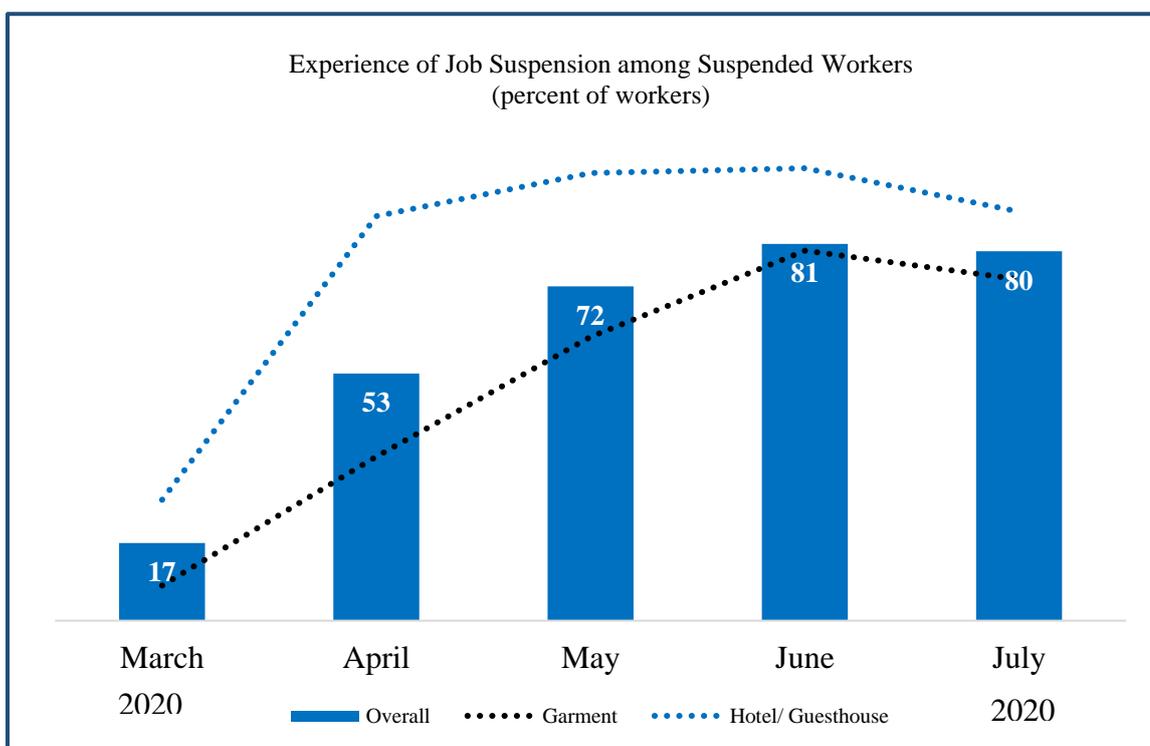


THE COVID-19 PANDEMIC AND WORKERS IN CAMBODIA:
 Magnitude of Impacts on Suspended Workers and Implications for
 Policy and Programme Interventions



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List of Acronyms

ACILS	American Center for International Labour Solidarity
CPS	Centre for Policy Studies
DFAT	Department of Foreign Affairs and Trade
FDC	Fixed Duration Contracts
FGD	Focus Group Discussion
MLVT	Ministry of Labour and Vocational Training
NEA	National Employment Agency
NIS	National Institute of Statistics
NSSF	National Social Security Fund
TAF	The Asia Foundation
UDC	Undetermined Duration Contract

Definitions of Village Types Covered by FGD

Rice village	is the type of village whose residents are largely reliant on the cultivation of paddy rice as a primary crop for own consumption and/or commercial reasons.
Vegetable village	is the type of village that is characterised by a significant proportion of farmers growing vegetables.
Livestock village	is the type of village characterised by a significant presence of farmers raising livestock such as chicken, ducks, pigs, cattle, fish, frogs, and so on for commercial purposes.
Cash crop village	is the type of village characterised by a significantly large proportion of farmers growing non-rice agricultural crops mainly for commercial purposes. These crops include both seasonal crops such as cassava or corns and perennial crops such as rubber or cashew.
New land village	is the type of village that is located inside or near the forest where people have cleared new lands for farm expansion. Crops that are commonly grown on these new lands are similar to those in the cash-crop villages
Tourism village	is the type of village whose residents are highly dependent on tourist arrival for earning a living.

Executive Summary

The survey was conducted in August 2020 through phone interviews with 1,525 of the approximately 130,000 workers in the garment, footwear, travel goods, hotel/guesthouse, and other tourism service industries who were officially suspended for 30 days or more due to the impact of COVID-19 on their enterprises between late March and July 2020. Overall, 68 percent of the workers in the whole sample, and 80 percent in the garment, footwear and travel goods sector sample, are female. For industry-level analysis, the total sample is grouped into four major industries: garment (38 percent), footwear/travel goods (26 percent), hotel/guesthouse (20 percent), and other tourism service (16 percent). The “other tourism service” mainly comprises restaurants, travel agencies, souvenir shops, and casinos.

In terms of the scope of impact on employment, a large proportion (80 percent) of the surveyed workers faced job suspension and work reduction in July 2020. Initially, female workers tended to be less vulnerable to job suspension as 78 percent of them were suspended in July while it was 83 percent for male. Industrywide, workers in hotel/guesthouse and other tourism service industries have been more heavily affected than those in the garment and footwear/travel goods industries. Overall, they had been suspended for an average of 11 weeks by the time of the survey. Workers in the hotel and guesthouse industry experienced the longest suspension period of 15 weeks on average. Remarkably, 95 percent of the workers surveyed stated that their employers had followed the procedures (payment of final entitlements, prior notice).

The employment situation has developed in different ways in the post-suspension period. About 60 percent of the suspended workers (64 percent male, 58 percent female) were again employed by the time of the survey in August 2020 (fewer percentage of women, 58 percent, were called back to work, compared to men counterpart of 64 percent). The other 40 percent remained suspended, which means they remained on the payroll but were paid a partial salary (US\$70 in total). This level of suspension is similar for all the workers in the garment, footwear/travel goods, and hotel/guesthouse industries. Workers in other tourism service industries are more disadvantaged, as the suspension level is higher, at about 53 percent. In the garment industry in particular, 45 percent of the suspended workers were called back to resume their old jobs in the garment industry, 13 percent sought an alternative job, while six percent became self-employed.

With regard to income earning, 45 percent of the workers reported earning salary/wage for July 2020 while the other 49 percent earned no income besides the suspension allowance of US\$40-70 per month. About six percent of the workers did not benefit from the suspension allowance programme. Men had a higher chance to earn an income. 54 percent of them earned income in July 2020 while only 40 percent of female workers did. Of note, the reported 45 percent earning income in July 2020 is lower than the 60 percent level of employment because the latter represents the situation in August 2020. This suggests additional 15 percentage points of workers found or returned to employment in August 2020.

Among those who returned to work, the level of employment was not full. The survey findings show a remarkable difference in the number of workdays per month. On average, a worker performed about 20 days of work per month for July 2020, a significant drop from 26 days per month a year earlier (July 2019). Workers in the hotel/guesthouse industry experienced a disproportionately high reduction of work. In July 2020, they could only work around 15 days, compared to 26 days in July 2019. Correspondingly, the average salary earning has reduced from

US\$220 per month in July 2019 to only US\$190 per month in July 2020, a 14 percent drop. Workers in the hotel/guesthouse industry experienced the most severe reduction in their monthly salary/wage, with a 44 percent drop from US\$255 per month in July 2019 to just US\$144 in July 2020.

At the personal level, a worker spent US\$156 per month on average, which is about 82 percent of their regular monthly income. The estimated expenditure reported at the household level is about US\$320 for July 2020, which is twice the level of personal expense. Although the difference is not significant, workers in the garment industry tend to spend less compared to all other counterparts. In effect, the workers ration their expenditure. The two expenditure types that the affected workers have reduced most prominently in this time of crisis are food consumption and remittances to family/parent. Out of the survey respondents, 57 percent experienced a reduction of expenditures on both items. Limiting food consumption appears more prevalent among workers in the hotel/guesthouse industry as well as in other tourism service industries. That reflects the fact that their income dropped more significantly.

During the pandemic, many workers are restructuring their expenditures on various items, including food, in order to cope with reduced income during the crisis. Expenditure cut for daily consumption appears to be a very common strategy adopted by the most affected workers. About 80 percent of affected workers had reduced their expenditure on food, although it is not known if those food items are essential or non-essential. The most commonly reported cutback (90 percent of workers) was the reduction of expenditure for consumption items other than food.

Although at first most workers tended to adopt measures to reduce their expenditures, be it food or non-food items, many workers also undertook measures to save on their cost of living. A higher proportion of workers in the garment industry reported they had returned to their home villages in order to save on living expenses. With regard to the change of accommodation, 17 percent of the workers in the hotel/guesthouse industry sought a cheaper place to house themselves and/or their families.

Besides the direct expenditure-cut and cost-saving measures on living expenses, the affected workers also tried to limit their cash outflow through other means such as stop sending remittances to their family/parent or requesting restructuring of their debt service. More than 50 percent of workers no longer send remittances to their family/parent. This strategy is more common among workers in the garment and footwear/travel goods industries, with up to 58 percent reporting that they stopped sending remittances to support their family/parent.

The workers adopted four major coping strategies to finance their expenditures in such a difficult time. These include relying on previous savings, taking loans for consumption, selling available assets to cover expenses, and accepting any ad hoc work available to them. The study findings did not show a difference between male and female workers in the adoption of most coping strategies, except in accepting ad hoc work to earn extra income. The data show that 34 percent of male workers accepted this type of work when they were suspended, while only 23 percent of female workers did so.

The study did not explore whether loans for consumption were undertaken formally or informally. Relying on previous savings was the most commonly reported strategy among workers in the garment and footwear/travel goods industries. Nearly 80 percent of them did so. On top of their savings, many workers sold some of their current assets in order to keep up with their living expenses. Nearly 50 percent of respondents undertook that measure. The other 25

percent, who might be in a more severe situation, reported they would accept any ad hoc work available to them in order to earn some meager income.

Of all the surveyed workers, 40 percent of them were still suspended (not working) as of August 2020. It was hypothesised that returning to the home village would be an option for the suspended workers to either earn income or reduce living cost. Interestingly, the majority (65 percent) of the workers who were being suspended at the time of the survey were already living in the village even before the COVID-19 outbreak. The share of the suspended workers who already lived in the village is higher among those in the garment and footwear/travel goods industries. Respectively, they represent between 72 percent and 78 percent of workers already living in the village. Further, about 12 percent of these suspended workers had already returned to the home village by the time of the survey. Only 6 percent indicated that they would return to the home village to either earn income or reduce living cost. The other 16 percent said they would not return despite the impact of COVID-19 pandemic.

The suspension allowance from the government is widely known and accessed by workers across industries, with 95-97 percent of the workers in garment and footwear/travel goods industries having received the suspension allowance from the government. Suspension allowance from the employer is commonly received by workers in the garment and footwear/travel goods industries (respectively 93 percent and 87 percent). That reflects the fact that the employers in these industries are required to co-fund the US\$30 per month on top of that US\$40 from the government. Although employers in the hotel/guesthouse and other tourism service industries are not obliged to co-fund the US\$30 suspension allowance, still 24 and 35 percent, respectively, of workers in these industries have benefited from the suspension allowance.

The government offers a skill improvement programme for affected workers in the garment, footwear/travel goods, and tourism industries, but this programme is not widely known among the respondents. Only 22 percent of the workers reported having heard of the programme and only eight percent have actually received the programme. A relatively higher proportion (10 percent) of workers in the garment and footwear/travel goods benefited from the programme.

In order to understand the recipient's preference in assistance mechanisms, workers were asked to choose which of several options interested them the most. Unsurprisingly, it appears that suspension allowance is most preferred. 32 percent of the respondents opted for that option. Cash transfer for poor households is also a popular option; 19 percent of the respondents preferred it. Interestingly, the demand for skill training is considerably high. One in five of the affected workers find this option most helpful. This suggests that these workers see the value of skill improvement.

In terms of employment prospects among the affected workers, more than 50 percent of the affected workers in the garment and footwear/travel goods industries were able to get back to paid jobs. These industries offer good prospects for jobs as 36-45 percent of the suspended workers were called back to resume their previous work. This level of re-employment is not very high, but it is an indication that there are some available opportunities. Job prospects in the tourism sector, however, are more limited. Only a quarter of the suspended workers in the hotel/guesthouse industry were called back to their work.

About 12 percent of the suspended workers reported finding a new paid job. Those who were working in the garment and footwear/travel goods industries before the suspension tended to

have a higher chance of finding new employment. 13-16 percent of them had found a new paid job after the suspension. Only 5 percent of those in the hotel/guesthouse industry found new employment.

While jobs were lost in major industries like garment, footwear/travel goods, and hotel/guesthouse, there appear to be no particular industries that can provide substantial alternative employment for the suspended workers. A large proportion of workers have remained suspended.

Agriculture does not appear to be a viable alternative source of employment as expected. Just 1.2 percent of the affected workers obtained employment in the agriculture sector. The FGDs at the village level confirmed that the returned workers do not generally want jobs in agriculture because they find the working conditions more difficult. They prefer to find other alternatives. Rural villages offer limited jobs. In rice villages, jobs are highly mechanised. Livestock raising generates very little employment opportunities, and jobs are mostly performed by family labour. Vegetable and cash crop villages can offer more job opportunities compared to rice and livestock villages; however, job opportunities are most available in new land villages.

Construction has become a new source of employment, but it did not absorb much labour either. Only 2.5 percent of the affected workers found jobs in the construction industry. Other evidence suggests that these workers are vulnerable to deception or otherwise non-payment of wages. According to FGDs in rice and livestock villages in Kampong Thom, many workers had returned from Thailand. While the borders with Thailand remain closed and therefore outward migration is restricted, these returned workers migrated internally for construction work in Phnom Penh. After working for several months, their wages were not paid, and they had to return to the village again and become jobless.

With limited alternative jobs available, a number of workers turned to self-employment. About four percent of the suspended workers did so. For example, they started to conduct online sales of previous products. Some became petty traders or vendors of vegetables and fruits. Others chose to become transport service providers.

I. Introduction and Research Methodology

1.1. Background

Although Cambodia has recorded a very low number of confirmed cases and no deaths from COVID-19, the impact of the pandemic has translated into a remarkable job suspension and loss and large reduction of income for firms and households. By June 2020, as many as 234 factories in the garment and footwear/travel goods industries requested the suspension of their operations in Cambodia, and hundreds of thousands of workers were suspended from their jobs. Even worse impacts were observed in the tourism sector, which has been severely affected for many months without any sign of recovery, including the return of international tourists. The construction sector, meanwhile, has been facing declining foreign direct investment and prospective projects, although many ongoing construction projects are still underway.

Cambodia's microfinance institutions reported requests for debt restructuring by 150,000 borrowers as of mid-May 2020, and this trend is likely to worsen when the greater impact from job losses in the industrial and tourism sectors is realised. While KTV, clubs and massage parlors were ordered by the government to close as early as March 2020, many of the services on the streets and transport services have been facing dramatic decline in their business operations. As a large number of workers are not working, transport drivers and supporting services for those workers are affected negatively too.

