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The clash of rural-urban migrants and real estate investors on Phnom Penh's housing market – Prospects for garment workers

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The clash of rural-urban migrants and real estate investors on Phnom Penh's housing market – Prospects for garment workers*

Vera Buttmann

Abstract

Housing markets of large cities around the world, particularly in so-called developing and emerging countries, are currently experiencing a clash: On the one hand, large numbers of labour migrants arrive from rural areas and need cheap rental housing. On the other hand, international real estate investment, particularly in the upper market segment, is strong. The resulting mismatch of housing demand and supply increases segregation, marginalises the vulnerable and leads to massive urban development problems. Phnom Penh illustrates this particularly well: Along with Cambodia's rapid globalisation in the last decades, hundreds of thousands of migrants, particularly garment workers, have moved to the capital. Housing for them is insufficient both in terms of supply and quality, though, because Phnom Penh's entrepreneurial mode of governance also attracts many investors, who focus on more profitable and prestigious real estate projects, often linked to speculation. These push land values up and push cheap rental housing further and further outside the city. This study carries out an in-depth analysis of the prospects for rural-urban migrant workers on Phnom Penh's investor-driven housing market by firstly outlining both migration and real estate investment trends and by secondly examining the case of garment workers' housing. To complement the scarce literature on the topic, field research and expert interviews have been conducted. From these, an assessment of the status quo, of stakeholders' approaches to it and finally, proposals for action are derived.

Keywords: Housing, real estate investment, entrepreneurial city, urbanisation, rural-urban migration, migrant workers, garment industry

JEL Classification: F63, F66, L67, R21, R23, R28, R31, R38

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1. Introduction

Turbulent developments are currently taking place in the housing markets of large cities around the world, particularly in developing and emerging countries: While large numbers of labour migrants arrive from rural areas, demanding cheap rental housing, also the demand for international real estate investment, particularly in the upper market segment, is strong. Especially in states which are weak in terms of funds and institutional capacities and hence cannot intervene or that due to entrepreneurial modes of governance do not want to intervene, these opposing trends cause massive urban development problems, increase segregation and marginalise the vulnerable.

Phnom Penh, capital city of Cambodia, illustrates this particularly well: As during the last decades, Cambodia has rapidly opened up its economy, the garment industry has become the country's major employer. Almost exclusively foreign investors have built factories that have drawn hundreds of thousands of, predominantly female, precariously employed and poorly paid workers to the outskirts of Phnom Penh. At the same time, again mostly foreign investors have bought properties in the capital city to such an extent that land and real estate values have drastically increased and many previous inhabitants have been ousted. Today, there is thus a glaring mismatch of housing demand and supply. For labour migrants, including the large number of garment workers, it is not only hard to find cheap rental housing in proximity to their work places, but also the quality of such cheap housing is often disastrous in terms of hygiene, health, privacy and security, which has even more severe impacts given that the majority of the workers are women. No stakeholder effectively tackles these problems, though, mostly due to interweaved global and local power structures.

After outlining the global scope of rural-urban migration and of international real estate investment, this study depicts how these phenomena occur in Phnom Penh, detailing the impact of the garment sector on labour migration as well as the favourable conditions that the construction sector enjoys. In the following, it analyses the situation of garment workers on Phnom Penh's investor-driven real estate market and presents the approaches that various stakeholders have to it. As the existing literature on the topic is very scarce, field research and expert interviews provide the basis for this analysis. The interviews have been conducted with a range of stakeholders from worker and employer organisations, the real estate, non-governmental and public sector as well as academia¹. As it becomes clear that the clash of migrant workers' and investors' demands will worsen further without intervention, this study finally proposes actions to be taken, particularly by the public sector.

2. The global scope of the clash of rural-urban migrants and real estate investors

The origins of the developments on Phnom Penh's housing market lie in globalisation and more specifically in two global trends it entails: firstly, strong rural-urban labour migration and secondly, strong international real estate investment. These have severe impacts on urban housing markets, which are in stark contrast with each other.

2.1. Rural-urban migration increases demand for cheap rental housing

Already, more than half of the world's population lives in cities, and the United Nations predict that "*all* the expected world population growth [of 2.5 billion people] during 2014-2050 will be in urban areas" (United Nations 2014: 23). Urbanisation will be

¹ Detailed information on all interview partners as well as the interview guideline can be found in the annex.

particularly strong in the global south (ibid.), where economies are shifting from agriculture to industry and services (World Bank 2015b: xv), which drives rural-urban labour migration (Tacoli et al. 2014: 3).

This drastically increases the demand for housing in the cities of the global south. If migrant workers cannot move in with relatives or friends, they typically look for cheap places to rent (World Bank 2014a: 16, UN-HABITAT 2003: 14, Arifin 2001: 110). The preference for rental housing has numerous reasons: It used to be possible in many countries of the global south that even people who are poor or with low incomes could gain de facto home ownership on the informal, irregular and self-help markets. But even these “have become increasingly commercialised and it is rare for low-income households to be able to find sites which they can occupy free of charge” today (UNCHS 2001 according to UN-HABITAT 2003: 20). Also, most rural-urban labour migrants, particularly in the global south, face economic or employment uncertainty (World Bank 2014a: 24). With low and fluctuating earnings, they are unlikely to be eligible for credit (ibid.: 13). Moreover, they often live without family and are ready to move on for other work or education opportunities (Naik 2015: 171), for which rental housing provides the flexibility (ibid.: 170).

The rental arrangements that rural-urban migrants have are often informal. Self-help or subsistence landlords are very common, who own a small number of units on small lots and often live close to the tenants, not differing much from them in their socio-economic status (Naik 2015: 157 f.). They are relatively more accommodating to tenants’ demands (World Bank 2014a: 16), as they may be cooperative in terms of payments and adjust for periods of absence, which is particularly relevant for seasonal migrants (Naik 2015: 170 f.). But of course, informality has disadvantages, too, precisely because written contracts are rare (ibid.: 157), which leaves tenants in a precarious position to take legal action against landlords who provide substandard or dangerous housing (World Bank 2014a: 16).

As rural-urban migrants’ housing in the global south is mostly for rent and informal, it is hard to say what its exact dimensions are. In the East Asia region “data on the dimensions of rental markets are uniformly scarce” (ibid.: 24). Renting is supposed to account for only, e.g., 25% in South Korea, 13% in Thailand or 10% in Singapore (ibid.: 9). But informal rental markets are expected to comprise 60 to 90% of all low-income rentals in Asia’s cities (UN-HABITAT 2008 according to World Bank 2014a: 16). Generally, renting is more common in urban than in rural areas, particularly so in developing countries (UN-HABITAT 2003: 17), thus that the number of rental units increases with urbanisation, particularly so in the low-income settlements that are located on the edges of most cities in developing countries (ibid.: xix).

2.2. Investment in high-end real estate increases with globalisation, financialisation and entrepreneurial urban governance

The strong demand for international real estate investment opportunities (Olds 2001 according to Percival 2012: 5) is due to the increasing globalisation of capital and the growing financialisation of the economy. Currently, it is reinforced by unfavourable conditions on the financial markets, such as low interest rates, bear bond markets and generally high uncertainty due to the economic slowdown in China, changes in the European Union, etc. (Rapoza 2016: n.p.). It is further enhanced by drastic increases in private capital and significantly by the establishment of large sovereign wealth funds, pension funds and insurance companies in Middle Eastern and East Asian countries, which are all searching for investment opportunities (PwC/Urban Land Institute 2015:

2, Kidd 2015: n.p., Rapoza 2015: n.p.). More and more countries have also introduced real estate investment trusts (REITs) to their laws, which own or finance income-producing real estate themselves, as compared to real estate funds, which mostly invest in securities offered by public real estate companies (Investopedia 2015: n.p.). In the 2000s, REITs have largely emerged in Asia, too (Ooi et al. 2006).

International real estate investors aim to “expand into new and unexplored territories” (Harvey 2010 according to Percival 2012: 5), where often, the role of the government and public sector is weak in terms of financial resources and policy intervention – partly because funds are misallocated and lost due to corruption, because taxation is inefficient (Percival 2012: 5 f.), and significantly because of deliberate state downsizing at the behest of international financial institutions. These conditions favour an entrepreneurial mode of urban governance (Harvey 1989), which is characterised by “a more decentralized geography of urban governance and significantly more autonomy for local leaders” (Lauermann 2016: 4), who typically seek to substitute state funding with alliances with the private sector (ibid.). As they aim to attract mobile capital and urban investments, entrepreneurial cities are marked by consumer- and global corporate-oriented spaces (Joo 2015: 2). They target intervention into specific places, favouring growth over the distribution of wealth and opportunity across their territory (Hall/Hubbard 1996: 167 according to Lauermann 2016: 5) in order to win the competition with other cities that they consider themselves in.

In the course of globalisation, also many South-East Asian cities have embraced such an entrepreneurial regime (Yeoh 2005: 946) and invested in the “imagineering” of a global city (ibid.). At the same time, the “post-colonial enterprise of cultivating national identity and promoting national pride remains highly salient” (Yeoh 2001: 458 according to Yeoh 2005: 946), thus that they sometimes struggle to be “Western without the onus of dependence on the West” (Shils 1960: 267). The result has been an accelerated creation of new urban forms (Forbes and Thrift 1987 according to Yeoh 2005: 947), mostly in the shape of flagship and mega-projects, particularly high-rise towers (Bunnell et al. 2002: 21). These are

“dependent on a host of factors closely associated with the globalisation of finance and property markets, the growth of transnational corporations as well as the creation of social networks between policy-makers and mobile urban élites and professionals” (Yeoh 2005: 947).

