State of SKILLS

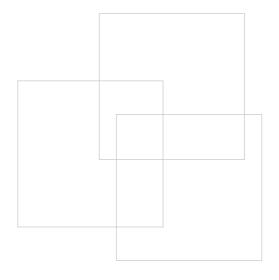






Cambodia

State of SKILLS



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The socioeconomic context

With average annual growth rates of 7.6 per cent between 1994 and 2015, Cambodia became a lower middle-income country in 2016. There are good prospects that this development will continue, given rising government spending and favourable global conditions. However, the country faces new challenges, such as the need to diversify its economy and move up the value chain in order to further reduce poverty and keep pace with external competitors.

The Cambodian economy still depends on agriculture.

Agriculture contributed 23 per cent of GDP in 2017, as well as on the export-oriented textile and footwear industry, tourism and construction. The high economic growth rates of the past two decades are attracting foreign direct investments, which almost doubled between 2016 and 2017, reaching US\$6.3 billion in 2017. New high value-adding industries are emerging. For instance, Cambodia has started to export bicycles and electrical and vehicle components, which are further processed and assembled abroad. These promising developments will, however, require further investments in skills development in order to keep abreast of technological change and meet the challenges that arise due to the country's growing integration into international trade (World Bank, 2018).

Education and training are key in the light of demographic trends.

Cambodia is a young country. In 2018, almost 30 per cent of its population of 15.44 million was under 14 years old. Since fertility rates have declined to 2.6 births per woman, the age-dependency ratio is improving, and the country faces a demographic window of opportunity, which requires investments in human capital to translate into economic and social development (ADB data, 2018).

Poverty has declined rapidly in the past two decades.

Official estimates show that the number of people living below the national poverty line fell from 47.8 per cent in 2007 to 13.5 per cent in 2014. However, the majority of those who have escaped poverty did so by a small margin. While 90 per cent of the poor live in the countryside, around 55.1 per cent of the urban population live in slums, according to Asian Development Bank data from 2014. Improved health provisions have led to a significant fall in maternal and infant deaths, but almost one out of three children under five experiences stunted growth due to poverty and lack of care (World Bank, 2017).

Poverty is still a strong driver of internal and international labour migration.

Around 900,000 Cambodians (6 per cent of the total population) were estimated to be living in Thailand alone, the main destination for emigrants. The majority of emigrants are illegal. They often have few educational qualifications, if any, and take up low-skilled jobs in agriculture, fisheries, construction, manufacturing or housekeeping (World Bank, 2017). While it is a challenge to equip potential migrants with the skills they need abroad, there is also a need to cater for the skills development of those who return to Cambodia. This issue has assumed growing importance due to recent trends. For example, in 2014, around 250,000 migrants who had left for Thailand decided to return to Cambodia as a result of political instability and insecurity (König and Dickson, 2016).

Cambodia has made tremendous progress in expanding access to basic education.

While almost all children now enrol in primary education, drop-out rates continue to be a problem, especially for children affected by poverty. About 73.87 per cent of boys and 78.79 per cent of girls will complete their primary education, according to statistics from 2016. About 13.3 per cent of adolescents drop out at lower secondary school, according to other statistics from 2015. Lack of financial means and low perceived economic returns on education, especially in rural areas, are some of the reasons for drop-outs. However, some progress has been made For example, at tertiary level, gross enrolment rates almost doubled between 2008 and 2017, from 6.18 to 12.17 per cent for girls, while the rate for boys rose slightly from 12.05 to 14.07 per cent during the same period (UIS data).

Enrolment in technical and vocational education and training (TVET) Cambodia is increasing, but remains low.

In 2017 enrolment in TVET (as a percentage of secondary enrolment) stood at 2.3 percent (World Bank, 2017). The number of students enrolled in certificate and diploma programmes increased by 26 per cent between 2009 and 2015, and the number of graduates leaving TVET institutions with formal vocational education and training (VET) qualifications rose by 17 per cent, resulting in an annual increase from 2,137 to 2,493 graduates (ADB, 2017a).