With the full impact of COVID-19 still unclear, serious concern has been raised over the struggles of the laid-off workers with no other jobs to meet their daily consumption and family support needs, while suspended workers in the garment, footwear/travel goods, hotel/guesthouse, and other tourism service industries are provided with only US\$40 support by the government. The suspended workers in the garment, footwear/travel goods sector are also entitled to US\$30 additional support from their employers. This could cause worsening social and economic problems leading to bleak future prospects if the negative impact cannot be addressed adequately. One example of such economic problems is that microfinance institutions are facing a higher rate of non-performing loans. While designing the responses to the COVID-19 crisis, the government would benefit from up-to-date research that identifies the real situation of affected workers and potential livelihood alternatives in various agro-climatic zones in Cambodia. The current research has been funded by the American Center for International Labour Solidarity (ACILS) and The Asia Foundation (TAF) using the DFAT-funded Ponlork Chomnes programme.

1.2. Research Objectives and Questions

The purpose of the research study is to explore how the global COVID-19 pandemic has impacted workers in Cambodia's key labour sectors and use these findings to advocate for more responsive policies and support. Potential users of the study are relevant government institutions, development partners, civil society organisations and other stakeholders.

The overarching **research question** is "How can laid-off/affected workers in the garment, footwear/travel goods, hotel/guesthouse, and other tourism service industries be supported, directly and indirectly?"

The main questions to address are as follows:

- 1. How have workers across target industries been impacted by the COVID-19 pandemic?**
 - What is the current working situation of interviewed workers, e.g. are workers maintaining regular working hours and pay/partial work and pay/suspended work /job losses/business closure?
 - What are the perceived COVID-19 risks for workers and the management options of these risks, e.g. understanding measures in place to prevent COVID-19, and workers' confidence in these measures; have transport means for garment and footwear/travel goods workers been rearranged to minimise the risk of the spread of coronavirus?
 - What are the workers' expectations about future work prospects, e.g. is workplace status expected to stay the same over the next three months, or continue but working time is reduced/continue but salary reduced/don't know?

- 2. For workers who have been laid-off or suspended from work due to COVID-19 impacts, to understand:**
 - For workers who lost work due to COVID-19, did they receive final wages and entitlements? If not, why not?
 - For workers whose work was suspended due to COVID-19, were they entitled to compensation and did they receive it (from employers and government)? If not, why not?

- 3. How can laid-off workers in the affected industries be supported, both directly and indirectly?"**
 - Are government programmes reaching laid-off/suspended workers that need the assistance? How many employers followed the suspension or closure process, and how does this impact workers differently?
 - How can government programmes be improved? How can they be better targeted?
 - What are the most critical needs for workers and their families that are not being addressed? Do they receive any essential supports (e.g. cash/debt-relief/food/ ...)?
 - What are the coping strategies laid-off workers undertake for survival?
 - How feasible is it for workers to return to their villages and be productive? *Are there future prospects in alternative employment or agriculture?*

1.3. Methodology

The methodology to achieve the above objective and answer the research questions is laid out in the following five steps:

(1) Desk Study and Research Design

The desk study involved reviews of relevant reports and government policies/measures related to the economic impact on workers in Cambodia. The review enabled the study team to gain a good understanding of the current situation of the COVID-19 impact in various industries. The desk study further informed the development of the questionnaire for the

worker survey, instruments for focus group discussions in the villages, and consultations with experts and key stakeholders.

(2) Expert Consultations

Consultations included discussions with key stakeholders including policymakers, technical government officials, experts, private sectors, and trade unions. Consultations with leaders of the Ministry of Labour and Vocational Training (MLVT) and National Employment Agency (NEA), and trade unions were conducted to introduce the proposed research and discuss the questionnaire. The consultations were particularly helpful in (i) updating the current status and development of the policies and interventions related to affected enterprises and laid-off/suspended workers; (ii) understanding stakeholders' views on the issues and challenges; and (iii) drawing future prospects for the recovery of the sectors concerned.

(3) Survey of workers

The sample selection was conducted in cooperation with MLVT and with support from the National Institute of Statistics (NIS). As a first step, MLVT provided a summary table of all the suspended workers of about 250,000 workers, recorded cumulatively. The summary statistic indicates key characteristics of the sampling frame distribution across the sectors, sub-sectors, provinces, and different lengths (number of days) of the suspension periods. CPS, with technical advice from NIS, proposed that the samples be selected from those who were suspended for at least four weeks in the garment, footwear/travel goods, hotel/guesthouse, and other tourism service industries. The tourism includes hotels, guesthouses, restaurants, travel agents, souvenir shops, and other tourism related services. As a result, the sample frame comprises about 125,000 suspended workers, which is about 50 percent of all the suspended workers.

Based on the proposed sample selection, MLVT used the random selection function in Microsoft Excel to draw the sample out of the sampling frame. The information available from the sample list provided by MLVT includes names of suspended workers, their gender, phone number, province of residence, and industry of work.

Table 1: Distribution of sample and population by gender across industries

Distribution by Gender	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Number of worker sample (persons)					
No. of male	118	78	178	118	492
No. of female	463	327	121	122	1,033
Total sample	581	405	299	240	1,525
Sample of suspended workers by gender (% of sample)					
Male	20	19	60	49	32
Female	80	81	40	51	68
Total percentage	100	100	100	100	100
Population of suspended worker by gender (% of population)					
Male	16	20	59	47	24
Female	84	80	41	53	76
Total percentage	100	100	100	100	100

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020) and the Ministry of Labour and Vocational Training (August 2020)

The survey was conducted with phone call interviews using a structured questionnaire. The survey employed 12 enumerators and took place from August 3 to 27, 2020. Three research assistants closely monitored the data collection. The enumerators were trained, and the questionnaire was tested and revised several times to improve its relevance.

As a result, 3,433 samples were selected, but only 1,525 (or 44%) of them were interviewed. The others who not responded include: busy (29 percent), no call access (19 percent), rejected the interview (3 percent), wrong phone numbers (3 percent), and not suspended (2 percent).

For industry-level analysis, the total samples are grouped into four major industries: garment (38 percent), footwear/travel goods (26 percent), hotel/guesthouse (20 percent), and other tourism service (16 percent). The “other tourism service” mainly comprises restaurants, travel agents, souvenir shops, and casinos (**Table 1**).

Of the total 1,525 surveyed workers, 68 percent (1,033) of them were female and 32 percent (492) were male. This distribution looks, though not so close, well in line with that of the population. Among the worker population who got suspended for at least four weeks or more, 76 percent of them are female; other 24 percent are male. Under the industry breakdown, the sample distribution by gender appears aligned with the population distribution. For example, the share of female workers in the footwear/travel goods industry is 81 percent in the sample and 80 percent in the population. In the other instance, the share of female workers in the hotel/guesthouse industry is 40 percent in the sample and 41 percent in the population.

(4) Focus Group Discussions at the Village Level

The focus group discussion (FGD) was an important part of the research. Researchers brought together several knowledgeable villagers, including men, women, and youth, to jointly discuss in detail the opportunities for income generation activities in the village, where laid-off workers had returned or could return. The FGD also identified the challenges for households affected by COVID-19.

Table 2: Summary of Focused Group Discussions and interviews at the village level

	Village Type						Total
	Rice	Vegetable	Livestock	Cash crop	New land	Tourism	
Number of selected villages	5	5	5	5	5	2	27
# FGD with key informant	5	5	5	5	5	2	27
# FGD with youth participant	5	5	5	5	5	2	27
# Interview with village representative	5	5	5	5	5	2	27

Source: Survey on impact of the COVID-19 pandemic on suspended workers (CPS, August 2020)

Drawing from the hypothesis that different rural areas have different potential for expanding agricultural production and thus mitigating the job losses in the urban sector, 27 villages from seven provinces¹ were chosen to reflect six major types of rural settings in Cambodia: i) rice

¹ Kandal, Prey Veng, Kampong Thom, Kratie, Preah Vihear, Siem Reap, and Battambang.

farming, (ii) vegetable farming, (iii) cash crop production such as cassava, mango, corn, and cashew (iv) livestock raising, (v) land with relatively new plantations (rubber, mango), and (vi) tourism-dependent villages. While the first five village types are supposed to offer different agricultural opportunities, the sixth village type (tourism-dependent villages) is included for a specific interest to understand how they were affected and what opportunities they can rely on. Only two villages were selected for the tourism-dependent stratum. Five villages were selected for each of the other five village strata.

A team of five enumerators visited all 27 villages. In each village, they conducted one FGD with key informants, one FGD with youth/laid-off workers, and one interview with a village representative. So, in total, the field team conducted 27 FGD with key informants, 27 FGD with youth/laid-off workers, and 27 face-to-face interviews with village representatives. The key informants are the elder men and women who are knowledgeable of what is going on in the village. Youth are those who were laid-off/affected by COVID-19 pandemic and ones who live in the village. In parallel to the FGDs, face-to-face interviews were held with the village chief/representative in all villages in order to get the general information of the village situation such as the population, household, and other village characteristics. In some cases, the village vice chief joins the interview together with the village chief. It was a semi-structured interview, guided by a checklist, lasting about one hour.

In total, the research team held discussions and interviews at the village level with 268 people (142 female): 105 key informants, 132 youths, and 31 village representatives.

1.4. Limitation

Below are the limitations of the research.

- The samples are only drawn from the record of Ministry of Labour and Vocational Training (MLVT) that registers the suspended workers who are qualified for the suspension allowance from the government. These suspended workers are ones from enterprises that are formally registered with the government. These enterprises are limited to those in the garment, footwear/travel goods, hotel/guesthouse, and other tourism service industries. Per the record of MLVT, the accumulative number of these suspended workers was about 250,000 between March and July 2020.
- Furthermore, the samples do not represent all the formally suspended workers. They are drawn from a subset of workers who were suspended at least four weeks between March and July 2020. As provided by MLVT, this subset of suspended workers comprises about 125,000 workers. Therefore, the responses are limited to only those who were formally employed suspended at least four weeks between March and July 2020 in their respective work industries.
- The samples were randomly selected from the sample frame through a random selection function in Microsoft Excel, but the number of actual samples were very much affected by a high non-responding rate. 3,433 samples were selected and called, but only 1,525 of them were interviewed. Therefore, the successful call/contact rate is only 44 percent. The other 56 percent were missed out. This may have made the responses bias to those who were available for the interviews. Those who were

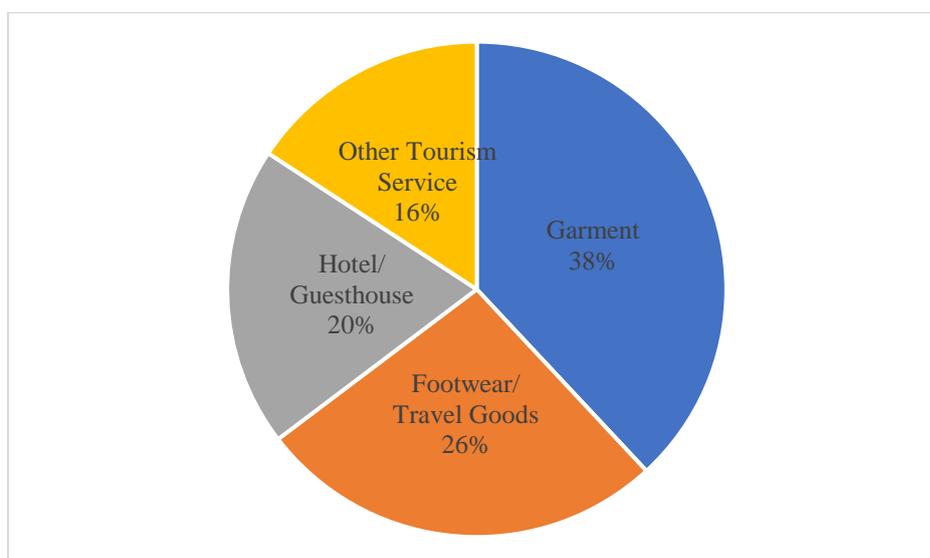
working tended to reject the calls for interviews (except during the evenings and Sundays), while the suspended ones had time to respond.

- In general, the behaviour of the respondents in the interview is one of the aspects that determines the quality of the collected data. At the end of each interview, the enumerators were asked to rate the behaviour of the respondents whether they are cooperative during the interview. Overall, the survey is not influenced by the non-cooperative behaviour of the respondents. Among the interviewed workers, only 0.8 percent of them were not so cooperative during the interviews.

II. Profile of Surveyed Workers

To analyze the different groups of affected workers in this survey, the sample of 1,525 workers was split into four major industries: i) garment, ii) footwear and travel goods, iii) hotel and guesthouse, and iv) other. The “other tourism service” industry includes travel agencies, souvenir shops, restaurants, and casinos. Workers in the garment industry comprise the largest share of the sample, accounting for 38 percent of the total. The footwear and travel goods industries represent 26 percent. The hotel and guesthouse industry makes up 20 percent of the total. The remaining 16 percent is workers from all other job industries.

Figure 1: Representation of surveyed workers across industries (percent of workers)



Source: Survey on impact of the COVID-19 pandemic on suspended workers (CPS, August 2020)

2.1. Distribution and Characteristics of the Survey Sample

In terms of marital status, two thirds of the workers are married and 27 percent are single. The other seven percent are divorced men and women. Overall, the interviewed workers are generally young in age. On average, workers included in the survey are 30 years old and there is no significant difference across industries. Most of them are between 25 and 40 years old. Nearly two thirds (64 percent) of them are found in this age group. The younger age group (below 25 years old) represents 26 percent. The remaining 10 percent are above 40 years old.

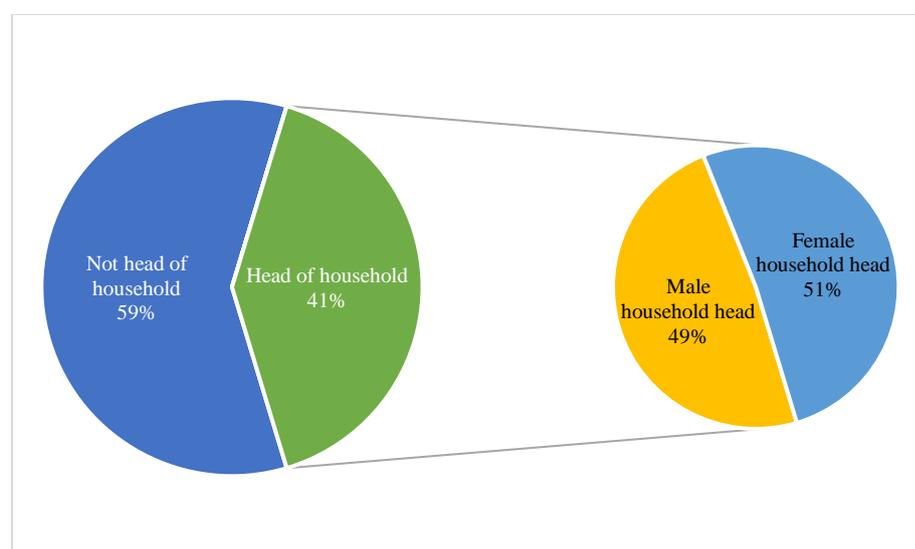
Table 3: Profile of the surveyed workers (percent of workers)

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Marital Status (%)					
Single	23	24	31	35	27
Married	69	69	63	58	66
Divorced	8	7	6	6	7
Average Age (years)					
	30	29	32	31	30
Age Groups (%)					
Below 25 Years Old	23	32	23	27	26
25 - 40 Years Old	69	59	61	61	64
Above 40 Years Old	8	9	15	12	10
Schooling (%)					
Primary/No School	48	49	14	22	37
Lower Secondary	39	37	27	28	34
Upper Secondary	14	15	60	50	29

Source: Survey on impact of the COVID-19 pandemic on suspended workers (CPS, August 2020)

With regard to the level of educational attainment, on average 37 percent of workers have attended the primary school at most. 34 percent of the surveyed workers passed the primary grades but did not advance their study beyond the lower secondary level. The remaining 29 percent continued their study up to upper secondary school.

