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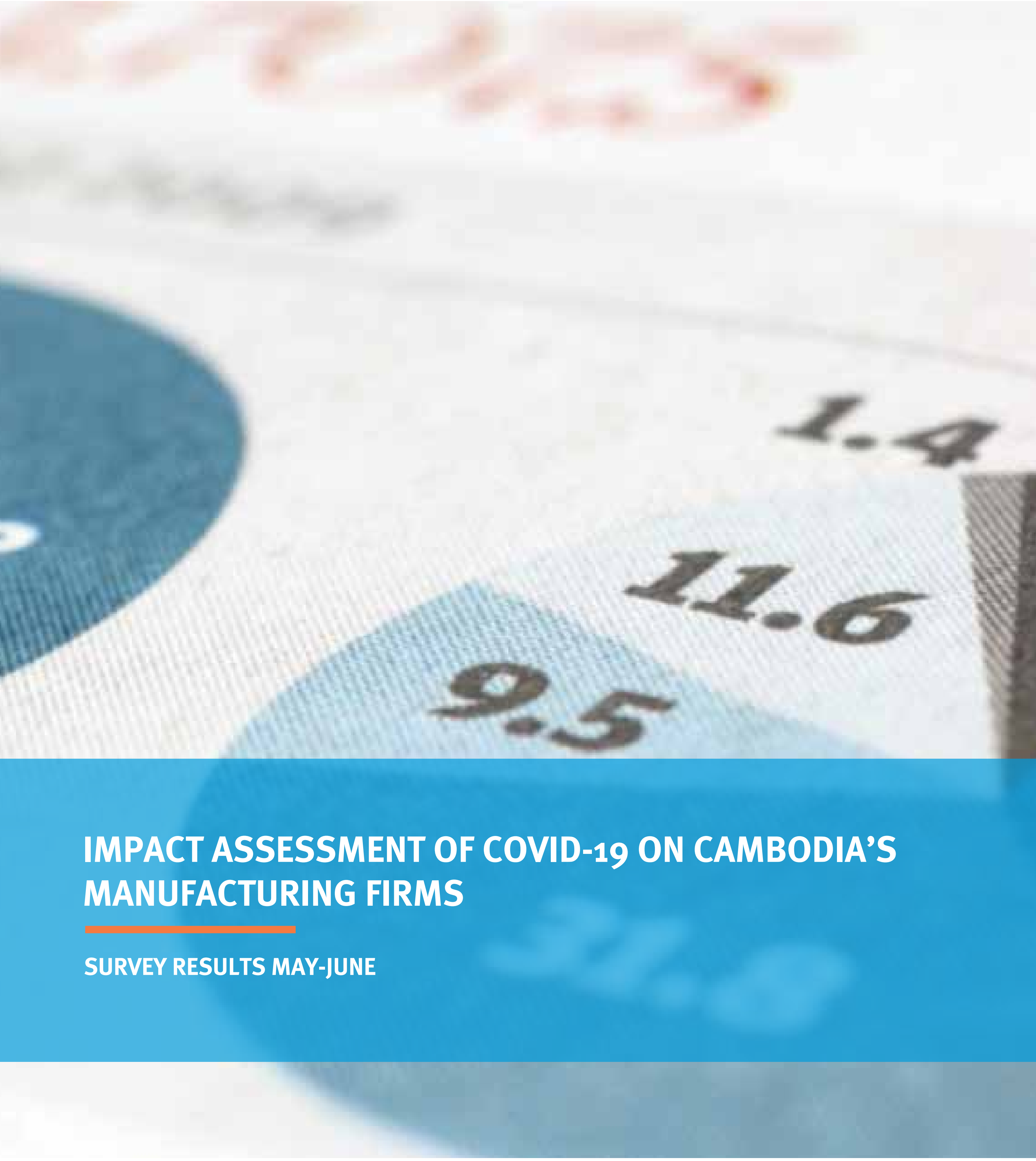

IMPACT ASSESSMENT OF COVID-19 ON CAMBODIA'S MANUFACTURING FIRMS

SURVEY RESULTS MAY-JUNE

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Our appreciation goes to the Ministry of Industry, Science, Technology and Innovation (MISTI), the Cambodia Investment Board (CIB) of the Council for the Development of Cambodia, the Ministry of Economy and Finance (MEF), and business associations such as the Garments Manufacturers Association in Cambodia (GMAC), the European Chamber of Commerce in Cambodia (Eurocham), Cambodia's Rice Federation (CRF), the Young Entrepreneurs Association of Cambodia (YEAC) and the Cambodia Women Entrepreneurs Association (CWEA) for their guidance and support.

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Executive summary

Introduction

As of 24 June 2020, the COVID-19 pandemic has affected over 9 million people in more than 200 countries and territories around the world, resulting in more than 480,000 deaths. Cambodia has had a total of 130 cases, including 128 recoveries and 2 active cases, but no reported deaths so far. All businesses, regardless of size, are facing challenges with a real threat of significant decline in revenue and job losses in certain sectors.

To assess the immediate economic impact on enterprises of all sizes and to better understand the evolving business sentiment in the face of COVID-19, UNIDO Cambodia conducted an online survey targeting the industries and businesses most at risk in Cambodia. The findings are intended to provide strategic guidance and recommendations for consideration by the government and relevant stakeholders to support a stronger and better recovery for the private sector from this pandemic.

Methodology and limitations

The survey was conducted between 18 April and 15 May 2020, targeting a sample of 250 enterprises. The questionnaire, which consisted of 22 questions, was completed by 144 enterprises.

The sample selected for the survey was proportional to the sizes of the enterprises in different industries. Randomization was not possible, however, due to the difficulties of reaching some of the respondents, and the fact that some respondents were unwilling to participate in the survey. Multiple data sources were used and multiple collection methods carried out simultaneously to ensure richness of data for analysis, including an online survey and desk review. The data analysis entailed a quantitative method accounting for a range of frequency of responses. The interpretation of data is based on indicative responses received, noting certain limitations with regard to the number of respondents from some industries and the sample's representativeness.

Key findings and discussion

The survey respondents have distinctive characteristics. They include representatives from the **textile, garment, food and beverages, tourism/hospitality, energy and recycling** industries. The key findings of the survey are presented below:

- **Profile of respondents:**

The majority of respondents work for **large enterprises** (52 per cent) followed by micro, small and medium enterprises (MSMEs) at 20 per cent, 19 per cent and 9 per cent, respectively. The majority of enterprises (68 per cent) are located in **Phnom Penh**, and around 39 per cent are **foreign subsidiary firms**, while 37 per cent are **100 per cent Cambodian owned**. Respondents from the **textile, garment and footwear** industries account for the largest group of respondents (26 per cent), followed by **food and beverages** (14 per cent), and **agricultural food production/food processing** (13 per cent).

- **Current impact of COVID-19**:

Although the scope of the impact of COVID-19 varies by industry, it is clear that **workers and revenue** have been hit hardest. In the food production/food processing industry, 87.5 per cent of employees were requested to work from home, followed by tourism (83.3 per cent), food and beverages (70 per cent), textile, clothing and footwear (51.4 per cent) and electrical machinery and apparatus (50 per cent). The **financial impact** has been particularly severe **in the garment and tourism industries**. The most common financial problems the firms surveyed are facing is a drastic drop in sales, and coping with fixed costs such as rent, wages and social security contributions. **Reductions in orders** represent the biggest challenge by far for the firms surveyed, followed by the increased difficulty of financing the undertaking and the disruption of logistics.

- **Expected impact of COVID-19:**

Sixty-nine per cent of respondents expect their revenue to decline in 2020 as a result of the COVID-19 pandemic.

- The impact of COVID-19 on **revenue** is evident in **medium-sized enterprises**. The **tourism/hospitality and garment industries** (textile, clothing and footwear) have been most severely affected. **Food and beverages and food production/food processing** have also been hit particularly hard by the pandemic.
- Enterprises that were established between **2006 and 2015 have been most severely affected**.
- **Ninety per cent of family-owned businesses expect a decline in revenue**.
- In terms of **employment**, the **tourism and garment industries** reported the highest number of layoffs**,** followed by food production, food and beverages and electrical machinery and apparatus. As the garment industry tends to employ more workers, the majority of which are women, **female employees have been**

disproportionately affected by layoffs. A higher percentage of **joint ventures and foreign subsidy** enterprises/firms have laid off or planned to lay off workers, particularly medium-sized enterprises and those producing finished goods for industrial firms.

- **On compensatory measures:** the **bulk of compensatory measures are monetary** in nature in the form of government wage subsidies, providing pension or financial compensation in accordance with Cambodian labour laws. Only around half of the 41 enterprises/firms that have laid off/plan to lay off workers had applied for compensatory measures or planned to do so.
- **On availability of cash to maintain operations:** 65 per cent of respondents indicated that they would be able to maintain their operations for at **least three months**, of which 20 per cent would be able to continue operating for more than one year.
- **On the ability to resume business as usual:** nearly 40 per cent of respondents stated that it would take **at least three months** before they could return to normal business, while around 31.3 per cent indicated that they would need between one to three months.

▪ **Dealing with the pandemic's impact:** firms are using different means to mitigate the various impacts of the pandemic on cashflow and staff and input shortages.

- On **cashflow shortages**: 77.8 per cent of firms reported that they were facing cashflow shortages. The most common measures firms were considering included a **reduction of operation** costs, **loans** from commercial banks and negotiations with lenders to avoid loan withdrawals.
- On **worker shortages**: although the majority of respondents claimed that they were not affected by worker shortages, firms in the **textile, clothing and footwear industries** faced such problems. The most common means firms were considering included a **reduction in production**, seeking new production channels and delaying the delivery of goods.
- On **input shortages**: around 46 per cent of respondents reported that they were dealing with input shortages, while about 37 per cent stated that they were not affected by this problem. The most common means to deal with such shortages are the **reduction in production, seeking new production channels and delaying the delivery of goods**.

Conclusion and recommendations

The results of this survey show that the COVID-19 pandemic has had impacts on all of the country's **most crucial industries**, particularly the **tourism/hospitality, apparel** (textile, garment and footwear), **food and beverages and food production and food processing**. The pandemic has led to a sudden decline in revenues, which varies depending on the firm's age, size and ownership.

The apparel industry, which is the largest contributor to Cambodia's economic growth, has been hit particularly hard. First, as raw material imports dwindled due to supply chain disruptions in China, followed by lockdowns in the United States and in European countries, drastically reduced orders for goods. What most such crises have in common is that they hit the most vulnerable and marginalized groups the hardest, which disproportionately represents women. As the survey's results show, the layoffs have disproportionately affected women due to the severe impact of the pandemic on the manufacturing/garment industry, which employs a higher rate of women than other industries.

The majority of enterprises reported that they would need at least three months to resume normal business operations, while only a small percentage could resume their operations immediately.

To address the impacts of COVID-19 on business operations, such as shortages in raw materials, workers and cashflow, many enterprises are using different approaches, including, but not limited to, seeking new production channels and different sources of materials, adopting advanced technology and equipment and a reduction of operation costs.

The following are key recommendations for consideration by the government and relevant stakeholders to support a stronger and better recovery of the private sector post-COVID-19:

1. Enhancing the private sector's resilience by bolstering productivity, competitiveness, access to finance and promoting digitalization

- Providing and enhancing existing capacity-building programmes to harness digitalization, science, technology and innovation, including the use of online platforms for sourcing and marketing.
- Adopting resources and energy efficiency business models to simultaneously reduce production costs, rapidly generate jobs and curb carbon emissions.
- Providing immediate relief to workers and enterprises by providing access to financial rescue packages, credit and unemployment benefits, taking the needs of women as workers, business owners and entrepreneurs into consideration.

- Encouraging official business registration and investment readiness by creating a more conducive environment and simplifying the processes. Paying more attention to small businesses, especially those led by women.
- Promoting Business Development Services (BDS) and product development to support MSMEs in the preparation of business plans, financial model development, business strategy development and product diversification.

2. Fostering recovery through innovative policies and plans

- Developing a national industrial recovery plan to provide highly effective and targeted support to restructure the industrial sector. This plan could be used as an implementation tool or provide inputs for the government to update its industrial policy in the mid-term review of Cambodia's Industrial Development Policy (2015-2025), which is scheduled to be completed in mid-2021.
- Developing policies to adopt green, resource and energy efficient technologies to promote sustainable and inclusive industries in a resilient manufacturing sector, providing support and creating an enabling environment, in particular for women entrepreneurs.
- Developing a national quality policy to guide the effective and efficient implementation of a quality system to promote product and market diversification.

