

## IV INFRASTRUCTURE

### IV-1 Use, Development or Exploitation Concessions

For Use, Development or Exploitation Concessions, Law on Concession was promulgated on October 19, 2007. The Law has the purpose to promote and facilitate the implementation of privately financed projects in Cambodia in order to ensure the public interest and the fulfillment of the national economic and social objectives (Article 1).

Law on Concession governs Concessions as specified in Article 5 and a concession shall be granted by a Concession Contract (Article 2).

#### Sectors for concession contracts

Concession Contracts in relation to Infrastructure Facility providing directly or indirectly services to the general public may be entered into by the relevant institutions in the following sectors (Article 5):

- a) power generation, power transmission and power distribution
- b) transportation facilities systems, including, but not limited to roads, bridges, airports, ports, railways, channel
- c) water supply and sanitation
- d) telecommunication and information technology infrastructure
- e) supra-structure related to tourism projects, but not limited to tourism resort museums
- f) gas and oil related infrastructures including oil and gas pipelines
- g) sewerage, drainage and dredging
- h) waste management and treatment
- i) hospitals and other infrastructure related to health, education and sport sectors
- j) infrastructure related to special economic zones and social housing
- k) irrigation and agricultural related infrastructure
- l) other sectors for which a specific law allows for the granting of Concessions

#### Concession contracts

A Concession Contract may provide by means of the following (Article 6).

- Build, Operate and Transfer
- Build, Lease and Transfer
- Build, Transfer and Operate
- Build, Own and Operate
- Build, Own Operate and Transfer
- Build, Cooperate and Transfer
- Expand, Operate and Transfer
- Modernise, Operate and Transfer
- Modernise, Own and Operate.
- Lease and operate manage or management arrangements or any variant thereof or similar arrangement, including joint public-private implementation of Infrastructure Facilities.

#### Administrative coordination

The Council for Development of Cambodia (CDC) is the one stop service entity for obtaining authorizations required to implement an Investment Project in accordance with the Law on Investment. The CDC shall upon receipt of a request for a Qualified Investment Project to be implemented under a Concession Contract from a selected Concessionaire (Article 8);

- a) Approve all investment incentives the Concessionaire is entitled to according to the Law on Investment of the Kingdom of Cambodia
- b) Specify all authorizations required to be obtained for the Concession Project, the competent institutions responsible for the issuance of the authorizations

- c) Obtain in a timely manner all required authorizations as specified in this Article from the relevant institutions on behalf of the Concessionaire provided that all required information and documents have been duly supplied.

The CDC shall be the centralized service institution providing, on request, general information to potential investors regarding investment in Concession Projects in the Kingdom of Cambodia, including such information as mentioned in Article 8 (a) and (b) of the Law. The CDC shall make available copies to all potential investors of any laws and regulations of general application to Concession Projects in Cambodia (Article 9).

#### Selection

The Contracting institution shall select the Concessionaire through international or national bidding procedures, by negotiated procedure according to the circumstances. The selection of the Concessionaire shall be carried out in accordance with the procedures provided for in the Sub-Decree (Article 11).

When the selection proceedings are completed and the Contracting institution is ready to accept a final bid or a negotiated proposal, the Contracting institution shall obtain approvals to the final terms of the Concession Contract as required by and in accordance with the procedures set forth in the Sub-decree (Article 12).

After approvals have been obtained, the Contracting institution shall issue a notification of award to the selected candidate prior to execution of the Concession Contract. The Contracting institution and the Concessionaire shall sign the Concession Contract within 6 months of the notification of award (Article 13).

At least within 60 days of upon receiving the notification of awards, the Concessionaire shall promptly establish and incorporate under the laws of the Kingdom of Cambodia the legal entity that will implement the Concession Project and apply, to the CDC for a final registration certificate in accordance with the Law on Investment (Article 14).

### IV-2 Electricity

#### General situation of electricity supply

The Electricity Law was promulgated in February 2001 with the view to regulate the power sector and the Electricity Authority of Cambodia (EAC) was established as a legal public entity to act as the Regulator and the arbitrator of power sector business activities.

Cambodian strategy for the development of electricity supply is to construct transmission lines between major cities in southern and western regions<sup>1</sup> in order to construct large-scale power generating plants and to import electric power from neighboring countries during the construction period of such power plants.

In Cambodia, electricity is generated and/or distributed by the following entities;

- Electricite Du Cambodge (EDC), a government enterprise
- Private entities including Independent Power Producers (IPP) in the provincial towns
- Licensees in smaller towns, and
- Rural Electricity Enterprises (REE) in the rural areas

Note 1 : The southern region includes Phnom Penh City, Kandal, Kampong Speu, Takeo, Kampot and Sihanouk provinces, while the western region includes Banteay Mean Chey, Battambang and Siem Reap provinces.

EDC has a consolidated license (generation, distribution and transmission) for electricity supply in Phnom Penh, Knadal, in the 12 following provincial capitals, namely, Sihanoukville, Kampong Cham, Takeo and Battambang, Siem Reap, Banteay Meanchey, Kampot, Kampong Speu, Steng Treng, Svay Rieng, Prey Veng, Rattanakiri (Banlung), and in the four following regions bordering on Vietnam, namely Bavet (Svay Rieng), Memot (Kampong Cham), Phonhea Krek (Kampong Cham) and Kampong Trach (Kampot).

The electricity supply currently does not meet the basic demands, where 24-hour supply of electricity is not assured and the quality of electricity is not reliable. According to the Power Development Plan of the Kingdom of Cambodia in 2007, electricity demand is expected to show a rapid increase until 2020. The future power demand is summarized in Table IV-2-1.

Table IV-2-1 Power Demand Forecast (MW)

2012	2015	2018	2020
1,062	1,643	2,283	2,770

Source: MIME

### Electricity supply expansion

In order to meet the increasing demand, the RGC has developed the power source expansion plan under the Power Development Plan for a period of 2008-2021. In line with the power source expansion, transmission lines are under construction and electric power has been imported from neighboring countries. Currently, 22.47% of Cambodian households have access to the electricity (54% of urban households and 13% of rural households). EDC aims to provide electricity service to 100% of all the villages by 2020 and 70% of all the rural households by 2030.

Regarding the expansion of power source, the Department of Energy Development of MIME formulated electricity supply development plan up to 2020. According to this plan, as Table IV-2-2 indicates, the construction of eight hydro power plants and three coal power plants will be completed by 2020 and approximately 6,300 MW at the maximum will be generated in 2020.

Table IV-2-2 Expansion Plan of Power Sources

No	Project	Country of Supplier	Type	Power (MW)	Year of Operation
1	Kamchay Hydro Power Plant	China	Hydro	193.2	2011
2	Kirirom III Hydro Power Plant	China	Hydro	18	2012
3	Stung Atay Hydro Power Plant	China	Hydro	120	2013*
4	200MW Coal Power Plant (I) in Sihanouk Province -Phase 1	Malaysia	Coal	100	2013
5	Stung Tatay Hydro Power Plant	China	Hydro	246	2013-2014
6	Lower Stung Russey Chhrum Hydro Power Plant	China	Hydro	338	2013-2014
7	700MW Coal Power Plant (II) -Phase 1	China	Coal	270	2014-2015
8	200MW Coal Power Plant(I) in Sihanoukville Province-Phase 2	China+ Cambodia	Coal	135	2016
9	700MW Coal Power Plant (II) -Phase 2	China	Coal	100	2017
10	Lower Se San II Hydro Power Plant	Cambodia+Vietnam	Hydro	400	2017
11	Stung Chhay Areng Hydro Poer Plant	China	Hydro	108	2017
12	700MW Coal Power Plant (II) -Phase 3	China	Coal	100	2018
13	700MW Coal Power Plant (II) -Phase 4	China	Hydro	100	2018
14	Lower Se San I Hydro Power Plant	Vietnam	Hydro	90	2018
15	700MW Coal Power Plant (II)- Phase 5	China	Hydro	100	2019
16	Sambor Hydro Power Plant	China	Hydro	2600	2019
17	Stung Treng Hydro Power Plant	Vietnam	Hydro	900	2020
18	Coal Power Plant (III) or Gas Power Pant	-	Coal/ Natural gas	400	2020
Total				6,318.2	