Figure 2: Role of household head among the surveyed workers (percent of workers)



Source: Survey on impact of the COVID-19 pandemic on suspended workers (CPS, August 2020)

Of note, the level of educational attainment appears different among industries of employment. Workers in the garment and footwear/travel good industries tend to possess a lower education level. Nearly half of them attended only primary school; otherwise, 85 percent never attended upper secondary school. In contrast, hotel/guesthouse and other tourism service industries generally employ workers with a higher level of education attainment. For instance, 60 percent of the workers in hotel/guesthouse industries received schooling at the upper secondary level.

Figure 2 shows a representation of household heads in the sample. Quite a high number of household heads were interviewed; they represent 41 percent of the total sample. In the hotel/guesthouse industry, the share of household heads in the sample even reaches 54 percent, significantly higher than that in the garment and footwear/travel good industries, which is around 36 percent. Of note, the representation of female household heads is relatively high in the sample. Among the household heads (41 percent of the sample), 51 percent of them are female.

2.2. Profile of Household Roles and Responsibilities

Table 4 illustrates the representation of household heads and breadwinners among male and female groups in the sample. Generally, a household head is the one that assumes the overall responsibility, especially decision making, in the family. He or she usually, though not necessarily, are the breadwinners who earn the main income for the family. In the Cambodian context, men generally assume the role of head of household.

While the representation of women in this household head's role is about 25.6 percent (NIS 2020), this survey reveals a very high proportion of women assuming that role and being a breadwinner in the family. As the survey shows, nearly one third (31 percent) of them are the household heads and 44 percent of all female workers are the main income earners for their families. Following the overall pattern, the proportion of women assuming the responsibility of household head and breadwinner are higher (39 percent and 56 percent respectively) among those working in the hotel/guesthouse industry.

Table 4: Profile of household responsibility share (percent of workers)

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Household Head (%)	37	35	54	43	41
Male	62	63	65	55	61
Female	31	28	39	32	31
Bread winner (%)	45	49	64	53	51
Male	57	60	70	67	64
Female	41	46	56	39	44
Responsibility in Household					
No. of Family Members	4.8	4.5	4.7	4.7	4.7
No. of Dependents	2.2	1.9	2.0	2.2	2.1

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

The size of family and the number of dependents can generally indicate the overall responsibility for the household head or breadwinner. As the survey shows, a family of these workers has 4.66 members on average; and there is no significant difference across observations in different industries. This family size is higher than the national figure of 4.3 (NIS, 2020). The number of dependents appears rather low, which is only 2.1 persons per family. This suggests that a family generally has two income earners. In other words, a family does not rely on a single income earner.

2.3. Vulnerability and Social Protection

The workers were asked about the type of their employment contract. The majority of them have either Fixed Duration Contracts (FDC) or Undetermined Duration Contract (UDC). A small number of respondents could not distinguish if their contract is FDC or UDC. FDC is a quite common practice (52 percent). It is especially common in garment and footwear/travel good industries, where FDC accounts for 66 percent and 55 percent respectively of both industries. There is no difference between genders. Unlike workers in the garment, footwear/travel goods and hotel/guesthouse industries, those who work in the other tourism service seem most vulnerable since 39 percent of them have no employment contracts. An employment contract in this context is confined to a formal/written [form](#).

Disability and permanent health issues are also sources of vulnerability for workers as they might be subject to some forms of discrimination by the employer. As it stands in **Table 5**, the proportion of respondents with a disability is 1.7 percent of all the affected workers covered by this survey. The share of workers with a disability who were affected by COVID-19 was the highest in the hotel/guesthouse industry. Against the health-related background, quite a significant proportion (16 percent) of the affected workers reported having permanent health issues (female: 18 percent vs. male: 11 percent). Although there is no reference if they were suspended due to their health condition, this figure appears rather high.

Table 5: Profile of vulnerability and social protection (percent of workers)

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Employment Contract (%)					
No Contract	10	19	14	39	18
Fixed Duration Contract (FDC)	66	55	46	23	52
Undetermined Duration Contract (UDC)	23	26	38	36	29
FDC/UDC	0.0	0.0	1.7	3	0.7
Vulnerability (%)					
With Disability	1.6	0.7	3.3	1.7	1.7
With Permanent Health Issues	17	16	16	12	16
Social Protection (%)					
Member of Labour Union	55	56	25	23	45
Having NSSF Account	99	96	94	86	95

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

One important form of protection against rights abuses for workers is a union. As the figure shows, 45 percent of the surveyed workers are members of labour unions. Higher proportion of female workers join the labour unions (female: 52 percent vs. male: 30 percent). The proportion of affected workers who have association with a labour union is high (around 55 percent) in the garment and footwear/travel good industries. This high figure can be explained by the fact that workers in these two industries were already well organised into unions in the first place.

Access to health insurance is another form of protection for workers, particularly when they become ill. From the survey, a very high rate of the affected workers are registered with the National Social Security Fund (NSSF), which is a social health insurance scheme that provides basic social security to workers in private sectors. Overall, 95 percent of the affected workers have an NSSF account. Almost all of the workers in the garment industry have an NSSF account. A high proportion (86 percent) of workers in the other tourism service

industries also have an account, although it is lower than that in garment, footwear/travel goods, and hotel/guesthouse industries.

2.4. Residence of Surveyed Workers

Table 6 illustrates the distribution of the surveyed workers by provinces according to their permanent residence. The 1,525 workers are living or have their permanent residence listed in 22 out of the 25 provinces in Cambodia and capital Phnom Penh. None of the workers reported their permanent residence in Pailin, Stung Treng, and Ratanak Kiri.

Based on their permanent residence, 53 percent of the workers come from five major provinces: Kampong Speu (13 percent), Takeo (12 percent), Siem Reap and Kandal (10 percent each), and Svay Rieng (eight percent).

Table 6: Residence background of surveyed workers (percent of workers)

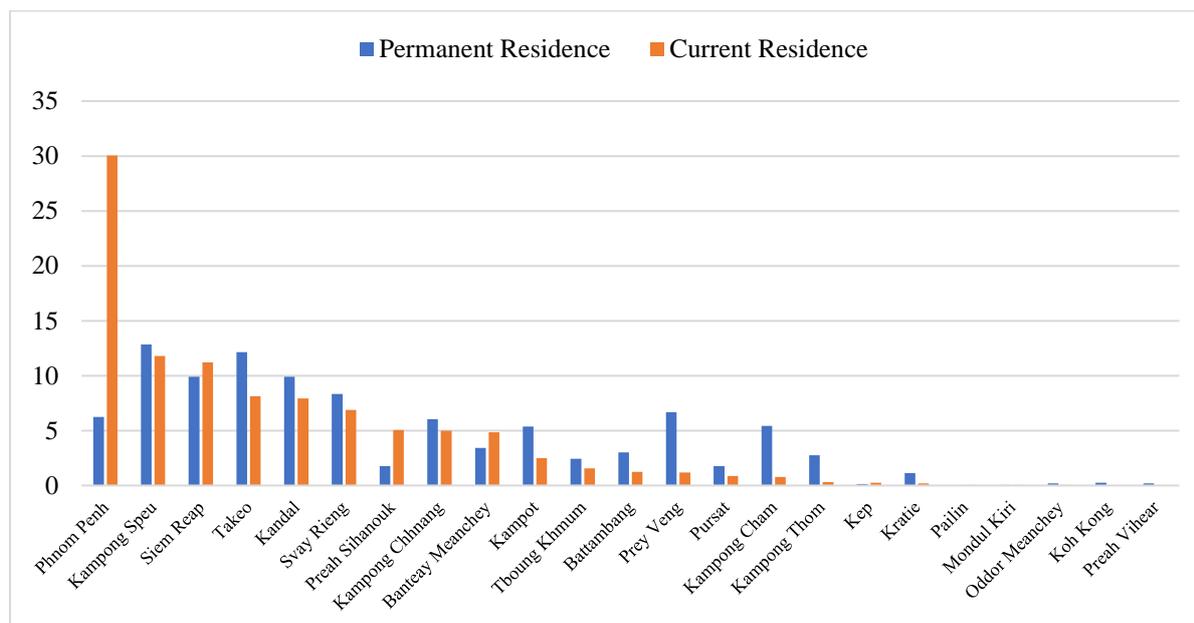
No	Permanent residence	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
1	Kampong Speu	17	21	3	2	13
2	Takeo	12	20	8	6	12
3	Siem Reap	1	2	27	24	10
4	Kandal	13	6	13	5	10
5	Svay Rieng	15	7	3	2	8
6	Prey Veng	10	5	3	4	7
7	Phnom Penh	4	0	15	11	6
8	Kampong Chhnang	2	16	3	3	6
9	Kampong Cham	6	6	4	5	5
10	Kampot	3	5	6	13	5
11	Banteay Meanchey	6	0	1	6	3
12	Battambang	2	1	2	11	3
13	Kampong Thom	3	3	3	2	3
14	Tboung Khmum	4	2	1	1	2
15	Preah Sihanouk	1	2	5	1	2
16	Pursat	2	2	0	3	2
17	Kratie	1.0	0.7	2.3	0.4	1.1
18	Koh Kong	0.2	0.2		0.8	0.3
19	Preah Vihear	0.2		0.7		0.2
20	Oddor Meanchey	0.3		0.3		0.2
21	Kep				0.8	0.1
22	Mondul Kiri			0.3		0.1

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

A large number of workers whose permanent residence is in Kampong Speu, Takeo, Kandal, Svay Rieng, and Prey Veng are employed in the garment industry. This corresponds to the fact that these provinces, except Prey Veng, are now home to many garment factories. The hotel/guesthouse industry is another important source of jobs. As shown in **Table 6**, a significant share of residents from Siem Reap and Phnom Penh are employed in this industry. Since these two locations are major homes of tourism and commerce, it suggests that people may have found jobs in their own locality without migrating elsewhere.

Figure 3 examines the mobility of workers across provinces by comparing their permanent and current addresses. As the figure shows, Phnom Penh stands out to be the current place of residence for 30 percent of all workers. This figure is relatively high; it is five times the proportion of workers who have their permanent address in Phnom Penh. Such a high discrepancy reflects the fact that people move from other places to work in the capital. Similar to Phnom Penh, Preah Sihanouk is another destination that absorbs labour from other parts of the country. About five percent of the workers report Preah Sihanouk as their current address while the share of those that report their permanent address is less than two percent.

Figure 3: Permanent residence versus current residence (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

The proportion of permanent versus current address looks quite similar in major provinces like Kampong Speu, Siem Reap, Kandal, and Svay Rieng. It is an indication that there are jobs available to workers within their locality or at a distance that they could commute daily from home. Prey Veng and Kampong Cham are the two provinces where the reported permanent address is much higher than the current one. It is an indication that workers from these provinces tend to have migrated for jobs out of the province of their permanent address.

III. Impact of COVID-19 on Officially Suspended Workers

3.1. Magnitude of Impact on Employment

Per the methodology, all of the samples are workers who were officially suspended for 30 days or more due to the impact of COVID-19. Nevertheless, as their employment situation may have changed by the time of this survey (whether they may have resumed their job, found a new one, or even got laid off), the surveyed workers were asked to report their employment experience since the outbreak of COVID-19 in March 2020. This question was meant to reassess their work situation between March and July 2020.

Overall, 92 percent of the respondents had experienced job suspension between March and July 2020 (95 percent of them are female and 86 percent are male). Approximately eight percent reported an experience of work reduction rather than suspension during the period. Seven respondents (which is roughly a half percent) reported they had been laid off. As **Table 7** shows, job suspension is widely reported in the garment and footwear/travel good industries. The experience of work reduction is generally the case in the hotel/guesthouse industry. Approximately a quarter of workers in this industry reported so. Work reduction generally means the workers had their work hours reduced and rotated their shifts with other colleagues.

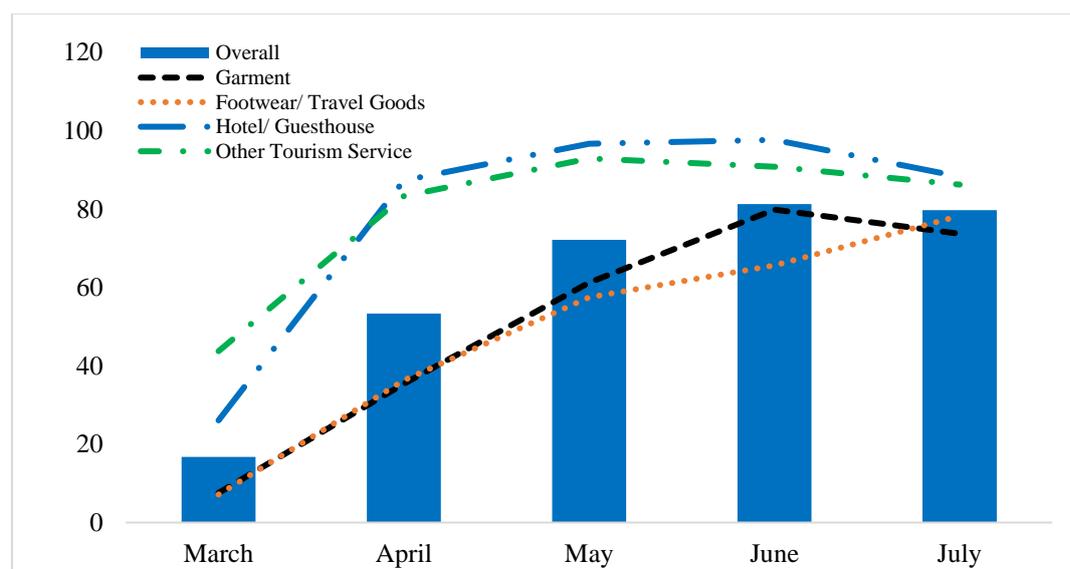
Table 7: Scope of impact on employment across industries (percent of workers)

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Type of impact					
Suspended	98	99	76	85	92
Work-cut	1.4	0.5	24	14	7.5
Laid-off	0.2	1.0	0.0	0.8	0.5
Total	100	100	100	100	100

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

An increasing number of workers started to lose their jobs since the outset of the COVID-19 outbreak. Those working in the tourism related industries (hotel/guesthouse and other tourism services) were more proportionally affected than workers of the garment and footwear/travel goods industries. From the start, COVID-19 immediately impacted workers. In March 2020, 17 percent of them were affected. Then, the magnitude of the impact continued to increase thereafter. The level of impact peaks in June. Except for the footwear/travel goods industries, all other job industries started to see the job suspension trend declining after June.

Figure 4: Trend of COVID-19 impact on employment during March-July 2020 (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

A large proportion (80 percent) of workers was facing job suspension and work reduction in July 2020. Industrywide, workers in tourism-dependent industries, such as the hotel/guesthouse industry, have been more heavily affected than those in the garment and footwear/travel goods industries. A slight decrease of the proportion of affected workers in the garment and hotel/guesthouse industries might be an indication that some of the workers may have resumed their work or found a new job in July. FGDs with key informants and laid-off workers at the village level confirm that some of the workers have returned to their jobs.

While trying to understand the occurrence of impacts through the timeline, workers were also asked to report the length of their job suspension. Overall, they were suspended for an average 11 weeks. Workers in the hotel and guesthouse industry experienced the longest suspension period of 15 weeks on average, a more severe impact compared to their counterparts in the garment and footwear/travel good industries.