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Acronyms

ADB	Asian Development Bank
ARDB	Agriculture and Rural Development Bank
BDS	Business Development Services
CIB	Cambodia Investment Board
CRF	Cambodia Rice Federation
CWEA	Cambodia Women Entrepreneurs Association
CIB	Cambodia Investment Board
Eurocham	European Chamber of Commerce
GDP	Gross Domestic Product
GMAC	Garment Manufacturers Association in Cambodia
ICT	Information and Communications Technology
IFC	International Finance Corporation
ILO	International Labour Organization
IMF	International Monetary Fund
MISTI	Ministry of Industry, Science, Technology and Innovation
MoC	Ministry of Commerce
PRS	Policy Research and Statistics Department
SDGs	Sustainable Development Goals
MSMEs	Micro, Small and Medium Enterprises
UNESCAP	United Nations Economic and Social Commission for Asia and the Pacific
UNIDO	United Nations Industrial Development Organization
US	United States
YEAC	Young Entrepreneurs Association of Cambodia
WB	World Bank

1 Introduction

As of 24 June 2020, the COVID-19 pandemic has affected over 9 million people in more than 200 countries and territories around the world, resulting in more than 480,000 deaths[1]. The pandemic has hit the economies and labour markets particularly hard. All firms, regardless of size, are facing challenges with a real threat of significant decline in revenues and job losses in specific industries. The challenges are even more daunting for micro, small and medium enterprises (MSMEs) to sustain their business operations.

Cambodia is no exception. The first imported case of COVID-19 was detected in Sihanoukville Province on 27 February 2020. Since then, the number of positive cases has continued to rise. After no new cases were reported for 37 consecutive days between 11 April and 20 May, additional cases—mostly imported—were reported in Cambodia. As of 24 June 2020, Cambodia had a total of 130 COVID-19 cases. Among these, 128 had recovered, and there were two active cases, and no reported deaths. So far, Cambodia has been successful in managing the pandemic and has been able to avoid catastrophic mass transmission through aggressive personal hygiene campaigns, social distancing, nationwide school closures as well as a number of other restrictions. Since the risk of community transmission remains high, many measures such as overseas travel restrictions, school closures, restrictions on public gatherings and on potentially high-risk businesses such as entertainment and recreational activities are still in place.

The COVID-19 pandemic has had an impact on both supply and demand in the private sector. This protracted crisis could quickly strain the complex web of interactions involving various stakeholders. Cambodia's economy has been hit hard by the outbreak of COVID-19. It has led to severe decelerations in most of Cambodia's main engines of growth in the first quarter of 2020. By 5 May 2020, 180 factories had suspended their operations, affecting roughly 200,000 workers[2]. International tourism declined sharply by 20 per cent in February, 50 per cent in March, and as much as 90 per cent in April 2020[3].

The increase in COVID-19 cases worldwide has changed how we live and work, and Cambodia is no exception. The private sector's business strategies may have to be modified once the COVID-19 virus has been contained due to the expected economic losses. As a result of these impending changes, many firms in Cambodia are exploring options to protect their employees and businesses during these uncertain times and the consequences of various courses of actions.

[1] https://www.worldometers.info/coronavirus/?
[2] https://www.phnompenhpost.com/national/buyers-urged-pay-200000-face-layoffs (accessed on 27 May 2020).
[3] https://www.thmeythmey.com/?page=detail&id=90706 (accessed on 27 May 2020).

Across industries, enterprises/firms have introduced measures to protect their employees and customers from the virus and to minimize economic damage. At the same time, the Cambodian government has consolidated fiscal support by stepping up national efforts to not only contain the spread of the virus, but to also address the many economic and social consequences of the COVID-19 pandemic. The Prime Minister[4] announced on 10 March 2020 that the government would spend between USD 800 million to USD 2 billion (6.8 per cent of the country's GDP) to address the economic impacts of COVID-19.

Survey objectives

The survey aims to provide a rapid assessment of the impacts of the COVID-19 pandemic on enterprises in Cambodia. The survey's specific objectives are to:

1) Document the immediate and expected effects of the COVID-19 pandemic on enterprises of all sizes in Cambodia;
2) Understand the challenges and issues enterprises face as a result of the pandemic as well as their innovation and response strategies; and,
3) Derive implications from the findings to inform policymakers and stakeholders in the formulation of their policy and programmatic interventions to support enterprises in their response to the pandemic's impacts and to spur a strong recovery.

1.1 Methodology and limitations

The survey was conducted between 18 April and 15 May 2020 and distributed to 250 enterprises using Google form. Of these firms, 144 responded, i.e. the response rate was close to 58 per cent. The questionnaire consisted of 22 questions.

A list of enterprises was compiled from UNIDO's engagement with enterprises through the organization's support projects and programmes. The list also included enterprises proposed by the Ministry of Industry, Science, Technology and Innovation (MISTI), the Cambodia Investment Board (CIB) of the Council for the Development of Cambodia, and business associations such as the Garment Manufacturers Association in Cambodia (GMAC).

The private sector enterprises were classified into micro, small, medium and large firms in accordance with the current definition of MSMEs[5] in Cambodia, which is based on firms' investment capital (see Appendix 1).

[4] Cambodia Allocates $ 800 M to $ 2 B for Covid-19 Emergency Response: (http://en.freshnewsasia.com/index.php/en/localnews/17179-2020-03-10-06-44-20.html)
[5] MISTI/Prakas 717.

The sample selected for the survey was proportional to the firm sizes in different industries. Randomization was not possible, however, due to the difficulty of reaching some of the respondents, and the fact that some respondents were unwilling to participate in the survey. The data collection process primarily consisted of an online survey and a desk review of recent and relevant publications. Micro and small enterprises are likely the most vulnerable firms and account for a large share of Cambodia’s industry. It was difficult to receive any feedback from them as they do not typically use ICTs, and this was an online survey. The survey’s structure and content were adapted from the initial questionnaire developed by UNIDO’s regional office in Bangkok and UNIDO HQ in Vienna. A similar survey was also launched simultaneously during the same period in many countries across the Asia Pacific region.

The data analysis entailed a quantitative method accounting for a range of frequency of responses. Where possible, simple descriptive statistics were used to display the frequency by category of response. The interpretation of data is based on indicative responses received, noting the limited number of respondents from some industries and the lack of the sample’s representativeness. The findings are based on the perceptions of those who participated in the survey.

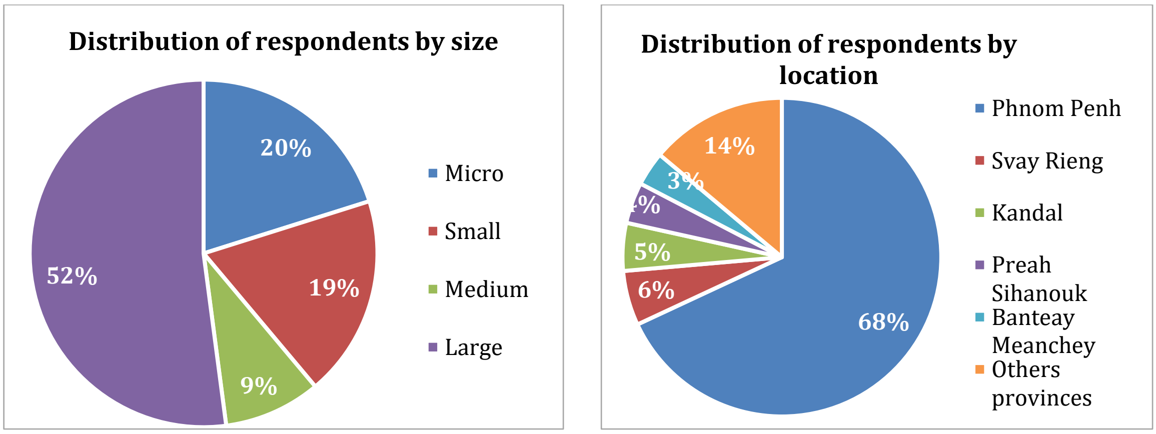
The survey was conducted at a time when businesses faced tremendous challenges and uncertainties. This consequently meant that only a limited number of respondents from each industry participated in the survey.

1.2 Key findings and discussion

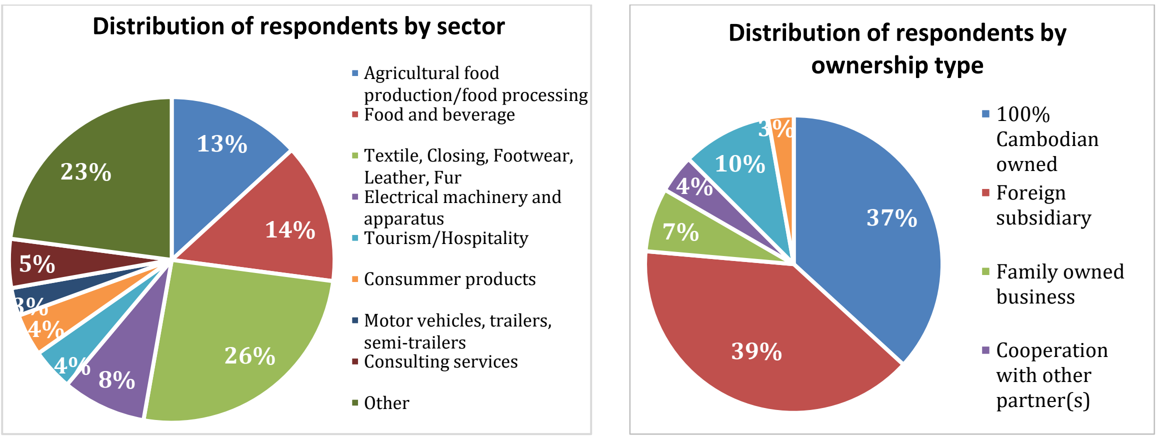
The survey results are divided into four sections with a specific focus on the impact the pandemic has had on the enterprises and how they are responding to those impacts. The survey also investigated the relevance and benefits of existing government interventions and the short-and long-term solutions the firms are pursuing to deal with the effects of COVID-19.

Representatives from the following industries, who contributed to this survey, included but were not limited to **textile, garment, footwear, food production, food and beverages, tourism/hospitality, energy and recycling.**

Figure 1 Respondents' profiles



A total of 144 firms completed the survey. The majority of respondents were large enterprises (52 per cent) followed by micro, small and medium enterprise (20 per cent, 19 per cent and 9 per cent, respectively). The distribution of the respondents' firm size reflects Cambodia's industrial structure with its low number of medium-sized enterprises (as reported in the Cambodia Industrial Development Policy report (2015 – 2025)). Sixty-eight per cent of respondents were located in Phnom Penh, followed by Svay Rieng (6 per cent), Kandal (5 per cent) and Preah Sihanouk (4 per cent).



The highest rate of response was registered in **textile, garment and footwear** (26 per cent), followed by **food and beverages** (14 per cent), **food production/food processing** (13 per cent), electrical machinery and apparatus (8 per cent), consulting services (5 per cent), and tourism and hospitality (4 per cent). Twenty-three per cent of respondents were from various industries, including chemical and chemical products, e-commerce and online retail, machinery and equipment, motor vehicles, trailers and semi-trailers, paper and paper products, printing/publishing, recycling, etc.

Thirty-nine per cent of the firms stated that they are **foreign subsidiaries**, while 37 per cent reported that they are **100 per cent Cambodian owned**. A further 10 per cent are **joint ventures**.

Fifty-one per cent of respondent firms produce **finished goods for consumers**, followed by **finished goods for industrial businesses** (15 per cent) and are engaged in **food production/food processing** (12 per cent). In terms of firm age, 25 per cent were founded before 2011, 40.3 per cent were established between 2011 and 2015, and 30.6 per cent between 2016 and 2020. No answer to this question was provided by 4.2 per cent of respondents. In total, the firms employed roughly 114,000 workers, of which around 78 per cent were women in 2019.

About 30 per cent of respondents reported that their enterprise had production facilities outside Cambodia, of which 17 per cent were being financed through direct investment and 13 per cent through contracts with domestic firms abroad.

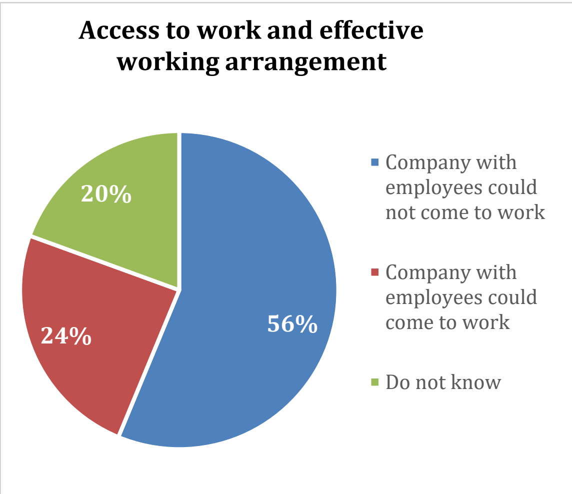
The apparel industry, which is the largest contributor to economic growth in Cambodia, has been hit hard by COVID-19, initially as raw material imports dwindled due to supply chain disruptions in China, and subsequently as Western brands cancelled orders en masse as the pandemic took hold in Europe and the U.S.

