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Disclosing recent territory-lift and rural development contributions of Cambodian large-scale land acquisitions

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Abstract

Large-scale land acquisitions (LSLAs) now represent a global phenomenon, yet Cambodia has become a real hotspot for such investments in the last decade. The commercial and investable characteristics of land have been boosted by a new land legal framework and a series of further laws and decrees promulgated by the Cambodian government since the early 2000s. Authorities have made economic land concessions (ELCs) a key instrument of agricultural development strategy with the argument that it will contribute to poverty reduction and rural development. Despite a recent moratorium on new land investments, granted concessions already cover 25 % of the national territory. The dynamics of this recent trend that has reshaped the use of land raises the following questions: Who are the key players? Where have these land concessions been granted? In what contexts have these land acquisitions occurred? Based on a national database with spatial references built from different sources of information, the descriptive analysis confirmed the omnipresence of national investors but also regional stakeholders, such as China and Vietnam. They represent key players in the Cambodian land economic concessions arena both in size and in number of concessions granted. Moreover the forestry subsector is the main sector of investments, largely exceeding the agricultural one. The main recent land deals are concentrated in clusters in the North and in the North-East of Cambodia. Additional aspects of the context of Cambodian land investments were then investigated by analysing the national data set in conjunction with several attributes such as accessibility, poverty incidence and land cover. The results of this spatial contextual analysis of Cambodian ELCs contrasts with the official discourse and common belief that land investments are mainly led by international companies that create jobs in targeted remote and poor areas in the countryside.

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1 Introduction

Large-scale land acquisitions (LSLAs) have become a global issue, though they concern only about fifteen countries in the world mostly in Sub-Saharan Africa and in Southeast Asia (Polack, 2012; Cotula, 2012). Governments of the concerned countries are often considered weak and not accountable for the people. Policies and laws were passed to support this process and discourses about the related benefits of land investments started to surface. Cambodia is at the forefront of this phenomenon and has experienced an unprecedented rush for land during the last decade.

This keen interest in land was promoted by the Royal Government of Cambodia (RGC) and was part of the economic development policies of Cambodia for several years. A new legal framework was adopted regarding land investment in 2001 which opened the way for the intensification of land use (RGC, 2001). Additional decrees have reinforced this trend towards private land investments (RGC, 2005; RGC, 2008). Private investments and land concessions are also mentioned in official development strategic documents and policies (RGC, 2015; RGC, 2014). These land concessions are also considered as being potentially beneficial to rural development, poverty reduction, increasing jobs and providing incomes from land use fee taxes. Yet, little reliable and transparent information is available from government bodies regarding these lands investments and their granting process. At the same time, they have also triggered a lot of criticisms in many parts of the country and abroad for the numerous impacts they have on small landholders and on the environment (Subedi, 2014; Subedi, 2012; Adhoc, 2013, Polack, 2012).

The article aims at analysing LSLAs granted in Cambodia in terms of commodities concerned and nationalities involved and try to answer the following questions: Who are the key players among LSLAs granted in Cambodia? Where have these land concessions been granted? What are the main subsectors and commodities concerned? Moreover, it also intends to analyse the geographical contexts in which LSLAs were granted and relates them to some of the expected benefits of land concessions put forward by the government. LSLAs are therefore overlaid with other georeferenced datasets such as poverty incidence, accessibility and land cover.

1.1 The emergence of the land concessions system in Cambodia

Development of the existing legal framework

The RGC has promoted large scale investment in agriculture and agro-industrial crops in Cambodia through the granting of Economic Land Concessions (ELCs), as part of its strategy focusing on economic growth in the agricultural sector. In 2001, the new land law was adopted, and the possibility to lease state private land for large scale investments up to 99 years was highlighted. A private company can lease land, up to 10,000 hectares, granted as an ELC. All granted companies are required to pay a fixed economic land concession fee between 0-10 USD a year per hectare, and according to production. ELCs should also start within 12 months after being granted otherwise they are at the risk of being cancelled (RGC, 2001). The regulations about the economic land concessions were then specified in the Sub-decree No. 146 on Economic Land Concessions in 2005, determining the procedures, mechanisms and other arrangements for granting state private land as ELC (RGC, 2005; Sperfeldt et al., 2012).

It is possible to distinguish three periods in the recent development of land concession policy in Cambodia (Sperfeldt et al., 2012). The first period expands from the first land law promulgated in 1992 and the 1993 Constitution, until the proclamation of the 2001 land law. This period was characterized by a series of policies aiming at encouraging private investment through, among other initiatives, the granting of state land mostly for forest concessions, but also agricultural concessions at the end of this period. Nevertheless, the 1992 land law did not manage to frame and regulate the

granting of land concessions (Sperfeldt et al., 2012) and outside the law land concessions granting took place (SRSG, 2004). During the second period that started with the 2001 land law, a new legal framework was put in place without all the regulations and mechanisms to enforce the law and the management of land concessions. Finally, the third period spanned from the 2005 Sub-Decree on ELC's and the 2006 institutional mechanism for the new land concessions policies until 2012. During this period, after the new policy framework related to land concessions was adopted, the granting of ELCs happened at a fast pace. On a very large scale, land was granted in Cambodia to both domestic and foreign investors for a very long term, especially during 2010 and 2011 (Messerli et al., 2015). The year 2012 saw a major change related to land concessions: the Directive 001 (Order 01BB) issued in May 2012 by the Prime Minister (RGC, 2012). It instituted a moratorium on the granting of new ELCs and called for a review of all existing land concessions to check their compliance with existing regulations (Adhoc, 2013). In June 2012, a National campaign was launched; it aimed at implementing Order 01 by legalizing unclear land occupation around ELCs and issuing land titles to existing land occupants who are using and cultivating land. Land targeted can be diverted into three categories: ELCs, forest concessions or confiscated land in the forest cover (Im Chhun Lim, 2012). It supported and enforced the "leopard-skin" policy of the government, which aims to exclude inhabited areas from the concessions and mitigate the encroachment on the land of farmers and communities (Adhoc, 2013).

Current ELCs situation (in terms of figures)

Currently, it is very difficult to estimate the exact number of land concessions in Cambodia as the figures differ according the source considered (Adhoc, 2014; Sperfeldt et al., 2012). Information from the MAFF website[1] indicates that, until June 2012, 118 companies were granted ELCs for a total land area of 1,204,750 ha. Nevertheless, these figures are known not to be updated and underestimate the reality (Adhoc, 2013; Subedi, 2012). Among other sources, Open Development Cambodia[2] mentioned at least 191 concessions and a total area of 1,483,026 ha for which they found official legal documentation from Government sources allowing them to identify four elements: the company name, the location, the GPS coordinates or map and the purpose. Licadho listed about 272 ELCs for a total land area of 2,141,146 ha[3] and Adhoc reported about 225 companies which were granted a total land area under ELCs of 2,657,470 ha (Adhoc, 2014; Adhoc, 2013). However, government officials reject these other ELCs counts.

Despite this diversity of sources, it is possible to highlight that a large number of private companies have been granted private state land for agricultural and agro-industrial crops such as rubber plantation, other tree plantations (trincomali, acacia), sugar cane and cassava. Domestic investors account for a large proportion of land deals and among foreign investors; the neighbouring countries of China and Vietnam are the most important, both in terms of number and land area granted, mostly for rubber plantations (Messerli et al., 2015; Schönweger et al., 2014). The predominance of domestic investors was already highlighted (Polack, 2012; Deininger et al., 2012) Moreover, it should be pointed out that even if the majority of ELCs are held by Cambodian individuals or companies, ownership structures are sometimes difficult to determine. It is therefore difficult to know if some of these national owners of concessions are in partnership with foreign investors as very little information is available on joint-ventures (Sperfeldt et al, 2012). In spite of the existence of several databases on ELCs and the obligation of the concessionaries to actually develop the foreseen agro-industrial project, the level of implementation remains a grey zone as no clear information is available. This raises the

[1] http://www.elc.maff.gov.kh/, consulted in March 2015
[2] http://www.opendevelopmentcambodia.net/maps/downloads/page/2/, consulted in March 2015
[3] http://www.licadho-cambodia.org/land_concessions/, consulted in April 2015

question of whether they only want to log the granted areas (SRSG, 2007). In this case, ELCs could serve as pretext for logging. The low lease fee is considered as not being enough to push the concessionaries to implement their project (Löhr, 2011).

Finally, it is worth noting that even if social land concessions, allocating land to landless people have been put forward in different policies (RGC, 2003), ELCs remain much more important in terms of area granted during the last ten years (Adhoc, 2014; Sperfeldt et al., 2012).

1.2 Expected benefits of ELCS

As part of their strategy to promote land investments, the RGC expects benefits from ELCs and their purposes are detailed in the related Sub-Decree (RGC, 2005 - Article 3; Sperfeldt et al., 2012). It encompasses:

- *to develop intensive agricultural and agro-industrial activities;*
- *to develop the land in an appropriate manner based on the land use plan*
- *to increase employment in rural areas (within a framework of intensification and diversification of livelihood opportunities, and a natural resource management based on appropriate ecological system);*
- *to encourage both small and large investments in ELCs projects*
- *to generate state revenues through land use fees, taxation.*

The evaluation criteria for ELCs projects also include similar elements such as increasing agricultural production, increasing employment, the promotion of the living standards of the people, linkages between social and economic land concessions and the processing of raw agricultural products (RGC, 2005 - Article 5 and 14). Additional benefits from land concessions also involve the development of rural infrastructures and a contribution to economic growth. This last contribution is foreseen by the RGC through the promotion of the agricultural sector. Both the National Strategic Development Plan (NSDP 2014-18) and the Agricultural Sector Strategic Development Plan (ASSDP 2014-18) (RGC, 2015; RGC, 2014) consider the promotion of this essential sector through a focus on modernisation using technological packages, commercialisation towards exported market and diversification mainly to high value products.

