



The rubber-tree boom in Cambodia: Assessing small landholders' optimism

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The rubber-tree boom in Cambodia: Assessing small landholders' optimism

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Abstract

This paper questions common understandings of the process of agrarian change and the fate of peasantry through a case study of large-scale land acquisitions (LSLAs) in Northeastern Cambodia that provides evidence against such understandings. On the highlands of Ratanakiri, the local economy has undergone a process of restructuring around rubber crops over the last five to ten years, as illustrated by large areas of cleared land ready to be planted, 'young' plantations (not yet productive) and numerous settlements on the edges of large and enclosed landholdings. Vietnamese companies and Cambodian individuals who acquire large landholdings are the main drivers of this process. The pioneer front dynamics have also attracted an increasing number of migrants from lowland provinces. Additionally, small landholders deploy efforts to participate in the boom.

In contrast with the literature, which suggests a rather pessimistic view of the consequences of large-scale landholdings for indigenous small landholders' livelihoods, most indigenous peoples interviewed were optimistic about rubber and were deploying efforts to develop rubber plantations. What are the reasons behind their optimism? What is their rationale for planting rubber? Is it rational, i.e. can it be profitable when considering the competition from large-scale plantations, the competition of in-migrants and the rubber commodity-chain? Based on field research carried out in 2010 and 2012, the intention of this paper is to answer those research questions and to set forth an analysis of small landholders transition to farming systems in which a growing portion of land is dedicated to rubber tree plantations. In a political economy perspective, the paper analyses households' strategies and the changing socio-economic environment in which they implement livelihoods transition. The rush for land by concessions and plantations, unbalanced social relations with in-migrants and the commercialization regime highlight some of the uncertainties facing local populations who attempt to participate in the rubber boom.

Introduction

The expansion of rubber production in Southeast Asia has reached the highlands of Ratanakiri in north-eastern Cambodia over the last five to ten years, as testified by large areas of cleared land ready to be planted with rubber trees, ‘young’ plantations (not yet productive), settlements on the edges of large and enclosed landholdings and massive immigration of Khmers from other provinces in search for land and work. The expansion of rubber trees planted area in Ratanakiri is twofold: both large-scale land acquisitions and small landholdings. Large-scale land acquisitions are comprised by either hundreds to thousands of hectares leased to foreign companies, mainly Vietnamese and Chinese, in the frame of *Economic Land Concessions* (ELCs here-after *concessions*) and by Khmer individual investors (here-after *companies*). Small landholdings, on the other hand, are comprised by one to a dozen of hectares, farmed by local populations and Khmers immigrants coming from other provinces.

Ratanakiri is still often depicted as remote; though, it has witnessed a rapid integration (Bourdier, 2009a) into national and sub-regional (in reference to the Greater Mekong region) territory, markets and networks. From the province capital-city Banlung, it takes 7 hours to drive to Phnom Penh, but little more than one hour to reach the Vietnamese border where most of the latex is transported and then exported throughout Vietnam to China and Malaysia. Ratanakiri has the characteristics of a pioneer-front (Dolfuss, 1981; Dufumier, 2006) as illustrated by unprecedented change in land cover and land use (Fox et al., 2009; Sloth et al., 2005), the emergence of new stakeholders, including concessions, companies, traders, development organizations, as well as numerous Khmer immigrants, mainly from Kampong Cham and Prey Veng provinces, in search of jobs and land. Local livelihoods are undergoing profound transformation, such as changing access to land resulting from increasing land prices and expansion of large-scale production units, new technology in agriculture, new markets, new non-farm activities and more opportunities outside of villages. The rubber boom is not only restructuring the local economy, but it is also impacting society as a whole, as illustrated by NGO staff who have become brokers of land or Vietnamese people trying to get Cambodian citizenship to facilitate their businesses.

How do local small landholders perceive the overall development of rubber? What are their expectations as they invest their land, workforce and assets in rubber? Can they turn their investment efforts into profitable and sustainable cropping system? Can they compete with large-scale concessions and companies and resist the rush for land? In

contrast with the rather pessimistic literature most households interviewed in Ratanakiri expressed enthusiasm and confidence in their capacity to benefit from rubber and many have deployed efforts to develop rubber plantations. What are the reasons behind their optimism? What is their rationale for planting rubber? Is it rational, i.e. can it be profitable when considering the competition from large-scale plantations, the competition of in-migrants and the rubber commodity-chain? Based on field research carried out in 2010 and 2012, the intention of this paper is thus to set forth an analysis of small landholders transition to rubber crop, their rationale for doing so, their achievements thus far, and the uncertainties around this process. Research was carried out in two communes in 2010 - Loum Choar (O'Yadav district) and L'eun Kang Mis (Ou Chum district) - and 2012: again Loum Choar and Malik (Andoug Meas district) in the frame of two research projects¹. Field research consisted mostly of semi-structured interviews with households including native Jarai and Tumpun populations and Khmer recent immigrants, concessions and company managers or cadres², representatives of local authorities at communal (heads of communal councils) and village (chiefs of village) levels. In August 2012, interviews were completed with land plots measurement, which were found crucial not only to obtain more accurate figures but also to geo-localize households' land, their proximity or distance from concessions and companies. Prior to fieldwork, literature was reviewed related to agrarian transition and recent and on-going socio-economic development process in the Ratanakiri area. Preliminary findings and analysis from the field research were discussed through a series of interviews with key-informant researchers and development organisations' staff. Due to the sensitivity of the land issue, the interviewees are kept anonymous.