2 Current impact of COVID-19

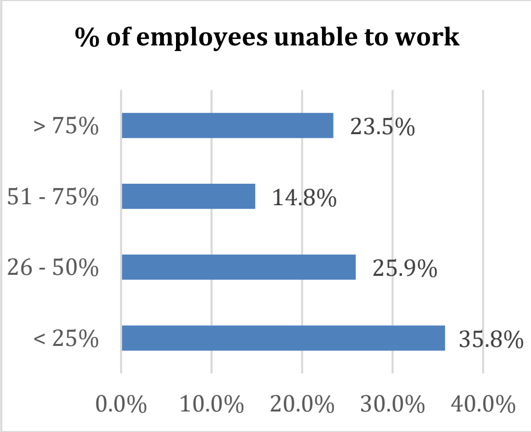
This survey sheds some light on COVID-19's impact on local businesses. Although the degree of the impact varies, the results clearly show that employees and business revenue have been most affected. The **financial hit** is considered a major threat, especially for the garment and tourism industries.

2.1 Impacts on access to work and effective working arrangements

Of the 144 respondents, 56 per cent stated that many of their employees were unable to come to work and could not effectively work from home due to the pandemic. Only 24 per cent of respondents reported that they did not experience any problem in terms of access to the workplace, while 20 per cent of respondents did not provide an answer.



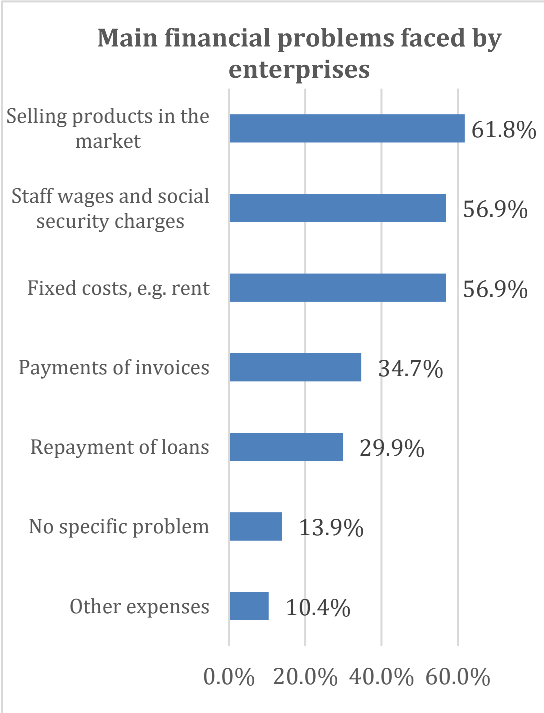
Among those who reported difficulties accessing the workplace, 35.8 per cent and 25.9 per cent of respondents claimed that between 1 per cent and 25 per cent, and 26 per cent and 50 per cent of their employees, respectively, were affected. Around 14.8 per cent stated that between 51 per cent and 75 per cent of their workforce was affected, while 23.5 per cent reported that over 75 per cent of their workforce was affected.



By industry, 87.5 per cent of respondents from the food production/food processing industry reported that their workers were unable to come to work, followed by tourism (83.3 per cent), food and beverages (70 per cent), textile, clothing and footwear (51.4 per cent) and electrical machinery and apparatus (50 per cent). The survey results reveal that the impact on food production/food processing and food and beverages is severe. This implies that these industries require more support.

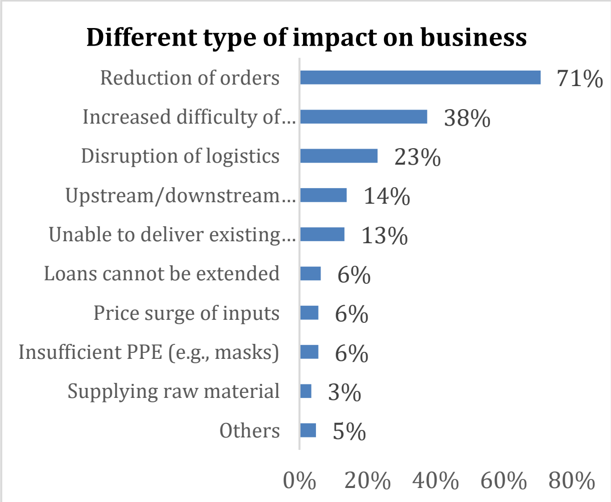
2.2 Impacts on business finances

The pandemic has caused a number of financial problems for enterprises. The survey results show that 86.1 per cent of respondents are facing financial problems. The biggest financial problem firms are currently facing are the sale of products in the market, difficulties paying fixed costs (e.g. rent) and wages, as well as social security contributions, the payment of invoices and loan repayments. These financial problems have a tremendous impact on firm survival, especially if the pandemic continues for a longer period.



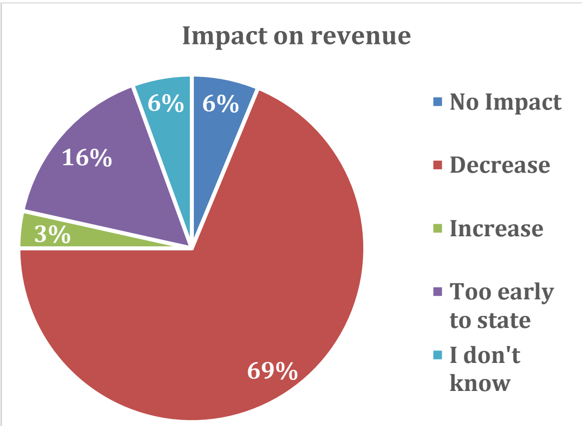
2.3 Impacts on business operations

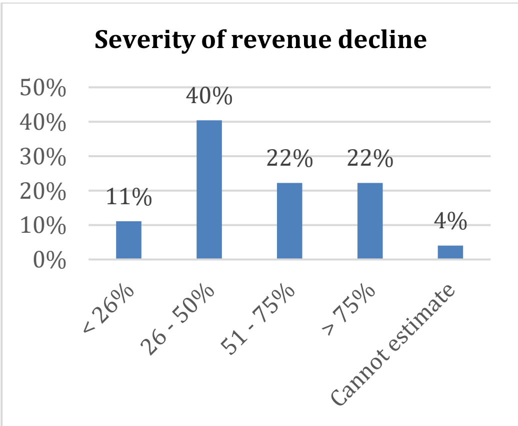
The biggest challenges the surveyed firms face are a **reduction in orders** (which is by far the most severe problem), increased difficulty of securing financing, disruption of logistics, upstream and downstream chain disruptions, delivery of existing orders, extension of loans and insufficient protective equipment.



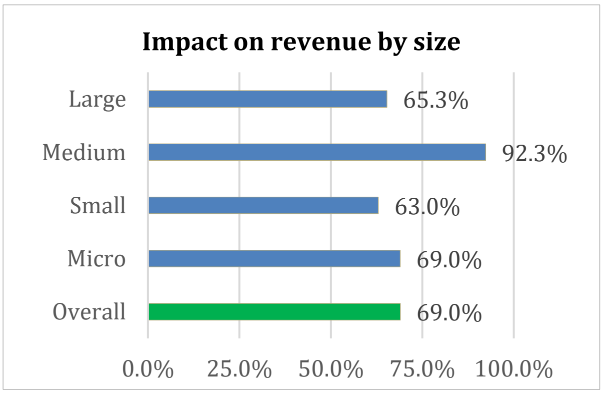
3 Expected impacts of COVID-19

3.1 Expected impact on revenue





Sixty-nine per cent of enterprises/firms surveyed expected their revenue to decline in 2020 as a result of the COVID-19 pandemic. Only a small fraction (6 per cent) does not expect the pandemic to have an impact on their revenue. Three per cent stated that they expected their revenue to increase. This is an interesting finding, which may need to be further investigated considering that many respondents also reported a reduction of orders.



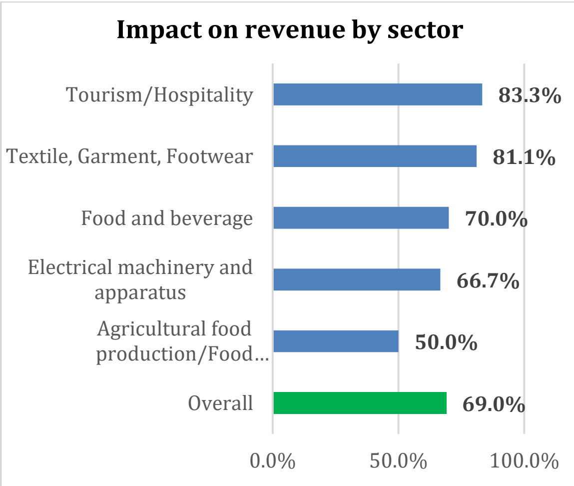
Among the 99 respondents who expect a decline in revenue in 2020, around 40 per cent expect their revenue to drop between 25 per cent and 50 per cent, while around 22 per cent expect their revenue to decrease between 51 per cent and 75 per cent. As much as 22 per cent of respondents expect their revenue to fall by more than 75 per cent.

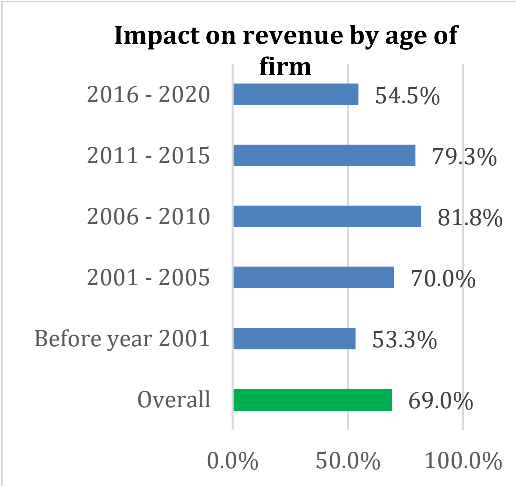
The impacts on revenue appear to be more balanced across all firm sizes surveyed. The **effects appear to be more severe**, however, **for medium-sized enterprises, with 12 out of 13 firms (92.3 per cent) expecting their revenue to decline.**

3.1.1 *Impacts on revenue by industry and age of firms*

The results of the survey reveal that all major industries in Cambodia have been significantly impacted by COVID-19. **Tourism/hospitality and garment (textile, clothing and footwear) are the two most affected sectors with 83.3 per cent and 81.1 per cent, respectively, expecting a decline of revenue**, followed by food and beverages (70 per cent), electrical machinery and apparatus (66.7 per cent) and agricultural food production (50 per cent). The **tourism and garment** industries are also expected to be hit hard as the United States and several European countries, which are by far the most important markets for Cambodia's garment exports, are on lockdown, which has resulted in a dramatic decline and/or cancellation of orders for wearing apparel. The severe travel restrictions put in place by countries around the world has essentially brought tourism to a halt.

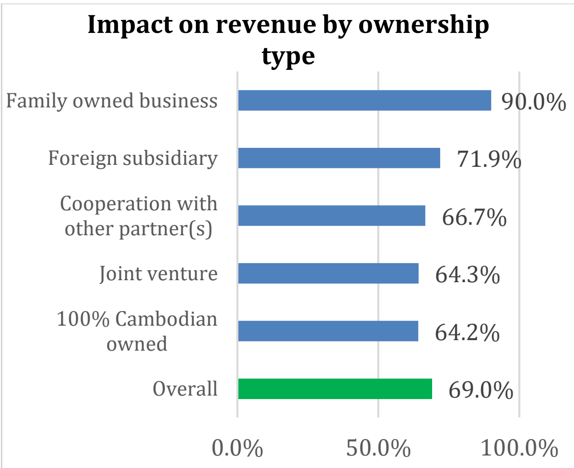
Food and beverages and agricultural food production/food processing are two industries that have been severely impacted by the pandemic, with 70 per cent and 50 per cent, respectively, expecting revenues to drop. Throughout the pandemic, people have been advised to stay at home, which might explain the impact on the food and beverages industry, in particular, as demand dwindled, with restaurants, cafes, food courts and major events such as wedding receptions being closed/suspended. This finding is important and could have policy implications, especially for the food and beverages and the agricultural food production/food processing industries, which could potentially impact the demand for agricultural raw materials and the supply of food products. Moreover, 18 of the 22 enterprises/firms from the two industries that expect revenues to decline, are either 100 per cent Cambodian owned or family owned. So far, the majority of government support has targeted industries that are widely known to have been impacted, namely the tourism and the textile, garment and footwear industries. The results of this survey, however, indicate that government's support is also required for the food and beverages and agricultural food production/food processing industries.

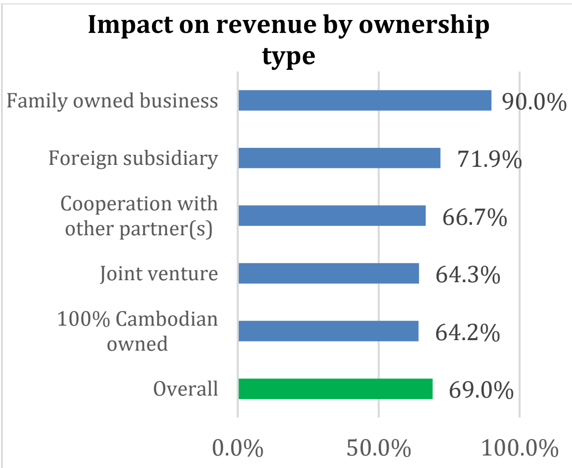




The anticipated decline of revenue also varies by age of the enterprise, as indicated in the figure above. Enterprises founded between **2006 and 2015 are the most severely affected**, with around 80 per cent expecting a drop in revenue. All large firms that expect their revenue to decline were founded during that period (89 per cent) while the remaining 11 per cent are micro enterprises. The majority of these enterprises produce final goods for consumers. The large firms are more likely to produce goods for export, which might explain the higher impact on their revenue.