Table 8: Degree of suspension/laid-off procedure compliance

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Length of suspension					
# weeks	10	9	15	15	11
If employers follow suspension/laid-off procedure? (percent of workers)					
Yes	98	93	94	89	95
No	1	4	3	5	3
Don't know	1	2	4	6	3
Source of notification on suspension/laid-off (percent of workers)					
Admin / HR unit	69	50	64	49	60
Workers' representative	16	40	11	22	23
Supervisor	8	7	12	9	8
Information board	2	1	10	14	5
Worker union	5	0	1	2	3
Others	1	1	1	5	2

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

For those whose jobs got suspended, a follow-up question was asked about whether their employers implemented the suspension/lay-off procedure. The result shows that the employers generally complied with the labour standard requirement. It is remarkably high that 95 percent of the surveyed workers stated that their employers had followed the procedure (payment of final entitlements, prior notice). Regarding the notification of job lay-offs or suspensions, the administrative/human resources unit was the major source of information for 60 percent of laid-off/suspended workers. Another 23 percent of the workers were notified through their worker representatives (**Table 8**).

3.2. Employment Dynamic

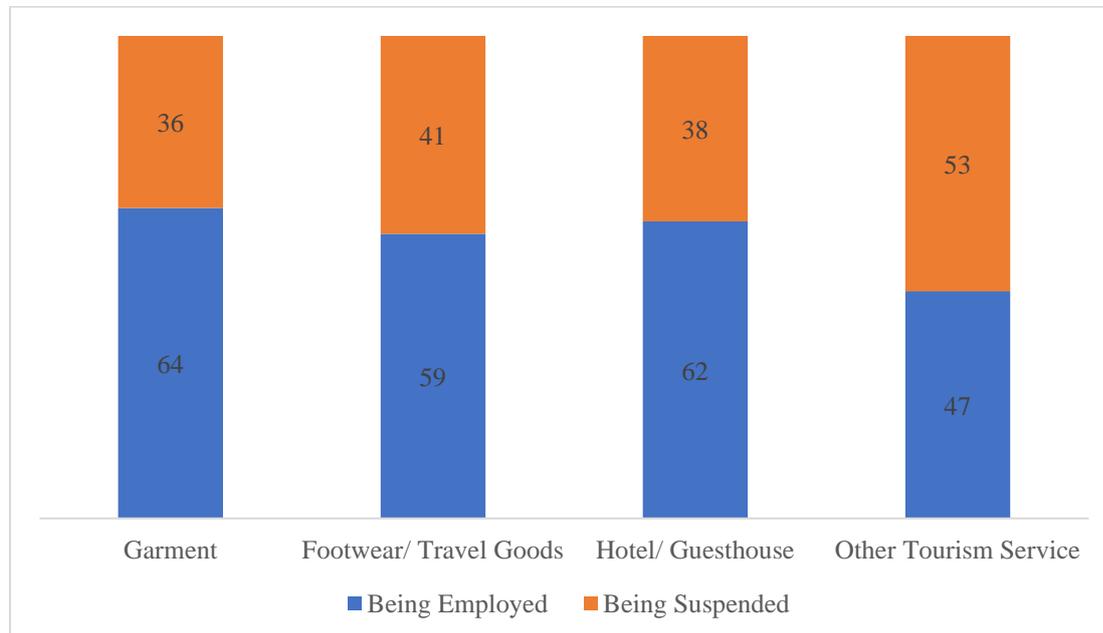
As all the workers covered by this survey had their employment affected by the COVID-19 pandemic, this section examines the development of their employment situation across different work industries in the post-suspension period, whether they have resumed their old jobs, got a new one, or have done other things to earn their living.

In principle, all the surveyed workers were affected by the COVID-19 pandemic, as the sample was drawn from that frame. **Figure 5** compares the level of employment across industries during the time of this survey (August 2020) and before the outbreak of COVID-19.

While suspended workers may have tried to earn their living from different sources, not all of them were able to find an alternative. **Figure 5** and **Table 9** illustrate the employment situation within the context of the COVID-19 aftermath. Overall, about 60 percent of the affected workers were again employed by the time of the survey in August 2020. The other 40 percent remained suspended, which means they remained on the payroll but were paid a partial salary (US\$70 in total). The government considers this suspension as “employed” for the status of the workers. This level of suspension is similar across workers in the garment, footwear/travel goods, and hotel/guesthouse industries. Workers in other tourism service industries are more disadvantaged, as the suspension level is higher, at about 53 percent.

The term ‘employment’ in **Figure 5** refers to fully employed or working post suspension. The majority of workers reported this status (except those in the other tourism service industries); 64 percent and 59 percent of those in the garment and footwear/travel goods industries, respectively, were back at work after facing suspension. However, it should be noted that in reality, even more suspended workers could have returned to work in the garment and footwear/travel goods industries after the survey in August as more orders have again been placed in Cambodia and more factories have resumed operations, according to MLVT officials interviewed

Figure 5: Re-employment level among the suspended workers (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

In a more detailed analysis, **Table 9** looks into the dynamic of employment among affected workers. It tries to capture different phenomena of employment situation across key industries.

De-employment in this context refers to a situation in which a worker is still working, but the amount of their work is reduced. In other words, he or she is not fully employed. Overall, eight percent of the workers had their work reduced (female: five percent vs. male: 14 percent). Such a phenomenon is particularly a practice among employers in the hotel/guesthouse industry. Approximately a quarter of the workers in this industry report the reduction of their work. That practice is also exercised by employers in the other tourism service industries, but by almost none in the garment and footwear/travel good industries.

Back to work or re-employment is another phenomenon, denoting a situation where the suspended workers return back, after a disruption, to the new phase of employment, whether they are called back to resume their old jobs, find an alternative job opportunity, or manage to become self-employed. Overall, 52 percent of the suspended workers got back to work and there is no difference between male and female groups.

The degree of re-employment is high for workers who worked in the garment industry – 63 percent of the suspended workers were back to work as of August 2020, but not all of them were returned to their previous jobs or industries. 45 percent of the suspended workers in the garment industries were called to resume their old jobs, 13 percent sought an alternative job, while six percent became self-employed.

Table 9: Current situation of employment among affected workers (percent of workers)

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Being Employed	64	59	62	47	60
De-employed	1	0	24	14	8
Back to work	63	59	37	33	52
<i>Resume old job</i>	45	36	25	14	34
<i>Get a new paid job</i>	13	16	5	11	12
<i>Become self-employed</i>	6	6	7	8	6
Being Suspended	36	41	38	53	40
<i>Suspended (not seeking a new job)</i>	25	28	22	28	25
<i>Suspended (seeking a new job)</i>	9	11	15	21	12
<i>Do housework (no hope for a job)</i>	2	2	1	5	2

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

Work resumption refers to the situation that the suspended workers were called back to resume their previous jobs. Overall, 34 percent had such opportunity, but the chance was higher for female workers (among females: 37 percent vs. among male: 27 percent).

Despite a lower rate, there is a good sign of re-employment in the hotel/guesthouse industry too. A quarter of these workers returned to resume their old jobs. Workers in the other tourism service industries seemed to be most vulnerable as only 14 percent of them were able to resume their old jobs. It is interesting to note that another 11 percent got a newly paid job, while eight percent started to run an own-account business.

While some suspended workers were called back to resume their previous jobs, some others managed to find new paid jobs. The survey shows that 12 percent of the suspended workers found new jobs. The chance is lower for female workers to get such employment opportunities. Only 10 percent of them found new paid jobs compared to 16 percent of male counterparts. These 12 percent found new jobs, but they earn a lower salary compared to their

previous jobs. On average, they earn US\$176 in July 2020, a 26 percent reduction from US\$238 in July 2019.

Amid a positive sign of re-employment, the level of job suspensions remains at a high rate. Available job opportunities cannot accommodate all the suspended workers. Overall, 40 percent of them remained suspended. That level of suspension is higher among workers in the other tourism service industries. 53 percent of them as of yet have no plans or prospects for employment.

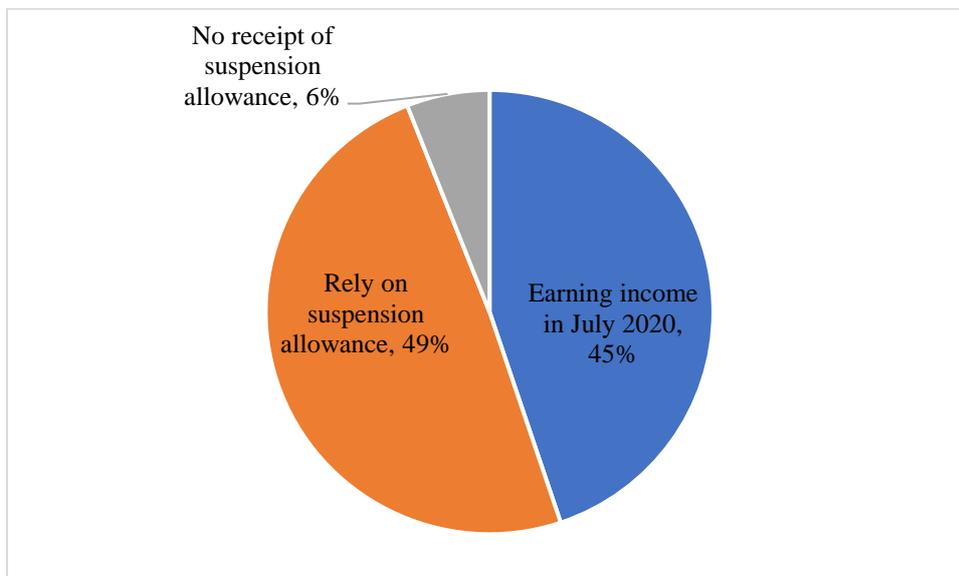
Overall, 40 percent of the suspended workers were **still suspended**. The case is relatively high for the other tourism service industries as a return to normalcy is still uncertain, especially compared to those in the garment and footwear/travel goods industries.

3.3. Impact on Working Hours and Incomes

While all the surveyed workers are affected by the COVID-19 pandemic as their jobs were suspended, some of them managed to find alternative jobs or become self-employed. Some other workers only had their work reduced; therefore, they have still been partially employed. In this regard, not all the affected workers covered by this survey had completely lost their income.

As **Figure 6** reveals, 45 percent of the workers reported earning salary/wage for July 2020 while the other 49 percent earned no income beside the suspension allowance of US\$40-70 per month. About six percent of the workers did not benefit from the suspension allowance programme. Men have a higher chance to earn an income. 54 percent of them earn income in July 2020 while only 40 percent of female workers do. Of note, the reported 45 percent earning income in July 2020 is lower than the 60 percent level of employment because the latter represents the situation in August 2020. This suggests additional 15 percentage points of workers found or returned to employment in August 2020.

Figure 6: Proportion of workers earning salary/wage income in July 2020 (percent of workers)

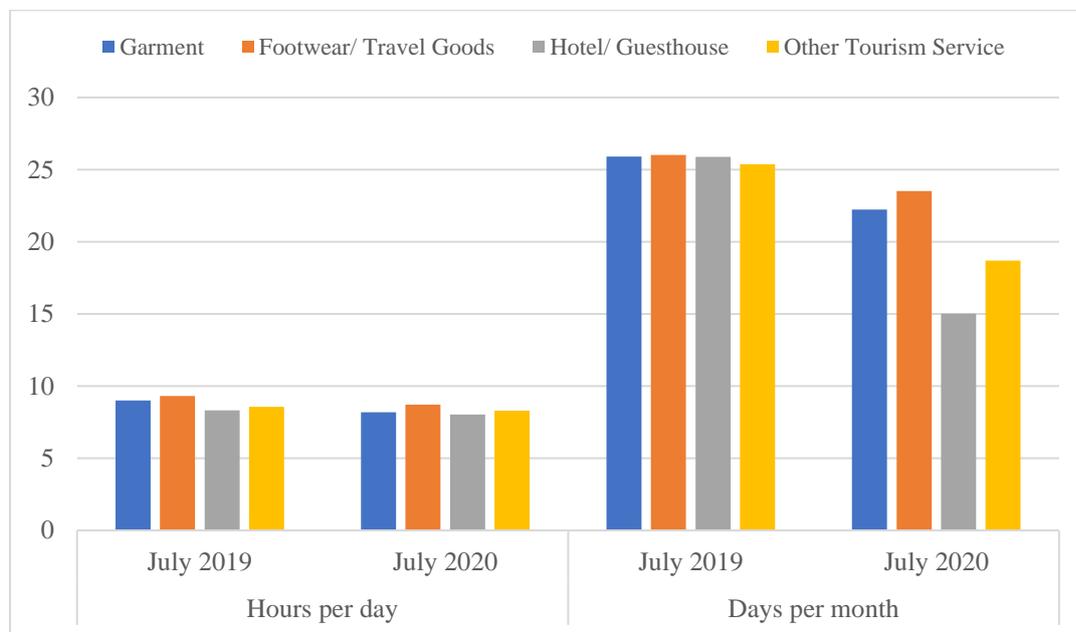


Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

Although earning an income is a good sign, the amount of the income matters significantly in real life. The level of income is normally closely related to the level of work. However, the same level of work may not necessarily translate into the same level of income, especially in such times of employment crisis. **Figure 7** demonstrates the work intensiveness among those who were employed and also earned an income in July 2020. It tries to measure the number of work hours per day and also the number of days per month of work.

Per the findings in **Figure 7**, there are no significant changes in the reported number of work hours per day. A slight decrease for July 2020 (8.9 hours per day down to 8.3 hours per day) could be simply explained by the omission of overtime work. A remarkable difference is observed in the number of workdays per month, however. On average, a worker performed about 20 days per month for July 2020, a significant drop from 26 days per month a year earlier (July 2019). Disproportionately, workers in the hotel/guesthouse industry experienced the highest reduction of work. In July 2020, they could only work around 15 days, compared to 26 days in July 2019.

Figure 7: Changes of working hours (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

Figure 8 compares the changes of income level earned in July 2020 and July 2019. A worker earned an average salary or wage of US\$220 per month in July 2019. This average salary dropped to only US\$190 per month for those who remained working in July 2020. Overall, this represents a **14 percent drop**. Workers in the hotel/guesthouse industry experienced the most severe reduction of this monthly salary/wage, with a **44 percent drop** from US\$255 per month in July 2019 to just US\$144 in July 2020.

With regard to other monthly income, there is no remarkable change. It is about US\$70 per month, except those in the footwear/travel goods who earned US\$90 on average in July 2020, an increase from about US\$60 a year earlier. That could be explained by the income from self-employed activities.

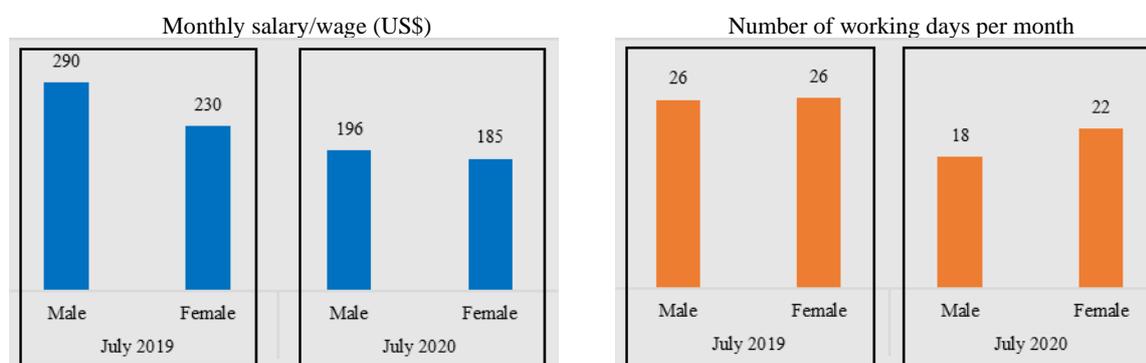
Figure 8: Changes of monthly income (US\$ per month)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

The below graph presents the salary gap earned by male and female workers in July 2020 compared to the same month of the previous year. The survey shows that women in general tend to earn a lower income despite their longer working hours in relation to the counterpart men, both before and after COVID-19 outbreak. As it reveals, men and women work roughly the same number of days (26 days) in July 2019, but women earned only US\$230, which was 20 percent less compared to men. In the same month (July) of 2020, women work longer than men (22 days for women vs. 18 days for men), but they still earn less; female workers earn US\$185 while men were paid at US\$196.