¹ This research would not have been possible without the support of (1) the Agence Universitaire de la Francophonie (AUF, Hanoi) for the programme *Les hévéacultures familiales au Cambodge et au Vietnam et leur intégration dans la région du Mekong*; (2) the Swiss Network in International Studies for the project *Large-Scale Land Acquisitions in Southeast Asia: rural transformations between global agendas and peoples' right to food* - http://www.snis.ch/call-projects-2011_1227_large-scale-land-acquisitions-southeast-asia-rural. I am grateful to my colleagues in Ratanakiri - Frédéric Fortunel, Amaury Peeters, Marie-Solène Pham, and Cambodian partners who prefer to remain anonymous - and to Kathryn Chelminsky from the Graduate Institute for editing and usefull comments.

² Interviews were carried out at Chea Chanrith (15000 ha Vietnam-Cambodian investment ELC overlapping with Loum Choar communal territory) on 17/08/2012; Cheng Ly Investment Co. Ltd (1800 ha Chinese-investment ELC overlapping with Malik communal territory) on 17/08/2012; Công Ty Hoàng Anh Gia Lai (Vietnamese-investment ELC in Ta Veang District on 17/08/2012; and a 300 ha private company located on Loum Choar communal territory (the manager asked not to mention the name of the owner) on 16/08/2012.

The paper is organized in four sections. The first section reviews academic and development organization literature, which describes a ‘dubious development process’ as related to land access and consequent vulnerability for local populations. The second section presents the theoretical background and analytical framework. The third section analyses households’ rationale and strategies in resource allocation and their achievements in developing rubber, The fourth section draws attention to the uncertainty around rubber development-related agrarian change, namely large-scale landholdings pressure on land, the commercialization of rubber and the competition from Khmer in-migrants on labour and land markets.

1. On-going agrarian change in Ratanakiri: a dubious development

Cambodian public institutions, sub-regional organizations and their projects such as the *Greater Mekong Sub-region project* sponsored by the Asian Development Bank, and inter-governmental cooperation arrangement such as the *Cambodia-Laos-Vietnam Triangle* are supportive of the current process of rubber development driven by large-scale production units.³ Foreign-direct investment for large-scale land concessions is deemed more efficient than household-based production. The positive stance is forged on a series of commitments for creating “favourable investment and business environment” to “enhance regional integration and closer cooperation”, which are deemed key in moving from “land-locked to land-linked” socio-economic development (MPI, 2009). Among the comparative advantages of the sub-region, “plentiful natural resources” and “large areas of fertile agricultural land” are highlighted. This potential is to be developed in a “clusters scheme” (ADB, 2012); Ratanakiri fits into such a scheme whereby “production (predominantly agricultural commodities) takes place along borders” (idem). In the *Greater Mekong Sub-region*, rubber is deemed attractive among agricultural commodities “due to its fewer (agricultural) inputs, long economic life and high market demand” (CDRI, 2009: 13). Hansen and Top (2006) analyse the various options for Cambodian natural forests’ use and explain that rubber (with an income of 3756 US\$ / ha (net present value) is more profitable than acacias (323 US\$ / ha) or eucalyptus (100 US\$ / ha), whereas cashew nut or oil palm trees would not be as profitable. The study by Fox et al. (2009) similarly shows that rubber is the best alternative to current natural forest uses and argues that it provides a “better economic position” to local populations. Their

³ See for instance Office of the Council of Ministers (2008); “Rectangular Strategy” for Growth, Employment, Equity and Efficiency; Enforcement Decree of the 2001 Land Law (Articles 3 and 5); Triangle Cambodia-Lao-Vietnam (2009)

study shows that there is no conflict between food crops (mostly rice) and cash crop, but rather crop “integration” is used when rubber trees are intercropped with rice until the trees become productive.

One of the first concerns about Cambodian rubber is its weak competitiveness within the sub-region because of lower per-hectare rubber yield, a significant rise in the real daily wage of labourers⁴ and relatively high costs of electricity and petroleum (CDRI, 2009, Saing, 2009). Notwithstanding possible improvement of rubber trees productivity, one must question the capacity for local populations to gain know-how and afford technology to develop rubber-cropping systems that can compete with large-size and capital-intensive landholdings. This raises the question whether the government will provide appropriate extension services to local populations. Another concern about rubber profitability and expected income relates to commercialization. The CDRI draws attention to the fact that small producers might not be paid adequately for their rubber (2009: 13) since they have no information on price, and end up with incomes not as high as expected.