This set of ambitious advantages foreseen contrasts with the reality of the benefits both in terms of economic growth and rural development in the regions concerned and do not reach the expectations. Despite the existence of a land use fee per hectare for each ELC, the foreseen amounts are considered too low to create an economic pressure to use the land (Löhr, 2011) and the state revenues, through taxation and lease fee of ELCs, were estimated to be quite low (Sperfeldt et al., 2012; SRSG, 2007). According to a recent report issued in April 2015 by the Ministry of Economy and Finance, the Royal Government of Cambodia earned about 80 million US dollars from leasing ELCs and forests to private companies over the last three years[4] which is viewed as quite low considering the total area allocated. Some concessionaries are not paying their fee and there is little evidence that this revenue has been reinvested by the Government in the development of concessions areas (Subedi, 2012). Lower than expected rural employment opportunities, lower than foreseen physical investment or infrastructure development have been also highlighted (Deininger et al., 2012; Mirza et al., 2015). The contribution of ELCs to the rural development and poverty reduction is also questionable. Globally, the increase of agricultural productivity has been recognised as one of the most important factor of poverty reduction during the last four decades. Growth in the agricultural sector resulted in significant poverty reduction in Southeast Asian countries which was not matched with manufacturing growth (Warr, 2001). Even if agriculture growth allows an increase of the incomes of the poorest, the importance of the inclusive

[4] Phnom Penh Post, *ELCs earning underwhelm*, 21 April 2015

characteristic of the business model including smallholder structures is also stressed. There are increasing evidences that farm size is inversely related to yield, i.e. small farms being more efficient than large farms (Ngo & Chan, 2010). This also questions the opportunity cost of ELCs compared to alternatives aiming at a better access to resources for local household families (De Schutter, 2011). Poverty in Cambodia remains predominant in rural areas where agriculture is central to the livelihoods of people and the main job provider. Overall poverty was reduced following an increase of the rice price, the improvement of rice production, better rural wages and the improvement of non-farm incomes (WB, 2014).

1.3 Impacts, criticisms and consequences on smallholders

The current impacts of ELCs for small landholders are serious and numerous and raised a growing criticisms. These include human rights issues, environmental destruction, land dispossession, forced evictions, displacements, loss of access to natural resources and changes in livelihood.

In terms of human rights, several elements can be highlighted: the lack of consultation with local communities when the land is granted which contributes to their marginalization, and conflicts with both companies and local authorities; the difficulty of registering indigenous peoples as legal entities which would allow them to preserve their culture, language and traditional agricultural practices, and apply for collective land title; encroachments on areas of cultural and spiritual significance; forced eviction, displacement and relocation of communities; militarization of land concessions, contributing to intimidation and violence by armed security guards; and lack of effective remedy for affected communities. When eviction happens and people are resettled from their homes and farm lands, relocation sites are often not well prepared for the people with clean water, sanitation facilities, health and education services and offer few opportunities to find or sustain employment or income generation (Subedi, 2014; 2012)

Despite existing policies, plans and recent Government's initiatives for a resolution of land disputes, there is a general lack of transparency, accountability, and the absence of an effective dispute resolution mechanism. Questions are raised about the independence and the effectiveness of the cadastral commission and the National Authority for land disputes resolution. The lack of independent judicial system and ineffective dispute resolution mechanisms does not allow complainants to obtain legal redress for the violations of their rights or the settlement of disputes (Subedi, 2014).

In addition, ELCs projects are creating adverse environmental impacts. Such projects should normally be granted on degraded forest or non-used land, but are established in valuable forest areas and also protected areas such as national parks (Sperfeldt et al., 2012). The main concerns are the destruction of the environment, the impacts on biodiversity, the planting of non-native crops or trees and illegal logging of forest land granted. Other problems generated by ELCs include soil erosion and water contamination (Subedi, 2012). Moreover, the low implementation of environmental regulations has affected the cultural rights of indigenous and non-indigenous people as their traditionally occupied lands faced encroachment and unregulated development (Adhoc, 2013; Subedi, 2012).

In terms of consequences on the livelihoods of small landholders, the situation and the range of effects can vary according to the region and the groups of population, but some recurring elements can be stressed. Encroachment on farm lands and substantial loss of assets are experienced by farmers together with a loss of access to reduced natural resources, and forest products leading to drastic changes in their environment and the loss of their traditional livelihoods. It is estimated that about 420,000 people have been affected by land concessions and other land grabs since 2003 (Licadho, 2014).

The losses of assets ranges from i) extreme – losing all land and including a compensation or/and displacement and relocation of people, ii) severe - no eviction but not enough land to satisfy the basic

needs, to iii) partial - enough land to maintain farming activities to satisfy the basic needs. The magnitude depends also to the size of the land acquisitions, overall land availability among affected areas, the proximity of the land concessions to areas used by the population, and finally the pace of the implementation of the ELCs (Gironde et al., 2014). For people experiencing eviction, displacement and relocation their livelihoods will mainly depend on the opportunities offered at the new location. The different categories of people described are clearly prone to become landless or land poor and face considerable difficulties securing their livelihoods.

Besides the immediate impact of ELCs, consequences on livelihoods should also be assessed in a mid-term perspective. Small landholders, especially ethnic minorities, who could face the losses of assets, are then confronted by an agrarian transition. Agrarian transition can be understood as a major transformation of agriculture, its role in the society, changing the relationships of the population with the environment (Castella, 2007). This process was taking place and was initiated by public policies prior to the explosion of ELCs, such as the promotion of modern techniques and market-based development of cash crops. The granting of ELCs, especially after 2005, dramatically increased the pace of the transformation of rural livelihoods, and changed the socio-economic environment, characterized by an increased need for cash. Farmers are now experiencing an uneven transformation of their rural livelihoods systems and also a process of social and economic differentiation as threats and opportunities arising from this new socio-economic environment do not affect the population in the same way (Gironde et al., 2014).

To sum up, although Cambodia has clearly the will to attract investors and has established a legal framework to regulate the granting of land concessions, most of these concessions have not proven to be drivers of economic development or rural job creation in Cambodia (UNDP, 2007). Local populations' rights and interests are insufficiently taken into account during the granting of land concessions. Given the high human and environmental costs of ELCs, it is not clear to what extent local population benefits from land concessions in Cambodia (Subedi, 2012; Sperfeldt, 2012)

2 Materials and Methods

A national database on large-scale land acquisitions granted in Cambodia was built from different sources of information gathered from several organisations or initiatives, and cross-checked. The sources include official data gathered by Open Development Cambodia (2013), from Licadho (2013), from NGO Forum (2012), from the Ministry of Agriculture, Forestry and Fisheries (RGC, 2012bis), and from the author's own field data collected. The resulting data set brings together land concessions with known spatial references and includes 486 deals covering 4.5 million ha. The last update and cleaning of the data occurred in September 2013.

Based on this data set, a descriptive analysis was first carried out in terms of the country of origin of each investment, the purpose according to subsectors and the granted date; these elements were also cross analysed and key stakeholders identified. Using the geo-referenced data of ELCs, this first analysis was followed by a contextual analysis of land acquisitions to get insights into the characteristics of the areas where land acquisitions occurred. The national land deals were compared with other spatially referenced country-level datasets, including attributes related to ELCs' policies, expected benefits or raised issues like poverty incidence, accessibility and land cover. Poverty incidence was retrieved from the Identification of Poor Households Programme dataset (RGC, 2012ter) and the Commune Database (NCCD, 2012) for 2008–2010. Among each province, the accessibility was calculated to provincial capitals in travel time in minutes with a cost-distance algorithm in ArcGIS 10, using national road dataset, digital elevation model, land cover data, and main rivers as inputs following a methodology described by Messerli et al (2008) for Laos. As land concessions can cover large areas with some part very close to roads and other quite far, an average travel time to provincial

capitals was computed for each concession in order to better reflect the general accessibility of each one. The land cover used is from 2001 and comes from the Ministry of Public Works and Transportation and the Japan International Cooperation Agency (RGC, 2003bis).

3 Results

3.1 Descriptive Analysis

Magnitude, trends and size

Information gathered on the Cambodian land concessions[5] shows that 280 ELCs projects were granted so far, covering a total area of 2.30 Mio ha and that mining concessions account for 206 projects and cover an area of about 2.18 Mio ha. It is worth noting the magnitude of the phenomenon as both ELCs and mining concessions together represent around 4.48 Mio ha or about a quarter of the whole Cambodian territory. The number of deals increased fifteen fold from 2000 until 2012 with a steep increase observed since 2005 (Figure 1).

