be an prevailing trend to work outside of their villages for the younger generation, especially within 10km from the center of Siem Reap district. In 2000, approximately 9200 persons, about 5-6% of labor force, were working outside the villages seeking off-farm jobs (Provincial Investment Development Plan 2002-2004, 2001, PRDC).

The present "Angkor Temple Only" mode of tourism may limit the future horizon of the tourism. It is quite probable to face the limit in this sort of "hotel booming" and could over run into the state of over-supply of hotel rooms. Even now, hotel room occupancy rate is considerably low during "low season" (rainy season). In order to diversify the modes and seasons of tourism, Siem Reap itself should be more attractive tourist place. In that sense, present limited capacity and poor level of urban infrastructure and services are the constraints.

## **17.3 Baseline Level of Framework**

### **Two Step Estimation:**

At this stage of study, a test calculation of socio-economic development framework for the Study Area has been formulated to present indicative targets of development. As the first step, "Baseline Levels" of Population and Employment Frameworks are set to provide a yardstick of working hypotheses. And then, preliminary sector scenarios are

incorporated to show an integrated image of the future development in the area. After more thorough discussion and examination, the development scenario will be further elaborated, and then the framework will be finalized accordingly.

### 17.3.1 Baseline Population

The sets of data from "First Revision, Population Projections for Cambodia 2001-2021 (revision of the original Report 6 of the Census 1998)" are adopted as the baseline level of population in our Framework for the following reasons. Future population is determined by a natural growth rate, the age structure, and the size of population net-inflow into Siem Reap province. All of these factors are incorporated in the revised projections.

In addition, these are the only comprehensive population projections with a detailed provincial break down that are needed to highlight spatial characteristics of the Study Area. Regarding the district level breakdown, the structure of population data from the Census 1998 and Provincial Hall data for the period from 2000 to 2004 were examined.

Results are summarized as the following table.

Major working assumptions to set baseline level of population projections are summarized as the followings:

- Total population of Siem Reap Province is adjusted to fit to the level of "Revised Census Projection" that is 9% larger than registered based population data published by the Provincial Hall. According to the technical notes of the Reised Projection, this discrepancy is largely due to an undercount in registration of "0-4 years old population".
- Population in Zone1&2 (protected zones managed by APSARA) is assumed that there will be no increase from the level in 2004. Districts of Siem Reap, Angkor Thum, Bantey Srei, Prasat Bakong, and Puok hold population living inside Zone1&2 that amounts to 108000 in total in 2004.
- Siem Reap District is assumed to have more population share in the province in the future. It is assumed to increase from 16.6% in 2004 to 17.1% in 2020.
- Other districts are assumed to keep the same distribution structure in 2004 for the rest of population in the province.

As shown in the table, Siem Reap Province as a whole is assumed to have a population growth rate that is higher than the level of national average. This implies the province has a net in-migrating population over the planning period. Within the Province, there are assumed to be two different trends. One trend is that the Siem Reap District will receive in-migrating population continuously. Relatively rapid urbanization in the center of the province will gradually drive expansion of the urban centers to suburban areas. On the other hand, areas within Zone 1 and 2 will have a net out-migrating population, which are most likely to be absorbed by the other part of the province.

**Table III.17.8 Baseline Population Projection for the Study Area**

	Land Area (km <sup>2</sup> )	2000 (in 000)	2010 (in 000)	2020 (in 000)	Distribution	Growth Rate 2000- 2010	Growth Rate 2010- 2020
Siem Reap Province Total	10,299	768	971	1,229	100.0%	2.4%	2.4%
Pop in Zone1&2 total	-	98	108	108	8.8%	1.0%	0.0%
Pop w/o Z1&2	-	670	863	1,121	91.2%	2.6%	2.7%
Siem Reap (District)	293	126	162	211	17.1%	2.5%	2.7%
Other Districts	10,006	642	809	1,019	82.9%	2.3%	2.3%
Angkor Chum	412	55	70	91	7.4%	2.5%	2.6%
Angkor Thum	308	20	26	31	2.5%	2.6%	1.8%
Banteay Srei	517	33	41	47	3.8%	2.2%	1.3%
Chi Kraeng	2,034	120	148	191	15.6%	2.1%	2.6%
Kralanh	489	63	76	98	7.9%	1.9%	2.6%
Prasat Bakong	342	59	73	87	7.1%	2.2%	1.8%
Puok	936	123	151	186	15.1%	2.1%	2.1%
Soutr Nikom	671	101	127	163	13.3%	2.2%	2.6%
Srei Snam	480	32	41	53	4.3%	2.5%	2.6%
Svay Leu	2,249	15	24	32	2.6%	5.3%	2.6%
Varin	1,570	21	31	40	3.3%	3.9%	2.6%
<i>For reference</i>							
Cambodia	178,035	12,574	15,269	18,724	-	2.0%	2.1%
Phnom Penh	290	1,114	1,529	1,983	-	3.2%	2.6%
Cambodia w/o Phnom Penh	177,745	11,459	13,739	16,741	-	1.8%	2.0%
Sihanoukville	868	176	247	335	-	3.5%	3.1%
Battambang	11,702	916	1,101	1,358	-	1.9%	2.1%

Data Source: "First Revision, Population Projections for Cambodia 1998-2020, June 2004", and structure analysis by the JST based on Provincial Hall data.

### 17.3.2 Baseline Level of Employment by Sector

Baseline level of future employment of the study area has been estimated in the following steps:

- Total employed population level of the whole province is set based upon the age structure of projected baseline population, labor force participation ratio, and unemployment ratio;
- Employment distribution pattern among different sectors of industry, except for the tourism sector, is assumed based upon data of Census 98, Labour Force Survey 2000, Labour Force Survey 2001, and following a set of key assumptions;
- For tourism sector, separate sub-model is established to illustrate future profile of the tourism in Siem Reap. The outcomes of the tourism model are converted and incorporated to the overall level of employment in the province. In the present preliminary calculation, the numbers of international tourists are assumed to be 1,412 thousands in 2010 and 2,007 thousands in 2020. See the chapter of tourism for detail assumptions;
- Employment distribution of Siem Reap District and the other districts in the future are set based upon assumed relative weight of Siem Reap District in each industry sector in the province.

#### (1) Employment of the Province

For the primary sector, the total volume of employment will remain the same over the period. This implies that the sources of primary sector growth are to be the improvement of land and labor productivities rather than additional inputs of labor.

The secondary and tertiary sectors, on the other hand, are assumed to accommodate the majority of the increased labor force. Non-agricultural employment at the province level is estimated in proportion to the increased additional labor force during the period. The distribution pattern within the non-agricultural sectors, except for the tourism sector, is assumed to be the same.