The sustainability of an “integrated” rice-rubber farming system – in reference to the above-mentioned study by Fox et al. (2009) - depends on the availability of land, and more precisely on the capability for local populations to have access to enough land to be cleared for rice accordingly to rotations required in *swidden* agriculture. This capability is indeed one of the challenges confronting local populations in the current process of agrarian change. For some, indigenous populations’ land rights are better protected than previously through the 2001 Land Law and 2002 Forest Law, particularly owing to collective / communitarian land titles (Nuy, 2010). Simbolon (2002: 26) provides a more nuanced assessment by highlighting that neither indigenous populations nor various types of land rights were taken into account in the design of the 2001 land law, which limits community rights on behalf of avoiding land alienations. The author draws attention to “legislative pluralism” whereby customary rights are recognized but remain under the discretionary power of the State. The State, on behalf of national laws such as the Law on Environment Protection, can acquire land by pre-emption (Simbolon, 2002: 24). Moreover, it is argued that the land rights registration scheme does not reach its objective, as very few indigenous people can comply with complex and sometimes costly procedures (Global Witness, 2009; So, 2009). Several authors argue that in practice neo-

⁴ This issue may not apply to Ratanakiri where, according to concessions workers interviewed in Ou Choum district in 2010, daily salaries paid by concessions for tapping the trees – 70’000 to 100’000 Riels - are far below salaries in Kampong Cham – 200’000 Riels.

patrimonialism and abusive power relations are the rule of law (Luco, 2008; Ironside, 2009; Un and So, 2011), whereas the bulk of the population tend not to participate in the land rights registration scheme due to its complexity and instead stay on the land without registration (Luco, 2008). According to Bourdier (2009a), such governance is part of a policy of “segregation and exclusion” of ethnic minorities who are not even informed about decision-makers plans. Moreover indigenous populations hardly have access to formal justice system because there is no institution or service to whom they could address their claims (Backstrom et al., 2007). Many authors doubt then that indigenous populations could have a say on economic land concessions (LICADHO, 2005; Mengin, 2007; Un and So, 2011: 289) and argue that concessions are actually set up regardless of any eventual community land rights record (Men, 2011).

Several losses derive from insecure land tenure and the rush for land by concessions and plantations. The first one is the loss of access to forests: Hansen and Top (2006: 73) recall that the collection of non-timber forest products can provide up to around 40% of total resources of the poor populations. One must add the loss of access to grazing lands for their animals (LICADHO, 2011: 27). A third loss is related to compensation for land plots overlapping with concessions territory; if any compensation is to be provided, they are usually below what they should be with respect to the income people generate from land use. Other cases of development projects, such as hydropower dams, show that compensation is based on untrustworthy social and environmental impact studies (Baird, 2009; Middleton and al, 2009; Racine, 2010) and do not correspond to the potential income that could be generated from the land populations lost.

Economic integration is also a synonym to migration, though the topic is rather absent from the analysis that is supportive of the current process of rubber development driven by large-scale production units. Migration to Ratanakiri is dominantly seen as negative for indigenous populations as one can find in the literature review prepared by Jammes (2010). The author asserts that: “From the 1960s until now, the environment and the indigenous communities were jeopardized and destabilized by the non-indigenous migration and State policies, losing their land and forest” (Jammes, 2010:9). Other authors provide a more varied assessment: the impact of migration to Ratanakiri has remained “moderate” until the 1990s according to Ehrentraut (2004) and even profitable to those among local populations who managed to keep their land according to McAndrew (2000). Others may have made highly profitable land deals (sales) with immigrants. While Ratanakiri has witnessed a continuum of in-migration since the

development of estate crops in the 1960s, the pace of arrivals driven by the current rubber boom has greatly accelerated over the last years. Migrants from lowland areas coming in search for work and for land are potential competitors for indigenous populations. Men (2011: 30) indicates that economic concessions prefer to hire Khmer immigrants rather than local populations because the former are better qualified – many come from areas with experience in rubber companies such as Kampong Cham – and accept lower salaries. Migrants come also in search of land and then add to the increasing rush for land created by economic concessions and companies. The question is then what the capacity is for the local economy to absorb or incorporate increasing cohorts of migrants without reducing space and opportunities for indigenous populations.

The contrast is thus striking between the literature on the ‘fostering development’ scenario and analysis drawing attention on the “obvious threats, such as land grabbing” (Hammer, 2009). To the win-win rhetoricians, critical analysts oppose a winners and losers picture showing that for “remote indigenous groups development” is “the story of powerful people dominating their lives” (Ironside, 2009: 109). For some, remoteness/isolation is a justification for a large-scale units-led development model, whereas others reply that it has also guaranteed autonomy and self-sufficiency to local populations thus far. Lastly, some view economic integration as crucial for living conditions betterment, whereas others argue that it will not even reduce poverty (Bourdier, 2009a) but rather create “insecurity” (Ironside, 2009).

2. Theoretical background and analytical framework

The current wave of large-scale land acquisitions relates to the broader debate on the process of agrarian change and more specifically for this paper to the discussions around, first the capacity of small landholders to ‘modernize’ their farming systems, and second the distribution of growth⁵.