Figure 9: Changes of monthly income and number of working days by gender



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

While COVID-19 pandemic has had the impact on job suspension in the urban sector, it has also driven down the labour wage in the rural sector. As described by a woman in Russey Dach village², it was difficult for farmers to find labour force before COVID-19 pandemic because many people went to work in Phnom Penh and Ta Khmao, Kandal province. The village was quiet and there were only old people in the village. There was not much labour available in the village, and the labour fee was KHR 30,000 (USD 7.5) per day. As impacted by the COVID-19 pandemic, approximately 60 to 100 workers who lost their jobs in factories, shops, and restaurants had returned home. The returnees are seeking jobs in and

² Prek Ambel commune, Sa'ang district, Kandal province

around the village. The available jobs include weeding, harvesting garlic, cultivating and harvesting vegetables, peeling sugarcane, and mounting sugarcane base with a daily wage of KHR 25,000 to KHR 30,000 per day. There are now more people in the village; so, it is easier for farmers to hire the labour, at a lower rate.

COVID-19 has spread rural employment thinner and pushed down the labour wage. As elaborated by a worker of a rubber plantation company near Po Chek village³, both his amount of work and wage has reduced recently. Before COVID-19 pandemic, the plantation work kept him busy for nearly 30 days per month, from 7:00 am to 3:00 pm each day, and often followed by overtime work until 5:00 pm. The daily wage was KHR 30,000 (USD 7.5) while the overtime work was paid at KHR 5,000 (USD 1.25) per hour. Due to the impact of COVID-19, many workers lost their jobs elsewhere. They returned to the village and sought jobs in the company too. With more labour employed, the amount of work is spread thinner among each worker. It has substantially reduced to about 15 to 20 days per month. There is no more overtime work as it was before. The daily wage has dropped to only KHR 27,000 (USD 6.75) per day.

3.4. Impact on Expenses and Living Conditions

In order to measure the degree of impact on expenditure, the workers were asked to report their estimated expenses in July 2020 in several key items such as food, loan payments, remittances to family/parent, transportation, and rental of dwelling. These estimated expenses were obtained at either personal or household level based on what the workers could best report. Then, they were asked to indicate the trend of each expenditure item if they have increased, unchanged, or decreased from the same month of previous year.

Table 10 presents the pattern of estimated expenditure in US dollars, at both the personal and household levels, as reported by the workers for July 2020. Overall, a worker spent US\$156 per month on average, which is about 82 percent of their monthly income. The estimated expenditure reported at the household level is about US\$320 for July 2020, which is twice the level of personal expense. Although the difference is not significant, workers in the garment industry tend to spend less compared to all other counterparts. On average, their personal estimated expense for July 2020 was US\$136 while the estimated household expense was US\$285. Such expenses do not vary notably between those earning and not earning salary/wage in July 2020.

Table 10: Pattern of personal and household expenses for July 2020 (US\$)

No.		Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Personal Expenses and Loan repayment						
1	Food items	67	77	78	56	69
2	Loan repayment	28	59	44	54	45
3	Remittance to family/parent	21	19	12	22	19
4	Transportation	10	9	17	16	12
5	Dwelling rent	10	9	11	17	11
	Total expenses	136	172	162	165	156
Household Expenses and Loan repayment						

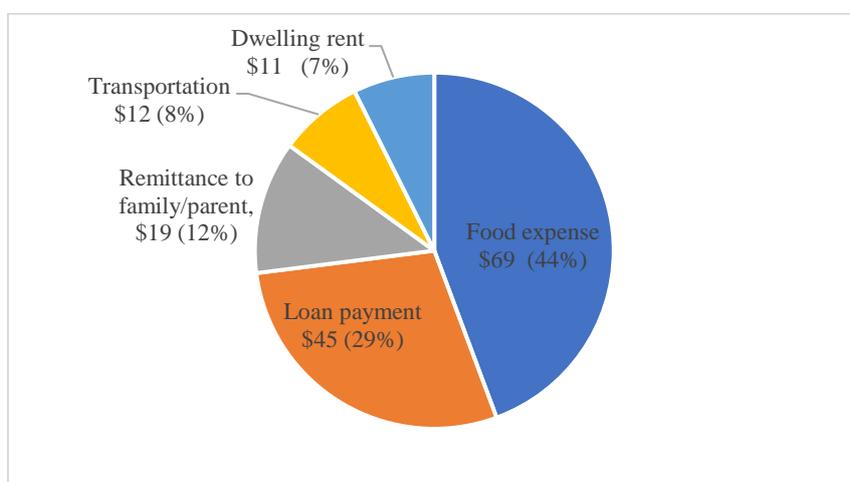
³ Kra Nhoung Sen Chey commune, Snoul district, Kratie province

1	Food items	140	144	162	163	149
2	Loan repayment	111	139	160	138	132
3	Remittance to family/parent	8	6	10	6	8
4	Transportation	15	17	22	26	19
5	Dwelling rent	10	10	23	14	13
Total expenses		285	315	377	348	320

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

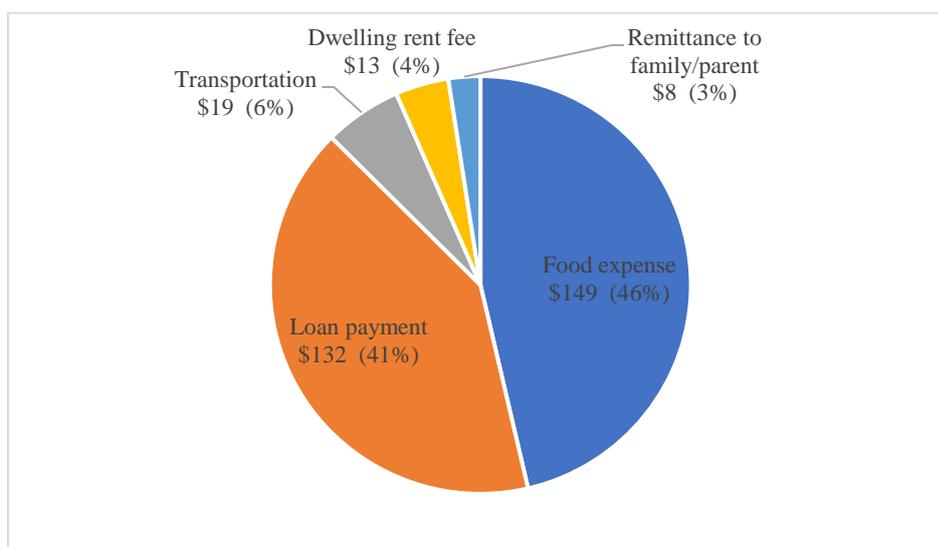
Food items and loan repayment appear consistently at the personal and household level as the largest shares of the total expenditure. At the personal level, the average estimated expenditure on food is US\$69, 44 percent of the total. Loan repayment is the second largest share of the estimated personal expense. It accounts for nearly 30 percent of total expenses, or US\$45. The difference between men and women is not significant.

Figure 10: Distribution of personal expenses across key items (July 2020)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

Figure 11: Distribution of household expenses across key items (July 2020)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

As high as 56 percent of the workers surveyed reported loan repayment, either individually or as a family, as a key expense. This does not include those who could restructure or delay their debt repayment. The burden on loan payment is heavier when reported at the household level. On average, a household repays the lender US\$132, which is 41 percent of the total estimated expenditure for July 2020. As food expenditure makes up another 46 percent, it leaves only 13 percent available for expenses on remittances, transportation, and accommodation.

As it was hard for the workers to remember and report their actual expenditure of each item in the same month of the past year, they were instead asked to indicate the trend of those expenditures whether each has increased, unchanged, or decreased from the same month of previous year. The results are shown in **Table 11**.

The overall trend is that the majority of the workers see their expenditures in July 2020 had mostly decreased or were unchanged when compared with July 2019. 64 percent of those not working in August reported they decreased expenditures on **food items**, compared with 52 percent of those who were working in August 2020. However, the study did not ask for details on food items, so it is unknown whether workers reduced consumption of essential foods or non-essentials, such as alcoholic drinks and soft drinks.

According to the survey, the two expenditure types that the affected workers have reduced most prominently in this time of crisis are food consumption and remittances to family/parent. Out of the survey respondents, 57 percent experienced a reduction of expenditures on both items. Limiting food consumption appears more prevalent among workers in the hotel/guesthouse industry as well as in other tourism service industries. That reflects the fact that their income dropped more significantly.

Table 11: Trend of expenses in July 2020 vs. July 2019 (percent of workers)

No.	Household Expenses	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Decreasing						
1	Expense on food	56	45	68	64	57
2	Loan payment	33	31	24	31	30
3	Remittance to family/parent	63	51	54	56	57
4	Transportation	45	43	54	49	47
5	Dwelling rent fee	17	16	20	25	19
Unchanged						
1	Expense on food	28	39	23	23	29
2	Loan payment	60	58	69	56	61
3	Remittance to family/parent	31	46	44	39	39
4	Transportation	43	42	37	35	40
5	Dwelling rent fee	77	80	76	72	77
Increasing						
1	Expense on food	16	16	9	13	14
2	Loan payment	8	11	7	13	9
3	Remittance to family/parent	7	2	2	5	4
4	Transportation	12	14	9	16	13
5	Dwelling rent fee	6	4	4	3	5

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

While many workers managed to reduce food consumption and remittances to their family/parent, the expenditure on rental of dwelling and loan payment is less likely to decrease. 77 percent and 61 percent of the workers reported that the expenditure on these two items, respectively, remains unchanged. Rental fee is less of a burden because it represents a very small share of the workers' total estimated expenditures. However, loan payment is significant given the fact that it accounts for more than 40 percent (or about US\$132) of the total estimated monthly expenditure. This unchanging trend suggests a greater challenge for workers, especially since many of them were not earning any income during this period.

For the impact on dwelling, the study traced the type of accommodation that a worker resides in between the time of the survey and the time pre-COVID-19 pandemic. The majority of respondents lived in their/parent's house before the COVID-19. In the aftermath of COVID-19, the proportion of workers using this type of accommodation increased to 68 percent, up from 57 percent before COVID-19. This may correspond to the fact that some workers reported the decreasing trend of their expenditure on dwelling rental.

In principle, renting a separate room/house generally represents a better affordability and living condition compared to a situation of sharing a rented room/house. **Table 12** shows that the proportion of workers who live in a separate room/house had reduced from 27 percent before COVID-19 to 20 percent in August 2020. However, such reduction does not push up the proportion of tenants who share a rented room/house. Such phenomenon somehow confirms the fact that the affected workers generally abandoned their rented dwelling facilities (be it a separate or shared room/house) and moved to live with their parent.

Table 12: Change of accommodation type (percent of workers)

No.	Accommodation Type	Footwear/ Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Current, August 2020 (%)						
1	Stay in own/parent's house	70	72	58	67	68
2	Rent a separate room/house	22	19	23	15	20
3	Share a rented room/house	5	5	8	8	6
4	Stay in relative's house	2	2	5	6	3
5	Employer-provided accommodation	1	2	6	3	2
6	Other	0	0	0	0	0
Pre-Covid-19 (%)						
1	Stay in own/parent's house	62	64	46	48	57
2	Rent a separate room/house	29	25	28	26	27
3	Share a rented room/house	6	9	13	11	9
4	Stay in relative's house	2	2	4	4	3
5	Employer-provided accommodation	1	1	9	12	4
6	Other	0	0	0	0	0

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

IV. Coping Strategies for Daily Livelihoods

4.1. Limiting Cash Outflow

Beyond the health crisis, the economic crisis is currently a major concern for workers in both formal and informal industries. During this pandemic, many workers are restructuring their expenditure and cash outflow on various items, including food, in order to cope with the crisis situation.

Expenditure cut for daily consumption appears to be a very common strategy adopted by the most affected workers. About 80 percent of affected workers had reduced their expenditure on food, although it is not known if those food items are essential or non-essential ones. The most highly reported cutback was the reduction of expenditure for consumption items other than food. 90 percent of the workers reported so.

Cost-saving is another strategy to reduce the expenditure. Although at first most workers tended to adopt measures to reduce their expenditures, be it food or non-food items, many workers also undertook measures to save on their cost of living. A higher proportion of workers in the garment industry reported they had returned to their home villages in order to save on living expenses. With regard to the change of accommodation, 17 percent of the workers in the hotel/guesthouse industry sought a cheaper place to house themselves and/or their families.

Besides the direct expenditure-cut and cost-saving measures for their living expenses, the affected workers also tried to limit their cash outflow through other means such as stopping sending remittances to their family/parent or requesting restructuring of their debt service. More than 50 percent of workers no longer send remittances to their family/parent. This strategy is more common among workers in the garment and footwear/travel goods industries. Up to 58 percent reported that they stopped sending remittances to support their family/parent.

Table 13: Coping strategies adopted by workers in the last three months (percent of workers)

Coping strategies	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Expenditure-cut					
Reduce food expenditure	79	78	84	80	80
Reduce expenditure other than food	89	93	93	89	91
Cost-saving					
Return home to reduce living cost	36	26	27	32	31
Move to cheaper accommodation	6	5	17	13	9
Restructuring cash outflow					
No remittances to family	58	57	47	38	52
Restructure debt service	21	23	32	30	25
Debt default	7	2	3	7	5

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

In terms of debt service payment, about 25 percent of workers negotiated restructuring of their debt service. That proportion is quite significant as it reflects the worsening situation of

income earning and they, therefore, could not repay the debt. A greater number of the workers in hotel/guesthouse and other tourism service industries requested debt restructuring.

In general, the adoption of coping strategies does not differ between men and women. No significant different is revealed, except their consideration of accommodation. Moving to a cheaper accommodation type is more common for the affected male workers (12 percent vs. eight percent for female).