## (2) Employment of Siem Reap District and the Other Districts

Future levels of employment in Siem Reap District and the other districts have been estimated by assuming the area's share in the whole province. It is estimated that there will be 8 to 8.5 thousands of net additional labor force every year. Total increase of employment will be 180 thousand during the period between 2000 and 2020.

Sector mix of projected employment is shown in Tables 17.9 and 17.10. For the primary sector, the present structures of distribution patterns of employment among the districts are assumed to be the same in 2020.

For the secondary and tertiary sectors, on the other hand, it is assumed to accommodate the increased labor force. In particular, tertiary sector is to create 96 thousands or about a half of total increased employment. Siem Reap District is the core of the tourism industry that will take 100 thousand persons or almost 60 % of tertiary sector employment in the province.

**Table III.17.9 Preliminary Calculation of Employment Structure in Siem Reap Province**

Employment by Industry	(000 persons)			Industry Share %			Annual Change	
	2000	2010	2020	2000	2010	2020	2000/2010	2010/2020
<b>100 Primary Total</b>	<b>324.8</b>	<b>356.0</b>	<b>356.0</b>	<b>77.2%</b>	<b>68.4%</b>	<b>59.1%</b>	<b>0.9%</b>	<b>0.0%</b>
101 Agriculture, Forestry & Logging	297.9	327.0	327.0	70.8%	62.9%	54.3%	0.9%	0.0%
103 Fishing	26.9	29.0	29.0	6.4%	5.6%	4.8%	0.7%	0.0%
<b>200 Secondary Total</b>	<b>27.3</b>	<b>46.7</b>	<b>71.2</b>	<b>6.5%</b>	<b>9.0%</b>	<b>11.8%</b>	<b>5.5%</b>	<b>4.3%</b>
201 Mining and quarrying	2.6	4.5	6.8	0.6%	0.9%	1.1%	5.5%	4.3%
202 Manufacturing	17.6	30.1	45.9	4.2%	5.8%	7.6%	5.5%	4.3%
211 Food, Beverages & Tobacco	7.4	12.8	19.5	1.8%	2.5%	3.2%	5.5%	4.3%
212 Textile, Wearing Apparel & Footwear	6.7	11.5	17.5	1.6%	2.2%	2.9%	5.5%	4.3%
213 Wood, Paper & Publishing	1.5	2.6	4.0	0.4%	0.5%	0.7%	5.5%	4.3%
214 Rubber Manufacturing	0.0	0.0	0.0	0.0%	0.0%	0.0%	-	-
215 Non-Metallic Manufacturing	0.7	1.2	1.9	0.2%	0.2%	0.3%	5.5%	4.3%
216 Basic Metal and Metal Products	0.8	1.4	2.1	0.2%	0.3%	0.3%	5.5%	4.3%
217 Other manufacturing	0.4	0.7	1.1	0.1%	0.1%	0.2%	5.5%	4.3%
203 Electricity, gas and water supply	0.2	0.3	0.4	0.0%	0.1%	0.1%	5.5%	4.3%
204 Construction	6.9	11.8	18.0	1.6%	2.3%	3.0%	5.5%	4.3%
<b>300 Tertiary Total</b>	<b>68.9</b>	<b>117.6</b>	<b>175.2</b>	<b>16.4%</b>	<b>22.6%</b>	<b>29.1%</b>	<b>5.5%</b>	<b>4.1%</b>
301 Wholesale and retail trade; repair of goods	40.3	69.0	105.2	9.6%	13.3%	17.5%	5.5%	4.3%
302 Hotels and restaurants	2.4	9.2	16.2	0.6%	1.8%	2.7%	14.2%	5.8%
303 Transport, storage and communications	4.6	7.8	11.9	1.1%	1.5%	2.0%	5.5%	4.3%
304 Financial intermediation	0.1	0.1	0.2	0.0%	0.0%	0.0%	5.5%	4.3%
305 Public administration and defence	10.1	12.0	12.0	2.4%	2.3%	2.0%	1.7%	0.0%
306 Real estate, renting and business activities	0.6	1.0	1.6	0.1%	0.2%	0.3%	5.5%	4.3%
307 Other Services	10.8	18.5	28.2	2.6%	3.6%	4.7%	5.5%	4.3%
<b>Total Employed at Working Place</b>	<b>420.9</b>	<b>520.3</b>	<b>602.4</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>2.1%</b>	<b>1.5%</b>
Total Population	767.8	970.7	1229.4	Employment/Pop			2.4%	2.4%
Total Employed Labor Force at Residence	420.9	520.3	602.4	55%	54%	49%	2.1%	1.5%
Net Commuting Population to SR District	0.0	0.0	0.0	-	-	-	-	-

Source: First trial calculation by JST

The level of the non-agricultural sector employment is estimated "at work place" basis rather than "at residence" basis. Thus, the gap between "work place" and "residence" basis employed population levels are understood as the difference between "day-time" and "night-time" population. As shown in Table 17.10, it is estimated that around 65 thousand people will be commuters from the surrounding districts to Siem Reap District in 2020.