A common view on agricultural modernization is based on the statement that ‘traditional’⁶ farming systems are mostly characterized by low yields and low labor productivity, and can less and less satisfy the needs of farmers, nor provide food for the growing urban populations. Moreover, it is argued that such farmer communities lack

⁵ The theoretical background section borrows largely from the research project proposal, which was approved for funding by the Swiss Network in International Studies.

⁶ ‘Traditional’ / ‘tradition’ are used here in reference to the common discourse whereby existing farming systems associated to labour-intensive, small-scale, diversified crops combination are opposed to ‘modern’ farming systems associated with capital-intensive, large-scale, specialized ones.

access to markets, capital, production inputs and technology that are needed to increase production and productivity and that those populations therefore cannot escape poverty traps. In addition, traditional farming systems are often accused of being environmentally unsustainable, as they are associated to decreasing soil fertility, thereby further diminishing the productive potential of land. This view is particularly strong when it comes to swidden agriculture performed by ethnic minorities, which is typically the case of Jarai and Tampun ethnic minorities from Ratanakiri highlands⁷. Following such statements, or “yields gaps” (World Bank, 2010), agricultural modernization would require investment in technology for mechanization and the use of improved input packages (varieties and strains, fertilizers, pesticides, etc.) and standardized products for a stronger integration into agri-business commodity-chains. LSLAs by capital-intensive production units fit with this pattern, as they would not only enable more productive use of natural resources but also, in reference to the staples theory and "staples-based" development (Findley and Lundhal, 1994), favour the development of linkages between agricultural sector and the rest of the economy. Against this view, some scholars argue that the “need for agricultural modernization” does not apply to every agro-ecological environment and that small-scale agriculture has not reached a dead-end (Dufumier, 2006). In contrast, they see a great potential not only for increased productivity but also for the provision of a multitude of environmental services (McIntyre et al., 2008). Moreover, historical account of the 1960-70s Green Revolution indicates a remarkable capacity of small farmers to adopt new technology (Barker and Herdt, 1985). This capacity has been confirmed by “energetic smallholder engagement” in boom crops in Southeast Asia (Hall, 2011). Thus the problem would not be intrinsic to peasants or their traditional farming systems which are indeed capable and prone to adopt more intensive farming systems. The limitations to agricultural modernization are rather to be found in the global restructuring of agrarian systems which often reinforce a process of differentiation and consequential marginalization that lead to “risks of transitional dead-ends” (Losch, 2008) for the bulk of the peasants because of the relative scarcity of alternative activities and unbalanced power relations (Hall, Hirsch, Murray, 2011), as depicted for instance by Ironside (2009) with Cambodian indigenous communities.

⁷ See P. J. Hammer (2009), *Development as Tragedy: The Asian Development Bank and Indigenous Peoples in Cambodia* for an illustration of this issue.

Second, this study relates to the debate on growth distribution and social differentiation and vulnerability in the context of globalization (Killick, 2001; Mazoyer, 2001; Harrisson and McMillan, 2007), as LSLAs provide one of the best illustrations of globalization and of how transnational processes increasingly interplay with national and local ones. According to win-win rhetoric and scenario, LSLAs provide opportunities in terms of rural development and potential benefits for rural population (Woertz et al., 2008; FAO, 2009). Yet, the supporters of LSLAs acknowledge that the promises are not fulfilled and that land acquisitions are in some cases detrimental to large number of populations (World Bank, 2010). Against this view, a large majority of scholars tend to underline the threats posed to the livelihoods of local populations and vulnerable groups (Spielloch and Murphy, 2009; Daniel, Mittal, 2010; Zoomers, 2010). Historians have recalled that frontier-expansion and frontier-based development have proven to be highly successful in the past for some economies and regions, but less successful for others (Barbier, 2011), and have often been closely bound to human exploitation, such as serfdom or slavery (Domar, 1970) that thus generated "abnormal rents" Di Tella (1982). For Southeast Asia, De Konincks (2000) notes that in a context where territorial expansion has included massive government-led migration programs and spontaneous migrations, "the prevailing historical trends has been the retreat of ethnic minorities who have everywhere given away, moved back, or been sedentarised and integrated into mainstream societies, generally with dire consequences to their identities". In such circumstances, the already vulnerable groups such as smallholders and indigenous people, which often lack appropriate titling over the lands they live on and farm are at great risk of having their livelihoods infringed upon (Guerin et al. 2003). For those of the farmers who are likely to turn to the large-scale landholding, there are concerns about the quality of employment, income and poverty (Murray Li, 2011). The distribution of growth depends also on the institutions and organizations that add value to agricultural outputs, through processing and commercialization. Farming (production) systems are increasingly integrated, vertically into commodity-chains and horizontally through new distribution systems. Therefore, the question – raised among others by Scoones (2010) - is to what extent the terms of this integration between agribusiness and farmers benefit or harm the farmers? One view is that contract farming has the "potential to boost the agricultural sector to be on par with other sectors" and to contribute to the well-being of farmers (D'Silva and al, 2009). On the contrary, it is argued that small farmers might be

excluded from contract farming schemes or may be adversely incorporated into contract farming (McCarthy, 2010). With respect to horizontal integration, the argument has been made that norms and standards imposed by new distribution systems, namely supermarkets, can be “difficult for the asset-poor” (Reardon and Timmer, 2007).