The entrepreneurial city is obviously to the detriment of poor and low-income groups, as the wooed global private real estate investment is solely profit-oriented, often speculative, and thus pushes prices up “to the point where housing is no longer affordable to the majority” (Percival 2012: 115). In terms of “the marginalized urban poor, the discourse highlighted their outright displacement and neglect in the process of refurbishing urban spaces” (Smith 2002, MacLeod 2002 according to Joo 2015: 2).

3. The clash’s crystallisation in Phnom Penh

Phnom Penh, capital city of Cambodia, illustrates the clash of high rural-urban migration and strong international real estate investment on urban housing markets particularly well. Due to the country’s history, the processes of globalisation have been occurring, as it were, in fast motion, thus accelerating both trends.

3.1. Cambodia’s turbulent history and fast motion globalisation

From 1975 to 1979, Cambodia was ruled by the Khmer Rouge, who aimed at an agricultural communist state. They forced everyone to leave the large cities, so that

Phnom Penh was almost entirely depopulated, and abolished the concept of private property (Percival 2012: 92). The organisation of housing remained more or less anarchic after this period and only became commodified again in the 1990s, when the United Nations Transitional Authority in Cambodia (UNTAC) took over the administration and prepared the country for a free market economy (ibid.: 100).

It was then that Western donors stepped in to substitute aid from the soviet bloc (Katz 1991: 147), largely applying the principles of the Washington Consensus, including large-scale privatisation and a strong liberalisation of Foreign Direct Investment (FDI) inflows (Ear 1997). This is how Cambodia has developed an extraordinary dependence on FDI: Inflows between 1994 and 2013 amounted to more than USD 28 billion (Open Development Cambodia 2016: n.p.). Although meanwhile, a shift from Western to Asian donors has occurred, this trend persists: Today, the two largest contributors to Cambodia's Gross Domestic Product (GDP), the garment industry and the construction sector, are largely foreign-funded (Natsuda et al. 2010: 1).

Although Cambodia's GDP per capita of USD 1225 (2015 est.; CDC et al. 2016: n.p.) is still very weak in comparison to the world average and even to the average among developing countries in the region, Cambodia's economy has grown steadily and strongly over the last two decades – between 1994 and 2014, the yearly average GDP growth rate of 7.7% was even the sixth largest in the world (World Bank 2014b: n.p.).

3.2. Phnom Penh's garment factories as a major driver for strong rural-urban labour migration

The economic growth parallels a sectoral shift: While surviving on traditional agricultural livelihoods has become more difficult (Harima 2012: 5), the share of the employed population that works in the service and industrial sectors has increased to more than 50% (2014; National Institute of Statistics 2015: 73 f.). The change in labour and income patterns goes along with strong rural-urban migration. This is typically perceived as temporary. Many workers also migrate seasonally, going back to the countryside when there is much work in agriculture (interview Meas). But surveys show that rural-urban migrants stay for increasingly long periods in the city (National Institute of Statistics 2013: 93). Cambodia's urbanisation rate has hence increased to 30% and is predicted to further grow to 50% in 2050 (interview Tep Makathy).

In Phnom Penh, the population has grown by 70% between 1998 and 2013 (ADB 2014: 1) and now amounts to 1.7 million (2015; CIA 2017). 70% of the city's inhabitants were not born there, and out of these, 47% have arrived within the last five years (2008 Cambodian Census according to Ministry of Planning 2012: 9). Moreover, it is estimated that around 250.000 people commute to the capital daily (Chhay/Huybrechts 2009 according to Percival 2012: 101).

A major employer and pull factor of Phnom Penh is the garment industry. The capital region hosts 90% (Chansamphors 2008: 9) and the city itself more than half (June 2016; GMAC 2016: n.p.) of the country's 655 garment factories (ILO 2015b: 1). Hence, it accounts for at least 300,000 (interviews Ath, Khemro) of Cambodia's 700,000 garment factory jobs (better factories Cambodia 2016: n.p.).

The garment industry as Cambodia's largest employer is also the largest contributor to the GDP with 10.5% (2015; CDC et al. 2016: n.p.) and accounts for 80% of Cambodia's exports (2014; Reaksmey/Peter 2015: n.p.). The large majority of factory owners come from China and Taiwan, while only roughly 5% are Cambodian (GMAC 2016: n.p.). Also, almost all inputs are imported (interview Conklin/So). This lack of local embeddedness is a reason why the garment industry is very fragile (interview Tep Makathy): It has

happened many times that factory owners disappeared “over night” (ibid.). Given the combination of the enormous importance and fragility, the garment industry attracts much media and political attention – and gets priority treatment in various regards. Over the last years, an explosive topic has been the minimum wage for garment workers. It caused many disputes (Naren 2016: n.p.) and was increased annually since 2013 (ILO 2015a: 1), now amounting to USD 153 monthly (Khuon/Zsombor 2016: n.p.). Additionally, employees get several extra payments (ILO 2015a: 3) and 87% of them earn more by working overtime (Sreang et al. 2015: 19). But in contrast to average nominal wages, average real wages have increased much less during the last years (ILO 2015a: 4).

3.3. Phnom Penh’s construction and real estate sector focus on upper market segments, land values rise and urban poor settlements dwindle

The construction industry is with 50,000 workers another very large employer in Cambodia (CIA 2016: n.p.), particularly in its towns and cities (Harima 2012: 5). It is highly relevant for Cambodia’s economy, too, having an 8.8% (2015; CDC et al. 2016: n.p.) and thus the second largest share in the GDP (Konrad-Adenauer-Stiftung 2015: 1) and being with 2.0 percentage points the largest contributor to GDP growth (2014; World Bank 2015a: 5). Investments in the sector increased by over 30% in 2013 and 2015 (remaining stable in 2014) (Meng 2015a: n.p., 2016: n.p.) and even by over 150% in 2016 (Meng 2017: n.p.). In 2016, 2,636 construction projects were approved, covering 14 million m² and totalling investments of USD 8.5 billion (ibid.). The majority of these projects can be found in the provinces of and around Cambodia’s large cities (Property Report 2016: n.p.). A special focus is on Phnom Penh, and here particularly on modern high-rise buildings and the upper market segment (World Bank 2015a: 7).

Like in the garment industry, the investment volume in the construction sector is largely from other Asian countries (Property Report 2016: n.p., Konrad-Adenauer-Stiftung 2015: 1). As far as the number of projects and not the investment volume is concerned, though, local real estate investors make up the majority (Meng 2015a: n.p.), which points to a stronger involvement of local investors in smaller projects, whereas foreign investors focus on large-scale projects.

The profits that can be achieved are enormous. In the 1990s, growth in Phnom Penh’s real estate sector began in inner-city areas and from the end of the 1990s on, periurban areas have increasingly been taken into account. The increasing transformation of agricultural into residential land has been accompanied by enormous growth in land values. From 2005 to 2015, they generally increased tenfold in Phnom Penh (interview Kim). Currently, the value of land and real estate increases by roughly 20 to 30% a year for industrial and residential use (interview Kim), and even more for commercial use (interview Sear/Tan), while salary increases amount to only 5% a year. Due to the high potential revenues, land is also withdrawn from use and kept empty for speculative purposes (interview Meas).

The enormous investments in Phnom Penh’s real estate segment occur in times where indeed, there is an improvement of living standards (Konrad-Adenauer-Stiftung 2015: 1), the average household size is slightly decreasing and the demand for housing is high and increasing in Phnom Penh (National Institute of Statistics 2015: 105). Of Cambodia’s total housing need, estimated at 1.1 million new houses excluding the current deficit by 2030 (Royal Government of Cambodia 2014: 3), most can be assumed to be in the capital. However, housing supply hardly matches the local demand: It “is seen at very fast rate especially for the middle-income and upper middle-income group [that are]

still not very big. The proportion of the low-income group is still very large, [...] because [...] urban poverty now is roughly 13% in the entire urban area” (interview Tep Makathy). Poor and low-income² groups together even amount to 50% of Phnom Penh’s population (interview Khemro). The supply of condominiums for instance has lately increased by 20% a year (Meng 2015b: n.p.), with selling prices in central locations peaking at averages between USD 1,800 to 2,500 per m² (CBRE 2012, n.p.). These are “out of reach from all but the top few per cent of Cambodians” (Percival 2012: 124). Large parts of condominium sales are therefore to foreigners, depending on the source 60 to 70% (Seng Bonna, director of Bonna Realty Group, according to Meng 2015b: n.p.) up to even 90% (interview Kim). Without doubt, the demand is “very much speculative” (interview Tep Makathy) and the physical occupancy rates are hence often low (Meng 2015b: n.p., Percival 2012: 148 f.). If investors do not “take into consideration the selling price of properties to appeal to many buyers” (Property Report 2016: n.p.), experts fear, rising land and housing prices, strong credit expansion and speculation could cause a bubble (World Bank 2015a: 7).

Nevertheless, real estate investors enjoy strong political support. Reasons are the great economic relevance of the construction sector and certainly also personal relationships and corruption, which is fuelled by the low base wage of public sector employees. The Cambodian government has developed the Land Law in favour of foreign real estate investors (Land Law of 2010, Article 44) and it treats the regulations on land categories and ownership very flexibly: There is no publicly available map of land categories (interview Tep Kosal), but observers reckon that within the last five years, large amounts of public state land, which is legally inalienable, have been simply converted into private state land in order to sell or lease it to the private sector, thus that public state land has become very rare (interview Meas, Kim, Sar). Furthermore, the conversion of land uses is not regulated, which facilitates speculation in the city’s periphery, where land is still agricultural, but will soon be needed for urban uses and hence increase in value (interview Tep Makathy).