**Table III.17.10 Preliminary Calculation of Employment Structure in Siem Reap District**

Employment by Industry	(000 persons)			Industry Share %			Annual Change	
	2000	2010	2020	2000	2010	2020	2000/2010	2010/2020
<b>100 Primary Total</b>	<b>24.1</b>	<b>26.3</b>	<b>26.3</b>	<b>32.0%</b>	<b>22.5%</b>	<b>16.0%</b>	<b>0.9%</b>	<b>0.0%</b>
101 Agriculture, Forestry & Logging	17.8	19.5	19.5	23.7%	16.7%	11.9%	0.9%	0.0%
103 Fishing	6.3	6.8	6.8	8.4%	5.8%	4.1%	0.7%	0.0%
<b>200 Secondary Total</b>	<b>13.5</b>	<b>23.2</b>	<b>35.4</b>	<b>18.0%</b>	<b>19.9%</b>	<b>21.5%</b>	<b>5.5%</b>	<b>4.3%</b>
201 Mining and quarrying	0.6	1.0	1.5	0.8%	0.9%	0.9%	5.5%	4.3%
202 Manufacturing	7.4	12.6	19.2	9.8%	10.8%	11.7%	5.5%	4.3%
211 Food, Beverages & Tobacco	3.1	5.3	8.1	4.1%	4.6%	5.0%	5.5%	4.3%
212 Textile, Wearing Apparel & Footwear	2.8	4.8	7.3	3.7%	4.1%	4.5%	5.5%	4.3%
213 Wood, Paper & Publishing	0.6	1.1	1.7	0.8%	0.9%	1.0%	5.5%	4.3%
214 Rubber Manufacturing	0.0	0.0	0.0	0.0%	0.0%	0.0%	-	-
215 Non-Metallic Manufacturing	0.3	0.5	0.8	0.4%	0.4%	0.5%	5.5%	4.3%
216 Basic Metal and Metal Products	0.3	0.6	0.9	0.4%	0.5%	0.5%	5.5%	4.3%
217 Other manufacturing	0.2	0.3	0.4	0.2%	0.2%	0.3%	5.5%	4.3%
203 Electricity, gas and water supply	0.1	0.2	0.4	0.2%	0.2%	0.2%	5.5%	4.3%
204 Construction	5.5	9.3	14.2	7.3%	8.0%	8.7%	5.5%	4.3%
<b>300 Tertiary Total</b>	<b>37.6</b>	<b>67.3</b>	<b>102.5</b>	<b>49.9%</b>	<b>57.6%</b>	<b>62.4%</b>	<b>6.0%</b>	<b>4.3%</b>
301 Wholesale and retail trade; repair of goods	23.4	40.0	61.0	31.1%	34.3%	37.2%	5.5%	4.3%
302 Hotels and restaurants	2.2	8.7	15.2	3.0%	7.4%	9.3%	14.5%	5.8%
303 Transport, storage and communications	3.2	5.5	8.3	4.2%	4.7%	5.1%	5.5%	4.3%
304 Financial intermediation	0.1	0.1	0.2	0.1%	0.1%	0.1%	5.5%	4.3%
305 Public administration and defence	3.5	4.1	4.1	4.6%	3.5%	2.5%	1.7%	0.0%
306 Real estate, renting and business activities	0.5	0.8	1.2	0.6%	0.7%	0.7%	5.5%	4.3%
307 Other Services	4.8	8.2	12.5	6.4%	7.0%	7.6%	5.5%	4.3%
<b>Total Employed at Working Place</b>	<b>75.2</b>	<b>116.8</b>	<b>164.2</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>4.5%</b>	<b>3.5%</b>
Total Population	126.0	161.9	210.6	Employment/Pop			2.5%	2.7%
Total Employed Labor Force at Residence	66.8	82.6	99.0	53%	51%	47%	2.1%	1.8%
Net Commuting Population to SR District	8.4	34.2	65.2	-	-	-	15.1%	6.7%

Source: First trial calculation by JST

**Table III.17.11 Preliminary Calculation of Employment Structure in the Other Districts**

Employment by Industry	(000 persons)			Industry Share %			Annual Change	
	2000	2010	2020	2000	2010	2020	2000/2010	2010/2020
<b>100 Primary Total</b>	<b>300.7</b>	<b>329.7</b>	<b>329.7</b>	<b>87.0%</b>	<b>81.7%</b>	<b>75.2%</b>	<b>0.9%</b>	<b>0.0%</b>
101 Agriculture, Forestry & Logging	280.1	307.5	307.5	81.0%	76.2%	70.2%	0.9%	0.0%
103 Fishing	20.6	22.2	22.2	6.0%	5.5%	5.1%	0.7%	0.0%
<b>200 Secondary Total</b>	<b>13.7</b>	<b>23.5</b>	<b>35.8</b>	<b>4.0%</b>	<b>5.8%</b>	<b>8.2%</b>	<b>5.5%</b>	<b>4.3%</b>
201 Mining and quarrying	2.0	3.5	5.3	0.6%	0.9%	1.2%	5.5%	4.3%
202 Manufacturing	10.2	17.5	26.7	3.0%	4.3%	6.1%	5.5%	4.3%
211 Food, Beverages & Tobacco	4.3	7.4	11.3	1.3%	1.8%	2.6%	5.5%	4.3%
212 Textile, Wearing Apparel & Footwear	3.9	6.7	10.2	1.1%	1.7%	2.3%	5.5%	4.3%
213 Wood, Paper & Publishing	0.9	1.5	2.3	0.3%	0.4%	0.5%	5.5%	4.3%
214 Rubber Manufacturing	0.0	0.0	0.0	0.0%	0.0%	0.0%	-	-
215 Non-Metallic Manufacturing	0.4	0.7	1.1	0.1%	0.2%	0.2%	5.5%	4.3%
216 Basic Metal and Metal Products	0.5	0.8	1.2	0.1%	0.2%	0.3%	5.5%	4.3%
217 Other manufacturing	0.2	0.4	0.6	0.1%	0.1%	0.1%	5.5%	4.3%
203 Electricity, gas and water supply	0.0	0.0	0.1	0.0%	0.0%	0.0%	5.6%	4.2%
204 Construction	1.4	2.4	3.7	0.4%	0.6%	0.8%	5.5%	4.3%
<b>300 Tertiary Total</b>	<b>31.3</b>	<b>50.3</b>	<b>72.7</b>	<b>9.1%</b>	<b>12.5%</b>	<b>16.6%</b>	<b>4.8%</b>	<b>3.7%</b>
301 Wholesale and retail trade; repair of goods	16.9	29.0	44.2	4.9%	7.2%	10.1%	5.5%	4.3%
302 Hotels and restaurants	0.2	0.5	0.9	0.1%	0.1%	0.2%	10.8%	5.8%
303 Transport, storage and communications	1.4	2.3	3.5	0.4%	0.6%	0.8%	5.5%	4.3%
304 Financial intermediation	0.0	0.0	0.0	0.0%	0.0%	0.0%	6.0%	4.3%
305 Public administration and defence	6.7	7.9	7.9	1.9%	2.0%	1.8%	1.7%	0.0%
306 Real estate, renting and business activities	0.1	0.2	0.3	0.0%	0.1%	0.1%	5.5%	4.3%
307 Other Services	6.0	10.3	15.7	1.7%	2.6%	3.6%	5.5%	4.3%
<b>Total Employed at Working Place</b>	<b>345.8</b>	<b>403.5</b>	<b>438.2</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>1.6%</b>	<b>0.8%</b>
Total Population	641.8	808.8	1018.8	Employment/Pop			2.3%	2.3%
Total Employed Labor Force at Residence	354.2	437.7	503.4	55%	54%	49%	2.1%	1.4%
Net Commuting Population to SR District	-8.4	-34.2	-65.2	-	-	-	15.1%	6.7%

Source: First trial calculation by JST

## Chapter 18 Spatial Framework

This chapter is intended to depict the spatial characteristics of the Siem Reap and Angkor Area by up-closing from the international context to city area. Then, it provides the basic ideas and constraints in development context. Especially, it assumes the future population distribution in the Siem Reap District based on the population estimate in Chapter 17. Then, as well as the tourism framework in Chapter 19, the number of residents by area provides a base for sector plans toward 2020.