3.1.2 Impacts on revenue by ownership and by type of product





The results of the survey show a disproportionate impact on revenue for different types of ownership. **Ninety per cent of family owned businesses expect a decline of revenue** while only 64.2 per cent of the 100 per cent Cambodian owned enterprises expect a drop in revenue. Family owned businesses tend to be less organized and might not have sufficient resources and/or a long-term vision to withstand external shocks, which might explain the survey results.

The enterprises/firms that produce intermediate inputs for manufacturing and immediate inputs for agriculture have been most affected, with 80 per cent and 77.8 per cent of respondents, respectively, expecting a decrease of revenue.

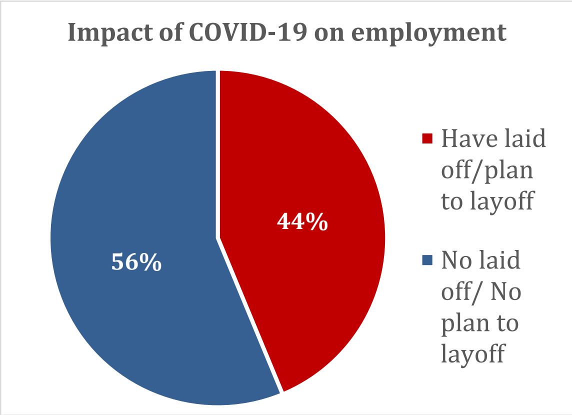
Those firms expecting a drop in revenue anticipate it to fall between 10 per cent to 100 per cent. The percentages of the expected decline are presented in Table 1.

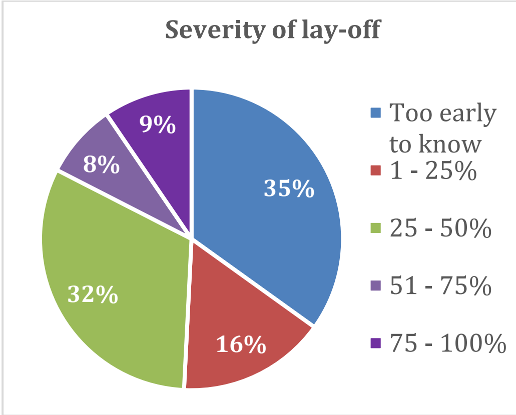
Table 1: Expected drop in revenue by key sectors in 2020

	Total respondents	Range [%]	Expected drop in revenue [%]	
			<50%	≥ 50%
Textile, garment and footwear	28	10 – 85	46	54
Food and beverages	14	20 – 80	14	86
Agricultural food production/ food processing	8	30 – 80	37	63
Tourism/hospitality	5	80 – 100	0	100

4 Impacts on employment

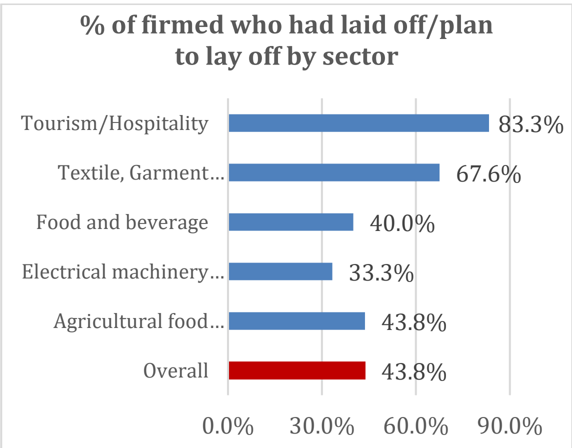
The COVID-19 pandemic is expected to have an impact on employment as enterprises/firms struggle to survive and are undertaking extensive efforts to minimize the damage. Forty-four per cent of businesses surveyed reported that they were considering layoffs or have already laid off workers (6 per cent have been permanently laid off, 17 per cent temporarily and the status of 21 per cent is unsure).

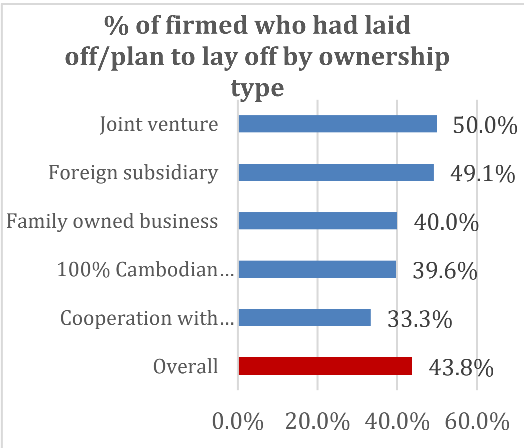




Among the 61 enterprises/firms reported to have already laid off or plan to lay off workers, 32 per cent have laid off/plan to lay off between 26 per cent to 50 per cent of workers, while around 16 per cent indicated that they have laid off/plan to lay off between 1 per cent to 25 per cent of their staff. Around 9 per cent stated that they have laid off/plan to lay off between 76 per cent to 100 per cent of their workers. Only 50 per cent of the 41 enterprises/firms that have laid off or plan to lay off workers applied for compensatory measures or plan to do so, while half reported having no such measures in place. The majority of the compensatory measures are monetary, either through government wage subsidies, providing pensions or financial compensation in accordance with labour laws. One possible explanation for not applying compensatory measures could be that those enterprises are not registered.

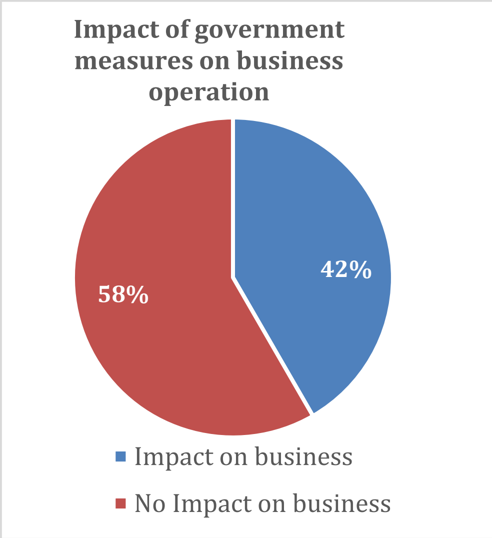
4.1.1 Impacts on employment by industry and by type of ownership





Similar to the case of decline of revenue, the extent of layoffs varies across industries, type of ownership, age of the enterprise/firm, product type and size.

The layoff of workers is highest in the **tourism and garment industries, with 83.3 per cent and 67.6 per cent of enterprises/firms**, respectively, reporting the figures indicated above. Other



industries reporting layoffs included agricultural food production (43.8 per cent), food and beverages (40 per cent), and electrical machinery and apparatus (33.3 per cent). As the garment industry employs more workers and the majority are women, the layoffs in this industry **disproportionately affect women**. According to the ILO, four out of five workers in the garment, textile and footwear industry are female, an industry characterized by low wages, long working hours and significant gender pay gaps[6].The results of the survey also indicate that a higher percentage of joint ventures and foreign subsidy enterprises/firms have laid off workers or plan to do so (50 per cent and 49.1 per cent, respectively). The layoffs are more balanced across size and product type of the enterprises/firms. However, 50 per cent of medium-sized enterprises and 54.5 per cent of enterprises that produce finished goods for industrial businesses have reported the highest number of layoffs or plan to do so.

5 Impacts of government measures to contain the COVID-19 outbreak

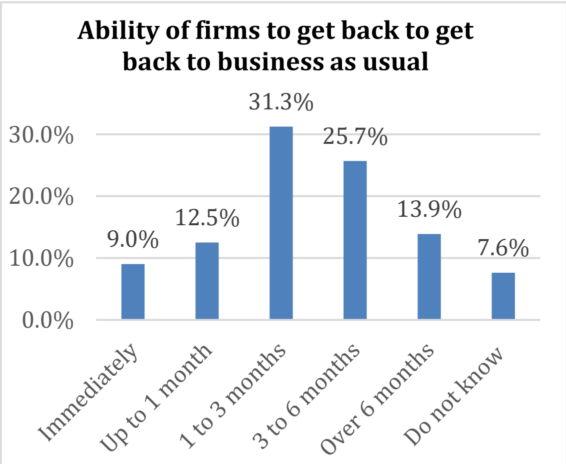
In line with the recommendations of the WHO and the global practices to minimize the risk of COVID-19 infections, the Royal Government of Cambodia has put forward and implemented a number of measures in a timely manner. These include campaigns for high standards of personal hygiene, social distancing, voluntary alternate working arrangements, entry ban for nationals from COVID-19 hotspot countries, closure of schools nationwide, closure of high-risk business establishments and cinemas. Restrictions of movement were also imposed during the Khmer New Year (9 to 15 April) to minimize mass movement. Some of the measures have been lifted in the meantime, except the closure of schools and the practice of social distancing.

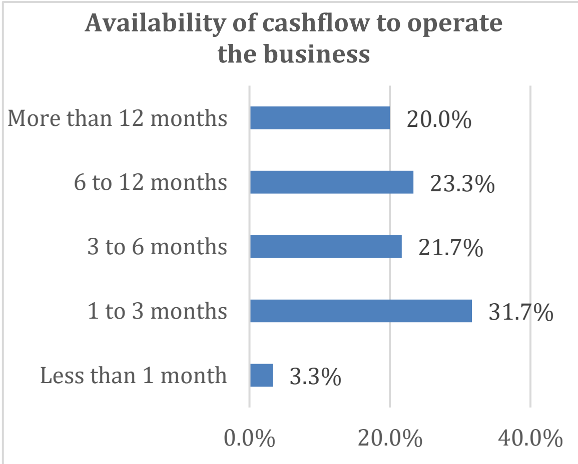
These necessary measures might have produced some unintended consequences for the operation of businesses in the country. Around 42 per cent of respondents indicated that the measures put in place impacted their business operations in one way or other, while the majority (58 per cent) stated that the measures did not impact their operations. It should be noted that the results might not provide a fully accurate picture, as the government's measures did not intend to halt economic

[6] ILO Bulletin 2018.

activities. The impacts are more likely due to the cumulative effects of both the COVID-19 pandemic and the government's measures.

When asked about the availability of cashflow to maintain their operations in the face of the pandemic and the government measures, 65 per cent of respondents indicated that they would be able to maintain their operations for at least three months of which 20 per cent asserted that they would be able to operate for over a year.

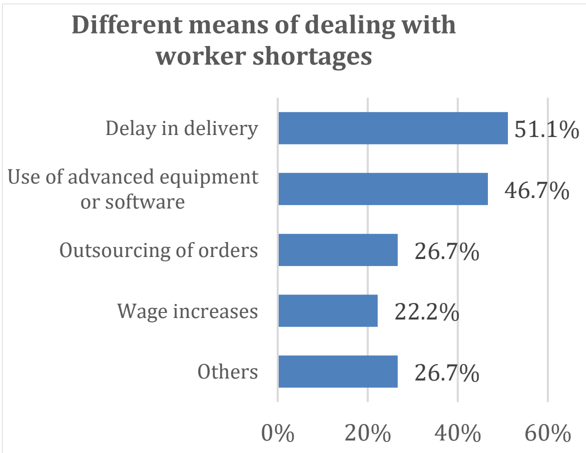




The respondents were also asked about their ability to resume normal operations and to return to business as usual if the pandemic end. Nearly 40 per cent of respondents claimed that they would need at least three more months before they could return to business as usual, while around 31.3 per cent stated that they would need between one month to three months, and about 9 per cent reported that they could go back to business as usual immediately.