Source: MIME

Table IV-2-3 Expansion Plan of Transmission Line

No	Project	Length (km)	Grant/ Invest	Year
1	110kV, Kampong Cham - Vietnam, (construct 3 substations: Kampong Cham, -Soung, -Pongnearekreak).	68	WB	2010
2	230kV, Takeo- Kampot (construct substation in Kampot)	87	KFW	2011
3	230kV, Phnom Penh – Kampong Chhang – Pursat - Battambang (construct 3 substations: Kampong chhang – Pursat - Battambang)	294	CPG	2012
4	230kV, Pursat - Osom, (construct 1 substation in Osom Commune),	175	CPG	2012
5	230kV, Phnom Penh – Kampong Cham	110	CUPL	2012
6	230 kV, Kampong Cham- Kratie,	110	CUPL	2013
7	230kV, Stung Tatay Hydro - Odom substation,	60	CHMC	2013
8	230kV, Kampot – Sihanukville	82	ADB& JBIC	2013
9	230kV, Stung Treng - Loa PDR, (construct substation in Steng Treng),	56	WB	2014
10	220kV, Phnom Penh – Sihanukville, along national road 4, (construct substation in Sre Ambil)	165	CHMC	2014-2015
11	115kV, East Phnom Penh – Neakleung – Svay Rieng, (construct 2 substations, - Neakleung, - Svay Rieng)	120	CHMC	2015
12	230kV, Kratie – Stung Treng,	126	INDIA	2015
13	115kV, West Phnom Penh – East Phnom Penh, (construct substation GS4 at South Phnom Penh)	20	WB	2015
14	230kV, Stung Chay Areng Hydro – Osom substation	60	CGC	2017
15	230kV, Kampong Cham – Kampong Thom – Siem Reap, (construct 1 substation in Kampong Thom)	250	KTC	2019
16	500kV, Loa PDR (Ban Sok) – Stung Treng – Vietnam (Tay Ninh), (construct substations in Stung Treng)	220	ADB	2019
Total		2,003		

Source: MIME

According to MIME, as shown in Table IV-2-3, the construction of transmission lines to import electricity from Thailand and Vietnam will be completed by the end of 2012 and, as a result, the electricity will be supplied for most parts of Cambodia. Besides, further expansion of transmission lines, which interconnects with Lao PDR as well as other neighboring countries, will be completed by the end of 2019.

The Power Cooperation Agreement with Vietnam was signed on 10 June 1999 and the Power Purchase Agreement (PPA) was made in 2001 and supposed to be renewed every five years. Since 2002, EDC has imported electricity from Power Company 2 (PC2) of Vietnam to supply for Bavet (Svay Rieng), Memot (Kampong Cham), Phonhea Krek (Kampong Cham), etc. For supplying the electricity to Phnom Penh, the purchasing agreement of 200 MW was concluded with Vietnam and the construction of 220kV-transmission line, which interconnects Phnom Penh/Takeo to Vietnam, has been completed. Under this purchasing agreement, transmission of 120 MW from Vietnam to Phnom Penh, which requires 300 MW daily, has already begun. Although another 50 MW, totally 170 MW out of contracted 200 MW, is planned to be transmitted, due to the recent shortage of electric in Vietnam, it has not been realized.

PPA was first made with Thailand in 2002 and was amended in 2007. Currently, electric power between Cambodia and Thailand is transmitted at 22 kV and 115 kV levels. An agreement was signed with Trat Province (Thailand) to supply power for Koh Kong and Poi Pet (Cambodia) by using 22 kV line. The above areas have been connected since 2001. Since November 2007, power has been imported through 115 kV transmission line from Arranh Prathet substation (Thailand) and supplied for Battambang, Siem Reap, etc.

The Power Cooperation Agreement with Lao PDR was signed in October 1999. Both countries agreed on power interconnection by 115 kV line between southern Lao and Stung Treng, Cambodia. The construction of the transmission line is scheduled to be completed in 2014.

Rural electrification is one of the key issues. Cambodia's strategy of rural electrification has been prepared basing on "Rural Electrification Master Plan" which focuses renewable energy and, under the Master Plan, Cambodia Energy Sector Strategy (CESS)<sup>2</sup> was formulated. Rural Electrification Fund (REF) was established in 2004. Two 370KW micro hydro power stations have been constructed and one reserve 300KW diesel generator has been installed. They are currently fully operational to provide electricity to the provincial town of Mondulhiri.

#### Electricity tariff

The electricity tariffs in major cities and provinces are shown in "Electricity cost" under "IX-4 Utility Cost" of "Chapter IX Cost of Doing Business".

### IV-3 Telecommunications

#### General situation of telephone services

Ministry of Posts and Telecommunications (the MPTC) is a policy-maker and regulator in the field of telecommunications in Cambodia. The MPTC was also an operator of the fixed line network but, in January 2006, separated its telecom operation arm and established a new public enterprise called "Telecom Cambodia", having provided its own assets equal to US\$ 40.3 million and 700 staff members, to provide fixed line service with the 023 prefix. Telecom Cambodia is said to have been instructed by the RGC to list on the Cambodian Stock Exchange in 2012.

The Regulatory function was also separated from the MPTC through the establishment of an autonomous regulatory body called Telecommunication Regulator of Cambodia (TRC) on September 20, 2012 according to the "Royal Decree No.: ns/rkt/0312/175 on the Establishment of Telecommunication Regulator of Cambodia". Therefore, the MPTC is currently responsible only for policy formulation, strategic development plan and international cooperation in telecommunication sector.

The total length of National Optical Fiber Backbone was 22,380km as of

Note 2 : CESS was formulated in 2003 and 2008.

Table IV-3-1 Telephone Subscribers and Penetration Ratio

		2008	2009	2010	2011
Population		13,400,000	13,900,000	14,100,000	14,300,000
Subscribers	Fixed Line	43,417	100,887	358,750	559,381
	Mobile	3,791,834	6,346,720	10,537,628	15,678,829
	Sub-total	3,835,251	6,447,607	10,896,378	16,238,210
Penetration ratio (%)	Fixed Line	0.32	0.73	2.54	3.91
	Mobile	28.30	45.66	74.73	109.64
	Sub-total	28.62	46.39	77.28	113.55

Source: Ministry of Post and Telecommunication, Cambodia (MPTC)

Table IV-3-2 Mobile Telephone Service Providers

Brand Name	Prefix	Operating Company
Cellcard (Mobitel)	012/ 017/ 077/ 089/ 092/ 095	CamGSM (Royal Group+Millicom International)
Metfone	088/ 097	Viettel (Cambodia) Pte.,Ltd
Smart Mobile	010/ 069/ 070/ 086/ 093/ 098	Latelz Co., Ltd
Beeline	066/ 067/ 068/ 090	Sotelco Ltd. (Vimpelcom Group)
Mfone	011/ 061/ 076/ 085/ 099	Mfone Co., Ltd
Hello	015/ 016/ 081/ 087	Hello Axiata Co., Ltd
QB (Cadcomms)	013/ 080/ 083/ 084	Cambodia Advanced Communications Co., Ltd
ExCell	018	GT-Tell (Cambodia) Investment Company Ltd.
XinWei	038	Xinwei (Cambodia) Telecom Co., Ltd

Source: Ministry of Post and Telecommunication, Cambodia (MPTC)

the middle of 2011 which was occupied to Telecom Cambodia (1,200km), Cambodia Fiber Optic Cable Network (5,180km) and Viettel Cambodia (16,000km). The fiber optic connection to CAT Telecom Public Co., Ltd in Thailand, Vietnam Telecom International (VTI) in Vietnam and ETL Public Company in Laos was completed in July 2010.

The total number of telephone subscribers in Cambodia has drastically increased in 2011 more than four times as a whole since 2008 as shown in Table IV-3-1. Cambodian telephone penetration rate at the end of 2011 was 113.55 of which 109.64 was occupied by mobile phone subscribers. In other words, 96.56% of all the telephone subscribers use mobile phones.

#### Telephone service providers

In Cambodia, there are three providers of fixed-line telephone service, namely Telecom Cambodia, Camintel and Camshin, but Telecom Cambodia dominates the fixed-line service. The company also operates the connection to international calls.

Currently there are nine providers for mobile phone service and the provider names and service are summarized in Table IV-3-2.

For international calls, all the mobile telephone service providers provide the VoIP services which connect with most of the destinations in the world. The call rates are rather affordable ranging between US\$0.06 to 0.50 per minutes, although the voice quality is not satisfactory yet to some destinations.

#### Internet services

Internet was introduced to Cambodia in 1997 by the MPTC with support from the International Development Research Center (IDRC) of Canada and Telecom Cambodia now runs internet service under the name of CamNet.

Optic fiber was installed with assistance of German KfW in 1999 from Thailand to Vietnam through a route of Poipet – Battambang – Phnom

Penh – Bavet. In addition, a loan agreement for “Greater Mekong Telecommunication Backbone Network Project (Cambodia Growth Corridor)” was signed in March 2005 between the Cambodian Government and JBIC and a project to install the total length of 400 km of optic fiber connecting Kampong Cham, Phnom Penh and Sihanoukville has already started.

As a part of “GMS Information Superhighway” project, 650 kilometers optic fiber cable laying has been completed in July 2009. The optic fiber cable links Cambodia, China, Lao PDR, Myanmar, Vietnam and Thailand. The cable runs from Siem Reap to Kampong Cham, to Memot and then Lao border. At Siem Reap, it links with the existing line which runs from Vietnam border to Thai border. It is said that the optic fiber cable network now covers two thirds of Cambodia.

Internet backbone is from 150Mbps to 550Mbps connected via satellites of Singapore, Hong Kong, Germany and US and 400Mbps connected in optical fiber cable via IP transit to Vietnam and Thailand.