Educational attainment of the working-age population reflects the country's conflict-affected past.

In 2015, 45.9 per cent of the Cambodian population aged 25 and older had only attended primary school, and 13.7 per cent had attended lower secondary education. Literacy rates are above 90 per cent for 15–24 year-olds, while the figure is just 75.03 per cent for women and 86.53 per cent for men, if all adults aged 15 and above are included (UIS data).

There is a strong mismatch between the skills of young workers and those required by employers.

A combination of low educational attainment of the working-age population, continued challenges regarding the progression from primary to secondary education, and the often low quality of education have resulted in strong skills mismatch. The private sector and workers' organizations are barely involved in TVET governance. One in five enterprises in the textile, clothing and footwear sectors considers the lack of skilled workers to be the main barrier to the introduction of new technology. Besides technological skills, employers particularly seek staff with communication and foreign language skills (ILO and ACTEMP, 2017).

Labour force participation in Cambodia is high.

In 2017 labour force participation amounted to 84.8 per cent (88.9 per cent for men and 81.1 per cent for women). Official unemployment is below 1 per cent; this also includes youth unemployment. However, the overall proportion of young men and women in Cambodia (aged 15–24) not in education, employment or training stands at 12.7 per cent. Some 15.2 per cent of women and 10.3 per cent of men fall into this category (ADB data, 2018). While underemployment is an important issue in rural areas, workers in non-agricultural jobs often work excessive hours (ILO and ADB, 2015).

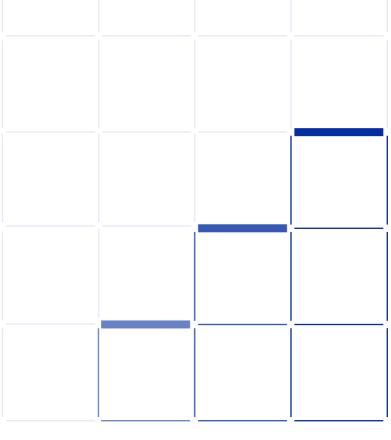
Employment rates in the agricultural sector have declined.

While employment rates in industry and services have increased to 46 and 27 per cent respectively (World Bank data) agricultural employment declined from 80 to 27 per cent. These structural shifts have been accompanied by internal migration from rural to urban areas. However, the vast majority of newly created jobs are low-skilled and do not offer decent working conditions (ADB and ILO, 2015). The proportion of those in employment earning less than \$1.90 per day was still 16.1 per cent in 2017 (ADB data).

In a nutshell, the labour force in Cambodia is young, but still has relatively low educational qualifications. Providing young people with adequate skills is therefore critical in order to pursue economic diversification, meet employer skills requirements, and support the structural transformation of the country's economy.



Development and employment policies



According to its development strategy – the Rectangular Strategy Phase III – Cambodia aspires to become an upper middle-income country by 2030. The strategy is based on the four cornerstones: growth, employment, equity and efficiency, and is implemented on the basis of National Strategic Development Plans (NSDP). The latest plan covers the years 2014–2018. Capacity-building and human resource development are among the key policy areas of the NSDP, with a focus on expanding access to secondary education, and improving the quality of education at all levels.

TVET is more specifically addressed through a dedicated policy, the National Technical and Vocational Education and Training Policy 2017–2025. This policy is directly linked to the Cambodia Industry Development Policy 2015–2025 and the National Employment Policy 2015–2025.

Cambodia's vision, as expressed in its Industry Development Policy, is to transform and modernize its industrial structure from a labour-intensive to a skills-driven industry by 2025. To realize this goal, the share of the manufacturing sector in the economy is to be increased to 20 per cent of GDP in 2025. Similarly, the Government wishes to diversify the export of goods by increasing the amount of non-textile and processed agricultural products. Further plans include the development of small and medium-sized enterprises, especially in rural areas, and their integration into regional and global production chains.