6 Dealing with the impacts of COVID-19

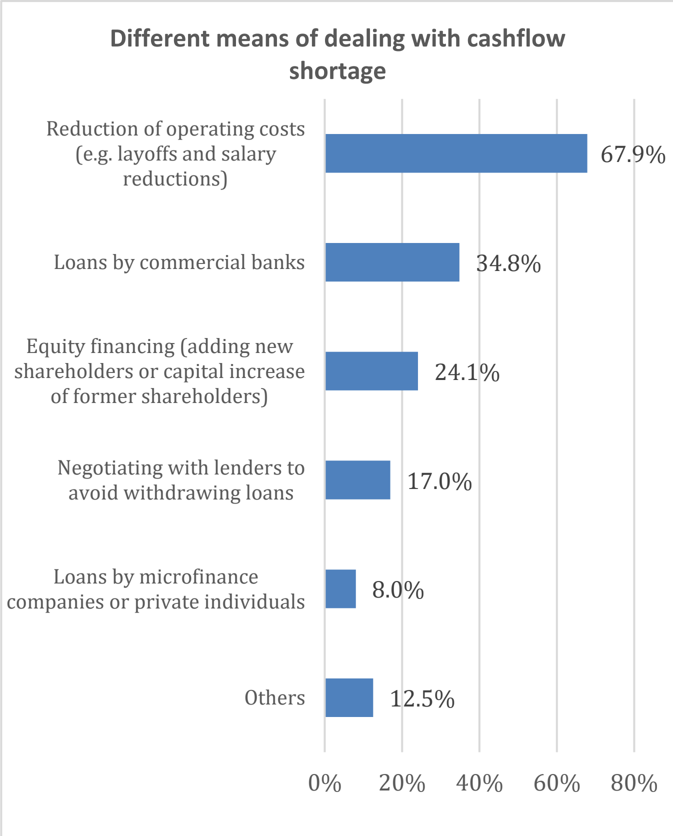
As the global pandemic intensifies and the human cost of COVID-19 rises, shockwaves are being sent through the world economy. Across industries, enterprises/firms have taken action to protect their employees, business operations and customers, and to minimize the economic damage. Many businesses use different means to mitigate the pandemic's different impacts.



6.1 Dealing with cashflow shortages

Only 22.2 per cent of respondents indicated that they had not encountered any problems with cashflow, while 77.8 per cent reported problems with cashflow shortages.

Enterprises/firms have used different means to address this problem. The most common measures reported are reductions of operation costs, loans from commercial banks, equity financing and negotiations with lenders to avoid loan withdrawals.

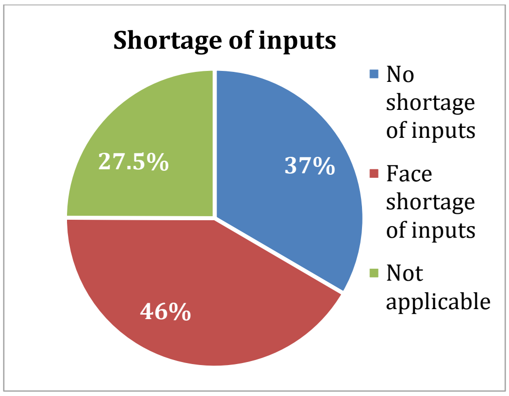


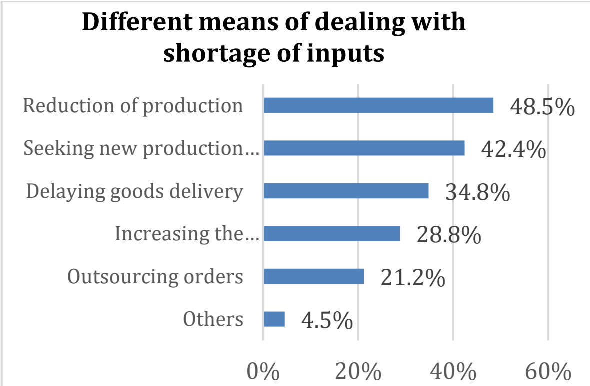
6.2 Dealing with worker shortages

About 68.8 per cent of enterprises/firms surveyed indicated that they did **not face worker shortages.** However, 31.2 per cent (45) of the surveyed enterprises/firms claimed that they had encountered problems in this regard.

The most common means to deal with worker shortages are to **delay delivery, use of advanced equipment or software, outsourcing of orders, and wage increases.** Around 34 per cent of these 45 enterprises/firms are from the textile, garment and footwear industry.

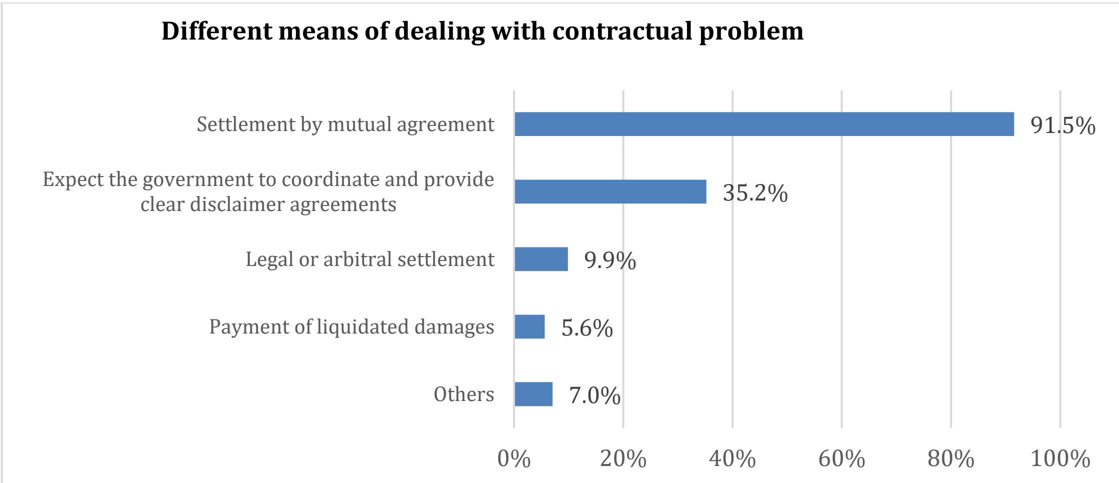
6.3 Dealing with input shortages





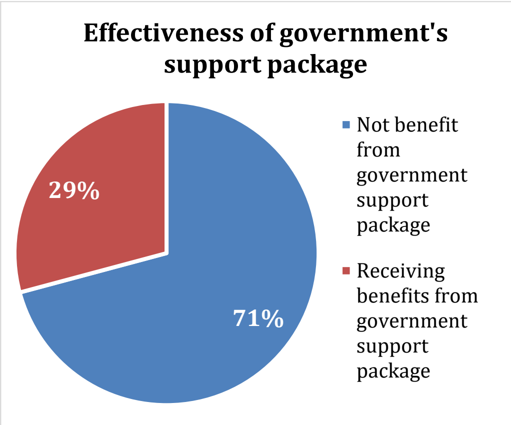
About 46 per cent of respondents reported having encountered input shortages while around 37 per cent stated that they had not encountered any issues. The most common means by which the surveyed firms deal with input shortages such as intermediate goods and raw materials are reductions in production, seeking new production channels, and delaying the delivery of goods.

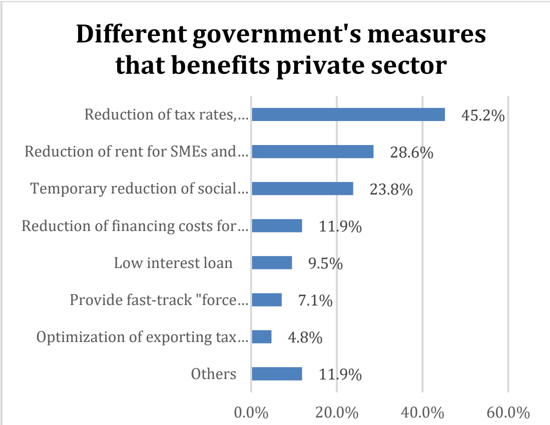
6.4 Dealing with contractual problems



About 50.7 per cent of respondents reported that they did not encounter any contractual problems while 49.3 per cent reported that they did. The main measures the surveyed enterprises/firms introduced to deal with the difficulties in fulfilling contracts are **settlement by mutual agreement** and **relying on the government** to coordinate and provide clear disclaimer agreements and legal or arbitral settlement.

7 Effectiveness of government interventions





In responding to the COVID-19 pandemic, the government has put in place a number of practical measures to support the private sector in mitigating the impacts, such as **reductions in rent for SMEs,** lowering the **costs of electricity**, reduction of tax rates, reduction or deferral of taxes, **reduction of financing costs for SMEs**, extension of loan terms or partial debt relief, temporary reductions in insurance premiums and reimbursement of unemployment insurance, optimizing fast-track “force major” certification to avoid contract breaches, low interest loans, etc. About 29 per cent of respondents reported benefiting from one or more of the above support packages.

According to the survey’s results, the most effective government measures the enterprises benefitted from were: reduction of tax rates, reduction or deferral of taxes, reduction of rent for small- and medium-sized enterprises, lower costs for electricity, gas and logistics, as well as temporary reductions of social insurance premiums and reimbursement of unemployment insurance for enterprises that did not lay off workers.

8 Conclusion and recommendations

The results of this rapid survey reveal that the COVID-19 pandemic has impacted all of the country’s most crucial industries, especially the tourism/hospitality, apparel (textile, garment, footwear), food and beverages and agricultural food production, and food processing. The impact has led to a sudden decline in revenue which varies by age, size and ownership of the enterprises.

The apparel industry, which is the largest contributor to economic growth, has been hit particularly hard. First, as raw material imports dwindled due to supply chain disruptions in China in response to COVID-19 and the subsequent lockdown in the United States and European countries took effect, orders drastically decreased. What most crises have in common is that they hit the most vulnerable and marginalized groups, among which women are disproportionately represented, the hardest. As the survey results show, layoffs disproportionately affected women given the severe impacts on the manufacturing/garment industry, which employs higher rates of women.

The majority of enterprises indicated that they would need at least three months to resume their normal business operations while only a small percentage would be able to resume them immediately.

In dealing with the impact on business operations such as shortages of raw materials, workers and cashflow, businesses use different approaches, including but not limited to, seeking new production channels and different sources of materials, adopting advanced technology and equipment and reduction of operation costs.

The UNIDO Industrial Development Report 2020, which was launched during the 18th session of the General Conference in November 2019 in Abu Dhabi, emphasizes the significance of national policy responses that promote the utilization of technology for inclusive and sustainable industrial development. It also provides three strategic directions for Member States to consider: (i) develop framework conditions, in particular digital infrastructure, to embrace new technologies; (ii) foster demand and leverage on ongoing initiatives using automatic data processing (ADP) technologies; and (iii) strengthen the necessary skills and research capabilities.

The coordination of joint efforts between the government and the international community is crucial to support Cambodia's recovery. Based on the results of this survey and discussions of these findings, the following are key recommendations for consideration by the government and relevant stakeholders to support and bolster the private sector in its recovery.

8.1 Enhancing the resilience of the private sector by strengthening productivity, competitiveness, access to finance and promoting digitalization

To enable the private sector to adjust and absorb shocks better, firms need immediate support in capacity-building in science, technology and innovation, production techniques and how to benefit from foreign direct investment (FDI). Support for the digital economy and reinforcement of the resilience of the country's industry and innovation should build on existing skills and products. In the context of rapid technological change, a firm's competitive advantage is highly dependent on its dynamic capabilities. The COVID-19 crisis also opens opportunities, therefore, support to MSMEs is crucial to help them cope better and recover.

- **Providing and enhancing existing capacity-building programmes** to harness digitalization, science, technology and innovation, including the use of online platforms for sourcing and marketing:

  Specific measures should be provided to help facilitate businesses' access to ICT tools and platforms and improve ICT infrastructure, particularly for small and medium businesses. Capacity-building in digital marketing and service delivery, and support for adjusting business models are key for speeding up business recovery and enhancing preparedness. The development and implementation of strategies to promote science, technology and innovation as well as strengthening eco systems to promote start-ups in various sectors is essential.

  In addition to increasing digitalization, expanding knowledge and skills of business owners through entrepreneurship training programmes, which may assist them to better cope and address the impacts on their business, is crucial.

- **Adopting resources and energy efficiency business model:**

  As a result of the COVID-19 pandemic, Cambodia's industrial sector has suffered a severe blow and it will take considerable time to recover. Adopting and incentivizing a resource and energy efficiency business model offers both MSMEs and industry alike competitive solutions to reduce production costs, to rapidly generate jobs and curb carbon emissions all at the same time. Most importantly, large-scale investments in low carbon and efficient technologies will ensure that industrial firms, MSMEs and countries can rebound and be stronger than before. This will help companies to become more resilient in dealing with potential future pandemics or crises.

- **Providing immediate relief to workers and enterprises:**

  To ensure job recovery, policy responses should focus on providing immediate relief to workers and enterprises to protect livelihoods and economically viable businesses. All essential aspects should be considered, including access to financial rescue packages, credit and unemployment benefits for the economic recovery to be effective, inclusive and sustainable. The specific needs and contributions of women as workers, business owners and entrepreneurs need to be better understood and addressed when developing these immediate measures.

- **Encouraging official business registration and Investment readiness:**

  The results of the survey indicate that MSMEs have suffered from the COVID-19 pandemic just as much as large enterprises. Despite all the efforts of the relevant ministries, there is still a large number of MSMEs that are not registered. Unregistered enterprises are not eligible for government or any other type of support programme and face more difficulties accessing formal credit and protecting their business.

  Encouraging official business registration through a simpler process and in a shorter time in a conducive environment will enable such enterprises to access formal support from the government and access to finance. Special attention should be paid to small businesses led by women due to their size and capacity. Local government plays an important role in supporting and encouraging local businesses to thrive rather than creating obstacles for their growth. Equally important, de-registration should also be simplified.