As of October 2012, there were about 37 ISP licenses issued. “Camnet”, “Online”, “TeleSurf”, “Camintel”, “Metfone”, “CityLink”, “WiCam”, “Clicnet” and “Ezecom” are among them.

The number of internet subscribers has been increasing rapidly between 2008 and 2011 as shown in the table IV-3-3. At the end of 2011, there were 1,689,389 subscribers which amounts 11.88% of the penetration ratio. 73% of internet subscribers are mobile phone users.

Table IV-3-3 Internet Subscribers and Penetration Ratio

	2008	2009	2010	2011
Population	13,400,000	13,900,000	14,100,000	14,300,000
Subscribers	20,402	291,589	320,190	1,689,389
Penetration ratio (%)	0.15	2.10	2.27	11.81

Source: Ministry of Post and Telecommunication, Cambodia (MPTC)

**Postal services**

Cambodia Post (C.P.) was established as a public enterprise with state company characteristics by Sub-Decree #57 (RGC) on Establishment of Cambodia Post as Public Enterprise dated on 21 June 2010. Under the Sub-Decree, it is determined that CP shall be a national operator of the postal sector and shall have the following duties and rights.

- (1) to provide services, receive, collect, transport and distribute all postal mail of all types including Express Mail Service (EMS) inside and outside the country;
- (2) to sell other materials or products for serving the postal and telecommunications sector;
- (3) to operate postal financial and banking services;
- (4) to develop a list of charges for postal services for inside and outside Cambodia;
- (5) to establish postal offices in the Kingdom of Cambodia;
- (6) to obtain rights for the use of postal stamp machines for serving the postal sector;
- (7) to cooperate with companies and institutions in the country and abroad in conducting the postal business;
- (8) to enter into a loan contract from other resources for further investment with approval from the Ministry of Posts and Telecommunication and the Ministry of Economy and Finance;

The initial capital of C.P. shall be determined by the MPTC and the MEF and the staff of C.P. shall be recruited from officers of the MPTC.

MPTC currently aims to increase the number of postal station and reduce the number of client per station as shown in Table IV-3-4.

Table IV-3-4 Number of Client per Postal Station

Particular	2008	2009	2010	2011	2012	2013
# of Client per Station	161,445	163,932	140,968	125,256	111,286	101,147

Source: NSDP Update 2009 - 2013

**IV-4 Water Resource**

Ministry of Water Resources and Meteorology (MOWRAM) is responsible for developing and managing water resources in Cambodia, while Ministry of Rural Development (MRD) is responsible specifically for Rural Water Supply and Sanitation (RWSS) and MIME is responsible for supply of clean drinking water to provincial capitals and medium/ small towns, as well as of the regulation of the private sector involved in piped water systems.

Urban water supply business which MIME manages is defined as;

- 1) Possessing the water treatment facilities
- 2) Supplying clean water through piped water system
- 3) Charging the users the water cost

The urban areas are also defined as the areas having;

- 1) Population density is over 2,000 persons/ km<sup>2</sup>
- 2) Ratio of agricultural population is less than 50%
- 3) Population of the area is over 2,000 persons

In Phnom Penh, the Phnom Penh Water Supply Authority (PPWSA), a public enterprise, is responsible for providing water since 1996. The Siem Reap Water Supply Authority (SRWSA) supplies water in Siem Reap. The Department of Potable Water Supply (DPWS) of MIME is responsible for water supply through piped network for 16 provincial capitals (except Phnom Penh/Kandal and Siem Reap) and for approximately 60 medium and small towns. It is said, currently, that approximately 87 private licensees supply water on a commercial basis under the supervision of MIME-DPWS.

Department of Rural Water Supply (DRWS) and Department of Rural Health Care (DRHC) of the MRD are responsible for rural water supply for the smaller towns and villages with less than 1,000 households.

In Cambodia, as shown in Table IV-4-1, 36.2% of total households have source of drinking water within their premises in 2008.<sup>3</sup> Especially, this proportion is 29.4% in rural areas, while 67.4% in urban areas. The RGC has made efforts to improve access to safe water in urban and rural areas in collaboration with foreign donors, such as World Bank, ADB and JICA. In both urban and rural areas, one of the key issues is the poor operation and maintenance of water supply facilities. Because of the lack of government

Table IV-4-1 Distribution of Households by Location of Source of Drinking Water (2008)

Location of Source	Households		
	Total	Urban	Rural
Number	2,817,637	506,579	2,311,058
Total	100.0%	100.0%	100.0%
Within the premises	36.2%	67.4%	29.4%
Others	63.8%	32.6%	70.6%

Source: NIS (2008)

budget, however, it is difficult for the RGC to renew or improve these facilities. Therefore, RGC encourages the private sector to participate in water supply in various forms (e.g. lease, BOT/BOO concession). More and more private firms and NGOs are expected to participate actively in rural as well as urban water supply.

As of 2009, there were 111 urban centers that have access to drinking water from drinking water supply systems and it was estimated that about 51% of urban population in Cambodia have access to drinking water supplied from Water Supply Authorities of urban centers. In Phnom Penh, it is estimated that around 90% of the population could access to safe drinking water 24 hours a day.<sup>4</sup>

**IV-5 Aviation**

Currently, there are 11 airports in Cambodia. The regular flights have been available only at three airports, Phnom Penh International Airport (PPIA), Siem Reap International Airport (SRIA) and Sihanouk International Airport. The present situation of airports in Cambodia is summarized in Table IV-5-1. “Société Concessionnaire des 1’Aéroports (SCA)”, which is a private consortium of French “Vinci” (70%) and Malaysian-Cambodian “Muhibbah Masteron” (30%) was given the 25-year BOT concession of PPIA in 1995 and of SRIA and Sihanouk International Airport (“Kang Keng Airport” at the time) in 2001 and 2006 respectively. Cambodia Airport Management Services Ltd. (CAMS), 100% controlled by SCA since 2005, operates these three airports. All other airports are under management of the State Secretariat of Civil Aviation (SSCA) except Kampong Chhnang Airport. In addition, the construction project of a new airport in Siem Reap, called Angkor International Airport, is now under preparation by the investors group including South Korea’s Lees & AA Co., Ltd.

Non-stop international flights to 13 destinations in 10 countries/regions are currently being operated from the PPIA. From the SRIA, 18 international air routes are being operated as of December 2012.

“Cambodia Angkor Air Ltd (CAA)”, which was established on July 27, 2009 as a joint venture among Vietnam Airlines (49%), Cambodian Investment Company (26%) and the Royal Government of Cambodia (25%), opened the thrice-weekly scheduled flights between Siem Reap and Sihanoukville

Note 3 : National Institute of Statistics (NIS) (2009) *General Population Census of Cambodia 2008*

Note 4 : National Strategic Development Plan Update 2009-2013



by ATR-72 aircraft starting from 14 December 2011. The flight is scheduled to take 70 minutes. The airline also has an expansion plan of the fleet to 15 aircraft and launch of new routes to Japan, China, South Korea and throughout the ASEAN region in the next coming years.

Myanmar Air (MAI), the national flag carrier established in 1993, started operations to Siem Reap Int'l Airport in February 2011. In November 2011, it began to operate the route to Phnom Penh with a triangular flight "Yangon - Siem Reap - Phnom Penh". It currently operates each

twice-weekly flights to Phnom Penh and Siem Reap.

In early 2012, Tiger Airways of Singapore and Easter Jet of South Korea will start the operation to Cambodia as the 22<sup>nd</sup> and 23<sup>rd</sup> airline flying to Cambodia.

Table IV-5-2 shows the number of direct flights leaving Phnom Penh. Those flights connect Phnom Penh with 14 destinations in 11 countries. There are 18 international air routes from Siem Reap.

Table IV-5-1 Present Status of Airports in Cambodia

Airport	Runway (m) Surface/Ref. Code	ILS	Area (ha)	Owner/ Operator	Status	Remarks
<b>International Airports</b>						
Phnom Penh	3000x45/ Asphalt/ 4D	*	387	RGC/SCA	Open	ILS for RWY 23 only
Siem Reap	2550x45/ Asphalt/ 4C	*	197	RGC/SCA	Open	ILS for RWY 05 will be operated in 2009.
Sihanouk	2500x40/ Asphalt/ 4C		123.84	RGC/SCA	Open	Re-commissioned on 15 January 2007
<b>Domestic Airports</b>						
Kampong Chhnang	2400x45/ Concrete/ 4C		2011	RGC/Air Force	Closed	The Area include military land use
Battanbang	1600x34/ Bitumen/ 3C		128.68	RGC/SSCA	Open	-
Stung Treng	1300x20/ Laterite/ 3C		112.5	RGC/SSCA	Open	-
Ratanakiri	1300x30/ Laterite/ 3C		48.09	RGC/SSCA	Open	-
Koh Kong	1300x30/ Laterite/ 3C		125.66	RGC/SSCA	Open	-
Mondulkiri	1500x20/ Laterite/ 3C		36	RGC/SSCA	Closed	Closed temporarily since July 2007
Preah Vihear	1400x20/ Laterite/ 3C		150.98	RGC	Closed	-
Kratie	1180x20/ Laterite/ 3C		112.5	RGC	Closed	-

Note: ILS stands for Instrument Landing System.