Land and real estate investment has hence put extreme pressure on existing, particularly poor, settlements. Their number has decreased from 569 in 2003 to 340 in 2013 (Fukuzawa 2014: 8), which corresponds to almost 30,000 urban poor families less (ibid.: 10). Many of them have been forcibly evicted (Sahmakum Teang Tnaut 2014: 1), often very brutally (e.g. Wright/Pheap 2016). Over the years, protests have led to the development of alternatives to evictions including relocations, on-site upgrading and land sharing, but their success has been meagre. The relocations that took place have resulted in moving urban poor settlements from the centre to the outskirts (Fukuzawa 2014: 8), where residents usually have decreased access to services, livelihood opportunities and income (Heinonen 2008: 98). As the need to travel increases, they often have to change their jobs or become unemployed (ibid.). Relocations have thus basically created new poor settlements with decreased standards of living. And in fact, forced removal still takes place, but “is usually presented as a voluntary or negotiated one” now (Durand-Lasserve 2005: n.p.). Today, 12,000 families in Phnom Penh’s urban poor settlements are under threat of eviction (Fukuzawa 2014: 18, Sahmakum Teang Tnaut 2014: 1). Evictees who are renters “are typically ineligible for compensation or resettlements” (Davis 2006 according to Pho 2013: 89), i.e. search for a new rental homes elsewhere. Also those who are subject to resettlements are often not happy in the new area (Pho 2013: 55) and therefore return, likely as renters, “to slum dwellings

² Khemro defines a low income as not exceeding USD 400 monthly (interview).

because it is possible to make a living” there: “the location is more important than what type of dwelling it is”, concludes Pho (ibid.: 79), and states that hence, “renting is becoming more pervasive in Phnom Penh” (ibid.: 55). Over 30% of the city’s population live without adequate housing and basic services (Municipality of Phnom Penh 2005 according to Heinonen 2008: 97).

4. Garment workers’ housing exemplifies the dilemma

Phnom Penh’s garment workers provide an ideal case study to analyse the dilemma situation created by the clash of rural-urban migration and real estate investment more concretely and in detail: They have typical characteristics of rural-urban migrants, but more data and more pressure to improve their situation exist due to the economic relevance of the industry and the political attention it hence enjoys. They live rather concentrated in certain places, form a large and relatively homogeneous group.

4.1. Phnom Penh’s garment sector and its workers

Of Cambodia’s garment workers, 90% are migrants (Chansamphors 2008: 10), mostly from rural areas (interview Loo). They are young: between 18 and 35 years old (Clean Clothes Campaign 2013: n.p.). Over 80% are female (ibid.) and most are unmarried (Chansamphors 2008: 10, interviews Sok Vanna, Ath). This makes them a vulnerable group (chapter 4.3). Garment workers have hardly any job security, with some 90% of them having no permanent but only fixed duration contracts (Solidarity Center n.d.: n.p.), typically for only 3 to 6 months (Harima 2012: 26). Some of them just come seasonally (interview Sok Vanna), but generally they stay for a few years (interview Sear/Tan, Sreang et al. 2015: 18). The workers’ average income including overtime etc. is generally more than the previous wage in rural areas (Chansamphors 2008: 3). However, due to various factors they remain very poor (interview Sok Vanna): The costs of living are higher in the city (Chansamphors 2008: 5); they hardly have any insurance (interview Sar); they usually have to support at least one other family member (Sreang et al. 2015: 18) and send back remittances of on average – depending on the source – more than 10% (ADB 2012: 12, chapter 3.3) up to even 40% of their income (interview Conklin/So).

Given the workers’ limited budgets and temporary stays, they need housing for rent (interviews Sear/Tan, Sok Vanna). They generally want to stay close to the factory (interview Loo, Pern 2014: VI) – Ath Thorn considers that 1 km is already far in Phnom Penh (interview) – because also transport is expensive, and they often start to work early in the morning and end work late at night, when it is good to reduce travelling time also for security reasons.

4.2. Housing close to the factory

About 30 to 40% of Phnom Penh’s garment workers keep living in their family’s home outside the city, and commute daily under very bad conditions (see Buttmann 2016: 49 f.), but the majority lives in the city (interview Ath). As the demand for cheap rental housing around the factories has increased, also the supply has quickly grown (chapter 4.5). Assessments on how easily workers can find housing today differ widely depending on expectations in terms of quality, price and proximity to the workplace – generally it can be said that some kind of housing is always available, but it may well be that the conditions are bad (see Buttmann 2016: 51).

The majority of garment workers shares rented rooms with co-workers, friends or relatives (Chansamphors 2008: 6, interviews Ly, Ath), typically between two to seven

people (Sothary Kun, former garment worker and now singer-activist, according to Tolson 2014: n.p.). The number of sharers tends to decrease and the space per person to increase (interview Kim), but the average living space per Cambodian garment worker is still very small with – depending on the source – 3.6 m² (Chansamphors 2008: 27) to 4 m² per person (Sreang et al. 2015: 18). For Phnom Penh in particular, experts more or less confirmed these numbers. Although they are slightly higher than for Phnom Penh's poor and low-income renters as a whole, they are only slightly above the minimum standard of 3.5 m² of covered living space per person that has been set by a wide range of humanitarian agencies (Sphere Project 2011: n.p.).

4.3. Poor housing quality and lack of security

Hence, most garment workers lack private sphere and space. Normally, they have only one place for sleeping, eating etc. (interview Ath). Often, their rooms are dark (Sokheng/Taguam 2015: n.p.) and do not have enough fresh air (Chansamphors 2008: 28). Despite Cambodia's hot climate and many sunshine hours, many landlords do not build ceilings under roofs of corrugated iron (interview Sar). Most rooms have no ventilation (Sokheng/Taguam 2015: n.p.), let alone air conditioning, and thus get very hot. This problem is exacerbated when workers have the night shift and sleep during the day. Many garment workers complain about poor sanitary facilities (Chansamphors 2008: 28): They usually share few toilets with many people (interview Ath), and sometimes, particularly right after having been build, accommodations lack water supply (interviews Sok Vanna, Ath). Also electricity supply is often problematic (Chansamphors 2008: 28). Also, the areas where garment workers' housing is located are often bad, because there is noise and air pollution, it is dirty and smelly (Chansamphors 2008: 28, interview Ath). Often, there are large gaps in providing essential services like education, health and legal services (Oeurm 2013: n.p.).

Garment workers' housing is generally insecure (Harima 2012: 26). Sometimes, workers are robbed (interview Ath), there is sexual harassment and rape (interview Conklin/So). As the workers are young, mostly female and single, they are particularly vulnerable. It is especially dangerous for them if the housing is in quiet areas (interview Ath) and they are out at night, which happens very much with nightshifts. There is often no lighting and inadequate policing (Oeurm 2013: n.p.). Some workers are "under constant fear of robbery and rape" (ibid.) and for security reasons, often travel in a group. But Ath Thorn rightly notes: "How can they live in a group all the time?" – "It's not easy" (interview).

Bad housing is a problem particularly for newly arriving migrants: Having lived in Phnom Penh for longer, it is possible to, over time, move to better housing, whereas newcomers first get the worst housing that others have left behind (interview Ath).

4.4. Rents increase along with minimum wage

The rent which workers pay of course depends on the room's size, the number of people with whom they share it and on the housing type and quality. Generally, they consider the price more important than the quality and take the cheapest room they can get (interview Ath). Cambodian garment workers' median rent or house maintenance costs are USD 12.5 without and USD 19.65 with utility costs monthly (Sreang et al. 2015: 20). These numbers roughly apply for Phnom Penh, too (see Buttman 2016: 52). Housing thus comprises 9.5% of the workers' median total consumption expenses of USD 207.5 monthly (ibid.). Much larger expenses are directed towards other fields like USD 116.3 for food and beverages, USD 78.79 for alcohol and cigarettes, or USD 45 for loan payments (ibid.).

In the low-budget rental sector, so for most garment workers, landlords increase rent prices every year (Sokheng/Taguiam 2015: n.p., interview Ath). It is further “common practice that landlords [additionally] increase the rents for garment workers when there are minimum wage increases” (Sokhorng 2015: n.p.). Dave Welsh, former country director of the Solidarity Center, gave the example that “when wages go up by \$5 to \$10, you will see rents around factories and other costs go up by around the same amount” (according to Sokheng/Taguiam 2015: n.p.). In case of the minimum wage increase of 2016, the rents of many have even crept up a month in anticipation (Sokhorng 2015: n.p., interview Conklin/So), and although the wage rise was only 9.3%, rents were increased more strongly by some landlords: Pav Sina, president of the Cambodian Union for the Movement of Workers, reports increases of 10% (according to Sokhorng 2015: n.p.) and So Somalay even of up to 50% (interview). Further increases might follow.

4.5. Providers of garment workers’ housing

There is no public provision of garment workers’ housing, but private investors are usually quick to construct rental housing when they see demand for it arising (interviews Loo, Sok Vanna). Renting out rooms to workers’ often starts from a family basis (interview Tep Makathy). Some locals living around the factory upgrade their own houses, purpose-build or convert existing structures into workers’ rooms (interview Loo), and some also newly develop land (ibid.). The quality varies widely – which is normally reflected in the prices (interview Ath).