  Enhancing investment readiness programmes among potential MSMEs by strengthening their capacity to address financing or loan requirements (proper accounting records or bookkeeping, pitching skills, financial reports and business plans), knowledge on how to deal with investors and to understand investor needs.

- **Promoting business development services (BDS) and product development**

  Access to business development services by MSMEs, including business plan development, financial model development and business strategy development, is one of the key challenges they face. Some of them benefitted from BDS by being registered as a member of a specific business association and other development project, but their numbers are still limited. Part of the reason for the lack of access to BDS is unawareness of this service on the part of MSMEs and lack of demand on the part of BDS. Capacity-building for BDS providers in offering such services should be taken into account by the government and other development projects. Furthermore, novel business development services covering technology and product development based on an open innovation model, best available technology transfer, etc., should be developed to help local businesses diversify their products and boost their competitiveness.

1. **Fostering recovery through innovative policies and plans**

   The COVID-19 crisis presents an opportunity for policymakers to institute bold measures for more resilient, inclusive and sustainable economies, and to reshape industrial development towards environmentally sound technologies. This is the right moment to critically review and decide on key strategies and actions to promote the strengthening of productive capacities, economic diversification and technological upgrading, while ensuring social and environmental protection.

- **Developing a national industrial recovery plan:** the development of such a plan should be carried out with the support of development partners. A detailed assessment should be performed to collect data for the proper analysis of strengths and weaknesses in the existing industrial structure. Such an analysis will ensure an appropriate balance of food security, economic resilience, pandemic preparedness, employment, improved matching of national supply and demand of critical products, disadvantaged groups benefiting from the recovery of industrial sectors, and minimized impact on global climate through sustainable production and consumption. Gender disaggregated data should be incorporated to determine the impact on businesses, especially those led by women. This helps in developing potential incentive schemes with specific targets, particularly for women entrepreneurs.

  This plan could be used as an implementation tool or to provide inputs for the government to update its industrial policy based on a mid-term review of the Cambodia Industrial Development Policy (2015-2025), which is scheduled to be completed in mid-2021.

- **Developing policies to promote sustainable and inclusive industry in a resilient manufacturing sector:** as manufacturing provides employment opportunities to a vast number of workers, especially women, the sector should be included in the recovery plan so that it has the necessary support to develop its resilience and response capacity. According to UNIDO's Index of Industrial Production, data comparisons of different countries around the globe show that the garment and textile industries belong to those that have been most affected by the pandemic. This is also supported by the results of the Cambodia survey. Hence, these industries should be included in a list of priority industries for which either local or foreign direct investment shall be encouraged. In this regard, differentiated policies, regulations, capacity-building and incentives, etc. are necessary in accordance with the industries' needs to support the sustainable and inclusive development of various manufacturing industries. Closer coordination with the private sector throughout the policy formulation process is essential for industrial policies to fully reflect the impacts on and the needs of industries, and to make policy implementation more effective.

  A policy that is favourable to the adoption of green, resource and energy efficient technology will incentivize investors to adopt such technologies. A policy with incentives that encourage the replacement of outdated machinery and improved production processes will also help generate jobs by rapidly accelerating demand for green, resource energy efficiency managers and experts. Gender responsive actions are also required. The specific needs and contributions of women business owners and entrepreneurs in this area needs to be better understood and addressed when developing this policy framework. A supportive and enabling environment for women entrepreneurs must be ensured.

- **Developing a national quality policy to guide the effective and efficient implementation of quality system to promote product and market diversification**

  The pandemic's current impact highlights the urgent need for market and product diversification. For Cambodia, the agro-industry presents a huge potential owing to the fact that the country has an abundance of unprocessed agricultural products. Cambodia has not, however, been able to reap the industry's full potential due to inter-related issues such as inadequate quality infrastructure, lack of investment in the industry and of technological know-how, among others. It is important to have coherence and synergy among different institutions. As an international best practice and in pursuit of Cambodia's Trade Integration Strategy 2019-2023, it is recommended for a national quality policy be developed to guide the effective and efficient implementation of a quality system, which is required to ensure safe and quality products for domestic markets and enable access to regional and international markets.

Appendix 1: Definition of enterprise classifications

Size	Investment capital
Micro enterprises	< USD 50,000
Small enterprises	USD 50,000 – USD 250,000
Medium enterprises	USD 250,000 – USD 500,000
Large enterprises	> USD 500,000

Source: MISTI/Prakas 717

Appendix 2: Survey Questionnaire

IMPACTS OF COVID19 ON THE PRIVATE SECTOR: FIRMS/ENTERPRISES SURVEY

ការស្ទង់មតិអំពីផលប៉ះពាល់នៃជំងឺកូវីដ១៩ទៅលើសហគ្រាសឯកជន

Current impact of COVID-19

ផលប៉ះពាល់បង្ករឡើងដោយជំងឺកូវីដ១៩

1. Because of the pandemic, what is the percentage of your company's employees who are unable to physically come to work and cannot adequately work from home at present?

   ដោយសារតែការរីករាលដាលនៃជំងឺនេះ តើបច្ចុប្បន្នសហគ្រាសរបស់លោកអ្នកមានបុគ្គលិកក្នុងអត្រាប៉ុន្មានភាគរយ ដែលពុំអាចមកធ្វើការបាន និងមិនអាចធ្វើការពីផ្ទះឲ្យបានសមស្រប ?

	_________%	_________% of female
	I don‘t know ខ្ញុំមិនដឹងទេ	

2. Please indicate the most significant financial problems for you/your firm/enterprise during the outbreak (Please select all that apply):

   សូមបង្ហាញពីបញ្ហាហិរញ្ញវត្ថុចម្បងៗ ដែលសហគ្រាសលោកអ្នកជួបប្រទះ ក្នុងអំឡុងពេលនៃការផ្ទុះជំងឺនេះ (សូមជ្រើសរើសរាល់ចម្លើយដែលសមស្រប)

	No specific problem ពុំមានបញ្ហាអ្វីទេ
	Staff wages and social security charges ប្រាក់ខែបុគ្គលិក និងចំណាយទៅលើសេវាសន្តិសុខសង្គម
	Fixed costs, e.g. rent ចំណាយជាប្រចាំនានា ឧ. ចំណាយលើថ្លៃជួលទីតាំង
	Repayment of loans ការសងប្រាក់កម្ចី
	Payments of invoices ការទូទាត់វិក្កយបត្រ
	Selling products in the market ការលក់ផលិតផលទៅទីផ្សារ
	Other expenses, please specify: _________________ ផ្សេងៗ សូមបញ្ជាក់៖ _________________

3. Are there any other business problems your firm/enterprise is facing due to the pandemic? (Up to two options)

   តើសហគ្រាសលោកអ្នកជួបប្រទះនឹងបញ្ហាអាជីវកម្មអ្វីខ្លះទៀត ដោយសារតែជំងឺរាតត្បាតនេះ? (អាចជ្រើសបានរហូតដល់ ២ ចម្លើយ)

	Reduction of orders ការកាត់បន្ថយការបញ្ជាទិញ
	Inability to deliver existing orders មិនអាចប្រគល់ទំនិញទៅតាមការបញ្ជាទិញ
	Increased difficulty of financing ជួបបញ្ហាលំបាកផ្នែកហិរញ្ញវត្ថុកាន់តែខ្លាំងឡើងៗ
	Existing loans cannot be extended កម្ចីដែលមានស្រាប់មិនអាចពន្យារពេលបាន
	Disruption of logistics ការរអាក់រអួលផ្នែកដឹកជញ្ជូន
	Price surge of inputs ការឡើងថ្លៃនៃធាតុចូល
	Upstream and downstream chain disruptions ការរអាក់រអួលខ្សែចង្វាក់ផ្គត់ផ្គង់ និងចែកចាយ
	Insufficient protective equipment (e.g. masks) កង្វះខាតសម្ភារៈការពារខ្លួន (ឧ. ម៉ាស់)
	Supplying raw material or animal food ការផ្គត់ផ្គង់វត្ថុធាតុដើម ឬចំណីសត្វ
	Other, please specify: ____________________ ផ្សេងៗ សូមបញ្ជាក់៖ __________________

Expected impact of COVID-19

ផលប៉ះពាល់រំពឹងថានឹងកើតមាននៃជំងឺកូវីដ១៩

4. What impact do you currently expect on your firm's/enterprise’s revenue this year as a result of COVID-19?

   តើលោកអ្នករំពឹងថា សហគ្រាសលោកអ្នកនឹងរងនូវផលប៉ះពាល់ទៅលើប្រាក់ចំណូលដូចម្តេចដែរ ដោយសារតែជំងឺកូវីដ១៩?

	No impact ពុំមានផលប៉ះពាល់ទេ
	Decrease of ____% ធ្លាក់ចុះ ____%
	Increase of ____% កើនឡើង ____%
	Too early to state ឆាប់រហ័សពេកក្នុងការលើកឡើងពេលនេះ
	I don’t know ខ្ញុំមិនដឹងទេ

5. Is your firm/enterprise currently considering layoffs, or has already laid off some workers because of the pandemic?

តើក្រុមហ៊ុន/សហគ្រាសលោកអ្នកកំពុងពិចារណាក្នុងការកាត់បន្ថយបុគ្គលិក ឬបានអនុវត្តមួយចំនួនហើយរួច ដោយសារតែការរាតត្បាតនៃជំងឺនេះ?

	Yes បាទ/ចាស
	No (go to question 6) ទេ (សូមបន្តទៅសំណួរទី 6)

5.1. What percentage of staff are you expecting to (or have already) cut?

តើលោកអ្នកកំពុងពិចារណាកាត់បន្ថយ (ឬបានកាត់បន្ថយរួចហើយ) បុគ្គលិកចំនួនប៉ុន្មានភាគរយ?

	_____% of which _____% of female staff ក្នុងនោះ_____% បុគ្គលិកភេទស្រី
	Too early to state (go to question 6) ឆាប់រហ័សពេកក្នុងការលើកឡើងពេលនេះ (សូមបន្តទៅសំណួរទី 6)

5.2. Do you expect these layoffs to be temporary or permanent?

តើលោកអ្នករំពឹងថា ការកាត់បន្ថយបុគ្គលិកនេះមានលក្ខណៈបណ្តោះអាសន្ន ឬអចិន្ត្រៃយ៍?

	Temporary បណ្តោះអាសន្ន
	Permanent អចិន្ត្រៃយ៍
	Too early to state ដូចជាឆាប់ពេកក្នុងការលើកឡើងពេលនេះ

5.3. Has there been any compensatory measures that your company/enterprise applied or will plan to apply?
តើមានវិធានការសំណងណាមួយដែលក្រុមហ៊ុន/សហគ្រាសរបស់អ្នកបានអនុវត្ត ឬគ្រោងនឹងអនុវត្ត?
If yes, in what form? ប្រសិនបើមាន តើក្នុងទម្រង់បែបណា?

_____ Monetary form
ទម្រង់រូបិយវត្ថុ

_____ Other incentives (Please specify: ______________________________________)

ការលើកទឹកចិត្តផ្សេងទៀត (សូមបញ្ជាក់៖___________________________________)

_____ No

មិនទាន់មានទេ

5.4. If possible, please indicate how these layoffs are distributed with respect to the following areas: (please insert value as percent for every option; total should sum up to 100%)

បើអាច សូមបញ្ជាក់អត្រាភាគរយនៃការកាត់បន្ថយបុគ្គលិកទាំងនេះ ដោយផ្អែកទៅតាមកត្តាខាងក្រោម (សូមសរសេរចំនួនជាភាគរយសម្រាប់ជម្រើសនីមួយៗ ហើយ ចំនួនសរុបគួរតែស្មើ ១០០%)

Qualifications (គុណវុឌ្ឍិ):

___%	University degree (បញ្ចប់សាកលវិទ្យាល័យ)
___%	Technicians (skilled) (អ្នកបច្ចេកទេស)
___%	Semi-skilled (បុគ្គលិកពាក់កណ្តាលជំនាញ)
___%	Unskilled (បុគ្គលិកគ្មានជំនាញ)
___%	Apprentice (អ្នកហាត់ការ)
	Too early to state ដូចជាឆាប់ពេកក្នុងការលើកឡើងពេលនេះ

Areas of Expertise (ជំនាញ):

___%	Management/Executive (ថ្នាក់គ្រប់គ្រង)
___%	Design (ផ្នែករចនា)
___%	Manufacturing/Assembly (ផ្នែកផលិតកម្ម/បង្គុំ)
___%	Quality Assurance/Quality Control (ផ្នែកត្រួតពិនិត្យ និងធានាគុណភាព)
___%	Customer Service (ផ្នែកទំនាក់ទំនងអតិថិជន)
___%	Administrative and/or Finance (ផ្នែករដ្ឋបាល)
___%	Labour (កម្មករ)
	Too early to state ដូចជាឆាប់ពេកក្នុងការលើកឡើងពេលនេះ

Sex (ភេទ):

___%	Male (ប្រុស)
___%	Female (ស្រី)

6. Are there currently restrictions by the government that impact your normal way of operating as a business?

តើបម្រាមដែលរដ្ឋាភិបាលដាក់ចេញបច្ចុប្បន្នមានផលប៉ះពាល់ ទៅលើដំណើរការជាប្រក្រតីនៃប្រតិបត្តិការអាជីវកម្មរបស់លោកអ្នកដែរឬទេ?