Source: Infrastructure and Regional Integration Technical Working Group (2009)

Table IV-5-2 Departure Flights from Phnom Penh International Airport  
(Effective from 25 October 2012 – 24 March 2013)

Country/Region	Destination	Flight Frequency
China	Guangzhou-Beijing	1 daily x 1 airline company (Non-stop)
	Nanning	1 daily x 1 airline company (Non-stop)
	Shanghai	1 daily x 1 airline company (Non-stop)
Hong Kong	Hong Kong	2 daily x 1 airline company (Non-stop)
Malaysia	Kuala Lumpur	4 daily x 2 airline companies (Non-stop)
Singapore	Singapore	4 daily x 3 airline companies (Non-stop)
South Korea	Seoul - Incheon	2 daily x 2 airline companies (Non-stop)
Taiwan	Taipei	1 daily x 1 airline company (Non-stop)
Thailand	Bangkok	7 daily x 3 airline companies (Non-stop)
Laos	Vientiane	1 daily x 1 airline company (Non-stop)
Vietnam	Ho Chi Minh	3 daily x 2 airlines companies (Non-stop)
	Hanoi	1 daily x 1 airline company (1 stop)
Myanmar	Yangon	2 weekly flight x 1 airline company (Non-stop)
France	Paris	3 Weekly flight x 1 airline company (1 stop)

Source: Cambodia Airports Website (<http://www.cambodia-airports.com/>)

Table IV-5-3 Number of International and Domestic Flights (PPIA and SRIA)

	2005	2006	2007	2008	2009	2010
International Flight (PPIA)	12,9109	15,292	17,092	16,253	16,096	16,855
Domestic Flight (PPIA)	4,125	3,990	4,789	4,130	4,256	3,301
International Flight (SRIA)	12,657	14,660	16,924	15,431	13,287	15,354
Domestic Flight (SRIA)	4,266	4,197	5,088	4,551	4,960	5,093

Source: Cambodia Airports Website (<http://www.cambodia-airports.com/>)

Table IV-5-4 Number of Passengers (PPIA)

	2005	2006	2007	2008	2009	2010
Domestic Arrival	80,033	79,594	88,314	76,609	58,517	52,286
Domestic Departure	78,063	75,842	90,632	80,052	63,529	57,375
International Arrival	455,059	575,641	701,898	754,060	718,148	832,064
International Departure	468,590	591,190	717,580	781,149	747,792	774,689

Source: Cambodia Airports Website (<http://www.cambodia-airports.com/>)

Table IV-5-5 Number of Passengers (SRIA)

	2005	2006	2007	2008	2009	2010
Domestic Arrival	72,743	75,734	90,677	83,347	66,333	60,191
Domestic Departure	74,451	79,395	93,983	86,929	70,089	55,128
International Arrival	436,528	596,931	774,338	681,209	557,465	716,012
International Departure	454,396	608,328	773,430	680,335	561,279	732,968

Source: Cambodia Airports Website (<http://www.cambodia-airports.com/>)

As shown in Table IV-5-3, the number of flight using PPIA and SRIA reached its peak in 2007 and decreased in 2008 and 2009 affected by the world economic recession. However, it recovered in 2010 to almost same level as in 2007, since the tourism returned to normal in Siem Reap and the business demand has increased in Phnom Penh.

At PPIA, the growth of passenger traffic was disturbed by the sluggish economy of the world and the number of passengers considerable decreased in 2009. Such down trend was reversed in 2010 and the number of passengers increased by more than 8% over that of 2009 as shown in Table IV-5-4. As economy keeps expanding, the number of international arrival passengers at PPIA in the first 8 months of 2011 increased by 25% comparing with that of the same period in 2010.

As the tourism was also severely damaged by the world recession which began in 2008, the number of international passengers at SRIA sharply

dropped in two consecutive years from 2008. In 2010, as the economy recovered, the number of tourists visiting Angkor Wat started increasing and the international passenger traffic of SRIA reached at the almost same level of its peak year, 2007.

#### IV-6 Roads

Cambodia's road network currently extends approximately 52,500 km, consisting of 5,600 km of national roads and 6,600 km of provincial roads, which are under the responsibility of the Ministry of Public Works and Transport (MPWT), and approximately 40,300 km of tertiary roads for which the MRD is responsible. No divided expressway exists yet in Cambodia. Although many roads in Cambodia were severely damaged during the civil war, most of major roads have been improved under the assistance of international donors.

Table IV-6-1 Length of Road Network (as of 2012)

Road Classification	Length (Percentage)	No. of Bridge (Length)	Management Authority
1- digit national roads	2,258 km (4.3 %)	589 (17,643m)	MPWT
2- digit national roads	3,342 km (6.3%)	698 (15,710m)	
Provincial roads	6,607 km (12.6%)	904 (16,309m)	
Rural roads	40,379km (76.8%)	1,869 (26,559m)	MRD
Total Length	52,586km (100.0%)	4,060 (76,221m)	-

Note: The figures of MRD are as of July 2012. The figures of MPWT are as of 2012 for road and as of 2006 for bridge.

Source: MPWT

Table IV-6-2 International Roads in Cambodia

GMS Road No.	Asian Highway No.	ASEAN Highway No.	Cambodian Road No.	Route
R1 (Central Sub-corridor)	AH1	AH1	NR1, NR5	Poi Pet -Sisophon -Phnom Penh -Svay Rieng - Bavet
R6 (Inter-Corridor Link)	AH11	AH11	NR4, NR6, NR7	Sihanoukville -Phnom Penh - Kampong Cham - Stung Treng -Trapeng Kreal
R10 (Southern Coastal Sub-corridor)		AH123	NR48, NR3, NR4, NR33	Cham Yeam -Koh Kong -Sre Ambel -Veal Rinh -Kampot -Lork
R9 (Northern Sub-corridor)			NR66, NR7, NR78	Siem Reap –Talaborvath- O pongmoan- O Yadav Boder

Source: Infrastructure and Regional Integration Technical Working Group (2010)

Table IV-6-3 Major Road Improvement Projects in Cambodia

No.	Donor	Cost (\$ mil)	Length (km)	Section	Year		Fund
					Start	End	
1	Japan	80	56	Phnom Penh- Neak Loeung	2005	-	Grant
2	ADB	-	63	Kbal Thnal- Takeo	2001	-	Loan
3	China	71.5	109	Preak Ta Mak- Anlong Chrey	2007	2010	Loan
4	ADB	13	17	Kampong Trach - Kampot	2007	2010	Loan
5	China	57.8	157	Meanchey- Preah Vihear	2008	2011	
6	China	51.9	127	Snuol- Sen Monorom	2007	2010	Loan

Source: Infrastructure and Regional Integration Technical Working Group (2009)

Table IV-6-4 Major Bridge Constructions in Cambodia

Name of Bridge	Donor	Cost (\$ mil)	Length (km)	Location	Year		Fund
					Start	End	
Kizuna	Japan	57	1.3	Kampong Cham NR7	1996	2001	Grant
Chrouy Changvar	Japan	23	0.7	Phnom Penh NR6A	1992	1994	Grant
Neak Loeung	Japan	131	1.6	Kandal, Svay Rieng NR1	2010	2014	Grant
Preak Ta Mak	China	43.5	1.1	Prey Veng NR8 & NR6A	2007	2011	Loan
Preak Kdam	China	28.9	1	Phnom Penh NR5 & NR61	2007	2011	Loan
Kampong Bai	Korea	-	0.3	Kampot, as a part of NR3	2005	2007	Loan
Se Kong	China	-	-	Toeng Treng, as a part of NR7	2005	2008	Loan
Koh Kong	Private	7	-	Koh Kong, NR48	2001	-	BOT
New 2 <sup>nd</sup> Chrouy Changvar	China	90	-	Phnom Penh – NR6A	-	-	Loan
Prek Phnov	Private	42	1.543	Phnom Penh – NR6A	-	2010	BOT
Mekong River Bridge in Stung Treng	China	5	1,731	Stung Treng, as a part of NR9)	2012	2014	Loan
Koh Thom Bridge	China	25		Kandal Province	2012	2014	Loan

Source: MPWT



The current situation of the international roads, which link Cambodia with the neighboring countries, is shown in Table IV-6-2. National Roads No. 1 and 5 are a part of Asian Highway 1. National Roads No. 4, 6 and 7 are a part of ASEAN Highway 11. National Roads No. 48, 3 and 33 constitute a part of ASEAN Highway 123, and National Roads No. 66 and 78 constitute a part of the arterial highway of the Greater Mekong Sub-region (GMS). Japanese government and the RGC signed the Grant Agreement in October 2010 for constructing the Neak Loeung Bridge over Mekong River. It is expected to be an indispensable part of the Southern Economic Corridor and Asian Highway No.1. Currently the traffic on National Road No.1 is blocked by Mekong River and has to cross the river by ferry. Once the new bridge is completed in 2016, the travel time between Phnom Penh and Bavet at Vietnam border will be considerably reduced.