The research uses mainly the tools of political economy and more specifically agrarian change political economy related to large-scale land acquisitions (Zoomers, 2010), including a historical perspective with reference to the former waves of large-scale land acquisitions in Southeast Asia such as during the colonial era (Hayami, 2001) or from the 1960s where territorial expansion was central to agricultural transformation and state consolidation (De Koninck, 2003). The research borrows also from ethnographic work on indigenous communities in the Ratanakiri region (Bourdier, 2009b). Following the sustainable rural livelihoods framework (Chambers and Conway, 1991 ; Scoones, 1998) and the concept of livelihood trajectories (de Haan and Zoomers, 2005), this research addresses the change in access to productive resources, as well as strategies and outcomes at the household level. Strategies include the rationale for Ratanakiri indigenous populations to be optimistic about rubber trees development and the efforts and arrangements they deploy to develop rubber crops. Context and institutions are analysed firstly at the village and communal levels, drawing on the concept of “everyday politics” (Kerkvliert, 2009), as it is assumed that local politics is not only a component of the context in which land deals are implemented, but also because the local authorities’ room of maneuver via both upper-level government and populations is crucial to the ways land deals impact on livelihoods and can ultimately benefit or not the different groups of populations (Barbier, 2011).

3. Optimistic small landholders

In contrast with the pessimistic analysis of the development of large-scale land acquisitions and its outcomes for local livelihoods, most farmers are rather optimistic about rubber crop development and many have deployed substantial efforts to invest in rubber. Others explain that they are willing to do so. It seems to be just a matter of time... This section will review and interpret farmers’ rationale for investing in rubber. Then, their achievements over the last four to five years will be presented and a preliminary typology of households will be drawn.

Farmers' rationale

Farmers give a range of arguments that support a rationale of switching to rubber crops. When interviewed, farmers explain that rubber appears to be a profitable business since they have witnessed Vietnamese companies, rich individuals and immigrants all investing in it and argue that, "If they do so, it must be profitable." Then, interviewees mention agricultural price trends that have impacted crop choices: cashew nuts have become less profitable and consequentially, Vietnamese traders show less interest in cashew nut and more interest in cassava and soya. Farmers then highlight the long life of rubber trees and the opportunity for their children to inherit productive assets. The workload and difficulty, which are lower than for many others crops, is another argument for the switch to rubber: once rubber trees are planted, "you just have to tap them", several interviewees described. Households explain that they do not know the process for tapping rubber trees, but they express being aware that they will have to learn and appear very confident that they will be able to undertake the work. Similarly, they explain that they do not know to whom they will sell their crops, but they do not express any concern about this. Their explanations are similar to those reported by Fox et al. (2009: 317) about farmers developing cashew nut in a previous period. When pushed to consider the fact that they do not have experience in taking care of or tapping the trees, or a lack of knowledge about the market for rubber crops, farmers just reply "it's like before, when we started with cashew nuts." When farmers were asked about work and know-how, some explain that they will ask employees from concessions or companies who they know; a few said that they had the opportunity to attend trainings; others say that they will learn by doing. In the same way, they guess that it will not be difficult to become known and approached by buyers to sell their rubber. Discussing more broadly their worry-free attitude, farmers simply reply that there cannot be innovation without uncertainty. Interviewees are not worried either about the prospective of having less self-produced food items nor are they worried about having to rely on the market for their food supply, as they expect higher incomes through rubber crops.

How can we assess small landholders' optimistic views? A first element of the answer relates to the stage of the transition: although rubber is occupying an increasing share of total cultivated area, households still have food crops (rice, beans, vegetables, fruits), as well as husbandry for their own consumption. Thus, they presently do not fear a 'lack of food'. Risk-taking must then be understood differently: households do not see any risk in developing rubber as long as they see food provision being secured. They explain (once

again) that it was the same when they started to plant cashew nut trees. The interviewees who had sold land plots to finance investment in rubber did not express concern about missing land; many explained that they can and will consider to clear more land to compensate if needed. Their confidence appears that they consider the land sold as a surplus that was not needed and can be sold risk-free. This may be true for well-off households; however, households that held less land also sold some plots, which could reflect a lack of awareness of the amount of land left available and the changing conditions for access to land. Finally, small landholders express another view on risk: they consider that it is the concessions and companies who take big risk given their amount of financial investment and that in comparison they do not take a big financial risk.

By drawing on the analysis of F. Bourdier (2009a), the ‘no-worry enthusiastic’ attitude can be assessed differently. Bourdier’s argument is that “local peoples (...) are developing a short-term vision linked with the sentiment of surviving in a new insecure social environment” (2009: 184). Then, small landholders’ enthusiasm for rubber would rather be the symptom of a no-choice perception, as they see that local economy is rapidly restructuring around rubber, although they do not have information about government plan towards economic land concessions and companies and the rush for land, nor about possible consequential change in their land tenure and rights. Thus, indigenous populations would invest in rubber because of insecurity rather than because of its expected profitability. Whether they are right or wrong, an increasing fraction of indigenous populations has turned to rubber over the last 4 years.