Skills development interventions are planned to support this policy by developing targeted measures, in close cooperation with industry at a national and local level. The National Employment Policy specifically aims at promoting decent work, and emphasizes the need to make economic growth both inclusive and sustainable. In this context, TVET plays an important role in providing skills to young people, especially those migrating from rural to urban areas. Policy goals include the provision of soft skills, the setting of qualification standards compatible with Association of Southeast Asian Nations (ASEAN) standards, the strengthening of links between TVET and industry, the development of work-based learning and apprenticeships, and the improvement of labour market information systems.



"The State shall establish a comprehensive and unified system of education throughout the country, capable of guaranteeing the principles of freedom of education and equal access to schooling, in order to offer each citizen the equal opportunity for the betterment of his/her living conditions."



- Constitution of the Kingdom of Cambodia

Article 66

The skills system in Cambodia

TVET reform policy

The Government launched the National Technical Vocational Education and Training Policy 2017–2025 in June 2017. This policy is structured around four main goals and underpinned by numerous sub-goals and objectives. The goals are as follows:

I. To improve TVET quality so as to meet national and international market demand: Develop a quality assurance system based on the Cambodia Qualifications Framework (CQF), invest in teacher and trainer training, as well as in infrastructure for TVET centres, and establish Technical and Vocational Parks (TVP) in selected industrial or economic zones.



II. To increase equitable access to TVET for employment generation: Establish flexible pathways for learners and provide more opportunities for women and marginalized groups (such as poor youth, school drop-outs, migrant workers and indigenous people), expand the provision of TVET, increase public awareness and develop related services, such as career guidance.

- III. To promote public-private partnerships (PPPs) and aggregate resources from stakeholders to support sustainable development of TVET: Strengthen forms of PPP for curriculum development and delivery, establish a National Skills Development Fund and develop a student fee policy (including scholarships for women, poor students and other marginalized groups).
- IV. To improve governance of the TVET system:
 Strengthen the regulatory framework and foster capacity building in TVET institutions at all levels, develop results-based funding mechanisms for TVET institutions, and develop TVET and labour market information systems.

The development and implementation of the TVET policy is supported by the TVET Sector Development Programme, which runs from 2015 to 2021, and has a total budget of \$42.26 million, mostly financed through international loans.

Governance

The Directorate General of TVET of the Ministry of Labour and Vocational Training (MOLVT) has been managing the national TVET system since 2004. While most TVET institutions come under the responsibility of the MOLVT, some other ministries run their own TVET institutions. Under the authority of the MOLVT, the Directorate General of TVET acts as the secretariat for the National Training Board (NTB).

The NTB was formally established in 1996 to play a coordinating role in TVET, and strengthen the link between the TVET system and the labour market. All 14 ministries running TVET institutions are represented on the NTB, together with representatives from the education sector and social partners.

The National Training Board identifies development challenges and contributes to the development and monitoring of TVET policy. In addition, it has gradually been granted new roles and responsibilities in operating and managing the TVET system. For example, it will be responsible for accrediting qualifications, and for managing and monitoring accreditation based on the CQF, a process that is still at a trial stage within the framework of the TVET Sector Development Programme (World Bank, 2015).

The Cambodian TVET governance system is undergoing a remodeling process, which implies continuous changes and provisional arrangements. The TVET policy foresees the adoption of a new law on TVET, which can also be expected to have an impact on governance of the skills system.



Social dialogue

Social partners are formally involved in TVET policy through their representatives on the NTB. But while the National TVET Policy 2017–2025 strongly emphasizes the need for social dialogue in TVET, proposed measures are primarily directed at employers and business associations, rather than at trade unions and workers' associations. In order to foster employer involvement in TVET, Sector Skills Councils (SSCs) are being established, within the framework of the TVET Sector Development Programme (MOLVT, 2018).