However, Tep Makathy, lecturer at the Faculty of Architecture and Design of Phnom Penh’s Pannasastra University of Cambodia and consultant to the World Bank and Asian Development Bank, “noticed that renting now [has] become a bit more professional and large-scale [...] especially in locations where there is a concentration of the factories” (interview). According to Paling (2012: 3) “until 2011, 90 private communities had been developed [in Phnom Penh], some of them gated, some consisting of many identical shop houses between one and four storeys”. All this is still individual, though: “It’s just one guy who owns a piece of land, build one block, that’s his. He’s not a company, he’s not a real estate developer” (interview Loo).

It is assumed that most of these providers know the right people in local politics or are family members of factory owners (interview Conklin/So). According to Ken Loo, secretary general of the Garment Manufacturers’ Association of Cambodia (GMAC), it is “for sure” that some developers of factories are in dialogue with providers of housing (interview). Some of them are landlords themselves, just that they do it as a business completely separate from the factory (interviews Loo, Kim, chapter 5.2).

By law, factories are required to provide accommodation for their workers, and if not pay them a USD 7 allowance for accommodation or transport per month (GMAC 2015: 2). Very few of Phnom Penh’s garment factories do provide housing, though – exact numbers are not available; The highest estimate is 5 to 10% (interview Ath). So Somalay notes that many of the factories that say they provide housing actually do not (interview) to avoid paying the allowance. According to Ken Loo, factories only provide accommodation if there is a lack of supply of labour, which may be the case due to a specific location or a higher requested skill-level (interview). Even then, price and quality of the housing remain the same, though, and only the proximity to the factory increases (interview Sok Sam On).

4.6. Legal framework for garment workers' housing

Many landlords in Phnom Penh charge their poor and low-income tenants, so mostly students and migrant workers and in particular garment workers, much more for electricity and water than the prices of the state-run providers actually are (Pern 2014: VI). To prevent this from happening, in January 2015 the Cambodian prime minister Hun Sen and the state-run electricity provider Electricité du Cambodge (EdC) launched an energy discount initiative: In districts of Phnom Penh that are heavily populated by garment workers (Taguam/Chakrya 2015: n.p.) EdC charges the tenants directly to avoid price manipulation by landowners (ibid.). So far, the covered tenants, labour union leaders and non-governmental organisations (NGOs) are largely satisfied with the initiative, and ask for its expansion to more places in Phnom Penh (Taguam/Chakrya 2015: n.p.). Hun Sen has ordered the examination of a similar initiative for water in February 2015 (Sokheng/Taguam 2015: n.p.), but information is still not available on this plan.

Also in 2015, a rent control law was passed particularly for garment workers, to avoid that rent hikes further accompany their minimum wage increases (Sieng 2015: n.p.). Accordingly, landlords and tenants have to agree to a fix rent price for at least two years in case of new rental agreements (Whitehead 2015: n.p.). For existing ones, EdC assesses rent prices and then fixes them for two years, too (Sieng 2015: n.p.). Critics worry that landlords will increase rents in advance and “factor in future inflation, expected market changes, and the increased risk they face due to rent control” (Ward/Seila 2015: n.p.), so that prices will increase even above current market levels. They further fear that landlords will prefer to rent to other people than garment workers who are not covered by the law, that the supply of garment workers' housing will thus decrease and rent prices hence increase (ibid.). Many stakeholders welcomed the rent control law, though: Some, because they hope that it will reduce calls for higher wages, stabilise the workforce and calm industrial relations in the garment sector (Matthew Rendall, Partner at Soksiphana & Associates according to Whitehead 2015: n.p.), others because they hope for better living conditions of the workers. Generally supporting the law, NGOs and unions only see some gaps in its implementation – How much can landlords increase the rents after two years? How will they be punished in case of non-compliance? – and point to the importance of effective monitoring not only by the NGOs, but also by the public authorities (interview Bour).

5. Stakeholders do not tackle the problems

The garment worker case includes a multitude of stakeholders – prominently worker and employer organisations, the private real estate, public and non-governmental sector as well as academia. Their approaches to garment workers' housing exemplify many fields of tension such as between private and public, incentive and regulation, economic and social aspects. An effective handling of the clash on the housing market in order to improve the situation of garment workers is missing, though.

5.1. Labour unions focus on minimum wage

Compared to other groups of workers, garment workers are relatively well organised. Over the last years, their main concern has been the minimum wage, but as conflicts about it have been going on “for too long” and unions are worried about the reputation of the garment industry, they increasingly consider pushing for other kinds of remuneration including a housing allowance (interview Sar). This is still a very marginal topic, though, and housing has otherwise hardly been considered, despite the unions

reckoning that “room rental is very important to the worker” (interview Ath). For at least two reasons, it is not sufficient to treat housing as part of the minimum wage discussion, though. First, because minimum wage increases are generally followed by rent increases, of which labour union representatives are aware. Secondly, unions doubt that if the minimum wage were higher, workers would decide to spend more money on better housing. According to William Conklin and So Somalay, country director and programme officer at the Solidarity Center, housing is not the workers’ priority and they would prefer buying other items or remitting more money home over spending even only slightly higher amounts on better housing (interview). Hence, unions consider it better to prohibit housing below a certain standard to prevent workers from minimising costs to their own detriment (interview Conklin/So, Ath Thorn according to Sokheng/Taguam 2015: n.p.). They are aware that a minimum housing standard might not always be complied with, but William Conklin reckons that at least, it should exist (interview).

Apart from standards in terms of enough space, light, air and hygiene (interview Conklin/So, Ath Thorn according to Sokheng/Taguam 2015: n.p.), a variety of security measures such as fencing dormitories in, lighting them well, installing locks and inside toilets as well as having security personnel are proposed, particularly in view of the female workers (interview Conklin/So), and unions consider it important that housing is close to the factory (interview Sar).

According to William Conklin the public sector should conduct a housing census that assesses current conditions and actual needs by getting the input of the workers (interview). In terms of who should actually provide housing, the opinions of union representatives differ. Ath Thorn, president of the country’s largest independent labour union, the Coalition of Cambodian Apparel Workers’ Democratic Union (C.CAWDU), reckons that factories should build dormitories (interview), while several others consider the state in charge to build low-cost rental housing (interviews Conklin/So, Sar). They doubt that it does not have funds or land for this and estimate that rather, most of these are directed towards the private sector (ibid.). An increasing involvement of the latter they consider unrealistic, pointing to the unwillingness of the public sector to introduce stricter regulation, but also to the lack of attention that is paid to regulation. For example, they note, incentivising landlords to provide low-cost rental housing with tax reductions would not be effective as probably, only 1% of all landlords pays taxes at all (interview Conklin/So). Frustration and a feeling of powerlessness in face of increasing privatisation, strong influence of the private sector and prevalence of corruption are obvious.

5.2. Garment factories engage only indirectly in housing market

The employers of the Cambodian garment sector are represented by the Garment Manufacturers’ Association in Cambodia (GMAC), which has 616 members (GMAC 2016: n.p.), so a large part of Cambodia’s 655 factories. Their secretary general Ken Loo sees no need to supply more or better housing for garment workers (interview):

“Is there better housing available? Yes. [...] Do the workers have to stay in [...] unwell and less desirable environment? No. [...] They don’t want to spend more. Simple.” (ibid.)

While Ken Loo understands that workers need to use parts of their wages for remittances, he considers that they could redirect other expenses, e.g., for phones, to good housing – or even afford both, simply “you’ve got to work hard” (ibid.). He says this

given that garment workers typically work ten to twelve hours on six days a week (Tola Moeun, head of the Community Legal Education Center, according to Tolson 2014: n.p.). The rent increases that regularly follow minimum wage rises are a huge problem in Ken Loo's eyes (interview). He criticises the unions for not having aimed at wage rises that are not open to the public, so that landlords would not have known (ibid.). Public minimum wage increases he sees as a cause for inflation, because they result not only in higher rents, but also in higher prices for transport, food etc., why he considers the workers to be even worse off after than before wage increases – and of course “the factory is also worse off” (ibid.). One option he would welcome but deems not feasible is that wage increases are earmarked for housing, e.g., via allowances or even direct investment (ibid.). His reservation is that this would not substitute but simply supplement wage increases, though, because in his opinion, workers “want everything”, have a “minimum wage obsession”, and “the upward pressure on wages is eternal”, so that package deals do not work (ibid.). The rent control law Ken Loo considers an absolutely inadequate response to the constant rent hikes, because “this goes against every single WTO regulation” (ibid.). He rejects any public interference in the market economy, except “to prevent essential services from being priced out of the reach of the citizens” (ibid.). Housing he does not consider an essential service, though (ibid.). While factory owners refuse to be directly included in the housing discussion, many of them most voluntarily get involved in an indirect way. Some provide housing, but not in the name of the garment factory (chapter 4.5). Many factory developers buy much more land than is needed for the factory itself in order to speculate with the rising demand for housing close to the factory, which in investor circles is called “factory for real estate” (interview Kim). A typical case would be that the developer purchases five times as much land as is needed (ibid.). As the factory is built or even only planned close to it, its value significantly increases (interview Sok Vanna) – prices may double within the first and increase tenfold within the next ten years (interview Kim). Reselling the land after this time, the developer thus becomes a millionaire (ibid.). As most garment factories are foreign and production is hardly locally embedded, and as the Cambodian economy heavily relies on them, decisions about less priority treatment or even responsibilities and obligations for the garment sector are a delicate topic. But Sear Rithy, chairman of the Cambodian real estate company Worldbridge Land (WBL), claims that the government plans to oblige new factories to provide housing for their workers until 2025 (interview). Kim Heang is of the opinion that this would not deter investors (interview). Teck Kee Tan, executive director of WBL, even speculates that owners of factories will soon provide dormitories by themselves, in order to further attract workers, for whom Phnom Penh is becoming less attractive because of the rising cost of living, including rising rents (interview).