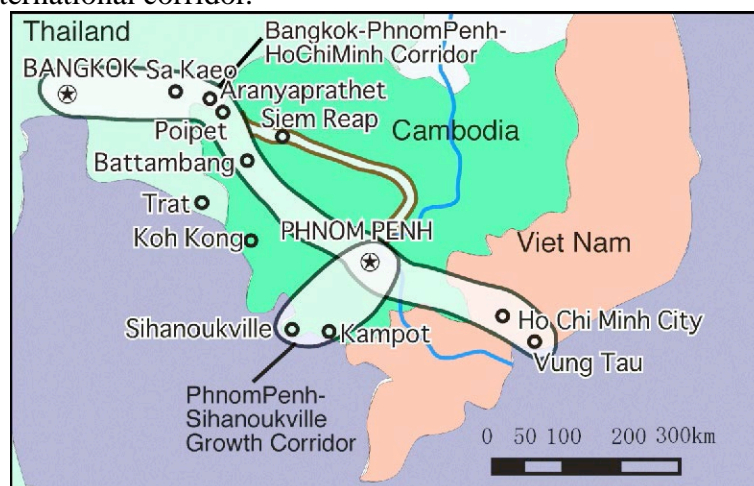
### 18.1 Present Conditions

#### 18.1.1 International Perspective

Siem Reap/ Angkor Town once dominated the large area of lower Indochina. The city had been the capital of Angkor Dynasty between the mid-8<sup>th</sup> century and 1431. Although they said “All roads lead to Angkor,” the town is not located at a hub of transportation network.

Since the collapse of the Dynasty, Cambodian territory has been surrounded by Thailand and Vietnam. These two powers had strong influence on politics and economies on the area for the long period.

Siem Reap had been close to the world until the early 1990s, but the situation changed dramatically. The increased visitors attracted foreign direct investment. These investments highlighted the importance of the Siem Reap area not only a single spot but a base on an international corridor.



Source: JICA Study Team

**Figure III.18.1 Corridors and Location of Siem Reap**

Additionally, the recent WTO (World Trade Organization) accession and AFTA (ASEAN Free Trade Area) will lower the economic barrier of national borders and Bangkok – Phnom Penh – Ho Chi Minh Corridor<sup>1</sup> will enhance the presence of

<sup>1</sup> Also called as Southern Economic Corridor (SEC). The principal route of the corridor is connecting from Bangkok, Battambang, Phnom Penh, and Ho Chi Minh City. Although the Route 6 is not on the route, it is considered as an important alternate for Route 5.

Cambodia in international economy. The development of SEC will change the position of Angkor heritage from a simple spot attraction to a tourism network hub by providing various infrastructure and services. Such a change will develop not only Siem Reap/ Angkor Town area but also the Siem Reap Province by wide range of economic influence.

### 18.1.2 Siem Reap/ Angkor Town in National Context

#### (1) Urban System

The Siem Reap District area holds the population of 123,000 persons in 2003. This means that the town is ranked as the 5~6th largest urban agglomeration in Cambodia. Normally, the urban development for a city of this size is not a complicated issue. Nonetheless, the Siem Reap is under exceptional circumstance because the area attracts millions of foreign tourists every year. The role of Siem Reap/ Angkor in Cambodian is considered as follows:

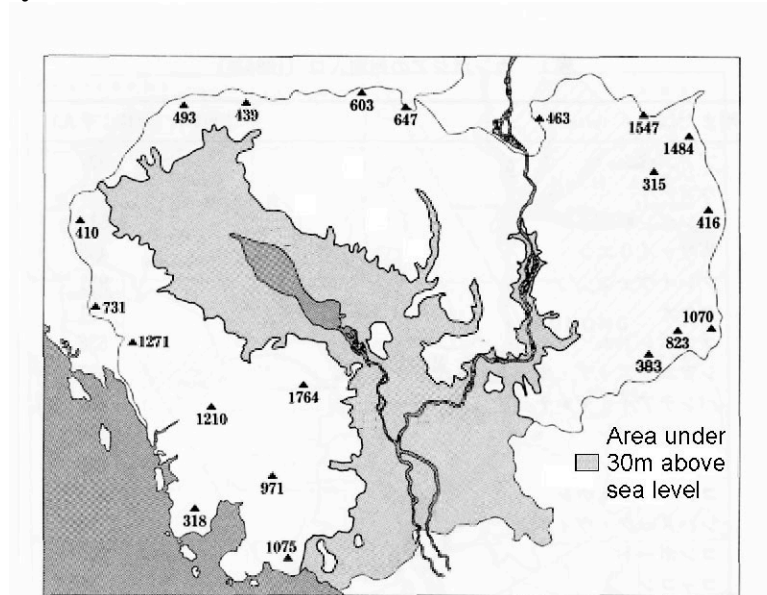
- The important source of foreign currency,
- Spiritual symbol as shown in the national flag, and
- Small urban agglomeration compared to the large tourism attraction.

These facts imply that the country can clearly separate the urban function in the country as follows:

- Phnom Penh as the economic and political center and
- Siem Reap as the cultural and tourism center.

This means that the country can develop based on the bipolar urban system.

#### (2) River System

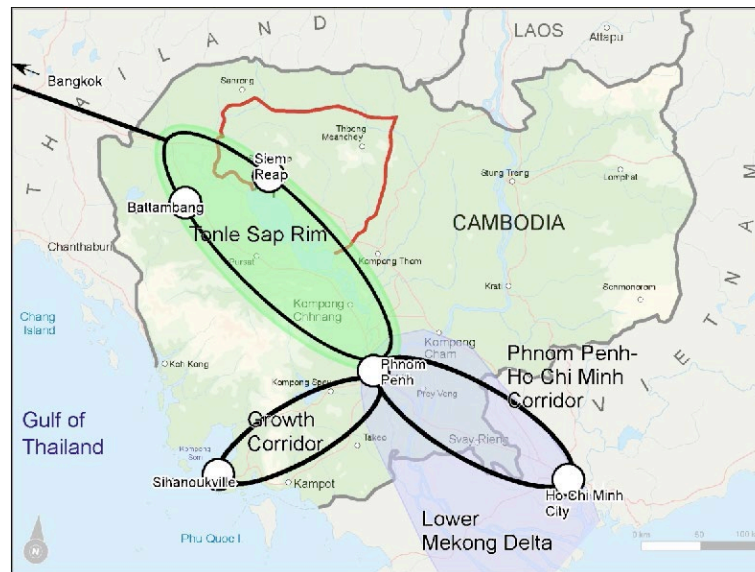


Source: Modified by JST from "*Motto Shiritai Kanbojia.*"  
**Figure III.18.2 Area under 30m Area Above 30m Sea Level**

The river system defines the basic geographical structure of the country. They are the Mekong River and the Tonle Sap Lake. Cambodian section of the Mekong River has

468km long. Tith water level of Mekong River fluctuates seasonally. During rainy seasons, the Mekong pushes back the Tonle Sap River to the lake. Thus, the rich sediment deposited during the rainy-season flooding has made for fertile agricultural land around the Tonle Sap Rim.