#### IV-7 Railways

The existing railway system in Cambodia consists of two lines: the 264 km Southern Line (SL) from Phnom Penh to Sihanoukville City and the 336 km Northern Line (NL) from Phnom Penh to Poipet on the Thai border. However, the last 48 km of the NL from Sisophon to Poipet was entirely missing. Current situation of railway facilities is shown in Table IV-7-1.

Table IV-7-1 Situation of Railway Facilities

Item	Northern Line (NL)	Southern Line (SL)
Length (km)	336 (including 48km missing line)	264km
Section	Phnom Penh - Kampong Chhnang - Pursat - Battambang - Sisophon - Poipet	Phnom Penh - Takeo - Kampot - Sihanoukville
Construction Year	1929-1942	1960-1969

Source: Infrastructure and Regional Integration Technical Working Group (2010)

Infrastructure of both lines was in poor condition due to the damages caused during the civil war, the trains operated at a speed less than 15-20 km/h. To rehabilitate the entire railway network and improve the operation, the Royal Government has concluded 30-year concession agreement with "Toll Holdings" of Australia in June 2009. ADB and AusAID agreed to fund US\$140m for the network and infrastructure upgrading work, which includes the line reinstatement of 48km missing line between Poipet and Sisophon and the construction of new inter-modal freight terminal on outskirts of Phnom Penh<sup>5</sup>. The rehabilitation work aims to upgrade the NL to take 20 tons of freight at maximum speed of 50 kilometer per hour and the SL to carry 15 tons of freight. Currently Toll holds 55% share and Royal Group of Cambodia has 45% in the railway concessionaire, Toll Royal Cambodia.

Following the conclusion of concession agreement, the Department of Railway was created under the supervision of Ministry of Public Works and Transportation by Sub-Decree #163 (RGC) of October 1, 2009, and the legal status of Royal Railway of Cambodia as a public enterprise was terminated as from November 15, 2009 by Sub-Decree # 164 of the same date.

As the rehabilitation work started, all the train operation on NL and SL was suspended from November 2009. On October 1, 2010, however, the rehabilitation work of railway section between Phnom Penh and Touk Meas, which locates at 118km from Phnom Penh and near Kampot, has been completed and currently a cargo train is being operated once or twice per week carrying cement from Kampot to Phnom Penh. The remaining section between Touk Meas and Sihanoukville is expected to be connected by the end of 2012 and the commercial operation in SL is expected to be resumed in the first half of 2013. Upon completion of

rehabilitation work of whole SL route, Toll Royal Cambodia expects to transport containers, construction materials, oil, coal and cement from Sihanoukville or Kampot to Phnom Penh. It is said that a train of 1-km long may be operated mainly for container transportation. In order to meet the requirements of the container transportation by railway, a new container handling yard is planned to be constructed between the Sihanoukville Port and Sihanoukville railway station.

Regarding NL, the rehabilitation work of a section between Phnom Penh and the separating point of NL and SL, which locates at 32km from Phnom Penh, has already been completed and a partial railway service has begun since April 2011. The reinstalling work of a section of 48-km "Missing Line" between Poipet and Sisophon on NL has also started in 2008. However, as the whole work has been suspended since July 2012 due to the problems of contractor, it is difficult to predict at this moment the reopening date of NL.

The feasibility study for the section of the missing link between Bat Deoung and Trapeang Sre or Lognign (railway connecting point between Cambodia and Vietnam) was completed and the feasibility report was also finalized in December 2010.

The Railway Cross Border Agreement between Cambodia and Vietnam was signed on November 4, 2008 and the same with Thailand is currently under discussion. The Minutes of Discussion for Railway Connecting Point has been signed between the Railway Department of MPWT of Cambodia and the State Railway of Thailand (SRT) on August 16, 2012.

The Study of Railway Master Plan for Cambodia is currently undertaken by KOICA and is expected to complete in June 2013.

#### IV-8 Sea Port

In Cambodia, there is only one deep seawater port in Preah Sihanouk Province. The Sihanoukville Autonomous Port (PAS) has been expanded steadily and it has now 12 berths equipped with modern cargo handling facilities. It has two channels, namely South Channel (Length 5.5km, Depth 8.4m, Width 80-100m) and North Channel (Length 1km, Depth 10m, Width 150-200m). The details of current situation of the Port are shown in the following tables. (Source: PAS brochure, April 2012)

Although the container cargo throughput volume of the Sihanoukville Port increased steadily until 2008, it sharply dropped in 2009 mainly because of the decrease of garment export to American and EU market being affected by the economic disorder started in 2008. General cargo throughput also decreased in 2009 due to the decrease in import of construction materials caused by the sluggish domestic real estate market. Container throughput returned to the growth track as the garment export started increasing in 2010. General cargo throughput also sharply increased in 2010 and surpassed the peak volume recorded in 2008. The import of construction materials to be used for the various large-scale development projects and factory construction by the investors surged throughout the year. In 2011, the container throughput further increased, while the general cargo remained at the same level as in 2010.

The construction of Sihanoukville Port Special Economic Zone (SPSEZ), which occupies 70ha of Port Authority's land adjoined to a container terminal of the Sihanoukville Autonomous Port, has been successfully completed by utilizing Japanese soft loan provided in October 2009. It was opened on May 1, 2012 and is now available for the investors to construct factories.

Note 5 : Source: <http://www.tollroyalrailway.com/>

Table IV-8-1 Berthing Capacity of Sihanoukville Port

Terminal	Length (m)	Depth (m)	Berths	Use
New Wharf	350	-9.0 (-10.50)	2	Medium size vessels
Container Terminal	400	-10.50 (-11.50)	3	Medium size vessels
General Cargo	290	-8.40	2	Inner berth of Old Jetty
Passenger Terminal	290	-8.40	2	Outer berth of Old Jetty
☆ The following jetties belong to the private companies.				
Sokimex	200	-10.00	1	Oil jetty
Pontoon	110	-6.00	1	Oil jetty
Stone Wharf	53	-4.50	1	Oil jetty
Tela	220	-7.10	1	Oil jetty

Table IV-8-2 Cargo Handling Facilities of Sihanoukville Port

Type	Capacity	Quantity (Unit)
Mobile Harbour Cranes	60t	2
Quay Gantry Cranes	30.5t	2
Rubber Tired Gantry Cranes	35.5t	7
Super Stackers	45t	8
Empty Stackers	7.5t	1
Trailers	20' – 40'	33
Shore Cranes	10t – 50t	9
Forklifts	3t – 25t	17
Trucks for General Cargo	10t – 20t	8

Table IV-8-3 Storage Facilities of Sihanoukville Port

Terminal	Size (m <sup>2</sup> )	Capacity	Quantity
Container Terminal (750m length)	139,000	2,724 (TEUs)	1
		10, 176 (TEUs)	
		370,406 (TEUs)	
Warehouse	36,000	60,000 tons	5 blocks
Reefer Container			54 socket

Table IV-8-4 Cargo Throughput of the Sihanoukville Port

	2007	2008	2009	2010	2011
Total cargo throughput (tons)	1,818,877	2,057,967	1,874,095	2,217,150	2,439,384
Container throughput (TEU)	253,271	258,775	207,861	222,928	237,941
General cargo throughput (tons)	193,572	291,114	241,494	374,801	372,554

Table IV-8-5 Current Ship Calling Status in Sihanoukville Port

Lines	Frequency	Rotation Ports
Maersk (8 calls/month)	2 calls/week	SGN-SHV-LZP-TPP-SIN-BTG-MNL-KAO-YAT-HKG-SGN-SIN-SHV-TPP-SIN
RCL (12calls/month)	3 calls/week	SIN-SHV-SGZ-SIN HKG-SHV-SGZ-HKG-(HPH-TXG-KEL) KUN-SHV-SGZ-SIN-KUN
SITC (Ben Line) (4 calls/month)	1 call/week	HCM-SHV-BKK-LZP-HCM-NSA-NBO-SGH-OSA-KOB-BUS-SGH-HKG-HCM
ITL (ACL) (4calls/month)	1call/week	SGZ-SHV-SIN-SGZ
APL (4calls/month)	1call/week	SIN-SHV-SIN
Cots (2 calls/month)	1 call/2 weeks	BKK-SHV-BKK-(LZP)
Total		9 calls/week

The ship calling frequency and rotation ports are shown in Table IV-8-5.

Beside, six offshore oil fields have being developed or are planned to be developed at offshore of Sihanoukville Port. A new multi-purpose terminal, which will consist of a supply base for those offshore oil fields and a handling area for bulky materials such as wood chip or coals, is now in the process of detailed design with assistance of Japan International Cooperation Agency.