Achievements

Developing rubber crops has rather been a matter of effort in work and money than a matter of risk. The work force constraints and demands are real for households who cannot afford hired workers. Financial demands are twofold, represented by the investment expenses for rubber and the loss of income from former crops. Though, during the first four years after rubber trees are planted, households can intercrop by cultivating soya, maize and cassava in between the trees, which compensates for the loss during the transition from former cashew nuts to forthcoming rubber harvests. In 2010, findings of this study reveal that the supply of young trees was an important constraint; farmers had to go outside village borders to buy trees and it was important to know where to go (mainly around Banlung at that time) to get good quality trees without a significant delay, to know nurserymen who could be trusted, as well as who would

eventually accept credit payment⁸. This has greatly changed since then with the settlement of numerous nurseries within villages; the provision of young trees is no longer an issue for farmers. Nurserymen native to Kampong Cham explained that local authorities facilitated their settlement as it was in their socio-political interests since rubber crops were extended to the bulk of the population, so that local elites are not seen as the ‘exclusive winners’ of the rubber boom⁹.

Although the percentage of households who have been able to convert part of their land into rubber cannot yet be estimated, several groups can be distinguished according to their current area and related arrangements to develop rubber tree crops. A first group includes households that are well-off with respect to land assets – around ten hectares – and enough financial capital to purchase small trees and inputs and to hire workers for clearing and preparing their land plots (notably uprooting trees)¹⁰. Those households explain that they received technical advice but that this was not crucial; their acquaintances were more important for getting good quality trees at a time when there was no nursery within villages and they had to go outside to buy trees. Unsurprisingly, this group includes communal authority representatives, their relatives and close acquaintances as was explained during field research in the villages¹¹. One essential feature of this group with respect to land grabbing risk is that concessions and companies do not threaten their assets. Firstly, their land plots were located far enough from those landholdings. Secondly, and probably most importantly, one can assume that land owned by those families was not the land that was ‘grabbed’, since local authority representatives had a personal acquaintance with owners or managers as they had previously acted as informant or middlemen when the latter came to buy land in their commune. One can also assume that this group could rely on their position and relations with upper-level government officers in case their land was at risk of being grabbed.

A second group of indigenous small landholders has sold part of their land to finance initial investment. In most of the cases, they sold land to immigrants and in a few cases to individual companies. Beyond land transactions, various arrangements between sellers and buyers can be found. In some cases, the buyers brought motorised tools such as

⁸ Interview with the head of Loum Choar communal council; 05/07/2010.

⁹ Interviews with two nursery managers located in Loum Choar commune, in Un village on 15/08/2012 and in Lai village on 16/08/2012.

¹⁰ Household surveyed in Lai Village, Loum Choar commune on 09/07/2010 and reinterviewed on 15/08/2012.

¹¹ Series of household surveys including geo-localization of their land plots in Loum Choar in August 2012.

chainsaws and tractors to clear the land, slashing, uprooting and removing the biggest trees, and provided inputs such as young trees, fertilizers and pesticides. The buyers thus received the land in exchange for land clearing. Such deals explain the rapid pace of rubber development among households. Similar arrangements were found between less well-off families, whereby the immigrant-buyer contributed only through labour. Arrangements were also found between nurserymen and local authority representatives who facilitated their settlement in the village by providing them land to develop rubber tree nursery. Owing to these arrangements, rubber development has extended beyond well-off households and without major difficulty so far. Though, there are several uncertainties pertaining to the process of agrarian change induced by the rubber boom in a mid-term perspective.

4. Uncertainty

Indigenous populations general optimism must be put in perspective as not all of them have yet managed to plant rubber trees. Will this group be able to do so? They might rather choose or be forced to sell their land in a context of growing pressures from other actors and powers and an increasing needs for cash. What then could be alternative livelihoods for them? In contrast to possible forthcoming vulnerability for ordinary indigenous families, Khmer migrants are obtaining better position in the Ratanakiri local economy and its integration into broader space and networks. The number of migrants is not only increasing, but they are also settling for longer time periods, taking control of burgeoning non-farm activities and buying agricultural land. Lastly, for those populations who have managed to develop rubber landholdings, the current control of commercialization and rubber price by one company may translate into lower incomes than expected.

What alternatives to farming for indigenous populations?

Among indigenous families who have sold land, for some it has been a means to develop their rubber trees as explained in the previous section, whereas others have not developed rubber trees. The latter explains that they sold land because of immediate needs such as health expenses. Apart from the extra expenses associated with particular events and situations such as diseases or family ceremonies, sales must be understood as the result of increasing social needs such as for housing (new materials like concrete for foundations and stairs), motorcycle, electric items, and clothes for youth. Interviews with ‘ordinary households’ – meaning households with average resources– indicate that they

do not have the productive assets required to develop rubber¹². Rubber is not within their reach and renting-out or selling land plots enable them to satisfy extraordinary and/or new needs. Though, those households may soon or regularly face similar needs for cash in a context where both cropping systems and life are more costly.