Figure III.18.2 shows the area under 30 meters above sea level. The area, 40% of total national land, holds approximately 90% of population and many historical capitals are located at the fringe of the area. The lowland area consists of two major regions. One is the Mekong Delta Region and the other is the Tonle Sap Rim Region.



Source: JST.

**Figure III.18.3 Two Major Regions and Transportation Network in Cambodia**

Figure III.18.3 illustrates the spatial structure of Cambodia. Siem Reap is located in the northwestern part of the lowland area and in on the gentle slope from mountain to the Tonle Sap Lake.

### (3) Transportation System

Cambodia developed unique land transportation network. Several urban cores are connected by primary road networks of single-digit national highways. These networks forms the circular system centered from Phnom Penh as shown in Figure III.18.3.

At present, Siem Reap/ Angkor Town has good accessibility by land, air, and water transportations. Access by road is limited by Route 6 which crosses the town. Siem Reap Angkor International Airport holds regular international flights. Small port on the lake is connected with the cities around the Tonle Sap Lake.

## 18.1.3 Siem Reap Area from Sub-national Viewpoint

### (1) Angkor Heritages and Human Settlement

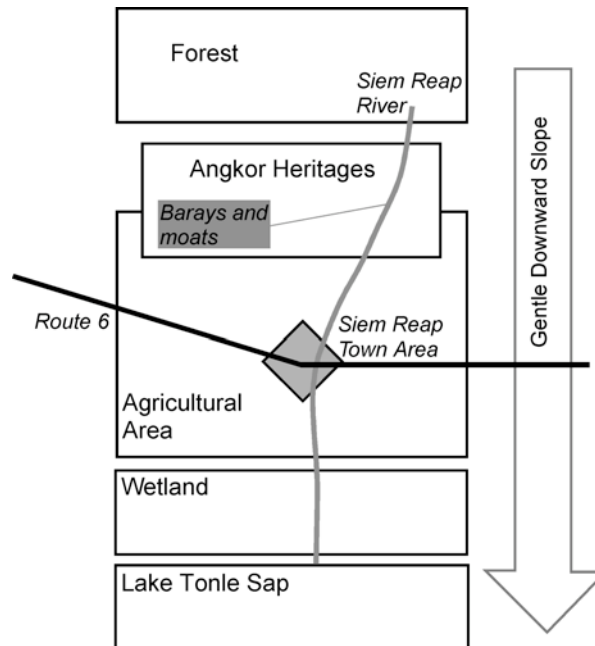
Siem Reap inherits spatial structure from the ancient Angkor heritage. Once, the area could hold a large population by the advanced water usage system, or Baray. People

used to live in the forest and worked in the irrigated paddy field. Between the forest and paddy field, they built the Angkor heritages.

It is unclear how the ancient residents formed their human settlement and the current Siem Reap town area only succeeds the urban form from the French colonial period.

## (2) Land Use

The land use around Siem Reap/ Angkor Town area changes from north to south on the gentle downward slope as shown in Figure III.18.4.

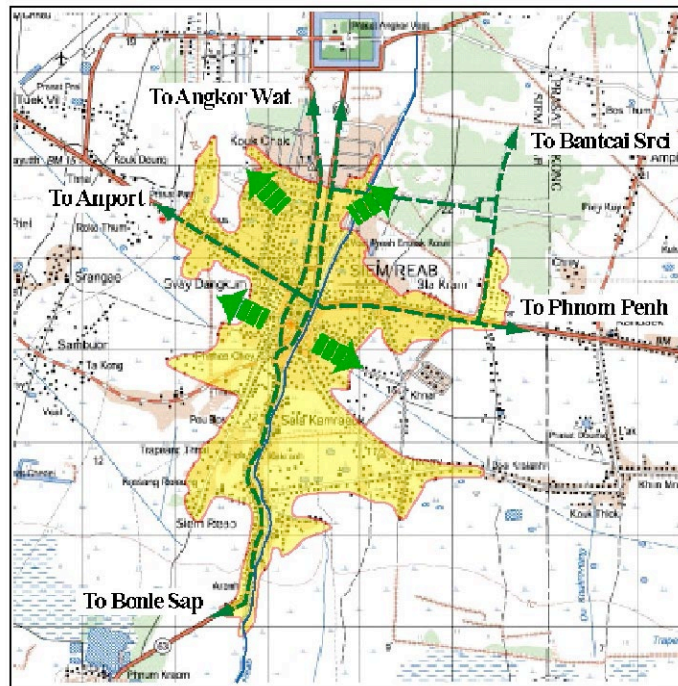


**Figure III.18.4 Land Use Pattern around Siem Reap/ Angkor Town Area**

Siem Reap is located on the crossroads of Route 6 and Siem Reap River. The Route 6 extends east and west and the River runs from north to south. The town center is on the western bank of the River and holds commercial and public facilities. Most tourist hotels are located on the town center and along the western section of Route 6. All area of built-up area belongs to the administrative boundary of Siem Reap District.

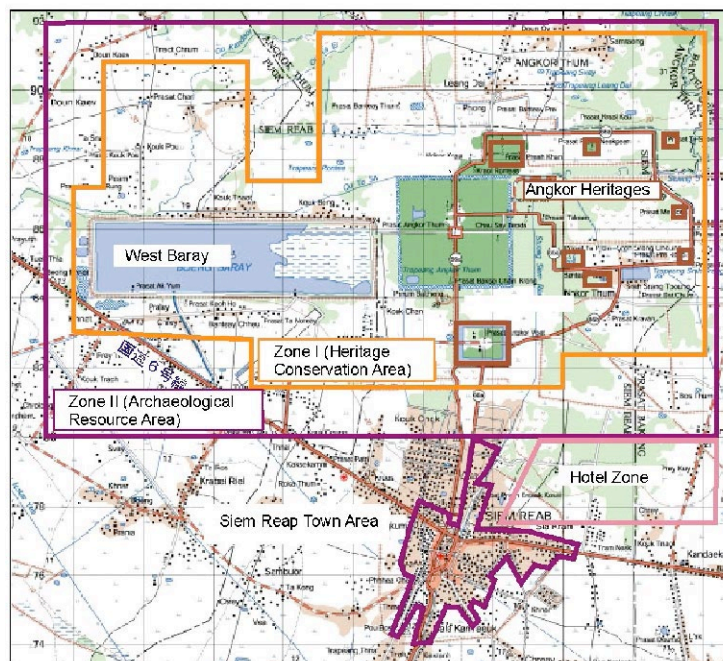
In the 1990s, the increased number of tourists boomed many restaurants and accommodations and it caused a substantial change in land use. However, there is no official documentation to indicate the change. Figure III.18.5 expresses the direction of urban growth.