While social dialogue at policy level is still underdeveloped, the private sector and workers' organizations are involved in a number of skills development projects. For instance, the National Union Alliance Chamber of Cambodia, the Cambodia Confederation of Trade Unions, and the Cambodian Labour Confederation are all involved in the Skills for Trade and Economic Diversification (STED) initiative. This is conducted in partnership with the International Labour Organization (ILO), the Swedish International Development Cooperation Agency (SIDA) and the Korea International Cooperation Agency (KOICA) in the light manufacturing and food processing sectors.

The Cambodian Federation of Employers and Business Associations has also implemented a skills project starting in 2007, the Youth Employment and Social Dialogue project, with the support of the Norwegian Government and ILO. A Swiss project, the Public-Private Partnership Forum (2017–2021), fosters social dialogue, research and capacity building on TVET issues, in partnership with the Cambodia Development Resource Institute (CDRI, 2018).

Despite these efforts, progress is slow. At company level, a recent study on the garment industry reveals that many Cambodian employees still face massive violations of labour standards. While both the workers and the industry as a whole could benefit from skills initiatives, this is not yet a core issue in the social bargaining process at company level (Friedrich-Ebert-Stiftung, 2017).



Financing

Recent data on the overall funding of Cambodian TVET are still scarce (ADB and ILO, 2015). Aside from government funding allocated to public TVET institutions, the TVET system appears to be still largely dependent on international assistance. In order to increase the sustainability of the system, the National TVET Policy aims to increase industry participation in its financing.

The NTB allocates government and non-government funds through the National Training Fund (NTF), which was established in 1998. The Cambodian NTF provides two funding facilities. The first, the Training Grant Fund (TGF), is a grant facility for suppliers contracted to provide training for certain groups of trainees in certain skills areas. The second, the Self-employment Generation Fund (SEGF), provides a microcredit loan facility to small entrepreneurs in both urban and rural areas (Johanson, 2009).

As part of the new National TVET Policy, several feasibility studies and other preparatory works are being carried out to establish a new skills development fund involving industry (ADB, 2018).



Skills anticipation

The development of labour market and TVET information systems is among the priorities of the National TVET Policy 2017–2025, in an effort to improve the relevance of TVET to labour market requirements. The TVET Management Information Service collects and processes data from public TVET institutions registered with the MOLVT since 2012.

In the near future, data will also be collected from registered non-governmental organizations (NGOs) and private TVET providers. Labour market information is gathered and processed by the National Employment Agency, with support from international partners. In both cases, more analytical capacities are needed, as well as new data collection, analysis and anticipation tools, and more effective communication of information to stakeholders (Choeun, 2016).



Skills development



Improving delivery and assessment of training

The Cambodian VET system lacks the capacities to provide skills development opportunities to a large part of the population. In 2017, there were 15 TVET Institutes and 24 Provincial/Vocational Training Centres (PTC/VTC) registered at the MOLVT. Together, the institutions provided training for around 39,000 people, of whom 11,400 were women (MOLVT, 2018). Most people therefore develop occupational skills informally, at the workplace or via private TVET providers. In 2016, 325 private TVET providers were registered at the MOLVT, most of them delivering short courses. Currently, the TVET system graduation rates meet less than 0.1 per cent of the demand for candidates required to fill job vacancies. This leads to lengthy delays in filling job vacancies, and an increase in competition among employers to recruit skilled workers (ADB, 2016).

There is no functioning formal apprenticeship system in Cambodia, and firms are not involved in formal training delivery. For most TVET students, work-based learning occurs only in the context of internships. Traditional apprenticeships exist in a few arts and crafts occupations, such as the goldsmith and silversmith sector, but these do not meet existing regulations regarding contracts and allowances, etc.