	Yes (go to question 6.1) មាន (សូមបន្តទៅសំណួរទី 6.1)
	No (go to question 7) ពុំមាន (សូមបន្តទៅសំណួរទី 7)

6.1 If the current restrictions continue, how long can your firm's/enterprise's current cash flow maintain the company's operation?

បើសិនបម្រាមទាំងនេះនៅតែបន្ត តើលំហូរសាច់ប្រាក់បច្ចុប្បន្នរបស់សហគ្រាសលោកអ្នក អាចធានាប្រតិបត្តិការអាជីវកម្មបានយូរប៉ុនណា?

	Indefinitely បានរហូត
	More than 12 months បានយូរជាង ១២ខែ
	Between 6 and 12 months បានពី ៦ ទៅ ១២ខែ
	Between 3 and 6 months បានពី ៣ ទៅ ៦ខែ
	Between 1 and 3 months បានពី ១ ទៅ ៣ខែ
	Less than 1 month តិចជាង ១ខែ

7. If the international COVID-19 crisis were to end today, how long would you estimate it would take for your company/enterprise to get back to business as usual?

ប្រសិនបើវិបត្តិជំងឺកូវីដ១៩ បញ្ចប់នៅថ្ងៃនេះ តើលោកគិតថាក្រុមហ៊ុន/សហគ្រាសរបស់លោកអ្នក ត្រូវការរយៈពេលប៉ុន្មាន ទើប អាចដំណើរការដូចធម្មតាវិញបាន?

_____ days _____ ថ្ងៃ

Dealing with COVID-19

ដំណោះស្រាយចំពោះមុខជំងឺកូវីដ១៩

8. What is the main means you are considering to deal with the cash flow shortage? (Up to two options)
តើសហគ្រាសលោកអ្នកនឹងដោះស្រាយបញ្ហាខ្វះលំហូរសាច់ប្រាក់យ៉ាងដូចម្តេច? (អាចរើសបានរហូតដល់ ២ ចម្លើយ)

	No cash flow shortfalls problem ពុំមានបញ្ហាខ្វះលំហូរសាច់ប្រាក់ទេ
	Loans from commercial banks កម្ចីពីធនាគារពាណិជ្ជ
	Loans from Internet finance កម្ចីតាមអ៊ីនធឺណិត
	Loans from microfinance companies or private individuals កម្ចីពីមីក្រូហិរញ្ញវត្ថុ ឬ បុគ្គលឯកជន
	Negotiating with lenders to avoid withdrawing loans ចរចាជាមួយម្ចាស់បំណុលកុំឱ្យដកកម្ចីទៅវិញ
	Equity financing (adding new shareholders or capital increase of former shareholders) ការបន្ថែមទ្រព្យសកម្ម (តាមរយៈការស្វែងរកអ្នកចូលហ៊ុនថ្មី ឬបង្កើនទុនវិនិយោគពីសំណាក់ម្ចាស់ហ៊ុនដែលកំពុងកាន់កាប់ហ៊ុន)
	Reduction of operating costs (e.g. layoffs and salary reductions) ការកាត់បន្ថយចំណាយប្រតិបត្តិការ (ឧ. កាត់បន្ថយបុគ្គលិក និងកាត់ប្រាក់ខែបុគ្គលិក)
	Other, please specify: ____________________ ផ្សេងៗ សូមបញ្ជាក់៖ __________________

9. What is the main means you are considering to deal with the shortage of workers? (Up to two options)

តើសហគ្រាសលោកអ្នកនឹងដោះស្រាយបញ្ហាខ្វះបុគ្គលិកយ៉ាងដូចម្តេច? (អាចរើសបានរហូតដល់ ២ ចម្លើយ)

	No shortage of workers ពុំមានបញ្ហាខ្វះបុគ្គលិកទេ
	Wage increases ដំឡើងប្រាក់ខែ
	Use of advanced equipment or software to reduce the amount of work ប្រើប្រាស់នូវឧបករណ៍ ឬសូហ្វវែរទំនើបដើម្បីកាត់បន្ថយការងារដោយមនុស្ស
	Outsourcing of orders បញ្ជាទិញទំនិញសម្រេចពីសហគ្រាសផ្សេង
	Delay in delivery ពន្យារពេលប្រគល់ទំនិញ
	Other, please specify: ____________________ ផ្សេងៗ សូមបញ្ជាក់៖ __________________

10. What is the main means you are currently considering to deal with the shortage of inputs such as intermediate goods and raw materials? (Up to two options)
តើសហគ្រាសលោកអ្នកនឹងដោះស្រាយបញ្ហាខ្វះធាតុចូលផលិតកម្ម ដូចជាទំនិញពាក់កណ្តាលសម្រេច និងវត្ថុធាតុដើមយ៉ាងដូចម្តេច? (អាចរើសរហូតដល់ ២ ចម្លើយ)

	No shortage of inputs ពុំមានបញ្ហាខ្វះធាតុចូលផលិតកម្ម
	Reduction of production កាត់បន្ថយផលិតកម្ម
	Outsourcing orders បញ្ជាទិញទំនិញសម្រេចពីសហគ្រាសផ្សេងៗ
	Increasing the procurement channels បន្ថែមការធ្វើលទ្ធកម្មពីប្រភពផ្សេងៗ
	Seeking new production channels ស្វែងរកមធ្យោបាយផលិតថ្មី
	Delaying goods delivery ពន្យារពេលប្រគល់ទំនិញ
	Not applicable មិនពាក់ព័ន្ធ
	Other, please specify: ____________________ ផ្សេងៗ សូមបញ្ជាក់៖ __________________

11. What is the main means you are currently considering to deal with difficulties in fulfilling contracts?

តើសហគ្រាសលោកអ្នកនឹងដោះស្រាយបញ្ហាលំបាកក្នុងការបំពេញកាតព្វកិច្ចក្នុងកិច្ចសន្យាយ៉ាងដូចម្តេច? (អាចរើសបានរហូតដល់ ២ ចម្លើយ)

	No contractual performance issues ពុំមានបញ្ហាក្នុងការអនុវត្តកាតព្វកិច្ចក្នុងកិច្ចសន្យាទេ
	Settlement by mutual agreement ដោះស្រាយតាមរយៈការស្រុះស្រួលគ្នាទៅវិញទៅមក
	Legal or arbitral settlement ដោះស្រាយតាមរយៈតុលាការ ឬអាជ្ញាកណ្តាលដោះស្រាយវិវាទ
	Expect the government to coordinate and provide clear disclaimer agreements រំពឹងថា រដ្ឋាភិបាលនឹងសម្របសម្រួល និងផ្តល់នូវកិច្ចព្រមព្រៀងជានាសងច្បាស់លាស់
	Payment of liquidated damages បង់ប្រាក់សំណងមិនបានអនុវត្តតាមកាតព្វកិច្ចក្នុងកិច្ចសន្យា
	Other, please specify: ____________________ ផ្សេងៗ សូមបញ្ជាក់៖ __________________

12. Are there currently any measures / support packages by your government that your company is benefitting from?
តើបច្ចុប្បន្ននេះមានវិធានការគាំទ្រដែលដាក់ចេញដោយរាជរដ្ឋាភិបាលដែលក្រុមហ៊ុនរបស់លោកអ្នកទទួលបាននូវអត្ថប្រយោជន៍?

	Yes (go to question 12) បាទ (សូមបន្តទៅសំណួរ 12.1)
	No (go to question 13) ទេ (សូមបន្តទៅសំណួរ 13)

12.1. In the face of the impact of the pandemic, the Government of Cambodia has introduced a number of relief measures. Are there currently any measures / support packages by the government that are most effective for your company and that your company is benefiting from? (can choose up to 2)

ប្រឈមនឹងផលប៉ះពាល់នៃការរាតត្បាតជំងឺនេះ រាជរដ្ឋាភិបាលបានប្រកាសដាក់ចេញនូវវិធានសម្រាលបន្ទុកនានា តើវិធានការណាខ្លះដែលមានប្រសិទ្ធជាងគេសម្រាប់ក្រុមហ៊ុន/សហគ្រាសលោកអ្នក ហើយដែលក្រុមហ៊ុន/សហគ្រាសរបស់លោកអ្នកកំពុងទទួលបានអត្ថប្រយោជន៍ពីវិធានការ/កញ្ចប់ជំនួយទាំងនោះ? (អាចរើសរហូតដល់ ២ ចម្លើយ)

	Reduction of rent for small and medium-sized enterprises and lower costs of electricity, gas and logistics, etc. កាត់បន្ថយថ្លៃឈ្នួលសម្រាប់សហគ្រាសធុនតូច និងមធ្យម និងកាត់បន្ថយថ្លៃអគ្គិសនី ហ្គាស និងការដឹកជញ្ជូន។ល។
	Reduction of tax rates, reduction or deferral of taxes បន្ថយអត្រាពន្ធ ឬពន្យាការយកពន្ធ
	Reduction of financing costs for SMEs, extension of loan terms or partial debt relief កាត់បន្ថយចំណាយហិរញ្ញវត្ថុសម្រាប់សហគ្រាសធុនតូច និងមធ្យម ពន្យារកាលបរិច្ឆេទកម្ចី ឬសម្រួលការសងបំណុលជាចំណែកៗ
	Temporary reduction of social insurance premiums and reimbursement of unemployment insurance to enterprises that do not lay off staff កាត់បន្ថយជាបណ្តោះអាសន្ននូវការបង់ ការធានារ៉ាប់រងសង្គម និងការទូទាត់សម្រាប់ការធានារ៉ាប់រងបុគ្គលិកបាត់បង់ការងារ ទៅដល់សហគ្រាសដែលពុំបានកាត់បន្ថយបុគ្គលិក

	Optimization of exporting tax rebate services បង្កើនប្រសិទ្ធភាពសេវាកម្មបង្វិលសងពន្ធនាំចេញ
	Provide fast-track "force majeure" certification to avoid contract breaches ផ្តល់វិញ្ញាបនបត្របញ្ជាក់ករណីប្រធានសក្តិ ដើម្បីបញ្ចៀសការរំលោភលើកិច្ចសន្យា
	Low interest loan ផ្តល់កម្ចីដែលមានការប្រាក់ទាប
	Others, please specify:_________________ ផ្សេងៗ សូមបញ្ជាក់៖ _________________

Background Information: ព័ត៌មានសាវតា

Profile of the firm/enterprise សង្ខេបអំពីក្រុមហ៊ុន/សហគ្រាស

13. When did the firm/enterprise start to operate?
តើសហគ្រាស/ក្រុមហ៊ុនរបស់អ្នកចាប់ផ្តើមនៅពេលណា?

	Insert year សូមបញ្ជាក់ឆ្នាំ

14. Please select the industry that best describes the products your firm/enterprise produces:
សូមជ្រើសរើសវិស័យឧស្សាហកម្មដែលដែលត្រូវទៅនឹងផលិតផលដែលក្រុមហ៊ុនអ្នកផលិត៖

	Food and beverages អាហារនិងភេសជ្ជះ
	Tobacco products ផលិតផលថ្នាំជក់
	Textiles វាយនភ័ណ្ឌ
	Wearing apparel, fur សំលៀកបំពាក់រោមសត្វ
	Leather, leather products and footwear ស្បែក ផលិតផលស្បែក និង ស្បែកជើង
	Wood products (excl. furniture) ផលិតផលឈើមិនរាប់បញ្ចូលគ្រឿងសង្ហារឹម
	Paper and paper products ក្រដាស និង ផលិតផលក្រដាស
	Printing and publishing រោងពុម្ព និងក្រុមហ៊ុនបោះពុម្ពផ្សាយ
	Coke, refined petroleum products, nuclear fuel ជ័រកាកប្រេង ផលិតផលប្រេង ឥន្ធនៈនុយក្លេអ៊ែ
	Chemicals and chemical products សារធាតុគីមី និង ផលិតផលគីមី
	Rubber and plastics products ជ័រ និងផលិតផលប្លាស្ទិក
	Non-metallic mineral products ផលិតផលរ៉ែមិនមែនលោហៈ
	Basic metals លោហៈធាតុ
	Fabricated metal products ផលិតផលដំឡើងពីពីលោហៈ
	Machinery and equipment

	ម៉ាស៊ីន និងបរិក្ខា
	Office, accounting and computing machinery សម្ភារៈការិយាល័យ និងម៉ាស៊ីនគិតលេខ
	Electrical machinery and apparatus ម៉ាស៊ីនអេឡិចត្រូនិច និង គ្រឿង
	Radio, television and communication equipment វិទ្យុ ទូរទស្សន៍ និង បរិក្ខាទំនាក់ទំនង
	Medical, precision and optical instruments បរិក្ខាវេជ្ជសាស្ត្រ បរិក្ខាដែលមានសុក្រិតភាពខ្ពស់និងអុបទិច
	Motor vehicles, trailers, semi-trailers យានយន្ត កន្ទុយរ៉ឺម៉កសណ្តោង
	Other transport equipment បរិក្ខាដឹកជញ្ជូនផ្សេងៗ
	Furniture; manufacturing គ្រឿងសង្ហារឹម កម្មន្តសាល
	Recycling ឧស្សាហកម្មកែច្នៃ
	Tourism/hospitality ទេសចរណ៍/បដិសណ្ឋារកិច្ច
	Information and communication technology បច្ចេកវិទ្យាពត៌មានវិទ្យា
	E-commerce/online retails ពាណិជ្ជកម្មតាមប្រព័ន្ធអេឡិចត្រូនិច/ការលក់តាមអ៊ីនធើណែត
	Consumer products ផលិតផលប្រើប្រាស់ប្រចាំថ្ងៃ
	Agricultural food production/food processing ផលិតកម្មកសិអាហារ/ការកែច្នៃអាហារ
	Others, please specify ផ្សេងៗ សូមបញ្ជាក់ ____

15. What is the ownership structure of your company/enterprise?

ក្រុមហ៊ុនរបស់អ្នកជាប្រភេទក្រុមហ៊ុន?