**Figure III.18.5 Existing Town and Its Growth Directions**

Protection zoning by APSARA Authority has been prepared as shown in Figure III.18.6. Currently, this is the only one zoning plan at Siem Reap. Within the Zone I (Heritage Conservation Area), the large construction is strictly prohibited. However, outside the Zone I, the land management tools to implement the plan is not working effectively.



**Figure III.18.6 Zoning by APSARA Authority**

## 18.2 Area-wise Development Approaches

### 18.2.1 Overall Development Concept

In order to prepare master plan, area-wise development approaches are presented for the Siem Reap/ Angkor Town. Firstly, the proposed Strategic Vision in Volume I is reviewed. Secondly, three areas are proposed by geographical representation. Then, finally, the area-wise development approaches are prepared.

Here inherits the Strategic Vision, which envisages Siem Reap/ Angkor Town 2020 to be “a more beautiful and unique tourist city based on a harmony of history, arts and nature of Khmer.” This statement expresses overall development concept for the whole study area.

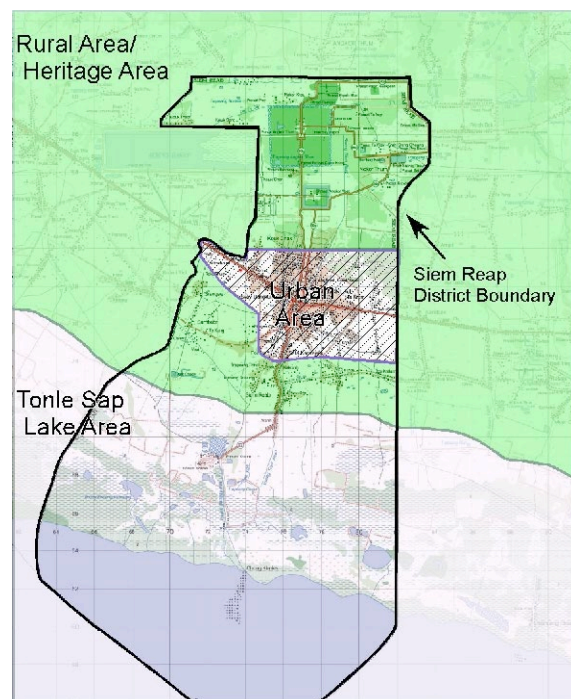
### 18.2.2 Three Areas in Siem Reap

This section dissects the Siem Reap area into three areas by its attributes as shown in Figure III.18.7.

- Urban Area
- Rural/ Heritage Area
- Tonle Sap Lake Area

Although the study area is delineated within the district boundary of Siem Reap, this conceptual area includes areas beyond the district boundary as those related to the study area.

The Urban Area is defined as the area which will be urbanized by 2020. A boundary is set between Rural/ Heritage Area and Tonle Sap Lake Area along the contour line of 10 meters above sea level.



**Figure III.18.7 Zoning of Siem Reap**

In response to the characteristics of each area as shown in Figure III.18.8, development approaches and possible projects have been identified as shown in Table III.18.1 and III.18.2.