Beside the Sihanoukville Autonomous Ports, there are other smaller ports such as Sre Ambel Port, Kampot Port and Oknha Mong Port. Among them, Oknha Mong Port is quite active for imports of smaller general cargo. Kampot Port is now under the expansion works. Kirisakor of Koh Kong has an expansion plan for sugar transportation. There are also the plans for developing new ports in Kirisakor of Koh Kong Province (deep seawater port), Steung Hav of Prea Sihanouk Province (International port) and Kep Province (tourist port).

#### IV-9 Inland Water Transportation

The Cambodian inland water network mainly consists of the Mekong River and its sub-streams, Tonle Sap River and Bassac River, of which total length is approximately 1,750km in the rainy season and may decrease to 580km in dry season when navigation is limited. The bends of the river prevents the passage of vessels more than 110 meters long. The Mekong's mainstream accounts for 30% of the total length, the Tonle Sap River 15%, the Bassac River 5%, and other tributaries 50%. Year-round navigation is possible through 580km.

Phnom Penh Autonomous Port locates at about 100 km from Kaam Samnar of the Cambodia-Vietnam border and about 332km by rive from the Cuu Tieu, an entrance mouth to the South China Sea. It provides one local terminal which is the base for distributing and collecting the goods to/from many provinces. The major ports along the inland water are as follows.

- Stung Treng Port (Stung Treng Province): on the mainstream of the Mekong 1280km up from Kratie Port
- Kratie Port (Kratie Province): on the mainstream of the Mekong 121km up from Kampong Cham Port
- Tonle Bet Port (Kampong Cham Province): on the mainstream of the Mekong 106km up from Phnom Penh
- Neak Loeang Port ( Prey Veng Province): on the mainstream of the Mekong 60km down from Phnom Penh Port
- Chong Khneas (Siem Reap Province) Port: on the Tonle Sap River 190km up from Phsar Krom Port
- Phsar Krom Port (Kampong Chunang): on the Tonle Sap River 100km up from Phnom Penh Port

In recent years, the inland waterways transport activities have decreased, except between Phnom Penh and Cai Mep of Vietnam, as a result of an increase in road transport. Transport by inland waterways vessels through the Mekong River and its tributaries would provide access to markets and other necessary services for those who live in rural areas. Maximum navigable vessel size in the Mekong River basin is shown in Table IV-9-1.

The Phnom Penh Autonomous Port accommodated 472 international

Table IV-9-1 Maximum Navigable Vessel Size in the Mekong River Basin

	Mekong Mainstream up to Phnom Penh	Tonle Sap, Phnom Penh to Siem Reap
Petroleum	Tanker barges 1,000 DWT/ Draught 4.0m	
Container	Barges 1,900 DWT (120TEU)/ Draught 3.8m	
General Cargo	Barges 1,500 DWT/ Draught 4.0m	
Tourism Cruise Vessels	50-65 passengers Draught 1.5m	50-65 passengers Draught 1.5m
Speedboats	25 passengers Shallow Draught	25 passengers Shallow Draught

Source: Infrastructure and Regional Integration Technical Working Group (2010)

Table IV-9-2 Current Situation of Phnom Penh Port

Channel	Berth			Other Facilities & Remarks
	Name	Structure	Length	
Maintenance Dredging (at Chaktomok ) Depth: 7m Width: 60m Length: 1,290m Volume: 159,648 Cube Meter	Port No.1			[Container Yards] 2 yards for laden containers, 1 yard for empty containers
	No.1	Jetty apron width 20m	Total 300m	
	No.2			
	No.3			
	Port No.2(for passengers)			1km downstream from Port No.1
	No.5b	pontoon	15x45	
	No.5c	Pontoon	15x45	
	Private Facilities			Between 4 and 13km upstream from Phnom Penh
	8 facilities for oil barges	Ship size from 600-1,000DWT		

Source: Infrastructure and Regional Integration Technical Working Group (2010)

vessels and barges, 885 tanker barges and 103 Cambodian vessels and barges in 2010 and handled 81,631 TEU of containers of in 2011. The current situation of Phnom Penh Port is shown in Table IV-9-2.

Phnom Penh Autonomous Port also handles the international container cargo. Following the commencement of operation of Cai Mep deepwater port in southern Vietnam in June 2009, some of the exporters in Phnom Penh area now tend to send cargoes through the Mekong River to Cai Mep Port, then to the global markets, particularly to Singapore and the USA, which is said to be cheaper and faster. To meet the increasing demand, Phnom Penh Port started on 9 March 2011 the construction of new container dock which will locate at 30km east of Phnom Penh, along Mekong River and the National Road No. 1 in Kien Svay District of Kandal Province. New container dock will have a space of 10 hectares, allows two 5,000-ton ships to anchor simultaneously and has an annual handling capacity of 120,000 TEUs. The project will be financed by Chinese government, constructed by Shanghai Construction Group and take 30 months to be completed.

## IV-10 Industrial Land

### Special Economic Zones (SEZs) as industrial land

In recent years, the industrial investment into the SEZ has been accelerated. While the number of companies or projects located in the SEZ was 36 in October 2009, it jumped up to 94 in October 2011 and more projects which plan to locate in the SEZ are waiting for the approval of QIP registration by CSEZB.

The Cambodian government has so far officially approved 22 SEZs. Among them, fourteen SEZs have been authorized by the Sub-Decree and eight other SEZs already received the licenses from the CSEZB. The locations of each SEZ are shown in the map below.

Among the approved SEZs, 21 are privately owned and operated and one is owned by the state company. As of November 2011, 94 investors locate in 8 SEZs and, among all the SEZs, the investors' favorable locations are Phnom Penh, Svay Rieng and Preah Sihanouk as shown in Table IV-10-1.

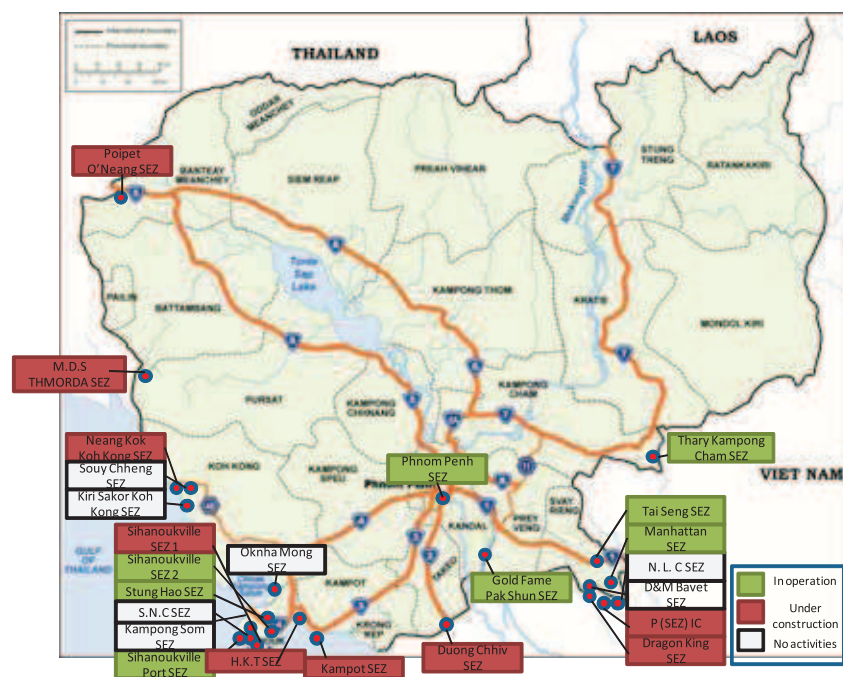


Figure IV-10-1 Locations of SEZs

Table IV-10-1 Cambodia's SEZ as of the end of October 2011

<b>1. Neang Kok Koh Kong SEZ</b>	
1) Location	Neang Kok Village, Pakkhlong Commune, Mundul Seyma Destrict, Koh Kong Province - 5km from Thai border
2) Land area	335.43 ha.
3) Project Implementation	Entrance, road, power grid from Thailand and water: Completed Fencing, administration building, waste water treatment: To be developed
4) Zone Investor	1-Camko Motor Company Ltd. (Vehicle assembly and spare part) 2-Yazaki Cambodia Products Co., Ltd. (Wire harness) 3-KKN Apparel Co., Ltd. (Garment) 4-MIKASA Sports ( Cambodia) Co., Ltd. (Sporting goods)
<b>2. Suoy Chheng SEZ</b>	
1) Location	Neang Kok Village, Pakkhlong Commune, Mundul Seyma Destrict, Koh Kong Province
2) Land Area	100 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>3. S.N.C SEZ</b>	
1) Location	Sangkat Bet Trang, Khan Prey Nob , Preah Sihanouk Province
2) Land area	150 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>4. Stung Hav SEZ</b>	
1) Location	Sangkat O Tres, Stung Hav District, Preah Sihanouk Province
2) Land area	196 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>5. N.L.C SEZ</b>	
1) Location	Phum Prey Phdao abd Phum Thlok, Khum Chrok Mtes, Srok Svay Teab, Sray Rieng Province
2) Land area	105 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>6. Manhattan (Svay Reing) SEZ</b>	
1) Location	Bavet Commune, Chantrea District, Svay Rieng Province - 6km from Vietnam border on National Road No.1
2) Land area	180 ha. - 1 <sup>st</sup> phase: 20 ha (Commercial zone) - 2 <sup>nd</sup> phase: 60 ha (Manufacturing zone: completed) - 3 <sup>rd</sup> phase: 100 ha
3) Project Implementation	Fencing, entrance, administration building, power grid from Viet Nam, water for the first phase: Completed Waste water treatment: To be developed