The apprenticeship system established through the Labour Law 1997 has evolved into a scheme used mainly by large enterprises for induction skills training of new staff. Training programmes are developed, delivered and assessed by the enterprises themselves, with some oversight by the MOLVT. With technical and financial support from the ILO, the MOLVT and the Ministry of Tourism are preparing a Standard Operating Procedure for Apprenticeship Programmes in Cambodia. In addition, these ministries aim to develop apprenticeship training manuals for hotel services, based on the ILO Toolkit for Quality Apprenticeships. Dual forms of apprenticeship, combining enterprise-based and school-based training, are being piloted in cooperation with the Swiss Development Cooperation (SDC).

The TVET curriculum is not well developed at the middle qualification level, thereby impeding progression within one occupational field. Short courses (3–5 months) are focused mostly on agriculture, and have a narrow scope. They are not recognized as valid prerequisites or entry qualifications for long courses at higher levels. Long courses are mainly provided in electricity (250 from a total of 917), civil engineering (116), information technology (123), and accounting and finance (55). Only 16 per cent of the courses delivered in public TVET Institutions target students who have completed Grade 9.

All the remaining courses require the completion of Grade 12 or equivalent qualification levels. As a result, students not completing upper secondary education lack opportunities to achieve formal TVET qualifications (MOLVT, 2018). In this context, the ILO and the MOLVT have started to develop competency-based standard training packages for four occupations on Levels 1–4 of the Cambodia Qualifications Framework, with financial support from the European Union, SIDA and SDC.

The course options are still very much biased towards male-dominated occupations. This limited offer contributes to the general perception among Cambodia's younger generation that TVET is only for low-paid, blue-collar jobs. Most educated people in Cambodia prefer higher education options at university, which lead to professional careers with more attractive salaries (ADB, 2016).

The quality of training suffers from constraints such as outdated curricula and learning facilities, lack of adequately trained teachers and trainers, and challenges related to assessment, such as corruption and cheating (ADB, 2015). While significant quality improvements have been made by individual TVET Institutions, including through donorfunded development projects, the overall quality of TVET training provided, and its labour market relevance, remain of serious concern.

Skills recognition and quality assurance

Skills recognition and certification initiatives are increasingly based on the Cambodian Qualifications Framework, which covers all streams and levels of the education and training system. While the CQF has already been designed, it is not yet being fully implemented. Competence-based qualification standard are still being developed, as is the training of assessors and accreditation rules, and the establishment of assessment centres, (World Bank, 2015). According to the MOLVT, 2019 progress reports for the TVET Sector Development Programme will be the first time that TVET students will have been assessed according to the new procedures, and on the basis of newly developed competence-based standards. The first roll-out of Recognition of Prior Learning (RPL) for workers will also take place in 2019.

Training for assessors has started, and guidelines and materials are being published (MOLVT, 2018). RPL is already being implemented in the tourism and hospitality sector, with assessment based on ASEAN competency standards.



Social inclusion

Accessing skills development

Cambodia needs to make education and training more affordable to the poor, and provide incentives for them to invest in more education and training. Several measures are included in the National TVET Policy 2017–2025 to address the affordability of education and training for certain sectors of the population. These new measures will include, for example, new scholarships, allowances and accomodation. While some measures have already been implemented, the number of beneficiaries is still low compared with demand (MOLVT, 2018). Funds provided by NGOs and international donors are still playing a major role in this context, as a means to help marginalized groups access education and thereby qualify for better jobs.

Supporting transitions to the labour market

Given the low unemployment rate (even among young people), a major concern is the quality of available employment, and the training of workers. Only 31 per cent of young men and women in Cambodia have jobs that match their qualifications, while 23 per cent are overeducated, and 46 per cent are undereducated for their current role (OECD, 2017). Approximately half of young adults are employed in the agricultural sector, and 46.8 per cent work as contributing family workers. Policies and skills development initiatives are addressing the needs of this age group from different angles. While educational policies focus on remedial and second-chance education, or on improving the relevance and quality of secondary education curricula, employment policies aim to empower these young men and women in setting up their own businesses, and improving their career chances. One example is the income-generation training programme (part of the National Policy on Non-Formal Education), which combines entrepreneurial skills development with career counselling and small-scale credit schemes. In remote areas, training is also delivered by mobile training teams to improve access to training for the rural population (ILO, 2015).