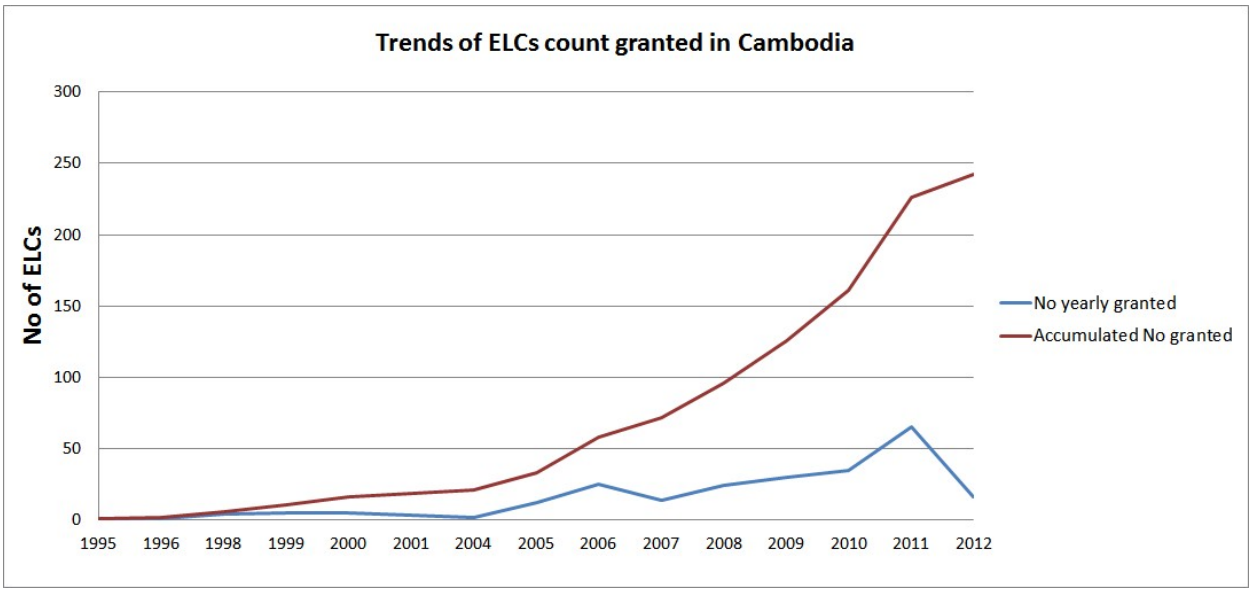


Figure 1[6]: Trends of the number of Economic Land Concessions (ELCs) projects granted in Cambodia

In terms of area, since 2000, it took 8 years to double the area granted to investors, rising from half a million ha to over a million ha but it only took another four year to double again the area granted, reaching over two millions ha in 2012(Figure 2).

[5] The last update of the data set produced was done in September 2013. Licadho recently released an update of its data set in April 2015 that could not be included in the data set used for this paper.
[6] The information about trends does not include mining concessions as no information about their granting date was available.

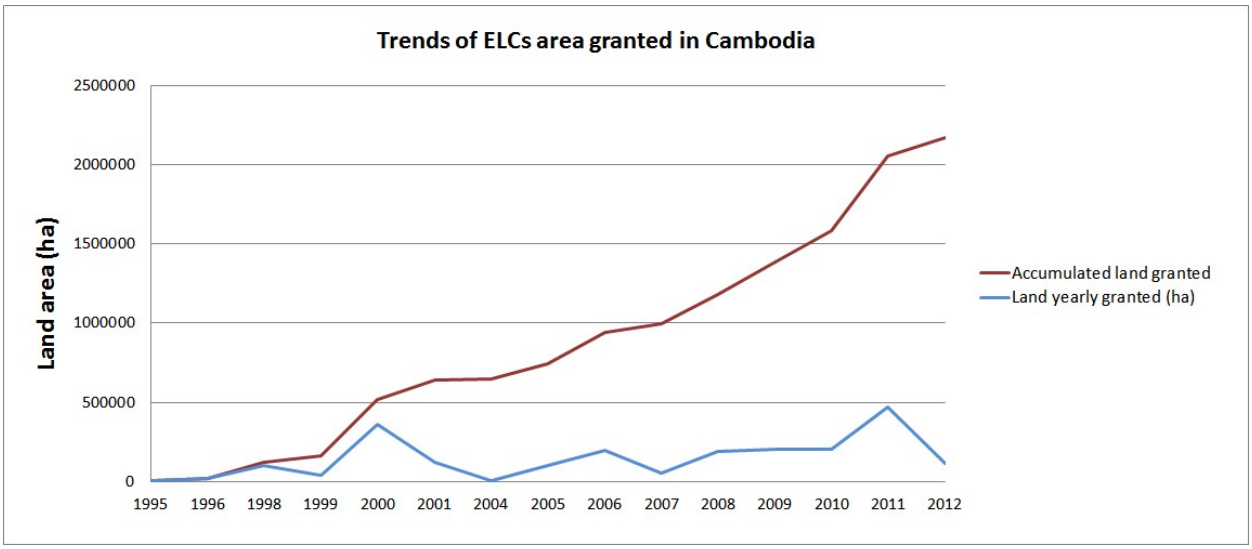


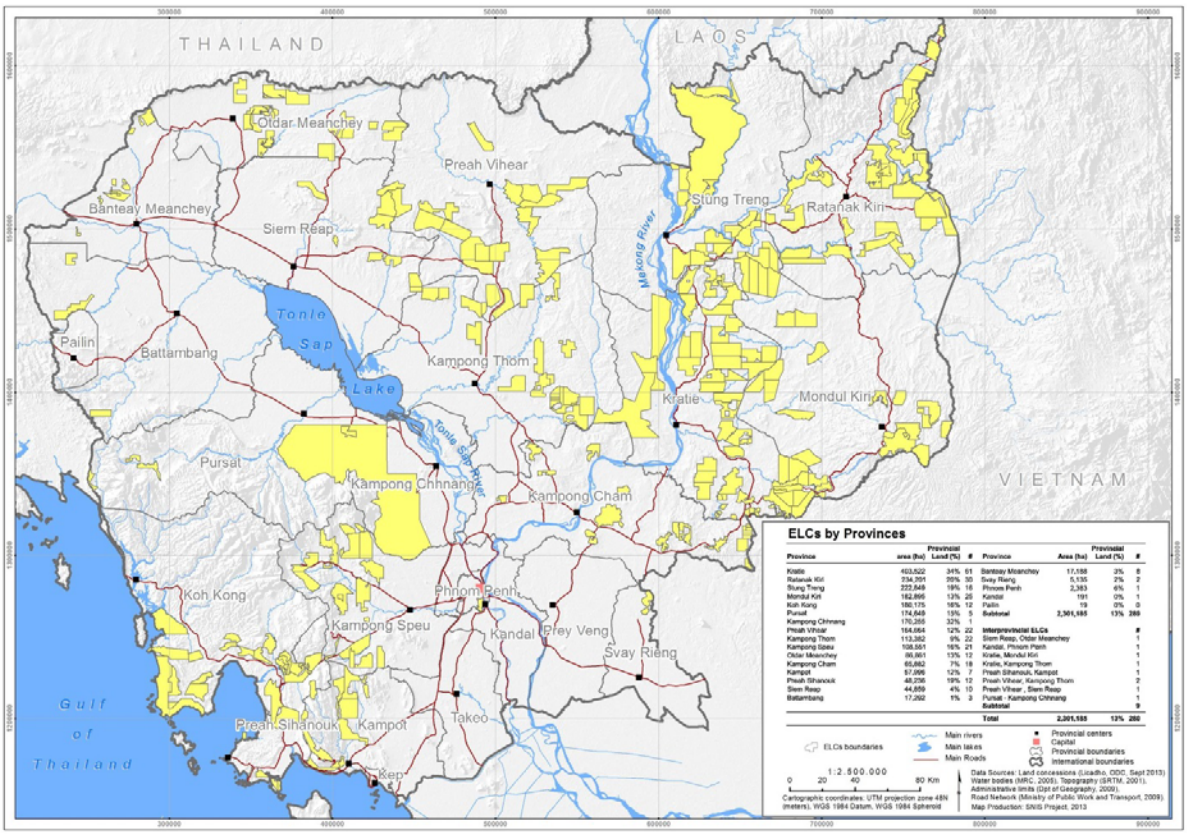
Figure 2[7]: Trends of Economic Land Concessions (ELCs) projects' area (ha) granted in Cambodia

Regarding the concessions' size, more that 89% of the ELCs are below 10,000 ha. Two peaks can be observed from the size distribution: a first one for concessions below 1,000 ha (13,9%) and a second between 9,000 and 10,000 ha (16,9%). This second peak around 10,000 ha could be related to the legal prescription stipulated in the Sub-Decree on ELCs (RGC, 2005). The first peak of below 1,000 ha concessions concerned recently awarded land deals, after 2008 and most of them in 2011 (14 cases). Moreover, it seems that many concessions of less than 1,000ha are missing in the data set as there is none before 2008. This should be related to the modification of the granting procedures of small concessions (under 1,000 ha), which formerly was authorized by the Provincial or Municipal Governor (RGC, 2008). Discrepancies between Provincial information and MAFF dataset related to this category of land concessions were already reported (Men Prachvuthy, 2011). It should be noted that the size of some concessions, granted after the 2005 Sub-Decree, are reported to be over the 10,000 ha limit or using the subterfuge of granting several concessions of 10,000 ha to different companies with very close names which obviously belong to the same group.

National spatial distribution

While ELCs are spread over the whole national territory, they are concentrated in some regions. The North and the North –East of the country gather most of the land investments, forming a crescent shape form extending from Otdar Meanchey to Ratanakiri via Kratie provinces. Another region with important concentration of ELCs lies in the South-West of the country, from the Tonle Sap Lake to the coastal regions (Map 1). By looking at the provincial level, Kratie province is the mostly concerned by ELCs with 61 concessions and a total of 404,000 ha, covering 34% of the total province area. Ratanakiri and Stung Treng, further north, are the second and the third provinces whose territory is concerned with 20% and 19% of their respective total provincial territory affected. These three provinces gathered together 861,000 ha which is over 37% of the whole ELCS. It should be noted that Kampong Chhnang province is also widely concerned by ELCs but by mainly one very large concession (Map 1).