4) Zone Investor	<ul style="list-style-type: none"> <li>1- Best Way Industry Co., Ltd. (Bicycle)</li> <li>2- S.Y.G. Steel International Co., Ltd. (Bold-Nut)</li> <li>3- Kingmaker Footwear Co., Ltd. (Footwear)</li> <li>4- Sheico (Cambodia) Co., Ltd. (Neoprene wet suits)</li> <li>5- Forest Packing (Cambodia) Co., Ltd. (Packing bag)</li> <li>6- Pique Garment Co., Ltd. (Garment)</li> <li>7- Leegrow Plastic Packaging Co., Ltd. (Packaging bag)</li> <li>8- Ampac Packaging (Cambodia) Ltd. (Packaging products)</li> <li>9- Eastern Industrial Enterprise Inc. (Garment and textile)</li> <li>10- Visca Plastics Joint Stock Company (Plastic)</li> <li>11- Angkor Spring Co., Ltd. (Mattress products)</li> <li>12- Kaoway Sports Ltd. (Sport Shoes)</li> <li>13- Morofuji (Cambodia) Co., Ltd. (Bags and package products)</li> <li>14- Top Sports Textile Ltd. (Textile and garment)</li> <li>15- Wally Packaging (Cambodia) Co., Ltd. (Packing bags)</li> <li>16- Elite (Cambodia) Co., Ltd. (Garment)</li> <li>17- Front Packaging (Cambodia) Ltd. (Packaging products)</li> <li>18- Seed Tech Industrial Co., Ltd. (Bicycle)</li> <li>19- Randy Crafts Co., Ltd. (Gifts products)</li> <li>20- Long Bright Electric Enterprise Co., Ltd. (Light string)</li> <li>21- J F Industrial (Cambodia) Co., Ltd. (Umbrella)</li> <li>22- Felecity Garment (Cambodia) Corporation Ltd. (Garment)</li> <li>23- San Feng (Cambodia) Company Limited (Blinds and window covering)</li> <li>24- Xia Fang Hanger (Cambodia) Co., Ltd. (Hanger)</li> <li>25- Angkor Shine Development (Cambodia) Co., Ltd. (Garment and hanger)</li> <li>26- Powerjet Home Product (Cambodia) Company Limited. (Household and car cleaning tools)</li> <li>27- Qingdao Yiqing (Cambodia) Co., Ltd. (Clock and craft)</li> </ul>
<b>7. Poi Pet O'Neang SEZ</b>	
1) Location	Poipet Commune and Nimit Commune, O' Chhrov District, Banteay Meanchey Province
2) Land area	467 ha.
3) Project Implementation	Infrastructure Developing: Fencing, Entrance gate, Electric pole
4) Zone Investor	<ul style="list-style-type: none"> <li>1- Campack Co., Ltd. (Jewelry Packing)</li> <li>2- Wireform Precision Parts Co., Ltd. (Plastics)</li> <li>3- Simmers Inter Co., Ltd. (Jewelry Product)</li> <li>4- ML Intimate Apparel (Cambodia) Co., Ltd. (Garment accessories)</li> <li>5- Hi-Tech Apparel (Cambodia) Co., Ltd. (Garment)</li> </ul>
<b>8. Doung Chhiv Phnom Den SEZ</b>	
1) Location	Kiri Vong District, Takeo Province
2) Land area	79 ha.
3) Project Implementation	Infrastructure Developing: Landfill and fencing.
4) Zone Investor	None
<b>9. Phnom Penh SEZ</b>	
1) Location	Khan Dangkao, Phnom Penh and Ang Snuol District, Kandal Province (18km from Phnom Penh)
2) Land area	<p>360 ha.</p> <ul style="list-style-type: none"> <li>- 1<sup>st</sup> phase: 141 ha (Completed)</li> <li>- 2<sup>nd</sup> phase: 162 ha (Construction started from January 2011)</li> <li>- 3<sup>rd</sup> phase: 57ha (Living area)</li> </ul>
3) Project Implementation	Fencing, roads, administrative building, entrance, electricity, water, waste water treatment and telecommunication system: Completed.



<p>4) Zone Investor</p>	<ol style="list-style-type: none"> <li>1- Navy Water Production Co., Ltd. (Drinking water)</li> <li>2- Bok Seng PPSEZ Dry Port Co., Ltd. ( Dry port)</li> <li>3- Redial Industrial Co., Ltd. (Plastic)</li> <li>4- Civil (CP) Construction Product Ltd. ( Pole)</li> <li>5- Tiger Wing Co., Ltd. ( Footwear)</li> <li>6- Evergreen Industrial Co., Ltd. (Garment)</li> <li>7- Yamaha Motor Cambodia Co., Ltd. ( Motorcycle assembly, accessories and spare parts )</li> <li>8- Cambodia Success Industries Co., Ltd. (Steel processing for construction material)</li> <li>9- Agricom (Cambodia) Co., Ltd. (Sugar packaging)</li> <li>10- Cambox Private Limited. (Plastic)</li> <li>11- Ji-Xiang Co., Ltd. (Cartons and papers processing)</li> <li>12- Colben Energy (Cambodia) PPSEZ Ltd. (Power Plant)</li> <li>13- Yi Xiang Co., Ltd. (Plastic)</li> <li>14- Ajinomoto (Cambodia) Co., Ltd. (Seasoning and food processing)</li> <li>15- Sin Chn Hong (Cambodia) Plastics Industry Co., Ltd. (Plastic)</li> <li>16- Clean Circle Co., Ltd. (Leather shoes)</li> <li>17- Cambodian Food Processing and Distribution Co., Ltd. (Food processing)</li> <li>18- Sichuan New Hope Agribusiness (Cambodia) Co., Ltd. (Animal feed)</li> <li>19- MKK Co., Ltd. (Cigarette and cigar)</li> <li>20- Liwayway (Cambodia) Food Industries Co., Ltd. (Food Processing)</li> <li>21- Haru Phnom Penh Comic Center Co., Ltd. (Comic book assembly and authoring)</li> <li>22- Dishells (Cambodia) Ltd. (Heat insulation and its products)</li> <li>23- Proceeding (Phnom Penh) Co., Ltd. (Japanese traditional clothes)</li> <li>24- FST PP Co., Ltd. (Japanese traditional clothes)</li> <li>25- Shin Feng Paper Co., Ltd. (Carton box and paper processing)</li> <li>26- Atlas Ice (Cambodia) Co., Ltd. (Ice manufacturing)</li> <li>27- Thibidi (Cambodia) Co., Ltd. (Electrical equipment)</li> <li>28- Minebea (Cambodia) Co., Ltd. (Small-size motor)</li> <li>29- O and M (Cambodia) Co., Ltd. (Leather products)</li> <li>30- Combi (Cambodia) Co., Ltd. (Baby goods and toy)</li> <li>31- Marunix (Cambodia) Co., Ltd. (Wire harness assembly)</li> <li>32- Sumi (Cambodia) Wiring Systems Co., Ltd. (Wiring Harness)</li> <li>33- Kyowaseikan (Cambodia) Co., Ltd. (Packaging materials)</li> <li>34- Sunhsin Thread and String (Cambodia) Co., Ltd. (Shoulder pads)</li> <li>35- Zion Label and Printing Co., Ltd. (Labels)</li> <li>36- Fontz Power Co., Ltd. (Garment and bags)</li> <li>37- KLB Bio-Energy Investment (Cambodia) Co., Ltd (Briquette)</li> <li>38- Japan Rocks S.E.A (Phnom Penh) Co., Ltd. (Garment)</li> <li>39- Soon-West (Cambodia) Co., Ltd. (Electric parts)</li> <li>40- Medipro (Cambodia) Co., Ltd. (Medical device and sterilization)</li> <li>41- Weibo EIC Garment Manufacturing (CAMBODIA) Co., Ltd (Garment)</li> <li>42- Weibo Best Production (Cambodia) Co., Ltd. (Garment)</li> <li>43- Mega Labels and Strikers (Cambodia) Co., Ltd. (Labels and strikers)</li> <li>44- Yamato Konpo International (Cambodia) Co., Ltd. (Packaging materials)</li> <li>45- Jia Long Plastic Porducts Co., Ltd. (Plastics)</li> <li>46- Marusan Plastic (Phnom Penh) Co., Ltd. (Automobile parts)</li> <li>47- KEZA (Cambodia) Limited. (Elastic bands)</li> <li>48- Taica (Cambodia) Corporation (Plastics)</li> <li>49- Taiwa Seiki (Cambodia) Corporation (Rice mill)</li> <li>50- CH Steel Wire Industries (Cambodia) Co., Ltd. (Steel wire for construction)</li> <li>51- Footmark (Cambodia) Co., Ltd. (Sportswear and sport equipment)</li> <li>52- Meikodo (Cambodia) Co., Ltd. (Pin product)</li> <li>53- G.S.Electech (Cambodia) Inc. (Wire harness)</li> </ol>
<p><b>10.Kampot SEZ</b></p>	
<p>1) Location</p>	<p>Koh Toch commune, Kampot district, Kampot Province</p>
<p>2) Land area</p>	<p>145 ha.</p>
<p>3) Project Implementation</p>	<p>Infrastructure Developing: Land and building Kampot seaport.</p>
<p>4) Zone Investor</p>	<p>1- Kampot Electricity Supply Co., Ltd. (Power plant of 270 MW by Coal fired)</p>