Lifelong learning

According to the World Bank Enterprise Survey in 2016, 17.6 per cent of Cambodian firms identify an inadequately educated workforce as a major constraint. However, only 22.2 per cent of firms provide formal training to their employees, well below the average figure of 33.6 per cent for East Asia and the Pacific (World Bank, 2016).

Lack of training opportunities for workers is all the more worrying given the challenges posed by technological change. The ILO estimates that 57 per cent of Cambodian workers face a high risk of automation. The largest numbers of workers at risk of losing their jobs due to automation are found in the construction and retail sectors.

In the garment industry, 88 per cent of jobs are at risk of being automated, with women and low-skilled workers the most likely to be affected. In this context, policy-makers, employers and training institutions need to work together in order to foster skills development and encourage further education among workers (ILO, 2016). With the help of international donors, some initiatives have been launched to set up training institutions, in partnership with industry. For example, the Cambodian Garment Training Institute opened in 2017 and provides initial and continuous training to members of the Garment Manufacturers Association in Cambodia. However, the vast majority of workers have no access to continuous education and training.



Key challenges

In 2017, Cambodia adopted an ambitious and comprehensive TVET policy to transform its TVET system. Among the many challenges facing the skills system, the following are especially difficult to address, due to their complexity and scale:

Limited access to skills training.

The limited access is a problem in particular among the poor, migrants, school drop-outs and informal workers. It can be attributed to multiple causes, which require a multi-dimensional approach. On the one hand, the supply of training is neither sufficient nor adequate to meet the needs of these disadvantaged groups, particularly given the limited geographical accessibility of training in rural areas. On the other, socio-economic constraints, health issues and lack of formal education represent strong barriers to the participation of these groups in TVET.

Poor quality and relevance.

While more resources and new management systems can improve the quality of training, stronger involvement of industry and workers' organizations is needed to ensure that the skills training provided by TVET institutions is relevant. Initiatives are under way to establish public-private partnerships, raise awareness of stakeholders on TVET issues, and strengthen the capacities of social partners to engage in TVET at all levels. The challenge lies in the transfer of good practices, so as to rapidly expand and modernize the curricula, make competence-based assessment standard procedure, and further develop work-based learning in the formal TVET system. Improvements in training quality and relevance can have a positive impact on demand for skills, especially if the impact of training is made transparent through tracer studies.

3 Lack of data and research.

TVET and labour market information systems are still underdeveloped, and there is little in the way of research on TVET issues under way in Cambodia. In order to improve informed policy-making, as well as the operation and management of TVET institutions, it is important to collect and develop research evidence. This could be fostered through capacity-building for the agencies and departments responsible for such sectors, as well as for research institutes. Such an approach is especially urgent in order to realize the country's vision of a diversified skills-driven industry-based economy. This will require good forecasting tools, to ensure that curricula and qualification standards are kept up to date.

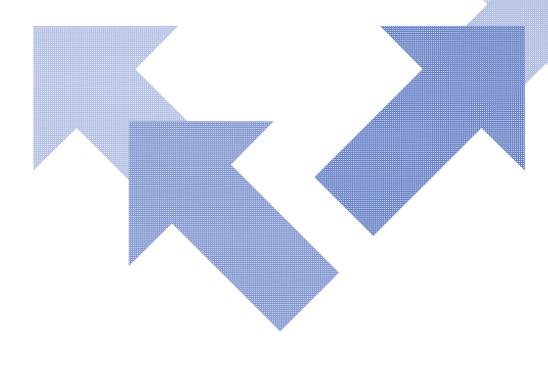
Limited governance and financing.