	100% Khmer owned enterprise ១០០% ជាក្រុមហ៊ុនខ្មែរ
	Foreign subsidiary សាខាក្រុមហ៊ុនបរទេស
	Joint venture ក្រុមហ៊ុនដែលបណ្តាក់ទុនរួមគ្នា
	Family owned business ក្រុមហ៊ុនគ្រប់គ្រងតាមបែបគ្រួសារ
	Cooperation with other partner(s) សាជីវកម្ម
	Other, please specify: ________ ផ្សេងៗ សូមបញ្ជាក់________

16. What was the number of employees of the firm/enterprise at the end of 2019?

តើសហគ្រាស/ក្រុមហ៊ុនរបស់អ្នកមានបុគ្គលិកប៉ុន្មាននៅចុងឆ្នាំ ២០១៩?

	Insert the number of employees at the end of 2019 បញ្ចូលចំនួនបុគ្គលិកនៅចុងឆ្នាំ ២០១៩ Of which ___% women

17. In relation to the main production activity, the firm predominantly produces (please select one option):

ទាក់ទងនឹងសកម្មភាពផលិតកម្ម តើអង្គភាពរបស់អ្នកផលិតអ្វីសំខាន់ជាងគេ? សូមជ្រើសរើសចំលើយមួយ

	Finished goods for consumers (food, garments, etc) ផលិតផលសម្រេចសម្រាប់អតិថិជន
	Finished goods for industrial business ផលិតផលសម្រេចសម្រាប់វិស័យឧស្សាហកម្ម
	Intermediate inputs for agriculture ផលិតផលពាក់កណ្តាលសម្រេចសម្រាប់វិស័យកសិកម្ម
	Intermediate inputs for manufacturing ផលិតផលពាក់កណ្តាលសម្រេចសម្រាប់វិស័យកម្មន្តសាល
	Intermediate inputs for services ផលិតផលពាក់កណ្តាលសម្រេចសម្រាប់សេវាកម្ម
	Agricultural food production/food processing ផលិតកម្មកសិអាហារ/ការកែច្នៃអាហារ

18. Which share of purchases of raw materials and intermediate goods corresponded to each of these categories in 2019? (please insert value as percent of total sales for every option; total should sum up to 100%):

តើសហគ្រាស/ក្រុមហ៊ុនលោកអ្នកទិញវត្ថុធាតុដើម និងទំនិញពាក់កណ្តាលសម្រេចពីប្រភពណាខ្លះនៅសម្រេចក្នុងឆ្នាំ ២០១៩?(
សូមបញ្ចូលចំនួនជាភាគរយនៃតម្លៃសរុបប្រចាំឆ្នាំសម្រាប់ជម្រើសនីមួយៗ
តម្លៃសរុបទាំងអស់បូកបញ្ចូលគ្នាត្រូវស្មើរ ១០០%)

___%	Import: foreign suppliers នាំចូល៖ ក្រុមហ៊ុនផ្គត់ផ្គង់បរទេស
___%	National: multinational corporations/foreign-owned suppliers located in the county អ្នកផ្គត់ផ្គង់ក្នុងស្រុក៖ ក្រុមហ៊ុនសារជីវកម្មអន្តរជាតិដែលមានមូលដ្ឋាននៅក្នុងប្រទេស
___%	National: domestic suppliers អ្នកផ្គត់ផ្គង់ក្នុងស្រុក៖ ក្រុមហ៊ុនផ្គត់ផ្គង់ក្នុងស្រុក
	Not applicable មិនពាក់ព័ន្ធ

19. Has the firm/enterprise run part of its production activity in another country in 2019 (offshore)? (please select one option):

តើក្រុមហ៊ុន/សហគ្រាសមានផលិតកម្មនៅប្រទេសផ្សេងដែរឬទេនៅក្នុងឆ្នាំ ២០១៩? សូមជ្រើសរើសយកចំលើយមួយដែលត្រឹមត្រូវ

	Yes, through direct investment (i.e. foreign affiliates/controlled firms) មាន តាមរយៈការវិនិយោគដោយផ្ទាល់(ក្រុមហ៊ុនបរទេស/ ក្រុមហ៊ុនគ្រប់គ្រង)
	Yes, through contracts with domestic firms abroad (e.g. technical/manufacturing partnership agreement, licensing agreement) មាន តាមរយៈកិច្ចសន្យាជាមួយក្រុមហ៊ុនបរទេស (ឧទាហរណ៍ ដៃគូរបច្ចេកទេស កិច្ចព្រមព្រៀងផលិតកម្ម កិច្ចព្រមព្រៀងអាជ្ញាប័ណ្ណ)
	No មិនមាន

20. Which province does you company/firm/enterprise have offices or production plants in?

តើក្រុមហ៊ុន/សហគ្រាស/រោងចក្រ/កសិដ្ឋានមានមូលដ្ឋាននៅខេត្ត/តំបន់ណាខ្លះ?

No. (ល.រ)	Location (ទីតាំង) (ឧ. កណ្តាល)
1	Phnom Penh (ភ្នំពេញ)
2	Banteay Meanchey បន្ទាយមានជ័យ
3	Battambang បាត់ដំបង
4	Kampong Cham កំពង់ចាម
5	Kampong Chhnang កំពង់ឆ្នាំង
6	Kampong Speu កំពង់ស្ពឺ
7	Kampong Thom កំពង់ធំ
8	Kampot កំពត
9	Kandal កណ្តាល
10	Kep កែប
11	Koh Kong កោះកុង
12	Kratie ក្រចេះ
13	Mondulkiri មណ្ឌលគីរី
14	Oddor Meanchey ឧត្តរមានជ័យ
15	Pailin ប៉ៃលិន
16	Prey Veng ព្រៃវែង
17	Pursat ពោធិ៍សាត់
18	Rattanakiri រតនគីរី
19	Siem Reap សៀមរាប
20	Preah Sihanouk ព្រះសីហនុ
21	Preah Vihear ព្រះវិហារ
22	Stung Treng ស្ទឹងត្រែង
23	Svay Reang ស្វាយរៀង
24	Takeo តាកែវ
25	Tbong Khmum ត្បូងឃ្មុំ

21. What is the total capital investment of your company (excluding land)?

តើក្រុមហ៊ុនលោកអ្នកមានទំហំទុនវិនិយោគចំនួនប៉ុន្មាន (មិនបូកបញ្ចូលថ្លៃដី)?

	< USD 50,000
	USD 50,000 – USD 250,000
	USD 250,000 – USD 500,000
	> USD 500,000

Follow up ការតាមដាន

22. We would greatly appreciate your participation in a follow up survey in a few months. If you would like to participate, please leave your contact details

    យើងសូមថ្លែងអំណរគុណយ៉ាងជ្រៀលជ្រៅសម្រាប់ការចូលរួមក្នុងកាស្ទង់មតិតាមដានរយៈពេលពីរបីខែ។ប្រសិនបើអ្នកចង់ចូលរួមជាមួយពួកយើង សូមទុកលេខទំនាក់ទំនងលំអិតនៅខាងក្រោម

Name (ឈ្មោះ):
Email:

Appendix 3: Summary table of selected government interventions to support the private sector (as of 24 June 2020)

1	On 17 March, the National Bank of Cambodia's press release No. 13-020-002 sets out five measures (to provide liquidity - cash on hand to banks and financial institutions to reduce the impact of COVID-19)
2	On 18 March, the National Bank of Cambodia Prakas No. 7-020-230 on reserves of the deposits and loans of banks and financial institutions by setting rate reserve requirements on deposits and loans in the national currency and currencies (7%)
3	On 18 March, the Agricultural and Rural Development Bank issued a press release on SME loans to support agriculture MSEMs in Cambodia
4	On 19 March, the Ministry of Labour and Vocational Training issued a reminder about additional measures for COVID-19 in manufacturing, factories and institutions
5	On 27 March, the Ministry of Foreign Affairs and International Cooperation issued a measurement on the Regulatory Travel Restriction of The Royal Government of Cambodia concerning the coronavirus disease (COVID-19)
6	On 27 March, the National Bank of Cambodia, No. 7-020-001, released the Directive on Credit Restructuring During the COVID 19 Crisis. The directive specifically targets the tourism, garment, construction and transportation industries.
7	On 30 March, the Ministry of Economy and Finance initiated action to suspend the exports of paddy and white rice overseas
8	On 2 April, the Ministry of Commerce issued the Notification to Fuel Stations or Depots that Sell Fuel for Unreasonably High Prices (reference not found, source: Economic Stimulus Measures)
9	On 3 April, the Ministry of Economy and Finance issued a press release on the Launch of SME Financing Enterprise Project to support SMEs in Cambodia
10	On 3 April, the Ministry of Economy and Finance's Decision No. 028 on the Establishment of a Multidisciplinary Working Group to Plan Monetary and Banking Measures to Manage the Impact of COVID-19 and the Withdrawal of "Everything but Arms (EBA)" was published
11	On 3 April, the Ministry of Economy and Finance 's Decision No. 024 on the Establishment of a Task Force to Control Supply and Prices of Strategic Goods During the Fight Against COVID-19 was published
12	On 3 April, the Ministry of Economy and Finance Decision No. 027 on the Establishment of a Task Force to Plan for Budget Policy on Financing and Social Assistance in Controlling the Fight Against COVID-19 was issued
13	On 3 April, the Ministry of Foreign Affairs and International Cooperation issued the Instruction to Automatically Extend Tourist Visas for Arrivals after 1 January 2020

14	On 3 April, the Ministry of Interior published the Instruction on Measures to Ensure Stability, Security, Public Order and Social Safety during the Khmer New Year 2020
15	On 5 April, the Ministry of Health published the Instruction on Preventive Measures of COVID-19 Transmission for Vehicle Transportation Owners and Passengers of Common Transport Vehicles
16	On 5 April, the Ministry of Health issued the Instruction on Preventive Measures Against COVID-19 at Barbers, Beauty Shops and Other Related Services
17	On 7 April, the Ministry of Tourism’s Letter No. 168 on Temporary Suspension of all Massage, Spa and Wellness Businesses was issued
18	On 7 April, the Ministry of Education, Youth and Sport’s Letter No. 1890 on Temporary Suspension of all Sports Activities and Exercises Which Require Gathering in Public and at Private Sport Clubs was published
19	On 9 April, the Ministry of Labour and Vocational Training released News Release No. 013/20 by issuing a four-point extension to enterprises, stipulating that the holiday celebrated during the Lunar New Year will entail 14 days in quarantine
20	On 20 April, the National Bank of Cambodia, No. 7-020-657, addressed all banks and financial institutions to request a preferential relaxation of credit-related fee waivers and / or fines for clients until the end of December 2020
21	On 30 April, the Ministry of Economy and Finance released an aid package to assist Khmer Entrepreneurs for Facilitating Small and Medium Enterprises and Innovative Businesses from the Impact of the COVID-19.
22	On 15 May, the Council of Ministries released the results of the meeting No 04. In the minutes of the meeting, the Council of Ministries allows re-exports of white rice and fish overseas that will start from 20 May
23	On 19 May, the Ministry of Mines and Energy, No. 0198, announced the implementation of a preferential plan and encourages the use of power electricity in industry, agriculture, trade and services from June to October 2020
24	On 26 May, the government released a guideline focussed on additional measures to assist the private sector and employees-employers who have been severely hit by the impacts of the COVID-19 pandemic, and rehabilitation measures to promote economic growth once the COVID-19 crisis has been contained
25	On 8 June, the Ministry of Tourism, No. 266, announced exemptions for all license renewal fees for 2021
26	On 24 June, Prime Minister Hun Sen launched the cash transfer programme for poor and vulnerable households during COVID -19

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