5.3. Private real estate sector has more profitable opportunities

Housing for garment workers is a profitable business, “if it wasn't no one would do it”, as Ken Loo states. But the returns are much less than in other segments of Phnom Penh's housing market (interview Sear/Tan). Teck Kee Tan estimates that investment in typical garment workers' housing would be amortised after four to five years (interview). Providing such housing with rather low returns and long amortisation periods, but also with low investment and low risk, is interesting mostly for local people, who have neither much money nor much expertise in providing housing, rather than for foreign investors with more capital and experience (interview Kim) or for real estate developers (interview Loo).

Ken Loo reckons that “real estate developers, they normally want to deal in sales, not in rental” (interview), which is confirmed by Teck Kee Tan, who points to the almost immediate return on investment that sales deliver (interview). Garment workers’ housing and more generally rental housing for poor and low-income groups on the contrary is “a lot more hassle” according to Ken Loo (interview). Also Sear Rithy says “it’s the hardest business, because you handle with all variety of the people. That you need to do a lot of education: How to live clean, how to live safe, how to live together at the community. It’s not easy”, “because we have to manage for them. We not just only built and get out the way, no” (interview). Teck Kee Tan agrees that to “handle more people scares” (interview), and he adds that administrative processes are often more complicated and longer with poor and low-income people from rural areas, because there is a lack of data and certification, even such as ID cards (ibid.).

That real estate companies invest not only for profit but also driven by social responsibility, Kim Heang has not heard of (interview). Sear Rithy explains that WBL’s cooperation with the government on an affordable housing project, the only such cooperation so far, is part of the company’s Corporate Social Responsibility (CSR) strategy and that WBL decided to provide affordable housing, because this “is one of the big things that the country needs” (interview). Teck Kee Tan has the vision that WBL will hence both be “helping each and everyone to own a proper house” and “helping the country” to further grow (interview). When he continues that it will probably be necessary “to relocate a lot of people from their own current houses” and “it’ll be good for us [WBL] to be able to build estates for all these people”, it becomes clear that the affordable housing project is not only a social, but also a profit-oriented one, which benefits of the public sector’s support.

This is underlined when Sear Rithy notes that the affordable housing will be for sale, not for rent. He recognises that this is not an option for rural-urban migrant workers, unless they bring their families along (interview). But he considers that it will be possible to afford ownership for people with monthly incomes under USD 150, as the instalment costs he targets are only USD 60 to 70 per month, which, he reckons, they can share among two or three persons (ibid.). For this price, though, Sear Rithy considers it impossible to do housing in the city centre unless land is provided by the public sector (ibid.). Instead, he plans to provide housing in the outskirts and expects cooperation with the Ministry of Land Management, Urban Planning and Construction (MLMUPC) and other ministries to improve public transport (ibid.).

The first project shall comprise 2000 to 5000 units for households of four persons and be low-rise, as Sear Rithy still does not have confidence in Cambodians living clean and hygienic in high-rises (interview).

5.4. Public sector postpones housing for poor and low-income groups

Over the last few years, the public sector has paid increasing attention to housing for poor and low-income groups – at least in theory. In 2014, Cambodia has passed its first National Housing Policy (NHP), which formulates the aim that all inhabitants of Cambodia “have access to adequate housing [...], especially low and medium income households and vulnerable groups” (Royal Government of Cambodia 2014: 3). In this context, a General Department of Housing (GDH) under the MLMUPC and an inter-departmental taskforce for affordable housing have been established (interviews Khemro, Tep Makathy).

Out of a variety of “housing alternatives” that the NHP proposes that could benefit rural-urban migrants like garment workers (Royal Government of Cambodia 2014: 8),

attention is given almost exclusively to “cooperation with the private sector”, though. To date, the private sector is the sole actor on Phnom Penh’s housing market, and it has by far the largest knowledge and data about it, too. Hence, the public sector relies upon it (interview Ly) and with its policy often follows rather than guides it.

So far, the public sector aims to “encourage” and “incentivise” the private sector to engage in the provision of affordable housing by offering it infrastructure and cuts on taxes (interviews Khemro, Sok Sam On). However, it has not been defined yet what affordable housing actually means and who will be eligible for it. In newspaper articles, Peng Hong Socheat Khemro, general director of the GDH and vice-chair of the taskforce for affordable housing, presents an affordable housing project planned together with WBL (chapter 5.3) as “for migrants and short-term job seekers” (according to Vida 2015: n.p.). In interviews for this study, in contrast, GDH representatives explain that the project will be for the middle-class and for sale (interviews Khemro, Tep Kosal) and “the poor will not be able to participate in this” (interview Khemro). Although the GDH is well aware that rural-urban migrants such as garment workers mostly rent (interviews Khemro, Tep Kosal), it is only very vaguely discussed to reserve a certain percentage of the affordable housing stock for rental units (ibid.), and like WBL also GDH representatives speculate that if prices do not differ much, “people rather want to buy than to rent” (interview Tep Kosal) – They do not consider aspects of flexibility and sharing that are crucial for most rural-urban migrants, though.

Furthermore, Khemro recognises that even with incentives, providing housing for poor and low-income groups will not be as attractive as for the high-income strata for the private sector, and that for this purpose, social housing will be necessary (interview). However, this is only envisaged for later – the major reason given is the public budget:

“In order to help those small segment of the market [the poor and low-income population], we have to help the middle-income first. When you [...] get kind of a margin of the profit, that funding will be able to channel into the social housing programme. [...] Otherwise where the money come from?” (interview Khemro)

That the public budget is the reason is hard to verify, because “the Government of Cambodia provides the public with scant budget information” (International Budget Partnership/The NGO Forum on Cambodia 2015: 1). Also, a high prevalence of corruption (Beddow 2015: 7) results in the misallocation of financial resources (interview Sia).

If not via funds, another way for the state to significantly support the construction of housing would be by providing land. But it is not possible to gain insight into if and where state land is available, and most probably, large parts of it have been privatised (chapter 3.5). Nevertheless, the GDH vaguely thinks about models where the state provides land in order for the private sector to develop housing on it (interviews Khemro, Sok Sam On).

Yet another way for the public sector to support low-cost rental housing would be via urban planning and regulations. On paper, there are attempts to develop a “clear land use plan by separating industrial zones and residential zones or urban areas” (Royal Government of Cambodia 2015: 21), and an urban master plan for Phnom Penh until 2035 has indeed been approved at the end of 2015 (Thiemann et al. 2015: n.p.). But neither a land use plan, nor the urban master plan, nor any other plan on land categories, ownership, values, nor information on construction permits etc. are publicly available (interview Ly).

Also, there are very few regulations on construction and housing, which seems to be slowly changing, though. A rent control law and a regulation on payments for electricity

are now in place, although just for parts of Phnom Penh, and a regulation on payments for water is planned (chapter 4.6). In the context of the affordable housing taskforce the GDH currently develops minimum standards for housing (interview Tep Makathy) as well as various regulations to ensure that affordable housing will reach its target group (interview Sok Sam On), if at some point it will be built.

However, when it comes to large-scale investors, GDH representatives are very cautious about regulation and rather “don’t want to force anybody” (interview Tep Kosal). Khemro says he drafts a regulation similar to a Malaysian one which obliges developers of sites larger than 2 ha to allocate 20% for public housing, but adds that this is still very vague. For garment factory owners in particular, obligations are seen very sceptically. Prohibiting them from buying more land than they actually use, Ly Chanphakdey, deputy director of the Department for Legislation, Planning and Cooperation of the GDH, considers not feasible, and points to a tax on unused land instead (interview). Khemro stresses that garment factory owners are a government priority and get many economic incentives, concluding that “we cannot make it mandatory for them to really housing the employees” or at least: “Making housing part of their mandate might be something very new” (interview).

Anyway, enforcement is difficult, as becomes obvious from factories pretending to provide housing to avoid paying the housing allowance, from doubts of the GDH that companies will really provide affordable housing when they get incentives for that (interview Khemro) and many other examples. One case that shows well how difficulties in enforcement alter the public sector’s approach to regulation is the property transfer tax. It amounts to 4% of the price of the property, but instead of using the actual price, the department for taxation estimates a much lower one, usually amounting to one fifth of the actual price, because otherwise, nobody would pay at all (interview Tep Kosal).

5.5. Non-governmental organisations concentrate on evictions or withdraw completely

A wide range of local as well as international NGOs work on the situation of urban poor housing in Phnom Penh. Most of them focus their work on existing urban poor settlements and upgrading activities there, try to avoid evictions and relocations or to improve the way these are carried out. They have essential knowledge and data about Phnom Penh’s urban poor population and its problems, needs and preferences in terms of housing. However, the NGOs hardly engage in pro-active planning, in constructing and organising new, additional housing for the urban poor. In view of the strong rural-urban migration it is sure, though, that even if all existing urban poor settlements would be upgraded and maintained at the disposal of the urban poor, these would still not suffice to accommodate Phnom Penh’s poor and low-income population.