Households who sold land explain that they intend to develop other activities to compensate. For those who cannot convert to rubber, the rubber boom and consequent land price rise would thus provide an opportunity to convert for instance to non-farm activities or to settle elsewhere. Though, when hearing about households' plans, one can fear that opportunities might turn short: they do not have concrete plans but rather ideas they are thinking about... Which activities could compensate for the loss of their crops after the land has been sold? What are some non-farm activities that could replace the previous livelihoods? When considering the current number of shops and services, the prospective opportunities are not promising. In addition, trade and services are fully controlled by Khmer migrants, even deep in indigenous villages. In the Loum Choar commune, there are 574 families (2721 inhabitants in 2011) and around one hundred of which are Khmer. They have settled along the 4 km of national road 78, which borders the commune. Given the number of those businesses and their turnover, and more important considering the networks required to organize such business and markets (provision of goods from Vietnam, partners far beyond Ratanakiri, etc.), there is little chance that Jarai and Tumpun families can develop similar activities and be competitive. There not have been any Jarai or Tumpun families found undertaking such activities.

Some of the indigenous families who sold land explained that they envisage working for concessions or companies. Although concessions and companies have undeniably created jobs, demand for jobs is increasing exponentially in comparison to the supply of jobs, and indigenous peoples are not placed well in this labour market. Workers for concessions explain that not all job searchers can successfully find full time jobs. More importantly than under-employment, concessions and companies preference for Khmer workers mentioned by Men (2011) was confirmed during interviews. Managers clearly explain that they hire "mostly Khmer peoples" and "sometimes some indigenous peoples." The first reason as argued by managers, is that "indigenous peoples work for a few days and then go" as "they have then the money they need" or "because they have farm work on their land", to which they give priority. Recruiters argue that they cannot

¹² Interviews with two households categorized as 'poor' by communal authority on 15/08/2010 and 16/08/2010.

rely on indigenous peoples who come and go, and sometimes do not show-up... Recruiters explain that, on the contrary, Khmers have come to work and will continue working as long as they can. The comparative advantage of Khmer workers comes from the control employers can have on them, and not (yet) on indigenous peoples who still prioritize farming on their landholdings. Khmer workers enjoy preference also as they already had contacts within concessions and companies as well as potential contracts when they first arrived. Employers organize the recruitment of workers among their acquaintances or through recruiters who know the people being recruited. Relations and networks are crucial to getting hired, but they are also for employers a means through which they can control workers who must remain compliant out of loyalty to those that facilitated their recruitment. Another argument for preferring Khmer to indigenous people as employees is qualifications since workers from Kampong Cham are the most numerous, and they come from an area where rubber has been planted for decades providing them with expertise in how to tap trees.

The growing presence of Khmer peoples

Among Khmer migrants, some stay for a couple of weeks in Ratanakiri during which they clear land or harvest for other households, and then return to their homeland where they own their land. Many migrants have settled in Ratanakiri where they have opened the numerous shops and services that line the main roads or have developed non-farming activities such as the trading of crops, wildlife and forest products, recruiting workers, coordinating storage and transportation, informal money lending, or working as brokers. Other migrants have rented-out their agricultural land at home or used this capital as a mortgage for bank loans, providing enough resources to rent land in Ratanakiri, and in some cases, enough funds to eventually buy land from indigenous populations.¹³ Another category of migrants includes individuals who came first in search for job and acquired land through the arrangements with indigenous populations described in the previous section. The poorest migrants came to Ratanakiri to work in concessions and companies; although work and salary can be irregular, they can cultivate land plots from concessions territory until it is planted and then intercrop (soya and cassava) during three to four years after rubber trees are planted. The most vulnerable of those workers explain that being a worker for company may provide the opportunity to cope with daily needs, e.g.

¹³ With a 2000 US\$ bank loan, migrants can afford renting 3 hectares (600 US\$), hire workers to clear the plots (600 US\$), to purchase inputs for casava (around 100 US\$ for casava cuttings) and to repay the bank during the 3-4-first months (200 US\$ monthly after 3 months deferred). With income from salaried work in concessions and companies, families explain that they manage to hold until casava crop and repay the loan.

borrowing cash or getting salary in advance from their employer, or buying on credit to the shops located in or around the company¹⁴. Some of the workers have managed to rent land plots on the edge of concessions and companies. All categories of migrants unanimously state their motivations for migration as related to the greater opportunities that exist in Ratanakiri than in their homeland, where there is no longer any available land or land prices are too high.

Living conditions upon migrants' arrival is typically very basic as illustrated by shelter-houses built with wood and bamboo structures and plastic tarps – costing around 30 US\$ for tarps and nails – that hold a bed and kitchen tools as the only furniture and equipment. However, former migrants who arrived four to five years ago explained during interviews that their living conditions were the same as upon arrival¹⁵; however, some of these migrants now hold between three and six hectares of land which they rent or have bought. The most advanced have landholdings that are as large as the biggest landholding owned by local elites (e.g. local authority representatives). Some of them have even carried out land transactions such as reselling plots they previously bought or have worked as middlemen for the migrants who arrived after them and were looking for land to rent or buy. Thus, a fraction of Khmer peoples manage to transition from migrant workers to landholders in a couple of years owing to the financial capital they brought from their homeland. The bulk of Khmer migrants benefit at least from preferential employment over indigenous peoples. Khmer migration is also facilitated through acquaintances that migrated previously to Ratanakiri who now assist newcomers in finding a place to settle upon arrival, and helping them to become familiar with concessions and companies where they can find a job. Owing to these networks, some of the newcomers actually already have a job when they arrive in Ratanakiri. The growing presence of Khmer populations then represent growing populations, increasing land accumulation and an increase in Khmer control of retail and the wholesale non-farming business.