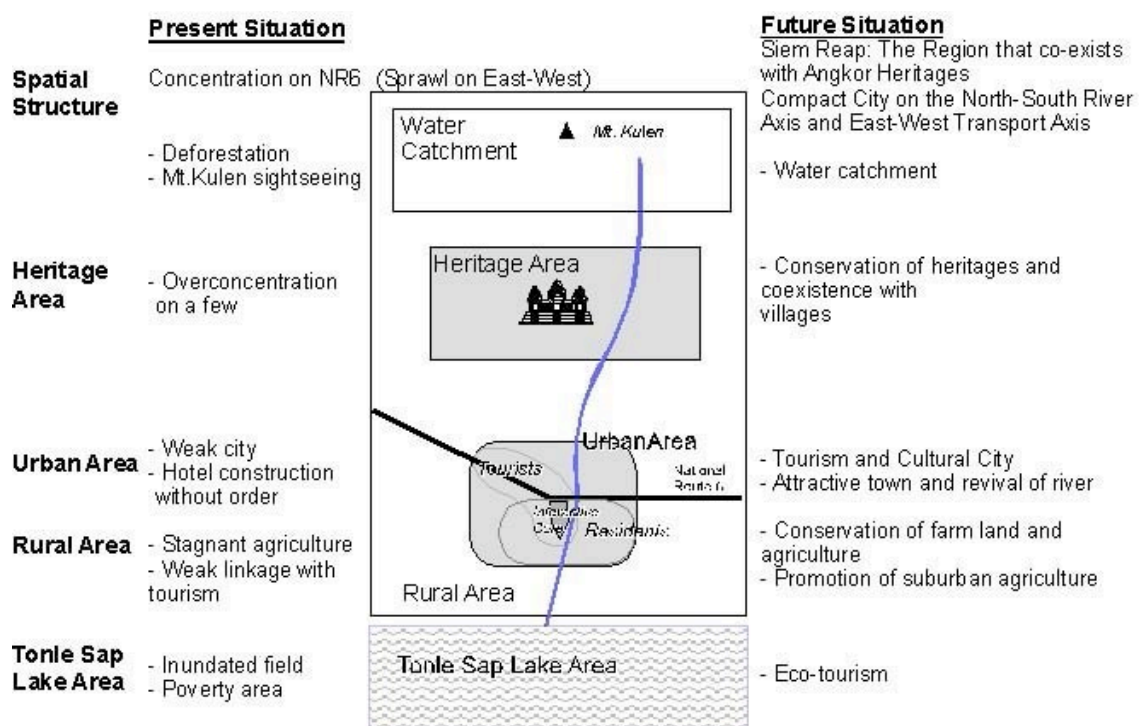


Figure III.18.8 Area-wise Situation of Siem Reap at Present and in Future

Table III.18.1 Planning Issues and Development Approaches

Area	Planning Issues	Development Approach
Urban Area	Need for attractive city with the historical architecture	• Urban improvement of the city center area with provision of urban infrastructure and of new greenery along main streets
	Creation of compact and orderly city	• Formulation of a compact, well-planned urban area with effective enforcement of the urban plan
	Scarce urban greenery	• Preservation of the existing greenery, particularly in the temple compounds
	Disorderly expansion of urban area in peri-urban areas	• Construction and improvement of city roads and infrastructure prior to urbanization with community partnership
	Lack of suitable lands in city center for large-scale hotel development	• Development of Hotel and Cultural Zone to accommodate increasing tourist visits and development of a visitor zone for the new Angkor Gate
Rural Area (Conservation Area)	Need for sustainable rural communities	• Promotion of village tourism with hands-on experience
	Sizable logging/ deforestation in progress	• Support for forestation at deforested areas and around the ruins
(The Remaining Area)	Limited use of local agricultural products for tourism	• Promotion of suburban agriculture and improvement of distribution system
Tonle Sap Lake Area	Limited data on environmental resources	• Comprehensive study on the natural resource of Tonle Sap and the perennial flooding area and planning for conservation
	Limited use of Tonle Sap for eco-tourism	• Promotion of sustainable ecotourism in Tonle Sap and the perennial flooding area



**Table III.18.2 Proposed Projects for Urban Development and Relevant Sectors**

Area	Development Approach	Proposed Projects[Relevant Sector]
Urban Area	<ul style="list-style-type: none"> <li>Urban improvement of the city center area to make the most attractive resort city in Southeast Asia</li> </ul>	<ul style="list-style-type: none"> <li><b>City Center Area Improvement Project</b></li> <li><b>Urban Planning Capacity Development Project</b></li> <li><b>Inventory of Historical Architecture with Preservation Value in Siem Reap City</b></li> </ul>
	<ul style="list-style-type: none"> <li>Development of a compact, well-planned urban area with effective enforcement of the urban plan</li> </ul>	
	<ul style="list-style-type: none"> <li>Preservation and enhancement of the existing greenery</li> </ul>	
	<ul style="list-style-type: none"> <li>Construction and improvement of urban roads and infrastructure prior to urbanization under community partnership</li> </ul>	<ul style="list-style-type: none"> <li>Community-Partnership Urban Improvement Project for the areas along urgent urban road and drainage improvement areas [Road, Drainage]</li> </ul>
	<ul style="list-style-type: none"> <li>Enhancement of visitor reception functions</li> </ul>	<ul style="list-style-type: none"> <li><b>Planning and implementation of Hotel, Cultural and Visitor Zone for New Angkor Gate</b></li> <li>Development of Siem Reap Products Mart / Visitor Information Center for New Angkor Gate [Tourism]</li> </ul>
Rural Area (Conservation Area)	<ul style="list-style-type: none"> <li>Promotion of village tourism with hands-on experience</li> </ul>	<ul style="list-style-type: none"> <li>Village Tourism Promotion Project at selected village in the protection zone [Tourism]</li> </ul>
	<ul style="list-style-type: none"> <li>Support for forestation at deforested areas and around the ruins</li> </ul>	<ul style="list-style-type: none"> <li>Initiative for public-private partnership for “Forestation Angkor”</li> </ul>
(The Remaining Area)	<ul style="list-style-type: none"> <li>Promotion of suburban agriculture and improvement of distribution system</li> </ul>	<ul style="list-style-type: none"> <li>Study on Promotion of Suburban Agriculture for Siem Reap [Agriculture]</li> </ul>
Tonle Sap Lake Area	<ul style="list-style-type: none"> <li>Comprehensive study on the natural resource of Tonle Sap and perennial flooding area and planning for conservation</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive Study on Tonle Sap Natural Environment and Protection Plan for Tonle Sap and Sustainable Ecotourism [Environment]</li> <li>Preparation for UNESCO Natural Heritage Registration [Environment]</li> </ul>
	<ul style="list-style-type: none"> <li>Promotion of sustainable ecotourism in Tonle Sap and the perennial flooding area</li> </ul>	

Note; Projects in **bold** are the projects for the urban and regional planning sector.

### 18.2.3 Development Approach for Urban Area

#### (1) Development Concept

The Urban Area of Siem Reap accommodates not only the hotels, guesthouses and commercial facilities such as restaurants and shops, but also the housing units of urban dwellers that supports and sustains the tourism industry at large.

This indicates that the urban area of Siem Reap must be a good and livable place for the dwellers, but at the same time it must provide with the tourists with amenity and relaxation after a visit to the ruins. This nature of the urban area is essential to sustaining and flourishing the tourism industry in the future.

Siem Reap District has the population of 139,000 in 2004, and is a compact city where most of the existing urbanized area is contained within a radius of about 2 km. Being a compact city is a natural gift of Siem Reap in the viewpoint of short and easy distance

for human and goods movement and thus is energy efficient. The urban area is along the Siem Reap river (although there is a water quality problem now that needs remedy), and has a long water edge line and riverine forests. Siem Reap has a history dating to the first decade of 20<sup>th</sup> century with prominent trace of French colonial architecture, wide streets with lining of trees. As Siem Reap City is thus potentially gifted with natural and historical enchantment, the basic direction of urban development is taken to enhance and substantiate the potential to make an attractive city for the city dwellers and visitors alike.

Following the Strategic Vision, the development concept for the urban area can be summarized in the following three features as also shown in Volume I.

- A quality tourism city where tourists can fully feel a touch of the Khmer culture, the Khmer history and the Khmer arts.
- A human scale city in the atmosphere of Angkor
- An environment-friendly city

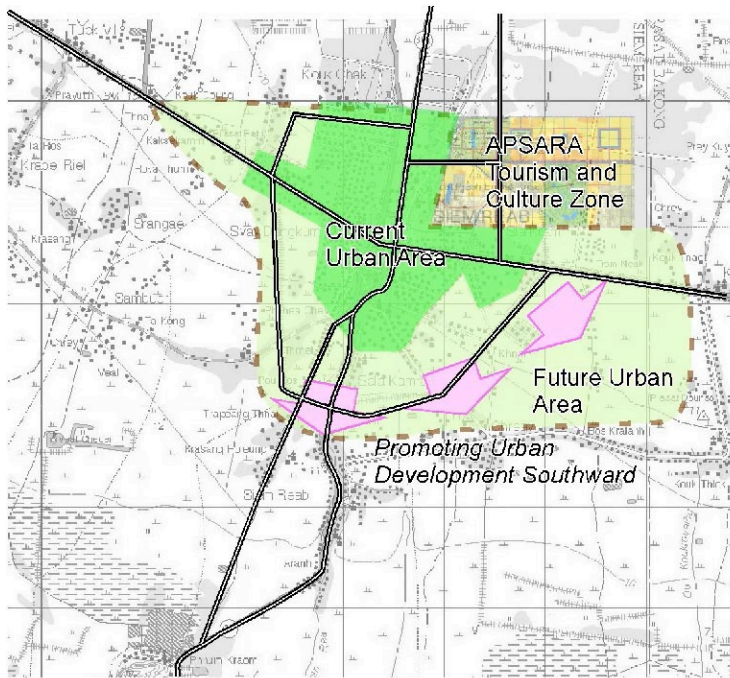
## (2) Approaches

The approaches to realize the concept associated with the urban development in the urban area including both currently urbanized area and urbanizing area are as follows.