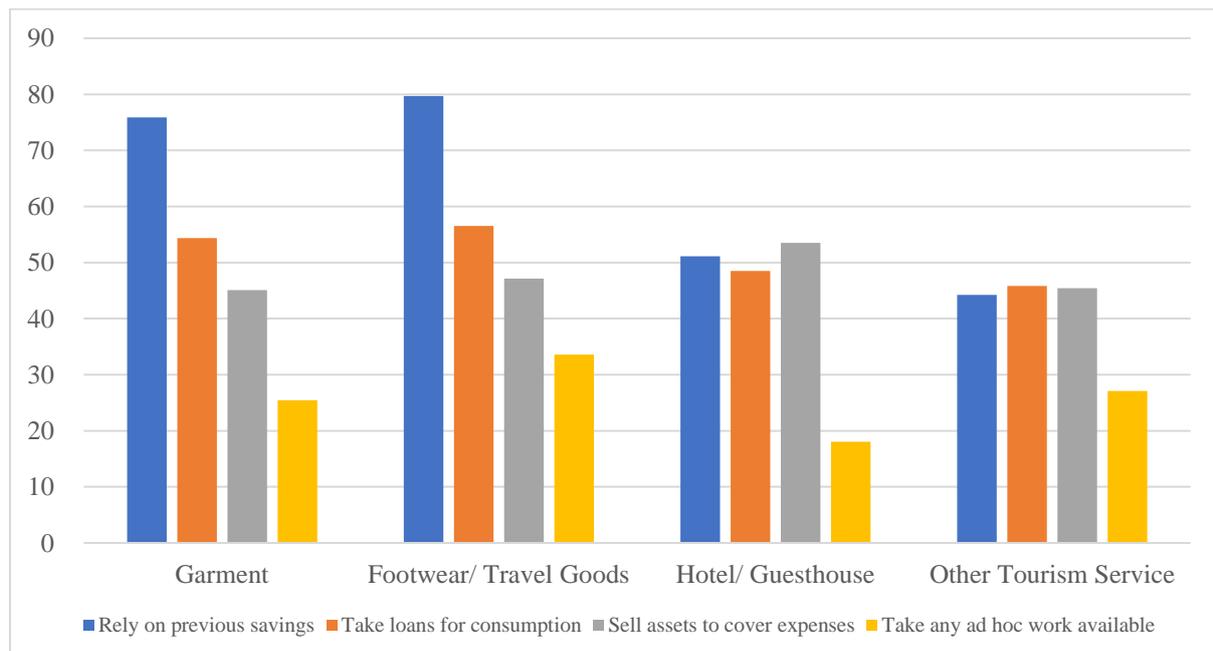
4.2. Expenditure Financing

The survey observed a number of other strategies that workers adopted to finance their expenditure in such a difficult time. **Figure 12** reveals four major coping strategies that workers employed. These include relying on previous savings, taking loans for consumption, selling available assets to cover expenses, and accepting any ad hoc work available to them. The significant difference is only found between male and female in doing ad hoc work. 34 percent and 23 percent respectively of men and women have done so. With regard to loan taking, the study did not explore whether such loans were undertaken formally or informally.

Relying on previous savings was the most commonly reported strategy among workers in the garment and footwear/travel goods industries. Nearly 80 percent of them did so. The data suggests that workers in these two industries may have been able to accumulate more savings than their counterparts elsewhere. This compares to approximately half of the workers in the hotel/guesthouse industry who could rely on savings in such time.

On top of their savings, many workers sold some of their current assets in order to keep up with their living expenses. Nearly 50 percent of respondents undertook that measure. The other 25 percent, who might be in a more severe situation, reported they would accept any ad hoc work available to them in order to earn some meager income.

Figure 12: Financing strategies to cover daily expenses (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

4.3. Returning to Home Villages

This section is to explore whether those who were currently not working would consider returning to the home village for either of the reasons: to earn an income or reduce living cost.

It was hypothesised that returning to the home village is one of the options that a suspended worker may consider, and two major factors that affect such consideration are probably an opportunity to earn income in the village and a pressure to seek lower cost of living due to salary/wage loss. It can be either of the reasons that pushes or pulls them, or a combination of both that influence their consideration. Therefore, the questions were applied to those who were not working at the time in order to explore whether they would consider returning to their home village for either of the reasons. However, by the time of this survey, it was understood that some of the workers may have already returned to their home village. On the other hand, the question would not be relevant since some of them may have already lived in the village, or have no home village to return to as they were born in the urban area. In such circumstance, in addition to the yes or no answer, the respondent was given other answer options.

Table 14 presents the responses from 606 workers, which is 40 percent of the sample (37 percent of male and 42 percent of female) who were still being suspended by the time of the survey. In other words, they were not called back to work or did not find an alternative job. As it shows, there seems to be no difference between the two motivations whether they would return to the home village to earn an income or reduce a living cost. In other words, it suggests that both factors are mixed.

When asked if they would consider returning to the home village to either earn an income or reduce their living cost. Interestingly, the majority (67 percent) of them had already lived in the village even before the COVID-19 outbreak. Therefore, it does not affect the consideration whether they shall return to the home village. This also means a significant number of workers were commuting to work directly from their home. Of note, the share of the being suspended workers who had already lived in the village is higher among those in the garment and footwear/travel goods industries. Respectively, they represent between 72 percent and 78 percent. Further, about 12 percent of these being suspended workers had already returned to the home village by the time of the survey.

Table 14: Consideration of returning to the home village by the currently suspended workers

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Still suspended	n = 203	164	113	126	606
Would you return to your home village to earn income? (% of currently suspended workers)					
I already returned to the village	11	9	11	17	12
Yes, I would	8	2	7	6	6
No, I would not	9	12	27	24	16
I have already lived in the village	72	78	56	52	67
Still suspended	n = 203	164	113	126	606
Would you return to your home village to reduce expenses? (% of currently suspended workers)					
I already returned to the village	11	11	11	18	13
Yes, I would	8	2	8	7	6
No, I would not	8	9	27	22	15
I have already lived in the village	73	79	55	52	67

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

As it shows, approximately 22 percent of the suspended workers are bound to reply yes or no to the questions whether they would consider returning to their home village either to earn an income or reduce living cost. Clearly, only 6 percent indicate that they would; the other 15-16 percent do not expect that they shall return to the home village to cope with their living despite the impact of COVID-19 pandemic.

V. Prevention Measures to Contain the Spread of COVID-19 Pandemic

5.1. Prevention Measures at Workplaces

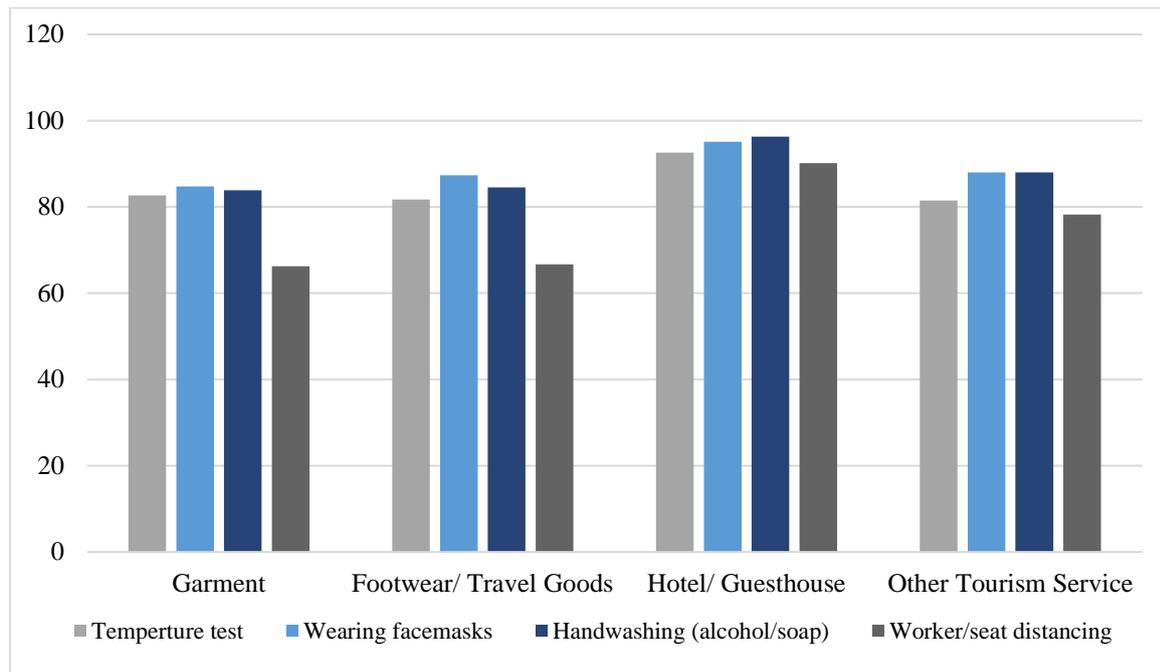
Although Cambodia has reported few confirmed COVID-19 cases, preventive measures should still be firmly practiced at workplaces and in public areas in order to mitigate the risk of spreading the virus. To maintain economic activities, some industries have been allowed to continue their business operations. However, they must adopt a number of prevention measures as advised by the ministry's instruction. Most commonly, the adopted measures include temperature tests, wearing facemasks, hand washing facilities, and physical distancing between workers/seats.

About 52 percent of the workers who remained at work at the time of the survey were asked whether their workplaces had adopted various prevention measures. The study acknowledges that the interviewed workers may not have been aware of all workplace measures. The employers may have applied these measures at the workplaces but the workers may not know it or if they had been in acceptable conditions already.

Figure 13 illustrates the degree of prevention measure adoption across work industries. It reflects how different industries take into account the safety measures. These measures not only concern the safety of workers, but also the whole business as the government may just call its operations off if any infection is found. Therefore, it shall also be in the interest of the employers to carefully monitor their business operations.

The survey reveals that all the industries have generally adopted the safety measures to prevent the spreading of COVID-19 pandemic. The adoption of safety measures is highly reported among the surveyed workers. The hotel/guesthouse industry appears to be more vigilant in this safety than their counterparts of other tourism service industries. Among all four measures, distancing between workers/seats is less practiced, especially in the garment and footwear/travel goods industries. This phenomenon reflects the fact that the production chains are fixed in these two industries. Therefore, there is little flexibility to reorganise the workers/seats.

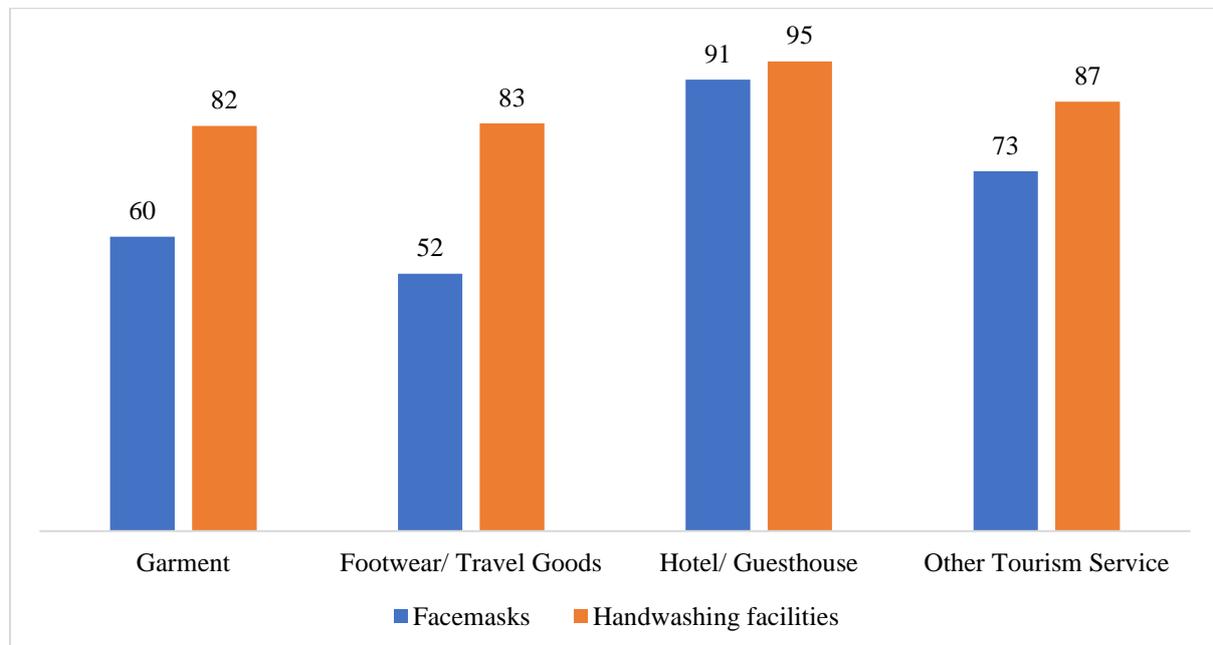
Figure 13: COVID-19 prevention measures adopted at workplace (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

While implementing the prevention measures is a good indication of care at the workplace, availability of safety facilities is also important for workers. The survey endeavors to find out whether the employers make facemasks and handwashing facilities available to their employees.

Figure 14: Provision of facemasks and hand washing facilities by employers (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

As shown in **Figure 14**, the employers generally provide facemasks to their employees. On average, 85 percent of the workers have received facemasks. A higher proportion (95 percent) of workers in the hotel/guesthouse industry reported receiving masks.

There is a large discrepancy with regard to the availability of handwashing facilities between industries. The provision of such facilities is lowest in the garment and footwear/travel goods industries. About 60 percent of the workers in the garment industry and 52 percent of those working in the footwear/travel goods industry reported the availability of handwashing facilities (soap/alcohol) at their workplaces. This figure is very low compared to a 91 percent report by their counterparts in the hotel/guesthouse industry.

5.2. Prevention Measures by Transportation Service Providers

Table 15 presents various modes of transportation used by the workers for commuting between their workplace and accommodation. The sample includes only workers who remained at work during the survey. The findings show that motorbikes are the most common mode of transportation for workers, particularly in the hotel/guesthouse industry (87 percent of them use motorbikes) and other tourism service industries (79 percent).

Table 15: Mode of transportation (%)

		Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Mode of transportation means to work (percent of workers)						
1	Motorbike	51	53	87	79	62
2	Walk	22	17	8	11	17
3	Lorry	16	24	2	5	14
4	Bus	4	2	1	0	2
5	Bicycle	1	1	0	3	1
6	Remork	2	1	0	0	1
7	Tuk Tuk	2	0	1	0	1
8	Other	2	2	2	1	2

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

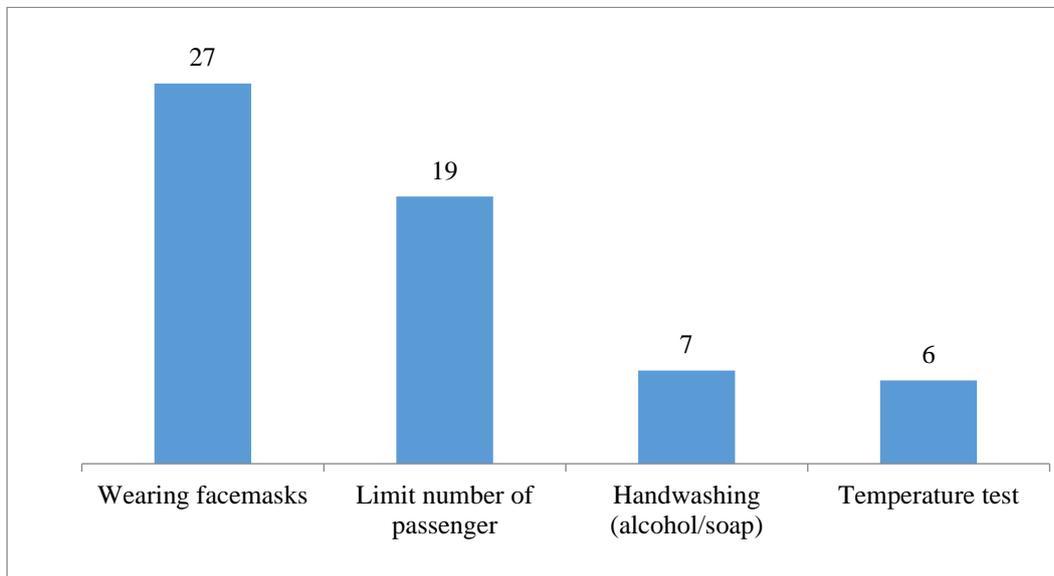
Workers in the garment and footwear/travel goods industries also preferred motorbikes to other transportation means. Roughly 50 percent of them ride motorbikes to work. Because the question was about their current transportation means (in August), there is no ground to suggest if workers have avoided other transportation means and thus resort to motorbikes to curb the spread of COVID-19. Nonetheless, it is still an indication that workers tend to live not far away from their workplaces. As such, they can use motorbikes for daily commute.