The issues around existing urban poor settlements are so numerous that they tie up the NGOs’ capacities already. The human and particularly the financial resources of most NGOs are too limited to acquire land, plan and carry out infrastructure and housing construction. To merely make proposals for new housing projects, the NGOs would need information on future development plans for Phnom Penh and on land availability, which is not provided by the government and public sector. The opportunities that remain are to provide information and issue recommendations as well as to criticise and mobilise protest. One NGO that engages in the latter is the Housing Rights Task Force (HRTF). Various threats and attacks, indirectly from the government, on the HRTF’s secretariat director Sia Phearum show that this is a dangerous approach to take, but also an effective one: Having empowered urban poor communities to put up resistance, voice

their critique and make contact with the media has put considerable pressure on the government and is certainly one reason why officially, no more evictions shall take place in Phnom Penh (interview Sia). Still, this approach is mostly reactive and at best maintains the status quo. Another NGO, Sahmakum Teang Tnaut, focuses on upgrading activities and research, and is among the few that have actually treated rental housing and rural-urban migration (Linton 2015a, 2015b), thus providing a rare and valuable database.

Many international organisations have withdrawn from the field of land and housing as the topics are economically and politically highly charged. Sok Vanna, country director of UN-HABITAT, outlines that the principles of any involvement of UN-HABITAT are that the issue is a) neutral, b) technical and that it is c) not dealt with in the media before it is finished (interview). As in terms of land and housing, these criteria are hardly fulfilled in Cambodia, UN-HABITAT is not active in these fields anymore. Also the World Bank has largely withdrawn from land and housing topics (interview Tep Makathy). It made bitter experiences with the funding of land titling programmes that were associated with thousands of evictions in 2011, and froze all its new lending to Cambodia after this (Hodal 2012: n.p.). Yet another example is the German development agency GIZ that has recently decided to end its long-term land titling programmes “in frustration over the government’s slow reforms” (Zsombor 2016: n.p.).

5.6. Academics see necessity for state action

Various academics see the housing situation as very problematic today, because low-cost rental housing is insufficient, but crucial for the poor and low-income population (interviews Tep Makathy, Meas, Kong). They agree that the provision of it has to be supported by the state, whose role it is to take care of those who nobody else wants to deal with as they “cannot afford” (interview Tep Makathy). Tep Makathy, lecturer at the Faculty of Architecture and Design of Phnom Penh’s Pannasastra University of Cambodia and also a consultant to the World Bank and Asian Development Bank, highlights that an important means for state support has been lost as Cambodia has largely privatised land (interview). Academics hence agree that to increase the supply of low-cost rental housing, the state must mobilise the private sector (interviews Tep Makathy, Kong). Tep Makathy and Meas Kim Seng, urban development lecturer at various universities and founder of various urban poor organisations, are in favour of obliging developers to allocate a certain amount of their land or project to affordable housing (interviews). There are different opinions on the specifics, though: While Meas Kim Seng generally favours pressure as otherwise “the private sector does not care (interview), Tep Makathy is very cautious with it regarding garment factory developers and proposes to rather incentivise them in order not to lose the competition for them (interview).

Academics call for various regulations and standards for garment workers’ housing, and they consider it important to develop these together with the workers themselves and with civil society groups and NGOs (interviews Tep Makathy, Kong). Also they see it as important to, once good low-cost rental housing is established, protect it against speculators by clearly defining eligibility criteria (interview Tep Makathy).

6. Ways to improve migrant workers’ housing in an investor-driven market

From the analysis above it results that the double pressure that migrants and investors exert on urban land and housing markets is pronounced and has severe results. This is merely noticed, but closer attention is lacking. Especially when it comes to reactions or

even a systematic and proactive handling of it, hardly any approaches are to be found. The following section will therefore give an overview of potential ways to go.

For a start, all stakeholders, but in particular the public sector as in urban policy makers and planners, have to explicitly acknowledge that increasing rural-urban labour migration and heavy investment in land and high-end real estate are conflicting trends, and that most decisions in terms of Phnom Penh's urban development and real estate market imply a trade-off between migrants' and investors' interests: Decisions for investors are mostly decisions against migrant workers and vice versa, at least in the short term. It also needs to be acknowledged that currently, conditions are largely for the benefit of investors, and if this is supposed to change and migrants' needs are to be put either on equal footing with or even get a greater significance than investors' gains, then action needs to be taken which favours rural-urban migrant workers' housing.

A general problem for this is the lack of accessible and good localised socio-economic data, e.g., on migration, income strata and housing, as well as maps, e.g., on land categories and uses. Gathering this would help to assess the status quo and the trends, to monitor and control measures that are in place, to enforce regulation and to design further actions.

Improve data base			
Approach	Control housing costs	Increase housing quality	Increase housing supply
Option	<ul style="list-style-type: none"> • Control rents • Control payments for utilities 	<ul style="list-style-type: none"> • Increase housing expenditures • Introduce minimum standards • Make use of urban planning instruments 	<ul style="list-style-type: none"> • Incentivise or enforce private housing supply • Oblige housing provision by factories • Public housing provision

Overview of approaches and options to improve rural-urban migrant workers' housing in Phnom Penh. Source: own table.

The table above shows three broad approaches to improve rural-urban migrant workers' housing in Phnom Penh and for each of these several options, which will be explained and evaluated in terms of 1) prospects for resolution, i.e. the chances that an option is actually chosen and implemented, 2) practicability, which refers to the chances to successfully implement and, where applicable, monitor and enforce options, and 3) impact, i.e. the expected effect and scale of the outcome of an option.

6.1. Control housing costs

One approach to improve the housing situation for rural-urban migrant workers would be to control housing costs, and one option here to control rents. A first and important step has been taken with the rent control law. Like critics say, it will be difficult to control. Given that poor and low-income renters so far rarely have formal contracts, it is particularly hard to prevent that rents will be disproportionately increased before being fixed. The renters themselves need to monitor landlords, which means that they have to be aware of their rights and need a contact point where to complain in case of non-compliance, which is not given, yet. Furthermore, landlords who increase their rents

hardly have to fear losing out on tenants both because housing is not a normal market product which consumers change according to prices as this is associated with high transaction costs, and also because the supply of low-cost housing is very limited and competition for it thus high. Also in terms of the other option – to control payments for utilities – a first and important step has been taken with the regulation on payments for electricity. It is easier to implement because landlords can be monitored by means of meters, and a positive impact of the regulation can already be observed.

6.2. Increase housing quality when housing is not prioritised

To increase rural-urban migrant workers' housing quality, one option would be that workers give it a higher priority and spend more on it. One way to achieve this would be awareness rising about the negative long-term effects that housing may have on, e.g., health. It can be assumed that this would be easy to decide on as it is to no one's detriment. Practicability comes down to financing, which would, for instance from donors or NGOs, probably be manageable. But awareness rising could only be effective if the supply of better quality housing was actually given, which remains unclear, and still then, it might not have very far-reaching consequences.

Another option to increase housing expenditures would be to earmark a certain budget for it. This happens already with the housing allowance, but with USD 7 to such a small extent that workers hardly pay less for housing anyway. Also, the earmarking is merely reflected in the name, but the allowance can as well be spent otherwise. The unions could push for a higher and more strictly handled housing allowance: Employers do not care whether they pay an increase of the minimum wage or an allowance instead, as long as the allowance is really instead and not on top of a wage rise. To ensure that the allowance is spent on housing, i.e. otherwise lapses, good monitoring or direct payments from the factory to the landlord would be necessary. Those who found a good place for less money than the allowance would thus not receive all of it and one might argue that the incentive to find housing cheaper than the allowance hence decreases. Furthermore, there is a risk of corruptive deals between factories and landlords. Moreover, if the rent control law does not work properly, it could happen that all landlords increase the rents to at least the amount of the allowance, also for substandard rooms, knowing that the money is there. Earmarking does thus not per se mean an improvement in housing conditions, unless combined with other measures. Practicability and impact are hence limited. Anyway, a crucial question is whether such interference in the workers' freedom of choice is justified. Is it not their right to allocate funds according to their preferences, and if they give more weight to other things than to good housing, they may? As I will argue below, this varies depending on what good housing refers to. But the effect of earmarking a part of the wage is certainly too vague to justify such an interference.

Yet another option to increase housing quality is to introduce a minimum standard for housing. This is a widespread demand among labour unions and NGOs and it is currently being worked on in the General Department of Housing (GDH), although it is not clear to which extent the GDH plans to implement it. While for a single housing project, a minimum standard is certainly easily decided upon, it is less probable, but still possible that it will be enacted for all housing in Phnom Penh. A considerable counterargument could be the practicability: The feasibility of upgrading all housing according to a minimum standard obviously depends on the specific criteria, but anyway, monitoring and enforcement are hard to ensure. Considering that not even once a census of all housing has been done, regular checks are far away and would only work if enough

human and financial resources were made available for it and if residents themselves cooperated by reporting non-compliance to a contact point, which, again, would need to be established. Due to necessary upgrading, rental prices might increase, and again the question arises whether it should not be the workers' choice what standards they want to afford. The question that comes up is: Which housing standards can a society support and which ones does it reject for human rights reasons? In the case of garment workers, housing does often not or just meet internationally acknowledged minimum standards, and the human right to adequate housing is frequently infringed. This cannot be justified when it comes to aspects like basic hygiene, e.g. supply of clean water and enough toilets, or basic security, e.g. lighting and door locks to decrease the risk of robbery and rape. A minimum standard would need to focus such aspects and, as there is a class bias when policy makers with different lifestyles and perspectives than the workers think of housing standards, standards would need to be developed in close cooperation with the workers. Then, their introduction would be appropriate and have, if monitoring and enforcement are successful, a great positive impact.