[7] Idem



Map 1: Overall location of Economic Land Concessions and distribution by provinces

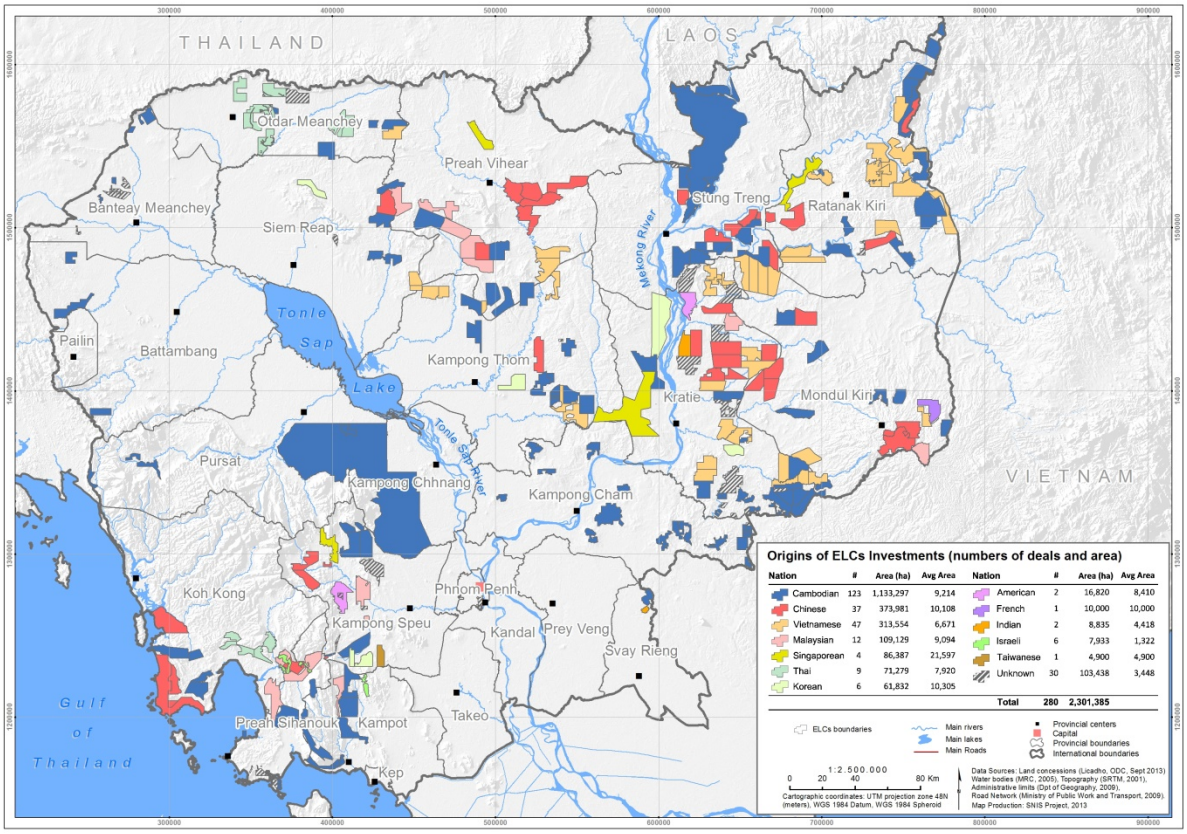
Investors and main subsectors behind LSLAs

With regard to the origin of investors, domestic investments play a predominant role both in terms of the absolute number of deals and the land area granted compared to other investors (Table 1).

Table 1: Economic Land Concessions in Cambodia by investors' origin

Investor Type	Investor Origin	No Deals	Total Area (ha)	Average Area (ha)	% Total No	% Total Area
Domestic	**Cambodian**	**123**	**1 133 297**	**9 214**	**43,9%**	**49,2%**
Regional	**Total**	**110**	**959 230**	**8 720**	**39,3%**	**41,7%**
	Chinese	38	378 881	9 971	13,6%	16,5%
	Vietnamese	47	313 554	6 671	16,8%	13,6%
	Malaysian	12	109 129	9 094	4,3%	4,7%
	Singapore	4	86 387	21 597	1,4%	3,8%
	Thai	9	71 279	7 920	3,2%	3,1%
Other	**Total**	**17**	**105 420**	**6 201**	**6,1%**	**4,6%**
	Korean	6	61 832	10 305	2,1%	2,7%
	American	2	16 820	8 410	0,7%	0,7%
	French	1	10 000	10 000	0,4%	0,4%
	Indian	2	8 835	4 418	0,7%	0,4%
	Israel	6	7 933	1 322	2,1%	0,3%
Unknown	**Total**	**30**	**103 438**	**3 448**	**10,7%**	**4,5%**
Total		**280**	**2 301 385**	**8 219**	**100,0%**	**100,0%**

While Cambodian domestic deals account indeed for almost 50% of the entire land area granted to ELCs with over 1.1 Mio ha, land investments are also dominated by regional neighbouring countries which account 42% of the land area, representing 960,000 ha. The following regional countries are playing a major role in the ELCs arena in Cambodia: China with around 379,000 ha (40%); Vietnam covering around 314,000 ha (33%); Malaysia with about 110,000 ha; followed by Singapore, 86,000 ha and Thailand, 71,000 ha (Table 1). While domestic investments are well distributed across the country, the proximity with their country of origin can partly explain the distribution of some regional investments: Thai investments are only located in Otdar Meanchey and Koh Kong provinces which are close to the Thai border and Vietnamese investments are mainly concentrated in the eastern part of the country close to Vietnam. Chinese investments for their part are located in the two areas of land investments concentration mentioned earlier (Map 2). Land investments from foreign countries outside the region only represent small shares in terms of number (6% of deals) and even less in terms of total land area (4.6%) of the concessions (Table 1). The predominance of domestic and regional countries among land investments is also observed in Laos (Messerli et al, 2015; Schönweger et al., 2012) and is going against the common belief that land concessions are led by international companies.



Map 2: Cambodian Economic Land Concessions by countries of origin

The evolution of the origins of investor shows that Cambodian are present since the beginning of ELCs granting and that an important rise happened in 2000 when a very large concession of over 330,000 ha was granted in Kampong Chhnang province. Since then, domestic investors show a steady increase, exceeding by far all other origins (Figure 3). Chinese investors are present in the land investment business since 1998 with two concessions representing together 60,000 ha. They have regularly invested since 2005 which lead them to the second position. Vietnamese started to invest in Cambodia later, in 2005 but since then they kept doing so and manage to reach very quickly the third

place right after Chinese investors (Figure 3). Malaysian and Korean investors were also among the early investors (before 2000) and increased their presence only after 2008, while Thai ones invested since 2005. The remaining investors only started recently, after 2008 but only represent a small share of the total. Finally, the 2011 investment peak, mentioned early, is obvious for many investors. Again, this shows the early and major involvement of both domestic and regional stakeholders in the land investments in Cambodia.

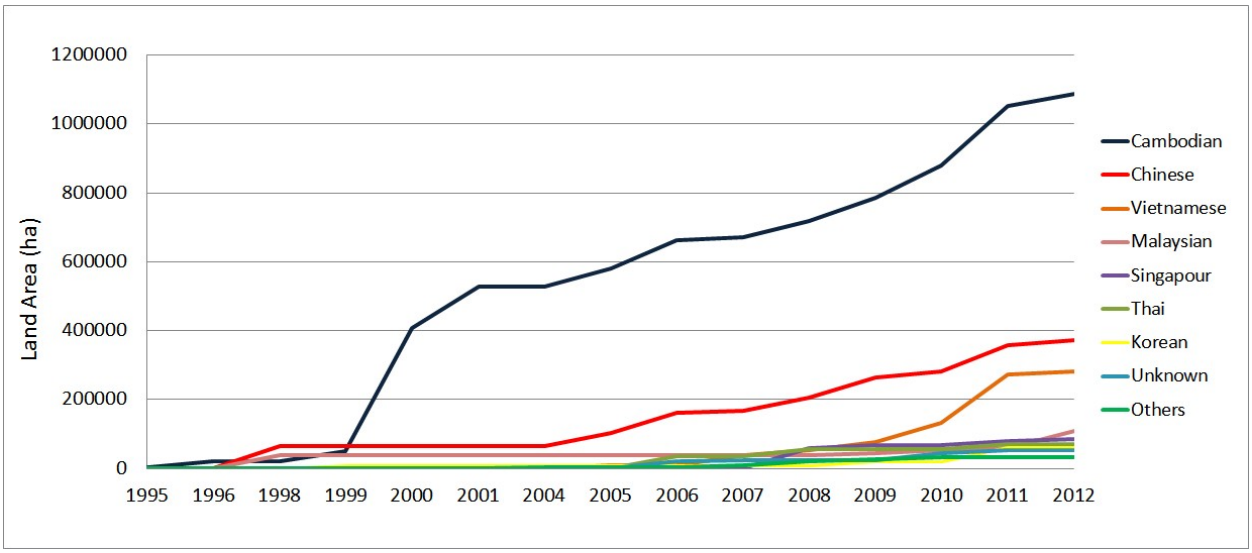


Figure 3: Evolution of Economic Land Concessions granted by investor origins

While analysing the purpose of investments, the forestry subsector – including all forms of tree productions and plantations (mainly here rubber, trincomali, acacia, oil palm and teak) – largely prevails over the agricultural subsector both in terms of number of deals and land area concerned. The number of project reaches 142 for forestry versus 43 for agriculture and the total land area is over 1.51 Mio ha for forestry compared to around 281,000 ha for agriculture (Table 2). Among this dominant subsector, rubber is the most common production with almost 80% of projects (113 on 142) and 52% of the total land area (785,000 ha) concerned. The situation in the agricultural sector is different with two main crops: sugar cane (23% by number and by land area) and cassava (14% by number and by land area). It should be noted that there are still a lot of unknown purpose among the land investments: over 39% in terms of number and around 43% in terms of land area (Table 2). This interest in sugar cane in Cambodia could be related to the duty-free access of sugar production to European markets for least developed country (Polack, 2012). The mean size of forestry projects (10,810 ha) also exceed the mean size for agriculture projects (6,541 ha). Land investments outside the forestry and agriculture sector concerned tourism, infrastructure or hydropower related projects and are representing a very small share of the total (11 projects expanding over 72,000 ha only) mostly located along the Coastal area (Table 2).