The mode of transportation that workers take to their workplaces is an indication of the associated risks. For example, crowded transportation is one of the areas in which workers are most at risk of transmitting or contracting the virus. Therefore, transportation service providers are expected to take the prevention measure more critically to mitigate the risk.

Flat-bed trucks often carry a large number of workers together. A typical flat-bed truck may have the capacity to transport around 80 to 100 workers and is considered cost-effective for long distance travel. This particular transport means is more generally used by workers in the

garment and footwear/travel goods industries. Respectively, 16 percent and 24 percent of them used it at the time of the survey. Workers were asked to indicate whether the service providers on this type of mass transportation have adopted measures to prevent the spread of COVID-19.

Figure 15: COVID-19 prevention measures adopted by transportation service providers (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

It is not required by law or specific regulation, but the transportation service providers, in such pandemic situation, are expected to adopt some safety measures for their clients. The measures may include limiting the number of passengers, adopting wearing facemasks rule, providing handwashing facilities, and practicing temperature tests when delivering their services. Survey results suggested that transportation service providers failed to adopt the prevention measures in a responsive manner. Only 27 percent of the service providers adopted or put the restriction on wearing facemasks with the worker travelers. A lot of them did not limit the number of passengers. Limiting number of the passenger was adopted by only 19 percent of the transportation service providers. Very few of the transportation agencies adopt the handwashing (seven percent) and temperature test measurement (six percent).

VI. Intervention Programmes and Needed Assistance

In response to the adverse impact of the COVID-19 pandemic, the government has launched several initiatives to support the affected population. For instance, the government has formulated two major relief programmes to support suspended workers, in tourism and key manufacturing sectors: suspension allowance and skill improvement training programmes. For the suspension allowance programme, each suspended worker shall receive US\$40 from the government and US\$30 per month from the employer in the garment and footwear/travel goods industries. In the tourism sector, the employers do not bear a US\$30 co-support. The poor households were also found to be severely affected by the COVID-19 pandemic. In response, the government formulated a cash transfer programme to extend its assistance to these poor households.

In the survey, workers were asked if they had heard of the intervention programmes. The question was meant to assess their awareness in general about various intervention programmes. Then, they were asked if they had benefited from these programmes. Overall, the suspension allowance from the government is widely known and received by workers across industries. 95 to 97 percent of the workers in garment and footwear/travel goods industries have received the suspension allowance from the government. The suspension allowance from the employer was commonly received by workers in the garment and footwear/travel goods industries (93 percent and 87 percent respectively). That reflects the fact that the employers in these industries are required to co-fund the US\$30 per month on top of that US\$40 from the government. Although employers in the hotel/guesthouse and other tourism service industries are not obliged to co-fund the US\$30 suspension allowance, still 24 and 35 percent, respectively, of workers in these industries have benefited from that suspension allowance.

Table 16: Coverage of the intervention programme for affected workers (percent of workers)

Intervention Programme	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Ever heard of the programme (%)					
Suspension allowance from government (US\$40/month)	99	99	98	82	96
Suspension allowance from employer (US\$30/month)	96	94	31	43	74
Government-sponsored training	25	21	21	16	22
Cash transfer for poor households	56	65	50	60	58
Ever received the programme (%)					
Suspension allowance from government (US\$40/month)	97	95	91	71	91
Suspension allowance from employer (US\$30/month)	93	87	24	35	69
Government-sponsored training	10	10	7	4	8
Cash transfer for poor households	7	9	2	3	6

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

The government offers a skill improvement programme for affected workers in the garment, footwear/travel goods, hotel/guesthouse, and other tourism service industries, but this programme is not widely known among the respondents. Only 22 percent of the workers reported having heard of the programme and only 8 percent have actually received the programme. A relatively higher proportion (10 percent) of workers in the garment and footwear/travel goods benefited from the programme.

Generally, the level of awareness among workers regarding direct cash transfer for poor households is not high. Around 58 percent of them have heard of the programme. When it comes to the actual beneficiaries, only six percent of the workers have received the programme. A relatively higher proportion of workers in the footwear/travel goods industries have benefited from this cash transfer.

Table 17: Challenges in receiving the intervention programme (percent of workers)

	Garment	Footwear/ Travel Goods	Hotel/ Guesthouse	Other Tourism Service	Overall
Ever face a challenge (%)	5	7	14	6	7
Types of challenges (%)					
Wrong ID/Phone number	23	50	20	46	31
Lose transfer code	38	31	27	15	30
Late payment	15	8	15	0	11
Miscommunication	12	12	12	0	10
Poor customer service at Wing	4	4	10	23	9
Other	8	15	15	23	14

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

To assess how accessible the programme is, the survey tries to understand the magnitude of challenges recipients may face. According to the findings, 96% of the surveyed workers have received one or more of the intervention programmes, and among them, just seven percent encountered some challenges in receiving these programmes. The challenges appear more prevalent among workers in the hotel/guesthouse sector. The types of challenges most commonly encountered by employees are wrong ID/phone number (31 percent) lost transfer code (30 percent), late payment (11 percent), miscommunication (10 percent, poor customer service at Wing⁴ (9 percent), and other challenges (14 percent).

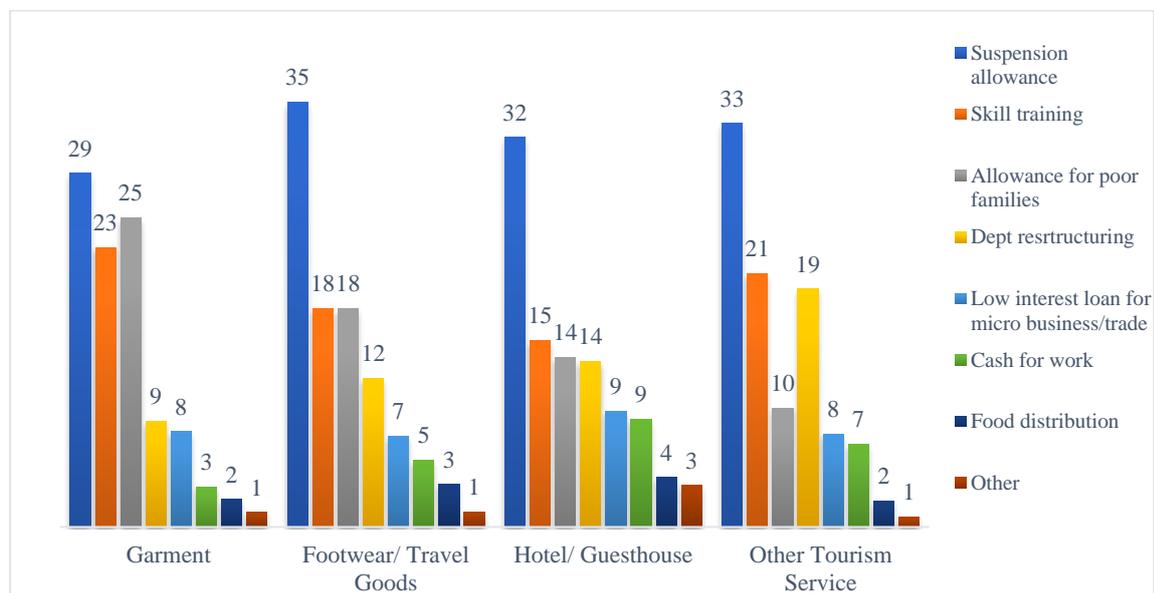
In order to understand the recipient's preference in assistance mechanisms, workers were asked to choose which of several options that interested them the most. After the question, the interviewer read out loud all several possible answer options including "other" and ask the respondent to choose a single choice of their most preferred assistance. Unsurprisingly, it appears that suspension allowance is most preferred. 32 percent of the respondents (equally distributed by gender) chose that option. Cash transfer for poor households is also a popular option; 19 percent of the respondents preferred it. Interestingly, the demand for skill training is considerably high. One in five of the affected workers find this option most helpful. This suggests that these workers see the value of skill improvement and therefore they prefer it to other types of assistance.

A closer look shows a significant difference between male and female workers in terms of their preference in receiving assistance. Three types of assistance that are differently preferred by men and women are cash transfer for poor families, skill training, and debt restructuring. Cash transfers for poor families are more preferred by female workers; 21 percent of them opted for this assistance compared to 13 percent of male workers. 15 percent of male workers preferred the debt restructuring option compared with only 11 percent of female workers. However, the skill training programme is mostly preferred by the male group – 23 percent of male workers prefer it – while only 18 percent of female workers chose this option. Interestingly, the data indicates that the training recipients stand a higher chance to

⁴ Wing is a Cambodian mobile money and electronic payment service.

get called to resume their jobs after the suspension. As the finding shows, 34 percent of the suspended workers resume their jobs, but 53 percent of the training recipients have received such chance.

Figure 16: Type of assistance preferred by the affected workers (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

Table 18: Impact of skill training programmes on employment (percent of workers)

	Skill Training Programme		Overall
	Recipient	Non-recipient	
Job resumption	53	32	34
New paid job	12	12	12
Self-employed	4	7	6
Other	31	49	48
Total	100	100	100

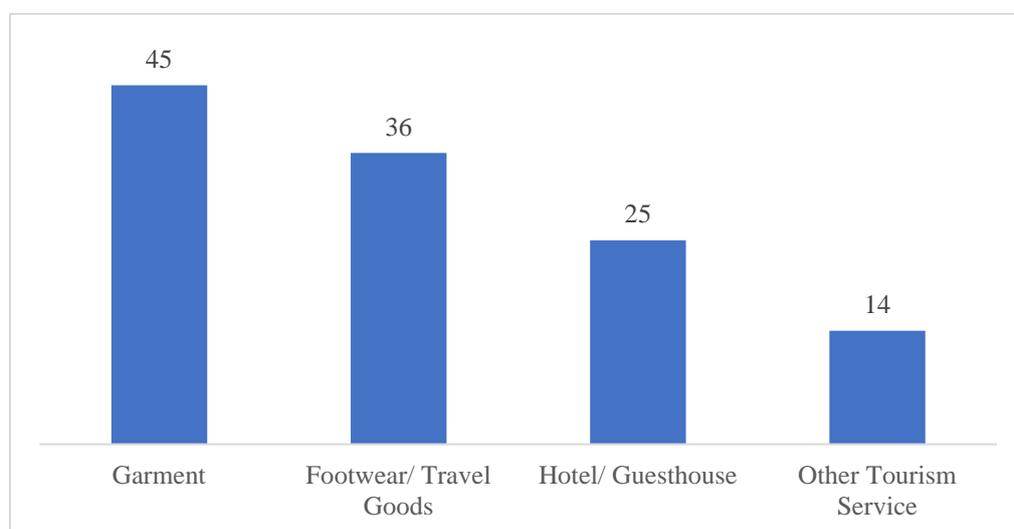
Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

VII. Employment Prospects and Opportunities

7.1. Employment Prospects

Figure 17 illustrates the level of employment opportunities among the affected workers. Garment and footwear/travel goods industries offer good prospects for job recovery as more of the affected workers in the industries were able to get back to jobs. 45 percent and 36 percent respectively of the suspended workers in the industries were called back to resume their work. This level of re-employment is not very high, but it is an indication that there are some available opportunities. Nonetheless, the job prospects in the tourism sector are more limited. Far fewer workers in this sector could return to their jobs. Only a quarter of the suspended workers in the hotel/guesthouse industry were called back to their work.

Figure 17: Post-COVID-19 employment opportunity (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

About 12 percent of the suspended workers were able to find a new paid job. Those who were working in the footwear/travel goods industries before the suspension tended to have a higher chance of getting new employment, with 16 percent of them finding a new paid job after the suspension. Only 5 percent of those in the hotel/guesthouse industry found new employment.

Figure 18 illustrates the job-seeking behaviour of suspended workers. On average, 28 percent of them did not seek alternative jobs. There is some variation of this behaviour across different industries. According to the survey, workers in the tourism sector were more actively seeking new job opportunities than workers in other sectors. About 15 and 21 percent, respectively, of workers in the hotel/guesthouse and other tourism service industries tried to find new jobs during suspension.

Figure 18: Job seeking behaviour of the suspended workers (percent of workers)



Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

While jobs in tourism and garment industries were hard hit by the COVID-19 pandemic, the expert consultation suggested a hypothesis that agriculture jobs could potentially offer alternative employment or livelihood opportunities for the suspended workers. The survey tries to trace the current employment prospects in key industries in relation to their pre-COVID-19 pandemic prospects to determine if there has been such an effect.

As presented in **Table 19**, job types were divided into nine industries. While jobs were lost in major industries like garment, footwear/travel goods, and hotel/guesthouse, there appears to be no particular industries that can provide substantial alternative employment for the suspended workers. A large proportion of them have remained suspended.

Table 19: Employment prospect by industries (percent of workers)

No.	Sector	Employment Prospect by Industries	
		Pre-Covid-19 (Before March)	Post-Covid-19 (August 2020)
	Total Employment (percent)	100	59.7
1	Garment	38	22
2	Footwear/ Travel Goods	27	11
3	Hotel/ Guesthouse	20	10
4	Self-employed	0.0	3.9
5	Restaurant	4.8	2.6
6	Construction	0.1	2.5
7	Casino	6.0	1.4
8	Agriculture	0.0	1.2
9	Other	4.9	6.1

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

Agriculture does not appear to be a very important alternative source of employment as expected. Just 1.2 percent of the affected workers found employment in the agriculture sector. As echoed by the FGD at the village level, the returned workers do not generally want to

work in agriculture due to several reasons. In general, agriculture jobs pay lower wages and are highly exposed to heat. Additionally, there are not many available jobs in rural villages. In rice villages, jobs are highly mechanised. Livestock raising generates very little employment, and jobs are mostly performed by family labour. For example, a cycle of chicken raising which lasts between 60 to 80 days only requires three workers over three days to clean the farms. Lastly, the employment itself is not constant in these rural jobs. It varies from one season to another.

Construction has become a more significant new source of employment, but it does not absorb much labour either. Only 2.5 percent of the affected workers found jobs in the construction industry. Nonetheless, these workers are vulnerable to deception or otherwise non-payment of wages. According to FGD in rice and livestock villages in Kampong Thom, many workers had returned from Thailand. While the borders with Thailand remain closed and therefore outward migration is restricted, these returned workers migrated for construction work in Phnom Penh. After working for several months, their wages were not paid, and they had to return to the village again and become jobless.

A particular case in point, a man and his wife, living in Daun La-or village⁵, once migrated for work in Thailand. There, he worked in an electronics factory while his wife worked in a rubber-material factory. After the COVID-19 outbreak, the couple returned to the village. The husband found a construction job in Phnom Penh. He was supposed to earn KHR 35,000 (USD 8.75) a day, but after working for half a month, he got paid only half of his wage. He continued to work two more months, but never received all his due wages. Without sufficient income to sustain his living expenses in the city, he decided to return to the village.

With limited alternative jobs available, a number of workers have turned to self-employment. About four percent of the suspended workers have done so. For example, they started to conduct online sales of various products. Some became petty traders or vendors of vegetables and fruits. Others chose to become transport service providers.

7.2. Job Opportunities

Table 20 summarises key findings from the FGDs of all 27 villages in six categories. It shows that the level of out-migration before the COVID-19 pandemic is high in four village types: rice, vegetable, livestock, and cash crop villages. Such high levels of migration suggest low employment opportunities in these villages even before the pandemic. The out-migration is low in two other village types: new land and tourism. The new land villages generally receive migrants as they have spare resources. Low levels of out-migration in tourism villages reflects the trend that villagers are able to find jobs in Siem Reap town, which is near their home villages.

Although the migration level is low in tourism villages, the reports of laid-off workers is the highest among all village types. This further suggests the severity of the impact of COVID-19 on the tourism sector. The number of laid-off/returned workers is also high in rice and livestock villages, while new land villages were the least impacted.