<b>11. Sihanoukville SEZ 1</b>	
1) Location	Stung Hav District, Preah Sihanouk Province
2) Land area	178 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	1- Cambodian Energy Limited (To build, operate and own 100 MW coal-fired power generation plant) 2- C.I.I.D.G Erdos Hongjun Electric Power Co., Ltd. (Power plant of 3x135 MW by coal-fire)
<b>12. Tai Seng Bavet SEZ</b>	
1) Location	Bavet District, Svay Rieng Province - 7km from Vietnam border on National Road No.11
2) Land area	125 ha. - Main phase: 77 ha. - Sub phase: 48 ha. (5km from the main phase site toward Phnom Penh)
3) Project Implementation	Entrance, administration buildings, road, power grid from Viet Nam and water: Completed Fencing and waste water treatment: To be developed
4) Zone Investor	1- Atlantic Cycle Co., Ltd. (Bicycle) 2- La More (Cambodia) Ltd. (Footwear) 3- DK Inc. (Garment) 4- Yorks (Cambodia) Co., Ltd. (Gloves) 5- Smart Tech (Cambodia) Co., Ltd. (Bicycle) 6- A and J (Cambodia) Co., Ltd. (Bicycle) 7- Swany (Cambodia) Corporation (Gloves) 8- Helsa South East Asia Co., Ltd. (Shoulder Pads) 9- Towa (Cambodia) Co., Ltd. (Men's Suits) 10- Nakayama Cambodia Co., Ltd. (Baby underwear) 11- Ronchester Inc (Garment) 12- ATX Industrial (Cambodia) Co/, Ltd. (Footwear, Sports leisure and related components) 13- Jiangsu Likang (Cambodia) Co., Ltd. (Medical products) 14- Japana (Cambodia) Co, Ltd. (Sport wear and gloves) 15- Xinsheng Plastic Pack (Cambodia) Co., Ltd. (Packaging products) 16- Tokyo Parts Industrial (Cambodia) Co., Ltd. (Coils and transformers) 17- La Peluche Couture Co., Ltd. (Stuffed Toys, Baby Sewing Goods and Sewing Bags) 18- Fopack (Cambodia) Enterprise Corporation (Plastics)
<b>13. Oknha Mong SEZ</b>	
1) Location	Srea Ambel District, Koh Kong Province
2) Land area	100 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>14. Goldfame Pak Shun SEZ</b>	
1) Location	Sa Ang District, Kandal Province
2) Land area	80 ha.
3) Project Implementation	Infrastructure Development: Fencing
4) Zone Investor	1- Gold Dragon Printing & Carton Boxes Factory Co., Ltd. (Carton, Printing plastic label, Knitting) 2- Kingway Manufacturing Limited (Garment) 3- Good Ray Development Limited (Garment)
<b>15. Thary Kampong Cham SEZ</b>	
1) Location	Da commune, Memot District, Kampong Cham Province
2) Land area	142.14 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>16. Sihanoukville SEZ 2</b>	
1) Location	Pou Thoug Village, Betrang Commune and Smach deang Village, Ream Commune, Prey Nop District, Preah Sihanouk Province - 12km from Sihanoukville Port
2) Land area	1,688 ha.
3) Project Implementation	Infrastructure Developing: internal roads, the administrative building, entrance, electricity, and telecommunication system: Completed Building fence, water and waste water treatment: To be developed.

4) Zone Investor	1- Nanguo Garment co., Ltd (Garment) 2- Hongdou International Garment Co., Ltd. (Garment) 3- Qianlima Vehicle Co., Ltd. (Vehicle assembling) 4- Taihua Plastic Products Co., Ltd. (Plastics) 5- Huang Jia Arts and Crafts Co., Ltd. (Arts and crafts candle) 6- Wealth (Cambodia) Steel Industry Engineering Co., Ltd. (Steel processing for construction material) 7- Horseware Products Cambodia Co., Ltd. (Horse ware products) 8- Zhong Zheng (Cambodia) Co., Ltd. (Material for construction) 9- Keptop Sporting Goods (Cambodia) Co., Ltd. (Bags) 10- Brilliant Shoes Factory Co., Ltd. (Shoes) 11- Prosource Electronics (Cambodia) Co., Ltd. (Household appliances) 12- Wan Hai Hanger (Cambodia) Co., Ltd. (Founded hanger) 13- Continental Cycles Cam Co., Ltd. (Bicycles) 14- Galey Global (Cambodia) Co., Ltd. (Garment) 15- Oufeiya Leather (Cambodia) Co., Ltd. (Leather Products) 16- Asle Electronic (Cambodia) Co., Ltd. (Electronics parts) 17- Shandong Forest Wood (Cambodia) Co., Ltd. (Floor and plywood) 18- Izumi (Cambodia) Co., Ltd. (TV frame and electric parts) 19- Rebecca Hair Products (Cambodia) Co., Ltd. (Hair Products) 20- Cambodian Gateway Underwear Co., Ltd. (Underwear Garments) 21- Sure Success (Cambodia) Industrial Co., Ltd. (Lever arch & ring mechanism) 22- Clear Water Leather Supply Co., Ltd. (Sofa cover of leather) 23- Happy Leather (Cambodia) Co., Ltd. (Leather products) 24- J.D.Y Pharm Co., Ltd. (Bio-Tech pharmaceuticals ) 25- Janda (Cambodia) Garments Mfg Co., Ltd (Garment)
<b>17- D&amp;M Bavet SEZ</b>	
1) Location	Bavet commune, Chantrea District, Svay Rieng Province
2) Land area	117.95 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>18- Kiri Sakor Koh Kong SEZ</b>	
1) Location	Khum Prek Kasach, Srock Kirisakor, Koh Kong Province
2) Land area	1,750 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>19. Sihanoukville Port SEZ</b>	
1) Location	Tomnop Rolok Area, Sangkat Lek1 and Lek3, Sihanoukville City, Preah Sihanouk Province - Adjoining Sihanoukville Port
2) Land area	70 ha.
3) Project Implementation	Fencing, Entrance, roads, administration buildings, electricity and water distribution system, waste water treatment, telecommunication lines, workers dormitories, apartments: Whole construction completed in early 2012
4) Zone Investor	1- Ojitex Harta Packaging (Sihanoukville) Limited (Carton box)
<b>20. Kampong Saom SEZ</b>	
1) Location	Village 4, Ortres Commune, Stung Hav District, Preah Sihanouk Province
2) Land area	255 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>21. P (SEZ) I C</b>	
1) Location	Salatean and Preytob Villages, Chhrokmates Commune, Svayteab District, Svay Rieng Province.
2) Land area	107.55 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>22. MDS THMORDA SEZ</b>	
1) Location	Khum Thmorda, Srock Veal Veng, Pursat Province
2) Land area	2,265 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None

<b>23. Kandal S.E.Z</b>	
1) Location	Puk Rouesey and Prek Om Pel Commune, Khsach Kandal District, Kandal Province
2) Land area	105 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>24. H.K.T SEZ</b>	
1) Location	Prek Torl and Terk Tlar Commune, Prey Nub District, Preah Sihanouk Province
2) Land area	345.20 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None
<b>25. Dragon King SEZ</b>	
1) Location	Road No.1, Ang Sela Village, Prey Angkunh Commune, Bavet City, Svay Rieng Province
2) Land area	106.5 ha.
3) Project Implementation	Infrastructure Developing
4) Zone Investor	None

Source: Project Implementation Sheets prepared by the CSEB

#### **Investment location outside of the SEZs**

The investment projects locate in various areas of Cambodia according to the nature of projects. In any case, the investment projects tend to accumulate along the main national roads. Provinces along the single-digit national roads are summarized as follows.

- National Road No.1: Kandal and Svay Rieng
- National Road No.3: Kandal and Kampot
- National Road No.4: Kampong Speu, Koh Kong and Preah Sihanouk
- National Road No.5: Kampong Chhunang, Pusat and Battambang
- National Road No.6: Banteay Meanchey, Siem Riap
- National Road No.7: Kampong Cham