Various reforms of the system's governance and financing modes are under way within the framework of the TVET policy 2017–2025, many of which are supported by development partners. As it strives to become an upper middle-income country, Cambodia faces the challenge of setting up a modernized VET system that is free of corruption, is decentralized, and is open to the participation of different stakeholders.



The way forward

The goal of establishing a VET system that is responsive to the needs of the labour market, inclusive, founded on the principle of lifelong learning, and integrated into the ASEAN context requires ambitious reforms. The Government has developed a number of policies to work towards this goal.



In order for future endeavours to succeed, it must ensure that all relevant stakeholders are involved in the process, and that skills development is fully integrated into national, sectoral and local development, as well as investment plans. In order to meet the challenges identified above, and based on lessons learned from past and ongoing programmes and projects, the following opportunities should be considered:

Support lifelong learning and a systemic approach in TVET reforms.

Cambodia is undergoing a complex process of restructuring its TVET system within the framework of an overarching development strategy. Coordination among stakeholders, including different ministries, employers, workers and civil society organizations, is key to success. Similarly, social dialogue needs to inform implementation of the Cambodia Qualifications Framework, which potentially provides a basis for a transparent and permeable system of lifelong learning and progression to all Cambodians. The ILO supports tripartism in sectoral initiatives, and regional cooperation projects for the development of competence standards for vocational certificates.

Support sectoral initiatives to strengthen private sector involvement and social dialogue in skills development.

Sector-based approaches have already been shown to facilitate the involvement of industry and workers' organizations in the development of standards and curricula, which need to be compatible with ASEAN standards and geared to the future skills needs of a modernizing economy. A good example is the sectoral strategy first adopted in the tourism and hospitality sector, with the support of ILO and Switzerland. This approach has since been successfully transferred to other sectors (such as light manufacturing and food processing) by the Scaling-up STED project funded by SIDA. Other sectors could also benefit from similar approaches based on the ILO Skills for Trade and Economic Diversification methodology. Sectoral approaches are particularly effective to address cross-cutting issues, such as the need to better integrate green skills in TVET, tackle gender inequalities, and involve the private sector in financing the skills system.



Fostering apprenticeship to provide young people with relevant skills.

Apprenticeships enable young people to develop practical skills that are relevant to the labour market, while earning a liveable wage and improving their chances of future employment. In order to realize their full potential, however, apprenticeships need to be regulated, and to some extent institutionalized, so as to protect the rights of the apprentices and secure close collaboration between all parties involved. The relevant provisions of the Labour Law are not yet fully implemented in Cambodia, and apprenticeships often take place informally. As a result, apprenticeships may not always benefit young people who need to develop more than just technical skills. The ILO, China and Switzerland are supporting Cambodia to improve its regulatory framework, and to implement standards for quality apprenticeships by combining enterprise- and school-based training in selected occupational fields, as well as trainer and assessor training.

Targeted programmes to increase access to TVET for (potential) migrants and returnees.

Migration policies need to address skills development issues in both the local context and in the subregion of Cambodia, the Lao People's Democratic Republic and Myanmar, as well as in the main destination country Thailand. To achieve effective policies, it will be important to foster standards for mutual skills recognition across national borders, and to take into account the specific needs of women and migrant families. Collaboration between TVET institutions, migration-related services and employment agencies should be strengthened, in order to disseminate information more effectively, and link returnees to local employers.

Support development of the labour market and TVET information systems to make the system responsive to future skills needs.

Identifying current and future skills gaps and appropriate training needs requires improved institutional arrangements and tools, as well as capacity building. International cooperation can contribute to mutual learning on good practices, and help to improve coordination in increasingly integrated markets, as demonstrated by the ILO's regular regional workshops on skills anticipation. The ILO also supports the development of digital tools for skills forecasting at the National Agency for Employment.



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