Table 2: Detailed purpose of the land investments

Subsector	Detailed Purpose	No Deals	Total Area (ha)	Average Area (ha)	% Total No	% Total Area
Forestry	Rubber	91	635,272	6,981	32.5%	27.6%
	Rubber and others	16	103,706	6,481	5.7%	4.5%
	Trincomali	1	100,852	100,85	0.4%	4.4%
	Oil Palm and others	4	88,155	22,039	1.4%	3.8%
	Acacia and others	8	53,568	6,696	2.9%	2.3%
	Rubber tree & other crops	6	45,468	7,578	2.1%	2.0%
	Teak tree	4	39,203	9,801	1.4%	1.7%
	Pinus merkusii	3	33,032	11,011	1.1%	1.4%
	Acacia	3	18,002	6,001	1.1%	0.8%
	Oil Palm	2	16,000	8,000	0.7%	0.7%
	Pistacia Chinensis Bunge	1	8,231	8,231	0.4%	0.4%
	Unknown (Forestry)	3	374,193	124,73	1.1%	16.3%
	Total	**142**	**1,515,682**	**10,674**	**50.7%**	**65.9%**
Agriculture	Sugar Cane	6	43,255	7,209	2.1%	1.9%
	Casava and others	2	25,325	12,663	0.7%	1.1%
	Sugar Cane and others	4	22,341	5,585	1.4%	1.0%
	Corn	2	20,292	10,146	0.7%	0.9%
	Cashew nut tree and others	3	17,906	5,969	1.1%	0.8%
	Cassava	4	13,167	3,292	1.4%	0.6%
	Unknown (Agriculture)	22	138,985	6,318	7.9%	6.0%
	Total	**43**	**281,271**	**6,541**	**15.4%**	**12.2%**
Other	Tourism	8	62,195	7,774	2.9%	2.7%
	Infrastructure	2	987	494	0.7%	0.0%
	Hydropower	1	9,100	9,100	0.4%	0.4%
	Total	**11**	**72,282**	**6,571**	**3.9%**	**3.1%**
Unknown	**Total**	**84**	**432,15**	**5,145**	**30.0%**	**18.8%**
Total		**280**	**2,301,385**	**8,219**	**100.0%**	**100.0%**

Once again, both domestic and regional investors are dominant in forestry subsector: regional ones are the most important with 51% of deals and domestic investors hold 43% of forestry deals but cover 57% of the land area concerned. Other investors total only 4% of all forestry deals (Table 3).
Agriculture subsector is led by domestic (49% of deals) and regional (37% of deals) investors but both embrace about the same land area (respectively 44% and 46%); other investors only account 9% of the total agricultural deals (Table 3).

Table 3: Origin of investors by main subsectors

Main Subsectors	Domestic		Regional		Other		Unknown		Total	
	No	ha	No	ha	No	ha	No	ha	No	ha
Forestry	62	857,469	73	591,003	6	65,985	1	1,225	142	1,515,682
Agriculture	21	124,484	16	130,660	4	16,835	2	9,292	43	281,271
Other	4	21,309	3	46,100	0	0	4	4,873	11	72,282
Unknown	36	130,035	18	191,467	7	22,600	23	88,048	84	432,15
Total	**123**	**1,133,297**	**110**	**959,230**	**17**	**105,420**	**30**	**103,438**	**280**	**2,301,385**

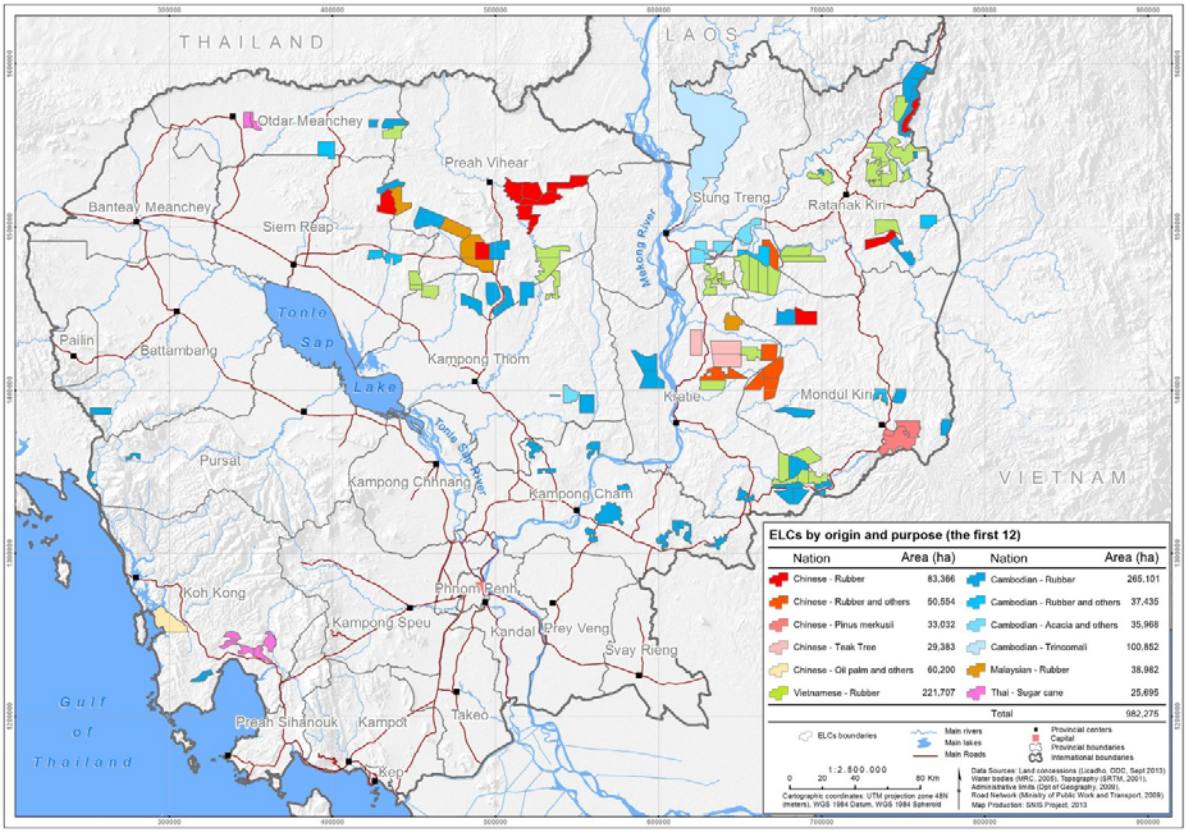
Combination of key players – key commodities

By combining the origin of the investments and their purposes, it is possible to highlight the first 10 key players and main commodities among the ELCs in Cambodia. Only combinations with more than one concession were considered except for two single plot combinations that were added to the selection as they represent each a very large area (Cambodian – Trincomali and Chinese – Oil Palm and others). Therefore, 12 combinations are presented in the Table 4 and represented in Map 3.

Table 4: Key players – Key commodities of Economic Land Concessions in Cambodia

Combinations of Key Players and Commodities	**Area (ha)**	**No ELCs**
Cambodian - Rubber	265,101	37
Vietnamese - Rubber	221,707	32
Cambodian - Trincomali (Berrya ammonilla)	100,852	1
Chinese - Rubber	83,366	10
Chinese - Oil Palm and others	60,200	1
Chinese - Rubber and others	50,554	7
Malaysian - Rubber	38,982	5
Cambodian - Rubber and others	37,435	6
Cambodian - Acacia and others	35,968	5
Chinese - Pinus merkusii	33,032	3
Chinese – Teak Tree	29,383	3
Thai – Sugar Cane	25,695	3
Total	**982,275**	**113**

These 12 combinations gather 42% of the total ELCs' area and 40% of the total number. The most important combinations are Cambodian – Rubber, Vietnamese – Rubber and Cambodia – Trincomali, representing 60% of the key players & commodities total area. The vast majority of these concessions are located in the north-east regions (Map 3).



Map 3: Localisation of the combination of Key players - Key commodities of Economic Land Concessions

3.2 Contextual Analysis

Following the descriptive analysis of land investments, it is possible to compare the dataset with several elements describing the geographical context of ELCs. This part intends to look at the contexts of the areas where land acquisitions occurred. Selected elements include poverty, accessibility and former land use. This comparison of land deals with different spatial datasets allows shedding more light on the context of ELCs and is related to the expected contribution of ELCs put forward by the government.