⁵ Samprouch commune, Stornng district, Kampong Thom province

Table 20: Summary of general situation and job opportunity across village types

No.	Key Parameter	Village Type					
		Rice	Vegetable	Livestock	Cash crop	New land	Tourism
1	Migration (overall)	●●●●●	●●●	●●●●	●●●●	●	●
2	Migration (overseas)	●●	●	●●	●●		
3	Laid-off/returned workers	●●●●	●●●	●●●●	●●●	●	●●●●●
4	Job opportunities from main commodity of village	●	●●●	●	●●●	●●	●
5	Job opportunity in/near village	●	●●●	●	●	●●●●●	●
6	Availability of natural resources for livelihoods	●	●	●	●	●●●	●●
7	Level of unemployment	●●●	●	●●●	●●	●	●●●●
8	Scale of indebtedness	●●	●	●●●	●●●	●●	●

Note: One drip (●) means lowest while five drips (●●●●●) indicate a relatively highest degree (row-wide).

Source: Survey on impact of COVID-19 pandemic on suspended workers (CPS, August 2020)

Job opportunities are observed at three levels: i) job opportunities that are generated by the village's main crop, for instance, rice farming or livestock raising activities; ii) other job opportunities in the village (beside its main crop); and iii) job opportunities outside the village.

In general, agricultural production itself does not generate much employment opportunity in the village, except in new land villages. Limited jobs can be expected in rice and livestock villages. Rice farming activities are highly mechanised. Vegetable and cash crop villages can offer more job opportunities compared to rice and livestock villages. Job opportunities are most available in new land villages. Nevertheless, it was revealed that laid-off/returned workers are not interested in working in agriculture because the nature of the job is highly exposed to the sun and dirt. They prefer to find other alternatives.

Despite some available jobs in and outside the villages, all these opportunities cannot absorb all the laid-off/returned workers. Many of them remained suspended by the time of this survey. The level of job suspension is highest in the tourism villages, followed by rice and livestock villages. This reflects the fact that there is a high number of laid-off/returned workers but low job opportunities in these three types of villages.

VIII. Conclusion and Recommendations

The COVID-19 pandemic has severely affected suspended workers in the garment, footwear/travel goods, hotel/guesthouse, and other tourism service industries in Cambodia. Cumulatively, more than 250,000 workers in the enterprises formally registered with government were suspended from March to July 2020, and as of August 2020, 40 percent of the sample workers (42 percent of female and 37 percent of male) were still without work, although they are still considered employed and were provided with up to US\$70 per month (US\$40 from the government and US\$30 from the employer in the garment, footwear/travel goods sector).

The resumption of work was more likely for workers in the garment and footwear/travel goods industries as 45 percent and 36 percent, respectively, were recalled to their factory jobs by August 2020. This resumption rate is double that in the hotel/guesthouse and other tourism service industries. Overall, around 12 percent switched to different paid jobs, while 6 percent became self-employed in their villages or elsewhere.

Of all the suspended workers surveyed, 46 percent earned salary income again in July 2020, although it was generally less than they received a year ago. The average salary earned July 2020 was US\$190, a 14 percent drop from US\$220 in July 2019. Workers in the hotel/guesthouse industry suffered the most as their salary income dropped by 44 percent to US\$144 in July 2020. With regard to the salary gap between male and female workers, the survey shows that women tended to earn a lower income than their male counterparts, despite their longer working hours, both before and after COVID-19 outbreak (July 2019 vs. July 2020). The survey indicates that men and women worked roughly the same number of days (26 days) in July 2019, but women earned only US\$230, which was 20 percent less compared to men. In the same month (July) of 2020, women worked longer than men (22 days for women vs. 18 days for men), but still earned less, with female workers earning only US\$185 while men were paid US\$196.

The reduction in income has a bearing on expenditures. The workers reported spending less on food items (though no details were asked), remittances, dwelling rental fees and loan repayments. As high as 56 percent of the workers surveyed reported having loan repayment obligations either individually or as a family. The burden on loan payment is heavier when reported at the household level. On average, a household repays the lender US\$132 per month, which is 41 percent of total expenditures for July 2020.

For this employment crisis period, workers adopted various coping strategies to sustain their daily livelihoods. As high as 90 percent of workers reported cutting back their expenditures on non-food items, and 80 percent of the workers reduced expenditures on food items, although it is not known if they are essential or non-essential ones. The third popular measure for workers was to not send remittances to their family/parent, mostly at the home villages, while some 20 to 30 percent restructured their debts.

In the face of cut salaries, 40 to 80 percent of workers relied on previous savings, taking loans for consumption (whether formal or informal), and/or selling available assets to cover expenses. Between 20 and 30 percent reported that they accepted any ad hoc work available to them. Relying on previous savings was most prevalent among workers in the garment and footwear/travel goods industries.

When asked if they would consider returning to the home village to either earn an income or reduce their living cost, it is interesting that the majority (65 percent) of the suspended workers reported already living in the village even before the COVID-19 outbreak. Of note, the share of suspended workers who had already lived in the village is higher among those in the garment and footwear/travel goods industries. Respectively, they represent between 72 percent and 78 percent of workers already living in villages. Further, about 13 percent of these suspended workers had already returned to the home village by the time of the survey. Among the other 22 percent of suspended workers, only 6 percent indicated that they would consider returning to the home village while the other 15-16 percent did not expect that they would return despite the impact of COVID-19 pandemic. More of the workers in the hotel/guesthouse and also other tourism service industries are more determined that they would not return to the home village.

About 52 percent of the workers surveyed remained at work during the survey period. They were asked if their workplaces had adopted various prevention measures. The study acknowledges that the interviewed workers may not have been aware of all workplace measures. The employers may have applied these measures at the workplaces, but the workers may not know it or if they had been in acceptable conditions already. The survey reveals that all the industries have generally adopted the safety measures to prevent the spreading of COVID-19 pandemic. The adoption of safety measures is highly reported among the surveyed workers. The hotel/ guesthouse industry appears to be more vigilant in this safety than their counterparts of other tourism service industries.

The suspension allowance from the government was widely known and received by workers across industries, with 95-97 percent of the workers in garment and footwear/travel goods industries having received it. The suspension allowance from the employer was commonly received by workers in the garment and footwear/travel goods industries (respectively 93 percent and 87 percent). That reflects the fact that the employers in these industries are required to co-fund the US\$30 per month on top of that US\$40 from the government. The programme appears least known to workers in the hotel/guesthouse and other tourism service industries. It is so because the employers in these industries are not required to co-fund the programme.

The government offers a skill improvement programme for the affected workers, but this programme is not widely known to the workers. Only 22 percent of the workers reported having heard of the skill improvement programme offered by the government to affected workers, and only 8 percent have actually benefited from the programme. A relatively higher proportion (10 percent) of workers in the garment and footwear/travel goods are recipients of the programme. Around 58 percent of the surveyed workers have heard about the direct cash transfer programme for poor households, and 6 percent of them met the requirements for this category and received the benefit.

While jobs in tourism and garment industries were hard hit by the COVID-19 pandemic, opportunities in agriculture have been thought to offer some form of employment to suspended/laid-off workers. However, only 1.2 percent of the affected workers get their new jobs in the agriculture sector. The FGDs at the village level confirmed that the returned workers do not generally want jobs in agriculture. Rural villages offer limited jobs. Rice cultivation has been mechanised while and livestock raising generally requires only family labour. Construction has become a new source of employment, but it does not absorb much

labour either. Only 2.5 percent of the affected workers found jobs in the construction industries.

Out-migration before the COVID-19 pandemic was reportedly high in four village types: rice, vegetable, livestock, and cash crop villages. Such high levels of out-migration are a suggestion of the low levels of employment opportunity in the villages in the first place. The out-migration is low in other two village types: new land and tourism. The new land villages generally receive the migrants as it has spare resources. Despite some available jobs in and outside the villages, all of these opportunities cannot absorb all the laid-off/returned workers. As high as 40 percent of them therefore remained suspended as of August 2020.

Recommendations

- 1) **The suspension allowance programme for the affected workers remains highly relevant, but more attention should be given to those in the tourism sector.** The suspended workers have widely benefited from the current suspension allowance programme and there is a strong preference for such a programme to continue if the employment situation does not improve. Although some workers were called back to resume their work, a high proportion of them remain suspended and have to bear the daily cost of living. Nonetheless, the US\$70 allowance per month is barely enough for a worker's food consumption of US\$69; 57 percent of workers have reported having to reduce their food expenditure. While the level of impact on workers in the tourism sector is more severe than other sectors, a suspended worker in hotel/guesthouse and other tourism related industries is entitled to only US\$40 allowance from the government. The amount helps, but falls far below the minimum needed for adequate food consumption. Therefore, it would be more helpful if the government could increase the amount of suspension allowance to the affected workers in the tourism sector. The government may also consider extending the programme coverage to include affected workers in other informal sectors.
- 2) **The current cash transfer for poor households should continue to be a separate policy choice to assist the vulnerable population.** The government has already implemented the cash transfer for poor households as a separate measure that does not directly target suspended workers. As the finding has shown, a large proportion of workers could no longer afford to send remittances to their family/parent when they got suspended and lost their income. In such case, the government's cash transfer for poor households could remain an alternative policy option to support the family/parent of the suspended workers if they are eligible for the programme.
- 3) **Expanding the coverage of health equity fund to poor households and workers in the informal sectors.** While losing jobs and income in the time of employment crisis, many people tend to avoid seeking health care service when they are sick or restrict their consumption such as food that may deteriorate their health. Therefore, expanding the coverage of free healthcare insurance such as the health equity fund would be a good policy option to support the poor households and workers in the informal sector.

- 4) **The provision of a skill improvement training programme for affected workers appears to be a wise policy option.** The benefit of the programme is two-fold. The policy measure directly helps mitigate the current employment crisis and also addresses the industry's demand for a higher skilled labour force in the future. According to the responses in the survey, there is a high demand for a skills improvement programme among workers. About 20 percent of the affected workers expressed their preference for a skill training programme if they were to receive an intervention from the government. Although the government has adopted this policy measure, it has not been widely implemented. There might be concerns regarding the low attendance in the training, which could be due to the relevance and quality of training. However, this concern should not discourage the policy measure since the industry needs to increase labour productivity - which could be gained from both improved technical and soft skills – and workers themselves expect to earn more income.

Therefore, it is a reasonable step to conduct a needs assessment and learn from various training programmes provided by the government or other partners. Lessons from other countries would also be valuable for designing an appropriate skills development programme. It is suggested that the training programme design should seriously take into account the following prerequisite factors: what skills (soft or hard skills) are needed, where training should occur (in the workplace or elsewhere), and when it should occur (during work hours or at other times). These factors will affect the attendance level and impact of the training programme.

It is also important to explore closer linkages with the industries in terms of technical and soft skills. The training programme should be designed together with industry partners to facilitate transition from training to employment. Such a training programme could also be implemented in close conjunction with the suspension allowance programme or other benefits. For example, attending the programme could be a condition for qualifying for the suspension allowance, but this may disadvantage and economically impact workers who have to stay in city in order to attend the training. Alternatively, the programme may offer additional benefits to those who regularly attend the training course. Nonetheless, while the skill training programme is needed and can be provided, it is rather a challenge to implement such a programme in the context of a pandemic. Hygiene and safety measures must be well taken into consideration of the programme design and implementation.

- 5) **It is highly desired that the government maintains the debt restructuring policy and ensures effective cooperation from the creditors.** Debt repayment is a significant burden for the affected workers and their families, as 56 percent of the workers surveyed reported outstanding loans to repay. The amount of debt is typically about 40 percent (approximately US\$130) of the total household expenditure. Debt restructuring is a huge relief in such times of employment and income crises. Overall, 25 percent of the affected workers had restructured their debt service in the past three months before the survey was conducted. This debt restructuring is higher (30 percent) among the affected workers in the other tourism service industries (restaurants, travel agencies, souvenir shops, and casinos).

- 6) **Expand targeted cash for work programmes to stimulate economic activities.** It is not a surprise that cash for work is not as much preferred in relation to other unconditional cash allowances. Nonetheless, with limited resources, the government may not afford to provide ongoing cash transfers without creating any employment and economic activities. Many affected workers in the tourism sector are very much in a desperate situation. They have faced a longer period of suspension than workers in other industries and thus severely lost their income. Only 25% and 14% of the suspended workers in the hotel/guesthouse and other tourism services, respectively, were called back to resume their previous jobs. A high proportion of them remain suspended and are trying to seek alternative income opportunities. As such, an expanded cash for work programme could be targeted to address priority issues such as the rehabilitation of irrigation canals and rural roads that were damaged by the recent floods and would help to provide temporary employment opportunities to those still without employment.
- 7) **Create urban jobs and off-farm employment to complement and sustain the employment opportunities.** While the pandemic has had a significant impact on employment and will do for at least the medium term, the government cannot rely on short-term and ad hoc interventions. It requires big-push investments in some labour-intensive projects in order to generate a domestically demanded employment opportunities. While the government should fund the projects, the implementation modalities can take different forms, especially in cooperation with the private sector. However, this may entail further research or analysis to adequately identify where investment is likely to have most impact. Agriculture had been highlighted as a potential area for decent employment opportunities for affected workers but has provided fewer alternative employment opportunities than expected. Work in rice and cash crop production is largely mechanised. Jobs in vegetable production and livestock raising are mostly limited to family labour. There are more job opportunities in new land villages and from large-scale agricultural development projects like economic land concessions. Nonetheless, young workers reported they did not find agriculture to be an attractive employment prospect due to the difficult working conditions. As such, there is a need for a better provision of decent work conditions to attract the workers for this type of work.
- 8) **Encourage the formation of labour unions to represent workers, especially in the informal sector.** For example, construction has shown a stronger opportunity for employment in the urban sector, but the informal nature of the job industry makes the workers more vulnerable to different forms of deception or exploitation, especially from the sub-contractors. FGD with key informants and youth/laid-off workers suggest that many workers were not paid after a couple of months of work. Therefore, the construction industry and other informal sectors require more protection measures for vulnerable workers, particular those in the informal sector like construction. One of the measures is to encourage the workers to form and join unions so that they can collectively advance their rights and interests as well as protect themselves from various forms of labour right violations. With proper representation, they will be able to raise and discuss issues such as unsafe work and exploitation with relevant stakeholders. The mechanism will also enable easy and effective communication with the governmental institutions on various issues, including the option and mechanism for assistance in time of crisis such as COVID-19 pandemic.

- 9) **The industry should further strengthen COVID-19 prevention measures and ensure adequate supplies of hygiene facilities at workplaces.** The prevention measures to contain the spread of COVID-19 pandemic have been widely adopted by the employers, but there is a need to further improve these in practice and make sure the necessary hygiene facilities are handily available. More than 80 percent of the workers in the garment and footwear/travel goods industries reported their employers implemented temperature tests and required facemask wearing and handwashing in the workplace. Although the adoption rate of the prevention measures is high, the report suggests some workplaces may not have adopted the measures or that the actual enforcement of the adopted measures was rather loose and therefore some workers did not have to strictly follow the requirement.

Access to and availability of the hygiene facilities can be an issue. Hygiene measures come with an additional cost, be it for the workers or the employers. Should the workers be responsible for their own facemasks, they may resort to a sub-standard one in order to save costs, but this exposes the employers to more risks if an infection occurs. From the survey, many employers chose to supply the hygiene facilities. 60 and 52 percent, respectively, of the workers in garment and footwear/travel goods industries reported that their employers provide facemasks and washing facilities. This level of availability is low and the issue requires more attention and policy options to encourage the accessibility to proper hygiene facilities.



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