### **Formation of a Compact City with Effective Enforcement of the Urban Plan**

Although Siem Reap has the population of about 139,000 in 2004, and is one of the largest regional cities in Cambodia, the urbanized area is almost concentrated in a compact radius of about 2 km utmost. This would mean that the city is a “Compact City”, which is good in energy efficiency and easy transport. This aspect of the city needs to be preserved in the future by inducing the urbanization in the central area to avoid overgrowth of the urban areas outwards.

In order to achieve a Compact City in Siem Reap, the control of new development shall be regulated based on the future land use plan. The land use plan depicted in this Study prepares the concept of a Compact City so that the city would not spread to much to outwards which would lower the efficiency of infrastructure development and the intra-urban transport more time and energy consuming.



Source: JICA Study Team

**Figure III.18.9 Expansion of Urban Area following Compact City Concept**

### **Urban Redevelopment and Integration of Old Quarter Area**

The Old Quarter area, with a number of French Colonial architecture with a style, is an ideal town center for the tourists and residents alike. The Old Market on the south and Central Market on the north both deal with mixture of souvenirs for tourists and daily commodities and foodstuff for local residents. As a consequence, the both markets are not quite attractive to tourists or very convenient for local residents. These markets need to have a clear distinction in the line up of the commodities they deal in, typically like the Old Market dealing in more tourism oriented commodities and the Central Market dealing in more daily commodities.

There is a triangular block separating the Central Market area with the Old Market area occupied by the Provincial Hospital. There is no road going through this block, and this hinders the interactions of the both areas. As it is said that site of the Provincial Hospital shall be available in the future for commercial purpose, the planning for the site shall need to be considered thoroughly to provide a connection to the neighboring block to the north with the Central Market, as well as to enhance the areas commercial / tourism appeal by way of redevelopment and integration of the entire block.

At the same time, the Old Quarter area needs to be safe and amiable to the visitors and residents alike. For that purpose, provision of wide sidewalks with tree lining is recommendable. In order to improve the security, street lighting is encouraged along the main pedestrian walkways. In conjunction with the redevelopment of the triangle zone in between, new urban roads connecting the two zones and public facilities such as a small urban park and parking space needs to be considered.

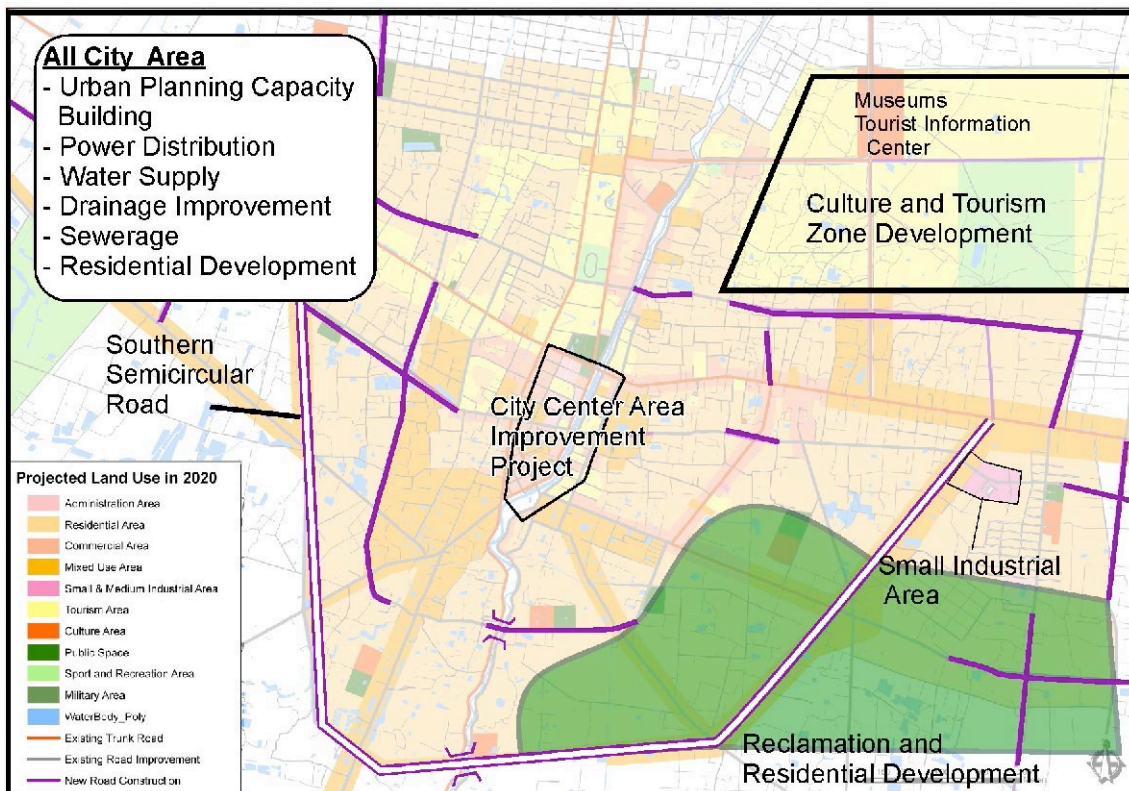
### **Urban Roads and Infrastructure Development**

Demand for road improvement is felt to be high in the urbanizing areas outside of the well-established urbanized area. Sla Kram Commune, for example, has a high rate of motorcycle possession, whilst the roads are in poor condition. Sala Kamraeuk Commune that suffers much from urban sprawl has a number of dead-ends and narrow, winding roads that resulted from enclosure by landowners.

The lack of decent road network also results in poor drainage. Without good road network, drainage canals or pipes are hardly devisable. Even existing drainage canals are already obsolete due to the lack of maintenance.

### **(3) Conceptual Plan**

The Figure III.18.10 shows a conceptual plan for the area.



Source: JICA Study Team.

**Figure III.18.10 Conceptual Plan for Urban Area**