Poverty[8]

Globally, while looking at the national level, villages included or located around ELCs[9] have a higher poverty incidence (32.6%) than the national mean (28.3%)[10] and the percentage of poorer villages than the national mean is also higher (63.4%) for villages concerned by ELCs than for all Cambodian villages (50.1%) (Table 5). This apparent concentration of land deals in poorer areas at national level conceals diverse situations depending on the origin and on the commodity concerned.

[8] Calculation based on ID Poor dataset (RGC, 2012ter) and the Commune Database (NCCD, 2012) for 2008–2010

[9] Villages inside and included in a 5 km buffer around ELCs have been selected here.

[10] Phnom Penh was not taken into account in the poverty incidence calculation as there was no data available.

Table 5: National and ELCs poverty incidence and percentage of villages poorer than the national mean

	No Villages	Population	Poverty Incidence (PI)	% villages with PI higher (Poorer) than National Average	No villages with PI higher (Poorer) than National Average
Villages in Cambodia	13,379	12,047,140	28.3%	50.1%	6,699
Villages around ELCs	1,730	1,551,949	32.6%	63.4%	1,097

By considering the origins of the investors, domestic investments obviously target less poor areas than both regional and other foreign investments groups, as villages around Cambodian owned land investments are close to the national mean while villages concerned by land investments from other origin except Indian projects have both higher poverty incidence and a higher percentage of villages poorer than the nation average (Figure 4). It is also worth noting that among the region, Vietnamese and Singaporean investments concern on average villages with the highest poverty incidence (over 50%) and represent more than 38% among this group while American and French investments also target villages with on average over 50% of poverty incidence, they only represent less than 30% in their respective group. On the other side villages concerned by Cambodian concessions which are on average close to the national mean represent more than 54% of the total villages affected.

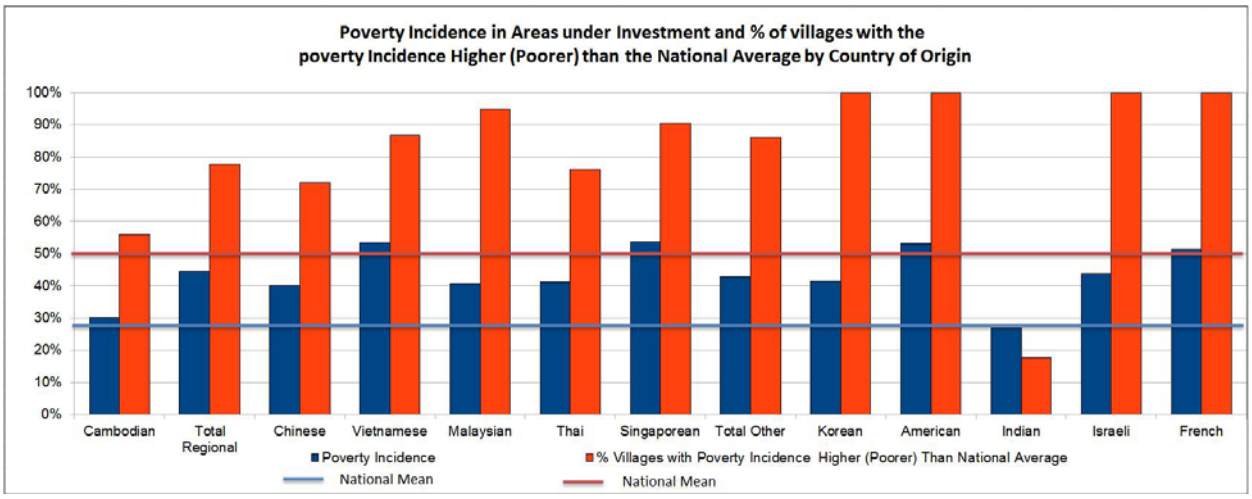


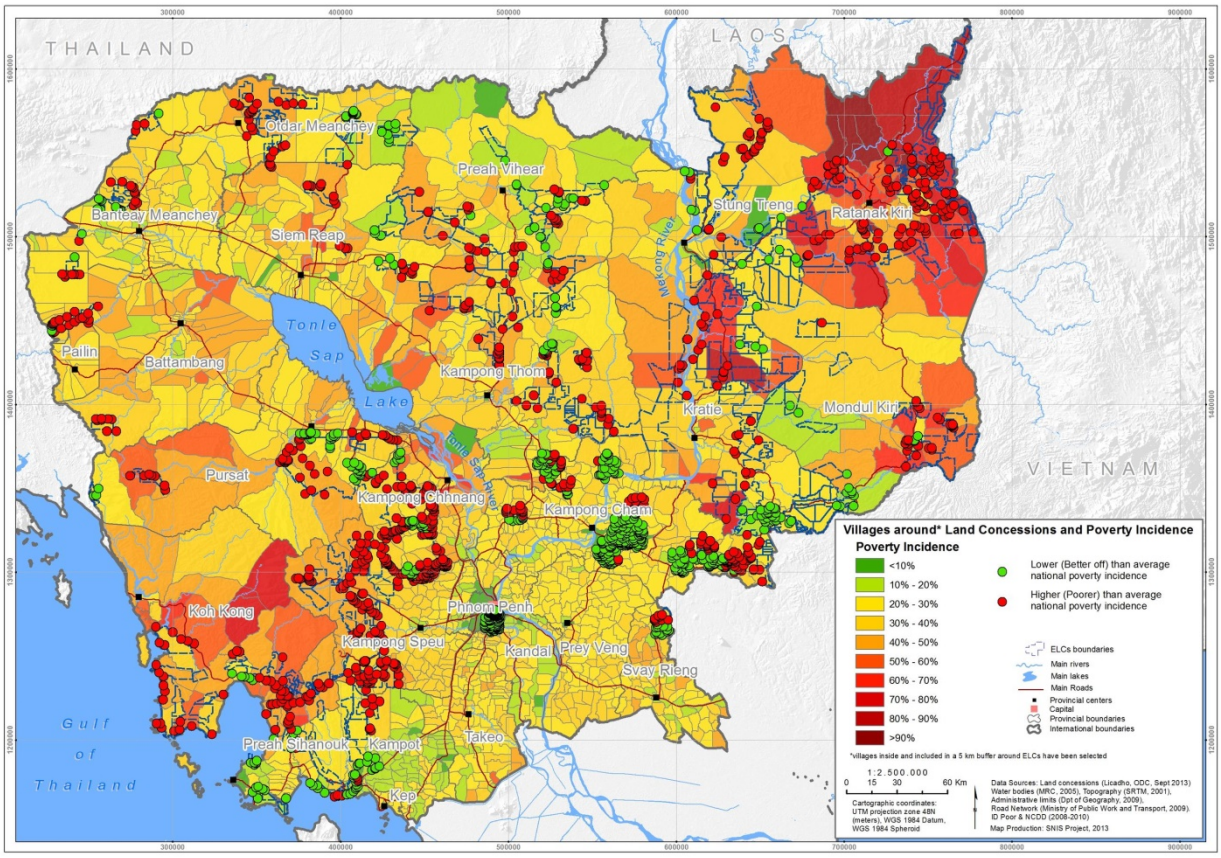
Figure 4: Poverty incidence in area under land investments and % of villages poorer than national mean by origin.

By looking the different commodities, forestry is targeting less poor areas compared to agriculture both in terms of poverty incidence and percentage of villages poorer than the national average. The rubber only purpose which is by far the first single commodity with a total area of over 635,000 ha implemented by both domestic and regional investors (Table 2 and Table 4) during recent dynamics can be distinguished from other commodities by being on average very close to the national mean, making it comparatively less targeting poor areas (Table 6).

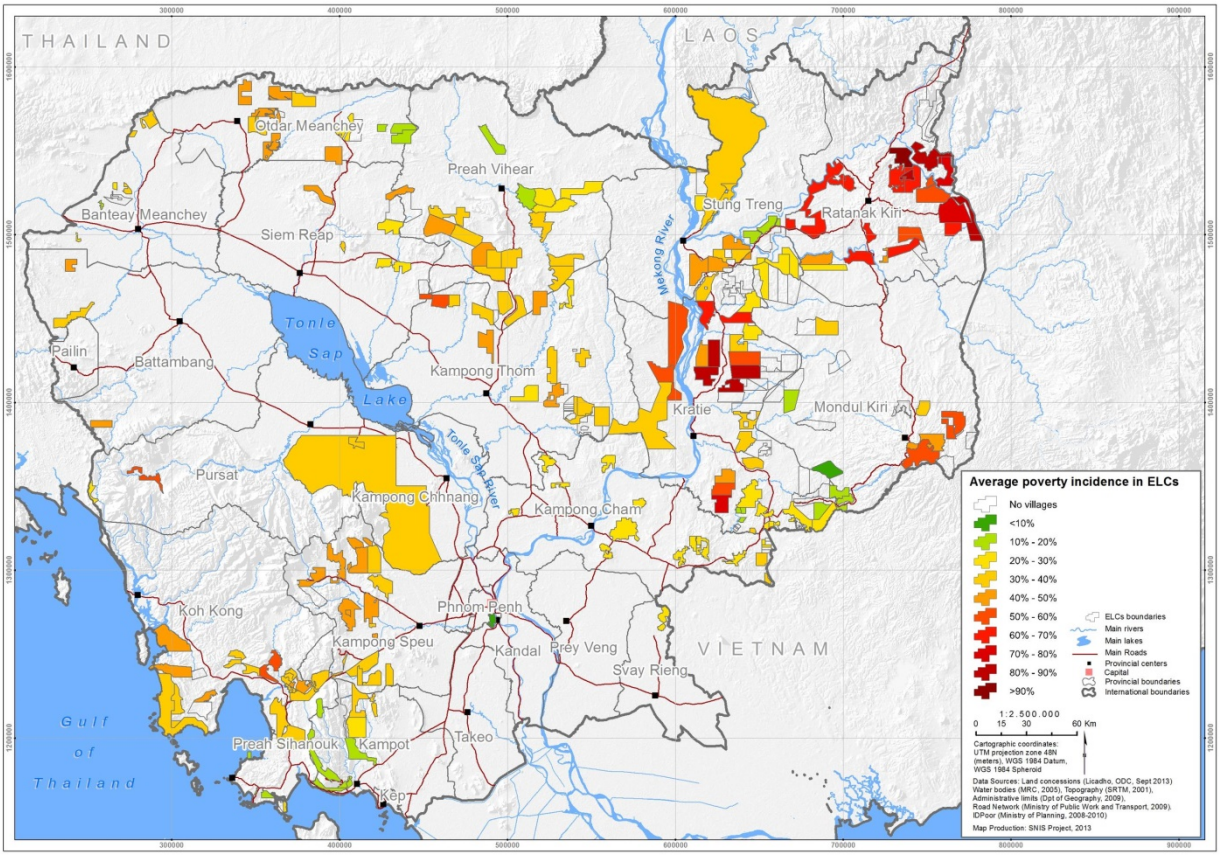
Table 6: Poverty incidence in area under investment and % of villages poorer than national mean by commodity, Accessibility of land investments *corresponds to the travel time to the nearest provincial capital (in minutes)