6.3. Increase housing supply in a much less profitable segment

Increasing the supply of low-cost rental housing would be a great improvement for those who are in need for it: It would mean more options, increase competition among providers and thus likely lead to better quality and lower or less rapidly increasing prices. It would merely be an offer, but not imply any obligations for tenants, so that it does not entail moral questions like earmarking funds or setting standards. It touches much more on the financial question, though.

One option to increase the supply of low-cost rental housing is to incentivise the private sector. Small-scale, informal providers currently provide large parts of low-cost rental housing, which is advantageous for tenants regarding, e.g., flexibility in terms of payments. The scale of the market is thus likely to remain small and the housing quality low, though, and also, monitoring, e.g., of minimum standards and rent increases, is difficult. It seems reasonable to include more professional and large-scale providers, who are more potent in terms of financial resources and expertise, in the low-cost rental housing market. This is what the public authorities currently aim for by offering positive incentives. It becomes obvious that these would need to be enormous in order to cover the difference between the profit margins in the top or middle and in the bottom housing segment, though, and that this approach has so far only managed to further increase the interest in investing in middle-class housing for sale, which is slowly developing anyway, but not in low-cost rental housing, as even the so-called affordable housing project in cooperation with Worldbridge Land Co. (WBL) shows. It is thus a politically supported and obviously feasible, but not very effective option.

Negative incentives, so not tax cuts for targeting lower income strata but instead increased taxes on high-class housing, are, on the contrary, not discussed, probably because it is feared that these would deter investment in the construction sector, which is a driver of economic growth and as such very welcome. The practicability of negative incentives might be weak as compliance and enforcement are often not provided for, but in terms of impact it could still be a good measure: Even if only some investors would comply and if the negative incentives would not encourage investment in the low-cost rental segment, they would at least increase the public budget instead of putting a burden on it. If they would slow down investment in high-cost real estate, this might be considered a short-term economic disadvantage, but it would be a long-term social advantage, as the chances for Phnom Penh's inhabitants, for urban policy and planning

to keep up with and adjust to the urban transformation process would increase and the pressure on land as well as the speed with which land values rise would decrease, which would be a great benefit for poor and low-income groups.

Given that both positive and negative incentives, and cooperation with the private sector not either, are sufficient to redirect investment of real estate developers to low-cost rental housing, a more useful option seems to be regulation. Some promising models that have proven effective in other regional countries have been discussed in the interviews for this study – these basically oblige large-scale developers to reserve parts of their property for affordable housing. Something similar has already been tried with a pilot project of land sharing in Phnom Penh a few years ago, where the investor has not delivered on its promises, though. Reasons for the failure are seen in a “combination of lack of transparency, abuses and large-scale speculation” and “inadequate monitoring and enforcement procedures” (Rabé 2010: 11). This would likely restrict the practicability of a similar regulation, too, and the bitter experience of the pilot project makes it currently very improbable that an obligation for developers would find political support. Also, a regulation would in fact also have the character of a negative incentive and is thus seen as a potential barrier to economic development in terms of large-scale investments, which further decreases political support. If it was successfully implemented, a regulation to develop a certain share of every large-scale construction project that is underway or planned as low-cost rental housing could have a great impact, though, why it is very worth developing a feasible model of it.

Another, similar option to increase the supply of low-cost rental housing would be to oblige factory owners to provide housing for all of their workers. The majority of the interviewed experts consider this very delicate, though, given the high priority and economic relevance that the sector has in Cambodia, and the option is thus unlikely to be decided on. Factory owners are a very powerful party and surely not in favour of such a regulation, and they would put up significant resistance. But like real estate developers, factory owners are financially potent and anyway often purchase land around their factories, although for speculation rather than for workers' housing. In terms of practicability, it would be relatively easy to control whether factory owners comply with a duty to provide workers' housing, with the rent control and other housing laws, and also minimum standards could be well set. Workers would of course still need to be allowed to live elsewhere, but the guarantee to get housing from the factory if they want it would increase their negotiating power and the competition among housing providers – a very positive impact. Negative effects could be increased segregation and insulation of garment workers and rising dependency on their employers. Also, as they often just work for some years or shorter periods at one factory, it might imply frequently moving house. Nevertheless, the overall effect for workers can be expected to be positive.

There is no public provision of housing so far, and it is, according to the research for this study, at least some years, if not many more, away, as public funds for it are allegedly lacking, i.e. it is not at all a political priority. Given the high incentives that the public sector plans to give to private housing providers to invest in low-cost housing, and given that real estate experts consider the provision of low-cost rental housing merely a much less, but still a profitable business, public housing should be considered more seriously and urgently, though. While it would mean a high initial investment, it would also mean low long-term gains instead of continuous expenses for incentives. Public housing would be an opportunity to provide housing above a certain standard without having to monitor and enforce this, as well as to set appropriate rent levels and, depending on the

scale of the public housing, even have a ripple effect on rents on the free market. It would further be an opportunity to improve the image of rental housing, which is so far associated with a few worn down buildings that were built in Phnom Penh's centre many decades ago, and it could thus benefit all those who cannot afford ownership.

6.4. Transparent urban planning

It is not clear to what extent spatial planning is currently used to guide urban development, but certainly, it is hardly used in favour of the poor and low-income population. Land use plans should be used to assure that new factories are set up in a surrounding where there is enough space for workers' housing, and generally, that not too much residential land is converted into office or commercial space, as it is currently the case. Spatial planning should further assure that from the beginning on, housing around factories is well connected to technical infrastructure like transport, water and electricity and to social infrastructure like schools, clinics, etc. Very importantly, urban planning should be used to prevent land speculation. One way to do this would, again, be land use planning, so that it would not be possible for garment factory investors to claim they need extra industrial land, but in fact use or sell this land for residential purposes. Another important issue is to protect state land and use it for the common good. Wherever state land still exists or can be regained, it should neither be sold nor leased except for social purposes.

Publicly available, transparent plans, also spatial ones, are also urgently needed to enable all stakeholders and the public to get involved in the housing discussion, comment on plans and help to develop ideas. This could be extremely helpful, as much knowledge that exists, for instance in NGOs, is otherwise lost for urban planning. More transparency in this regard would also help to regain the commitment of international organisations that have withdrawn from the field.

7. Conclusion

So what are the prospects for garment workers and other rural-urban migrant workers on Phnom Penh's investor-driven housing market? As has been outlined, a major reason why there is a housing and more generally an urban development problem in Phnom Penh is that two strong socio-economic trends collide: Firstly, hundreds of thousands of migrants arrive every year, mostly coming from rural areas and looking for labour opportunities. Many of them, particularly young and female ones, take up jobs in the garment industry. It is Cambodia's largest employer and has more than half of its factories, so more than 300, in Phnom Penh's outskirts. All the migrants need housing, i.e. increase the pressure on the city's land and housing market. The second trend is the boom of the construction and real estate sector. Like the garment industry, it is largely foreign-funded and backed by enormous capital, which is invested mostly in upper market segments, as these are most profitable, and also in large-scale speculation. This changes the face of Phnom Penh: It causes direct and indirect evictions of poor settlements for development projects, so that in addition to the migrants, also poor and low-income long-term residents need to find new housing. Furthermore, construction and speculation projects of the real estate industry use or freeze, respectively, much of Phnom Penh's land, and thus push land and housing prices so high up that ownership and even rental housing in central districts are becoming impossible for the majority.

As has further been outlined, the problems that result from this are limited availability and affordability as well as low quality of housing for rural-urban migrant workers: Most of these have low-skill and thus low-paid jobs that are instable, like in the garment

sector, hence have low budgets and are hardly eligible for credit. Most migrants plan to stay temporary and are ready to move on according to labour opportunities, some even on a seasonal basis. Thus, homeownership is neither affordable nor suitable for them. If they cannot live at relatives' or friends' places, they hence mostly rent. But rental housing has largely been neglected by Cambodia's housing economy and policy. While this is slowly changing in the high-cost segment, low-cost rentals are still mostly privately provided, on a small scale and informally. Therefore, supply is low, there are rarely any contracts, rents are increased arbitrarily, and the housing quality is low. This is particularly problematic in terms of very small rooms, hardly any privacy, hygiene and health, and in particular for female workers, of severe security problems.

But as the interviews for this study have shown, nobody really tackles these problems. For workers' unions, the housing question stands back behind minimum wage discussions. Employers are not held accountable and do not feel responsible for their workers' accommodation and on the contrary, speculate with land. The private sector with capital and expertise invests where the highest profit margins are, which is and will be very far away from the low-cost rental housing segment. Small-scale providers alone will not supply sufficient housing for the expected number of migrants. The capacities of NGOs are absorbed by defending and upgrading the urban poor settlements that remain in the city. Many international donors have completely withdrawn from the topics of land and housing as these are too politically charged. By academics, the topic of rural-urban migrant workers' housing has not been put on the research agenda, yet. The public sector has enacted some regulations that may decrease workers' housing costs, and it works on standards to increase their housing quality, but the effects are yet to be seen. Concerning housing supply, the public authorities have vague plans, but no practical measures exist, allegedly because the state lacks budget, but obviously also because economic growth by means of real estate investment is prioritised over the needs of the poor and low-income population.