Subsector	Detail Purpose	No villages	Poverty Incidence	% Villages with PI Higher (Poorer) than National Average	Accessibility* (Min.)
Forestry	Pistacia Chinensis Bunge	1	70.0%	100.0%	172
	Oil Palm and others	37	52.6%	100.0%	110
	Teak tree	17	49.4%	94.1%	143
	Pinus merkusii	25	44.2%	84.0%	44
	Acacia	15	42.8%	100.0%	109
	Rubber and others	27	39.8%	63.0%	201
	Trincomali	26	35.7%	96.2%	198
	Rubber and other crops	22	35.3%	81.8%	121
	Rubber	639	30.4%	44.1%	229
	Acacia and others	26	29.6%	57.7%	111
	Oil Palm	34	18.6%	23.5%	75
	Unknown	274	35.1%	76.6%	226
	Total	**1143**	**32.4%**	**58.2%**	**199**
Agriculture	Sugar cane	39	37.8%	51.3%	168
	Sugar cane and others	40	37.2%	95.0%	106
	Cassava and others	12	36.2%	58.3%	87
	Cashew nut and others	39	33.1%	82.1%	65
	Corn	6	32.9%	100.0%	144
	Cassava	32	32.7%	84.4%	121
	Unknown	52	46.0%	76.9%	162
	Total	**220**	**37.1%**	**77.3%**	**143**
Other	Hydropower	3	50.0%	100.0%	416
	Tourism	28	27.6%	64.3%	255
	Infrastructure	12	16.9%	0.0%	47
	Total	**43**	**24.4%**	**48.8%**	**232**
Unknown	**Unknown**	**324**	**32.0%**	**74.4%**	**171**
Total ELC's		**1,730**	**32.6%**	**63.4%**	**183**
Cambodia		***13,379***	***28.3%***	***50.1%***	**-**

The majority of land investments are located in regions with poverty incidence close to the national average. Two areas of concessions with a higher poverty incidence can be identified: in Ratanakiri province and on the left bank of the Mekong river in Stung Treng and Kratie provinces. Land concessions around the Cardamoms Mountains and in Mondulkiri province are also established in poorer zones. Some concessions are located in wealthier regions like in the north-east of Preah Vihear province, in the south-east of Stung Treng province, in the south-west of Mondulkiri province, around Phnom Penh and between Kampot and Preah Sihanouk provinces (Map 4 and Map 5).



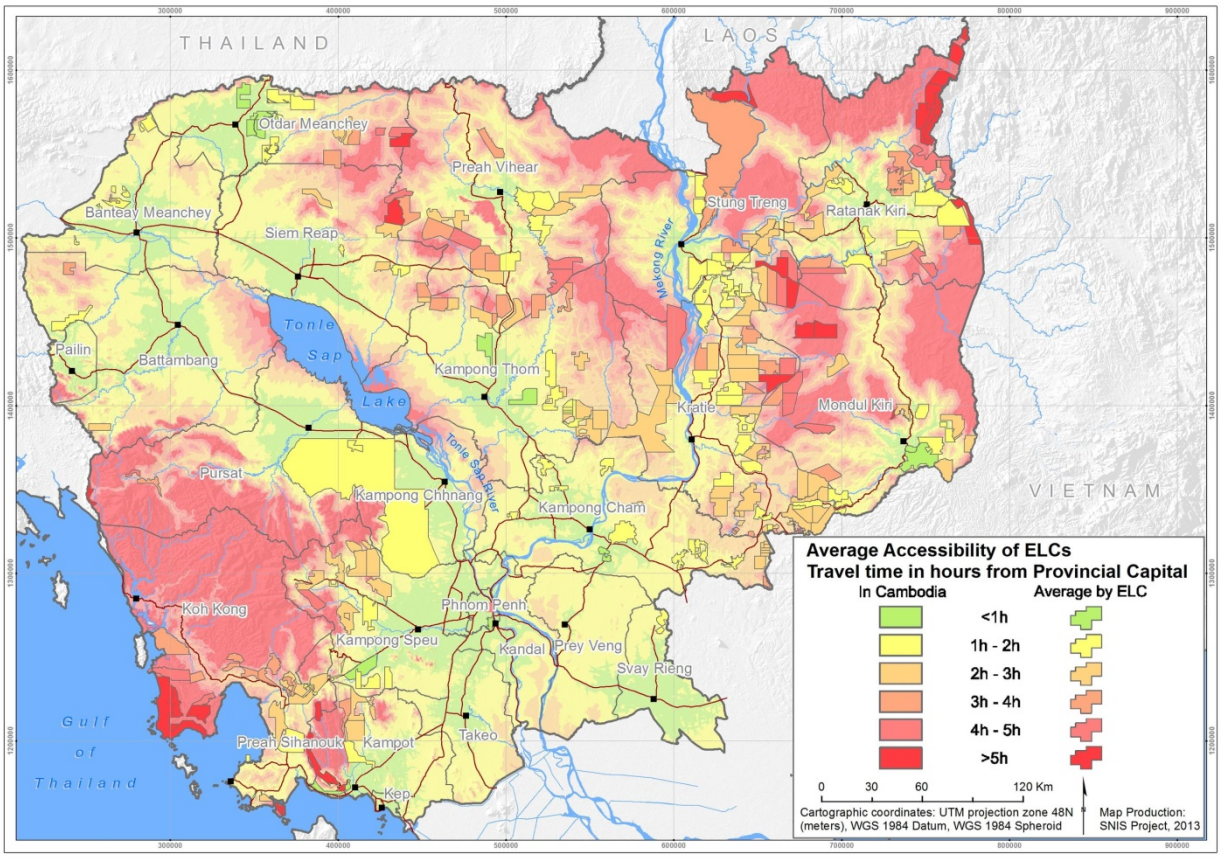
Map 4: National Poverty Incidence and Villages concerned by Economic Land Concessions lower (better off) in green or higher (poorer) in red than the average national poverty incidence.



Map 5: Average Poverty Incidence in Economic Land Concessions

Accessibility

Spatial analysis shows that the majority of land concessions are located in quite easily accessible places with an average travel time of around 3 hours from the closest provincial centre. Agricultural land concessions tend to be closer from provincial capitals than forestry land concessions with an average travel time of 2 hours and 13 minutes compared to over 3 hours for forestry land deals. Within forestry deals, it should be highlighted that rubber concessions are among the deals that are further away from provincial centres (Table 6). Yet, 55% of the rubber concessions are still accessible within on average less than 3 hours from provincial centres. For other subsectors, such as hydropower and tourism, the average travel time is close to 4 hours and these projects are clearly located far from existing roads. Finally, only a few deals are accessible in more than 5 hours (Map 6). Both domestic and regional investors have a tendency to invest in remote areas for both their agricultural and forestry projects compared to others investors (Table 7).



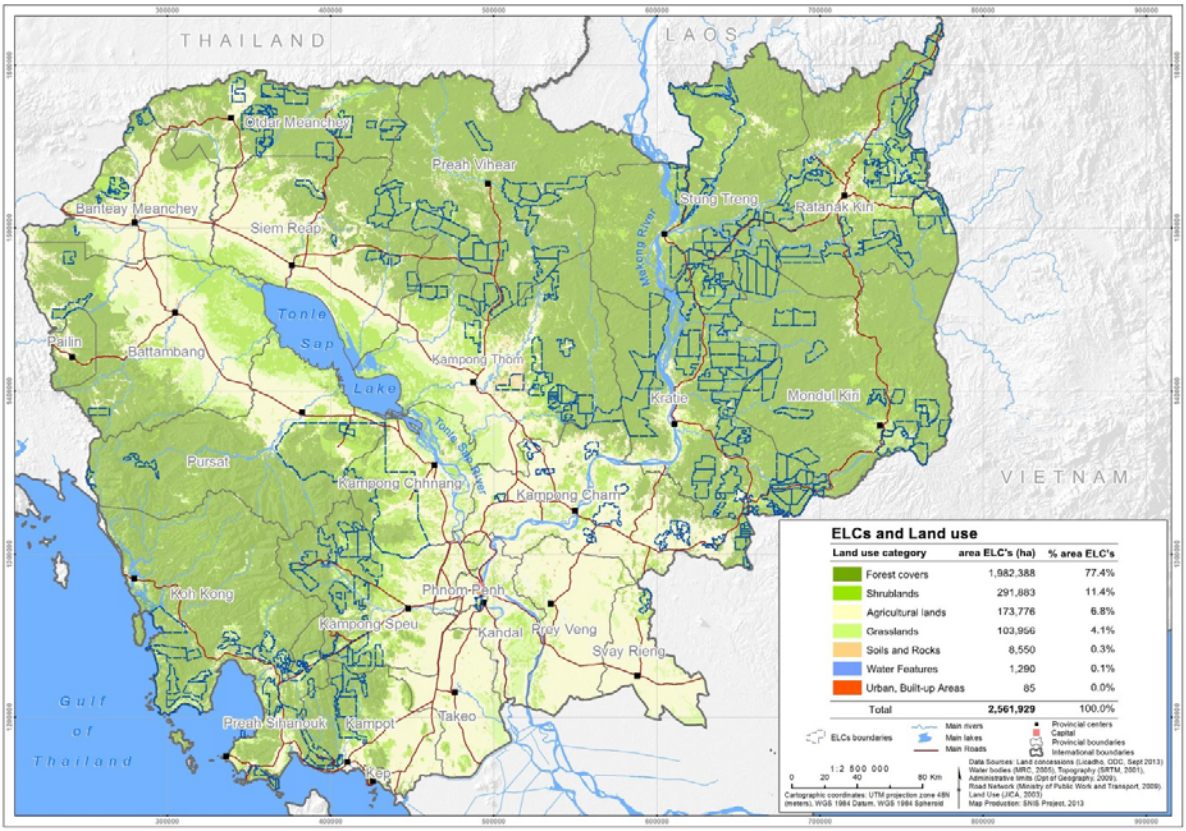
Map 6: Average accessibility of Economic Land Concessions from nearest provincial capital (travel time in hours)

Table 7: Average accessibility from the closest provincial capital by main subsectors and origins of investors

	Accessibility by origins (in minutes)			
Main Subsectors	**Domestic**	**Regional**	**Other**	**Total**
Forestry	216	191	145	**199**
Agriculture	137	159	106	**143**
Other	234	315	-	**232**
Unknown	229	143	126	**171**
Total	**207**	**182**	**128**	**183**

Former land cover

Superimposing the ELCs dataset with the 2001 land cover data reveals some interesting spatial patterns. In general, land concessions are mostly granted in forested areas (77.4%) followed by shrubland (11.4%) and agricultural lands or croplands (6.8%) (Map 7). All subsectors have been essentially granted in forest environments representing at least three quarter for each category (Table 8). Surprisingly, agricultural investments are not likely to be preferentially granted on existing croplands. The date of the data used may explain this. A 2001 land cover indeed allows analysing the landscape prior most of the land concessions were granted but the land cover situation could have already changed between 2001 and the period when most of the ELCs were granted, i.e. after 2008.



Map 7: Former land cover of Economic Land Concessions (2001 land cover)

Table 8: Former land cover (2001) of Economic Land Concessions by main subsectors

Main Subsectors	Forest ha	%	Shrubland ha	%	Grassland ha	%	Cropland ha	%	Other ha	%	Total ha	%
Forestry	1,297,717	75.1%	228,977	13.3%	54,507	3.2%	137,702	8.0%	818	0.0%	1,726,964	100%
Agriculture	257,983	82.5%	24,245	7.8%	18,426	5.9%	11,358	3.6%	8,061	2.6%	312,830	100%
Other	55,037	81.3%	4104	6.1%	7285	10.8%	1028	1.5%	215	0.3%	67,669	100%
Unknown	371,650	81.8%	34,558	7.6%	23,738	5.2%	23,689	5.2%	832	0.2%	454,467	100%
Total	**1,982,388**	**77.4%**	**291,883**	**11.4%**	**103,956**	**4.1%**	173,776	**6.8%**	9,925	**0.4%**	2,561,929	**100%**

4 Discussion

ELCs datasets

First, it should be stressed that building a complete and up to date dataset on ELCs is a difficult task given the lack of comprehensive and transparent information available from Ministries and governmental bodies linked to land concessions. One still has to juggle with different sources and to regularly update the data. It is an ongoing process and there are still gaps in the data even around three years after the moratorium and recent updating efforts.

This analysis does not consider the different levels of implementation for the ELCs as only sparse information is available. This element was identified as critical for the responses and the strategies of local farmers affected (Gironde & Peeters, 2015). Taking into account the current level of (non-) implementation even many years after the granting may shed light on the real objectives of land investment projects but also allow a better contextual analysis.

Questioning the expected benefits of ELCs

If we put ourselves in the perspective that ELCs have a significant impact on rural development and poverty reduction through an increase of agricultural production, an increase of employment and the diversification of livelihoods opportunities as stated in regulation documents (RGC, 2005), the RGC should have specifically targeted the poorest areas for the land concessions in order to maximize these expected positive impacts. Spatial analysis showed that even if it is the case at the national level, rubber only projects, the most important commodity, tend to be granted comparatively in less poorer areas (Table 6). One could speculate that maximising the impacts on poverty reduction does not seem to be the main criteria in the granting process. Moreover, as detailed before, there are many doubts regarding the effective benefits of ELCs in terms of poverty reduction as well as the underestimation of the opportunity cost of alternatives aiming at improving access to water and land for local smallholders (De Schutter, 2011).

While looking in terms of accessibility, most of land investment projects are already located in fairly accessible areas where we would have expected the opposite and projects targeting remote places. It would have been an opportunity of commitments from land concessions for improving of local road infrastructures. Rubber plantations here are also mainly established in fairly well connected areas while some others are much remote. Being accessible seems to be rather important for concessionaires, as it allows the transportation of the production to the export markets. Having said that, concessionaires do develop rural roads inside the concessions but they are not always accessible for all. Moreover, in some case the infrastructure development is not related to the agricultural project but concerns other infrastructures (national roads, sea port) (Cotula, 2009). Improving rural infrastructures sometimes favour outsiders or migrants reaching remote villages over local villagers accessing regional markets to sell their produce or other services as most of their activities are locally centred.

Spatial analysis limitations

The comparative analysis between the expected benefits and the context within land concessions were granted is not an exercise that aims to be the only source of explanation for the projects location. All variables involved in choosing a location for a project does not have a spatial dimension and the influence of the context must also be qualified in several cases against criteria related to investment and land governance (Messerli et al., 2015). Furthermore, the analysis of the impacts and benefits of land concessions requires completing this work by in-depth case studies to determine the consequences for the populations concerned.

5 Conclusions

Cambodia experienced an impressive increase in land concessions especially since 2005, reducing by half the doubling time of granted surfaces and reaching over 2 Mio ha in 2012. The vast majority of ELCs are below the 10,000 ha limit although some concessions granted before 2005 largely exceed it. This rush for land in Cambodia is concentrated in the North-East, the North and in the South-West of the country, and the analysis confirmed that this process is led first by domestic investors (around 50% of the deals' area) and then by regional neighbouring investors (42% in terms of area). Other foreign investors only play a marginal role with less than 5% of the deals' area. Chinese and Vietnamese are the leading regional investors in ELCs in Cambodia, representing 40% and 33% in terms of land area among this group. The data reveals that the proximity with the country of origin of regional investors can be part of the explanation for the investments' distribution, especially for some Vietnamese and

Thai investments. Domestic, Chinese, Malaysian and Korean investors are among the early investors whereas Vietnamese and Thai investors started arriving only in 2005 with the remaining investors arriving only in 2008. Domestic, Chinese and Vietnamese investments increased constantly with a peak in 2011, leading them to respectively the first three places.

The favourite subsector of key investors is forestry (tree productions and plantations) with a particular focus on rubber which is the most common tree production and represents 80% of the projects and more than half of the areas concerned for this subsector. The combined analysis of key investors and key commodities confirmed the predominance of domestic and the neighbouring Chinese and Vietnamese actors investing mainly in rubber or other tree plantations in the North and the North-East of the country.

The spatial analysis of the contexts where land concessions occurred highlighted some general patterns of ELCs. It also questions some of their expected contributions. Despite a global concentration of land deals in poorer areas at the national level, the predominant domestic investments, representing 54% of the villages affected, generally target slightly wealthier areas than regional and other foreign investments, except Indian ones. Nevertheless, Vietnamese and Singaporean investments among the regional group and American and French deals among the other foreign group are concentrated in villages with in average over 50% of poverty incidence, especially in the poorest provinces of Ratanakiri, Kratie and the Cardamoms. Forestry related land deals target less poor areas compared to agricultural deals and rubber, close to the national average, also target less poor areas comparatively. Spatial analysis reveals that in general land concessions are located in quite accessible areas within around 3 hours of travel time from the closest provincial capital. Agricultural deals tend to be more accessible than tree plantations and other subsectors are the furthest from provincial centres. Both domestic and regional investors are investing in farer areas. Rubber is in average among the furthest investments, but more than half of them (55%) are located at less than 3 hours from provincial capitals and few deals exceed 5 hours. The overlay of ELCs with the former land cover shows that land concessions were mostly granted in forested areas (77%) and it concerns all subsectors. Surprisingly, agricultural land deals do not seem to have been granted preferentially on existing cropland which could be partly explained by the date of the data set used. This spatial analysis also allowed to confront land concessions with their context and questioned some of the expected profits for local rural development.

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