Without deliberate change, the housing situation of rural-urban migrant workers will thus likely remain bad and even worsen. Available and affordable housing will be increasingly far away from the centre, and thus from services and facilities as well as from sources of income. Garment workers, who work in the outskirts anyway, are slightly better off in this regard. However, segregation and inequality can be expected to deepen like this. Moreover, problems will arise from the ad hoc way of urban development that is determined by single investment projects rather than guided by wholistic, strategic planning. Frictions that this causes in terms of, e.g., infrastructure, will be hard and costly to handle in the future. Maybe, at some point the state will find itself forced to evict rural-urban migrant workers from where they move to today.

Changes that need to be made have been outlined at the end of this study: Awareness needs to be raised among workers, so that they place greater value on good housing. Also, the minimum housing standard, which the public sector plans, should be developed and applied as soon as possible – for all housing, not just for single projects. It must be the result of data collection and consultations with, particularly poor and low-income, residents, and hygiene, health and security aspects certainly need to be considered. To decrease housing costs, the regulations that have recently been implemented are good steps and need to be monitored and enforced now. When it comes to increasing the supply of low-cost rental housing, this study has clearly shown that incentives do not suffice to compensate for the profits that investors can achieve in middle and upper housing or commercial segments or with speculation. The way for the state to increase supply are thus regulation and obligations, e.g., for real estate

developers to reserve some percentage of their project for low-income housing or for factory developers to provide workers' housing. Also public housing should be considered, as the provision of low-cost rental housing is less, but still profitable, and the public sector's arguments about its limited availability of funds and land are contested by several stakeholders.

Monitoring and enforcement of these measures face difficulties due to the lack of institutions, data and transparency. There is also generally a high susceptibility to corruption. Most importantly, though, the chances that these measures find political support are low. Certainly, the government and public sector do recognise that their striving for economic growth and their resulting favourable approach towards large-scale land and real estate investors are in conflict with the needs of Phnom Penh's residents, the poor, low-income and migrant population in particular, and maybe they recognise that this conflict becomes stronger the higher rural-urban migration and hence the pressure on the low-cost rental housing segment get. Nevertheless, they have hardly reacted by shifting their focus from investors to residents, and "it is vital to see this as an active rather than as a passive power, because it is precisely through the making of new geographies that landowners (in alliance with developers, construction interests and [...] financiers) advance their own class position while contributing key solutions to the capital surplus absorption problem" (Harvey 2010: 182). As it has often been the case, e.g., in Britain from the seventeenth century onwards or lately in China, it likely also occurs in Cambodia now that the upper class derives its wealth equally or even more from land and urban development speculations than from industrial production (Harvey 2010: 181 f.) – the phenomenon "factory for real estate" indicates this in particular. As the ties between landowners, the construction sector, industrial and political elites are often very close in Phnom Penh, political action to change the current predominance of land and real estate owners and investors over rural-urban migrants and other poor and low-income groups is unlikely to occur. Nevertheless, it is worth trying to implement the measures outlined above. As the courageous and incessant fight for social justice of many labour unions and NGOs in Cambodia shows, and as Sar Mora, president of the Cambodian Food and Service Workers' Federation puts it: Although normally an egg cannot break a stone, "we have no choice, we have to fight" (interview). An encouraging example is the time between 1953 and 1970, where the population of Phnom Penh also rapidly grew, i.e. tripled, and yet, due to urban planning and the systematic incorporation of housing into universities, industrial developments etc., there was adequate housing for all (Ross/Collins 2006).

The relevance of the presented case goes far beyond the borders of Phnom Penh and Cambodia. This is not only because the products produced by those who live under poor housing conditions there are largely consumed in other places, from where also the pressure for low wages originates. It is also because globalisation, financialisation and rural-urban migration lead to conflicts on urban housing markets worldwide, which are similar in nature despite local specifications: Where urban governance is entrepreneurial and growth-oriented and where land and real estate markets are investor- and profit-driven, the poor and vulnerable will generally face neglect. Both the lines of conflict and the needs for action outlined here, particularly for public sector intervention, thus refer to a multitude of cities apart from Phnom Penh.

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Annex I: List of interview partners

No.	Person	Institution	Position	Date of interview
Labour representatives				
1	Mr. ATH Thorn ³	Coalition of Cambodian Apparel Workers' Democratic Union (C.CAWDU)	President	Dec 8 th , 2015
2	Mr. SAR Mora	Cambodian Food and Service Workers' Federation (CFSWF)	President	Dec 9 th , 2015
3	Mr. William CONKLIN Ms. SO Somalay	Solidarity Center	Country director Programme officer	Dec 18 th , 2015
Employer organisation				
4	Mr. Ken LOO	Garment Manufacturers Association in Cambodia (GMAC)	Secretary general	Dec 15 th , 2015
Real estate sector				
5	Mr. KIM Heang	Cambodian Valuers and Estate Agents Association (CVEA) Khmer Real Estate	President Chief executive officer	Dec 3 rd , 2015
6	Mr. Rithy SEAR Mr. Teck Kee TAN	World Bridge Land Co. (WBL)	Chairman Executive director	Dec 21 st , 2015
Public authorities				
7	Mr. Beng Hong Socheat KHEMRO	General Department of Housing (GDH) Taskforce for affordable housing National Committee for Land Management and Urbanisation	Director general Vice-chair Deputy general secretary	Dec 16 th , 2015
8	Mr. SOK Sam On	General Department of Housing (GDH); Department for Housing Technique and Development	Director	Dec 8 th , 2015

³ Names are given in the order that the interviewees put them. Usually, family names are put before given names in Cambodia, which is likely to cause confusion. To avoid this, family names are put in capitals. Where interviewees are referred to in the text, family names are used and, if necessary for clarification, also given names. For any mistakes that might have occurred in assigning family and given names, I apologise in advance.

9	Mr. TEP Kosal	General Department of Housing (GDH); Department for Housing Fund and Loan	Director	Dec 14 th , 2015
10	Mr. LY Chanphakdey	General Department of Housing (GDH); Department for Legislation, Planning and Cooperation	Deputy Director	Dec 17 th , 2015
Non-governmental organisations				
11	Mr. SOK Vanna	United Nations Human Settlements Programme (UN-HABITAT)	Programme manager for Cambodia	Dec 3 rd , 2015
12	Mr. SIA Phearum	Housing Rights Task Force (HRTF)	Secretariat director	Nov 17 th , 2015
13	Mr. BOUR Chhayya	Sahmakum Teang Thaut (STT)	Senior research project officer	Dec 18 th , 2015
Academia and other				
14	Mr. MEAS Kim Seng	Various universities' faculties of architecture and urban development Sahmakum Teang Thaut (STT), Urban Poor Development Fund (UPDF), Community Development Foundation (CDF)	Lecturer Founder	Nov 12 th , 2015
15	Mr. TEP Makathy	Pannasastra University of Cambodia, Faculty of Architecture and Design World Bank, Asian Development Bank (ADB) Cambodian Institute for Urban Studies (CIUS)	Lecturer Consultant Founder and director	Dec 14 th , 2015
16	Mr. KONG Kosal	Royal University of Fine Arts (RUFA), Faculty of Architecture and Urbanism	Dean	Nov 16 th , 2015

Annex II: Interview guideline

Rental housing

1. How does the mentality of Phnom Penh's inhabitants develop regarding homeownership and rental housing?
2. How did and does the rental housing sector in Phnom Penh develop? (last 10 years)
3. Who do you see as the major target groups of rental housing in Phnom Penh? Why?

Rental housing for the urban poor

4. What role does rental housing play for the urban poor in Phnom Penh?
5. Currently, how is rental housing for the urban poor in Phnom Penh mostly provided? (By whom? Where? What type of housing?)
6. What problems do you see in terms of rental housing for the urban poor in Phnom Penh?
7. What positive examples or aspects do you see in terms of rental housing for the urban poor in Phnom Penh?
8. Do you know good examples of rental housing provision for the urban poor from other, comparable places?

Ways to provide housing for the urban poor

9. How do you think housing for the urban poor in Phnom Penh should be provided? (By whom? Where? What type of housing?)
10. How do you think, for the urban poor in Phnom Penh, rent payments compare with instalment payments? Are long-term instalment payments feasible for them?
11. What do you think about minimum standards for (rental) housing?
12. Only public authorities: Are you planning to introduce minimum standards for rental housing units? Why (not)? What kind (if applicable)?
13. Cambodia's National Housing Policy says the government should be "*encouraging and collaborating with the private sector which is willing to take part in resolving housing issues for low and medium income households and vulnerable groups*". Do you think (a part of) the private sector is willing to do so in Phnom Penh?
14. How do you think the private sector could and should be involved in the provision of more and/or better housing for the urban poor in Phnom Penh?
15. Only real estate sector: Question about the (lack of) projects for the urban poor in Phnom Penh and (if applicable) the motivation for developing these
16. Only real estate sector: How does the profit margin of (rental) housing for the urban poor compare to the one of luxury apartments in the city centre and in satellite cities? Is it positive at all? Are subsidies needed? What kind (if applicable)?

17. What do you think about the land-sharing model applied in Borei Keila?
18. What do you think about involving factory owners, who employ large numbers of workers in need of (rental) housing, in the provision of (rental) housing for the urban poor? How do you think they could and should get involved (if applicable)?
19. What about state land? Much is being sold or given long-term leases for. How much is left? Where? Would the state be able to provide land for housing for the urban poor?
20. Only public authorities: Are there maps showing land categories, land availability and land uses in and around Phnom Penh that I could get?
21. Only public authorities: What role do you think urban (land use) planning could and should have in facilitating more and/or better housing for the urban poor?
22. What do you think are the necessary steps towards “*resolving housing issues for low and medium income households*” as aimed for in Cambodia’s National Housing Policy?

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