¹⁴ Interview with a company's regular worker in L'eun Kang Mis Commune, Ou Chum district; 10/07/2010.

¹⁵ Interview with three migrants native from Prey Veng Province in Un village, Loum Choar commune, O'Yadav district; 21/08/2012.

Commercialisation

The uncertainties around commercialization are twofold: technical and institutional. The analysis is based here in a series of interviews carried out in Ou Choum district nearby Banlung city, where there are rubber plantations that are already productive.

Once it is collected, liquid rubber – latex – can be kept liquid for only a few hours before its quality and price decrease as it becomes less pure. There is no major difficulty for large landholdings to collect the latex and mix it with chemicals to ‘stabilize’ the product until it is transported to a processing factory. The process can be different in the context of small landholdings in more remote areas, as transportation takes more time and may be uneven (e.g. unusable dirt roads flooded when it rains). Producers then have to store the latex in holes dug into the ground, which is detrimental to the quality of the product. Consequentially, producers may find more rationale to sell their products as quickly as possible but at lower prices. This dilemma puts buyers in strong positions vis-à-vis producers. In this regard, power relations are greatly unbalanced in Ratanakiri, as the factories which process latex belong to a single company, which has also organized a tight control on commercialization. The Tai Sieng company’s power in the rubber sector dates back the late 1990s when it was leased a 2000 hectares concession by the State for a period of 70 years, with the right to use 2000 additional hectares. The deal included the obligation for the producers living on the company’s territory to sell their rubber to the company. Conflicts with producers developed rapidly after the lease as the latter set up ‘solidarity groups’ and sold rubber to outsiders and claimed property rights on the land they cultivated (Slocomb, 2002). Conflict arose also between Tai Sieng and the provincial governor when the latter attempted to promote other buyers. Tai Sieng replied with controls on the roads so that the rubber from his company was not traded outside its network.

The situation has changed around the mid-2000s: Tai Sieng has now the support of provincial authority and has built a factory, which is the only one to process fresh crop in the area (Fortunel 2013). To make sure that the factory is supplied with enough fresh rubber, Tai Sieng has tightened its control on rubber commercialization and has extended it to a larger area in the province. During interviews in 2010, the producers complained that the prices set by Tai Sieng were below market price: 1500 to 2500 Riels per kg of coagulum, whereas the same product was 6000 Riels in Kampong Cham (July 2010 price). The same interviewees also explained that producers had no room for negotiation when for instance the company argues that the rubber was not of good quality or “was

mixed with water”; the price could then fall down to 1000 Riels per kilo. They explained that trying to sell their latex to other companies besides Tai Sieng by transporting latex on motorcycles to the Vietnamese border was risky. The company has organized control on roads, “at any single crossroads” where policemen or individuals are paid by Tai Sieng to check vehicles¹⁶. If caught, transporters are confiscated along with their products and motorcycles. In addition, interviewees explain that Tai Sieng pays ‘informants’ to prevent and/or intervene in case someone is suspected of planning to sell rubber to outsiders. The monitoring and enforcement sounds very sophisticated as, according to interviewees, informants are ordinary individuals who are living within the community of concession workers and are well-known. In addition to sanctions and denunciations, Tai Sieng also ‘mobilize’ workers through regular meetings consisting of promises and threats regarding their jobs and through different prices paid to workers according to their loyalty and behaviours. Thus, producers may begin to expect lower incomes for rubber given the post-harvest technological challenge and the current organization of commercialization where they are constrained by the power of a company allied with public authority, which provides formal and informal support, as illustrated by patrols on the roads.

Conclusion

Ratanakiri’s local economy has witnessed a rapid restructuring driven by the development of rubber plantations. The pioneer front has witnessed not only territorial expansion for rubber, but also a process of population densification with migrants from the lowlands as well as agricultural intensification with the reduction of swidden agriculture. Beyond rubber, increasing areas of soya and cassava contribute to transform the whole farming system. The share of the crops for the market (in opposition to self-consumed crops) is increasing in a context where material and social needs require more cash.

The agrarian transition is led by large-scale land holdings, but small landholders are also motivated by the rubber boom. Most of them express a general optimism about their capacity to develop profitable rubber plantations. Their expectations and confidence differ greatly from many analyses, which draw attention to the risks related to ongoing land grabbing-based development for local livelihoods. At this stage, although they note

¹⁶ Interview with two workers from Tai Sieng concession unit, Ou Choum district, 10.07.2010,

growing interest for land and are even aware of the risks related to the development of concessions and companies, they assume that the risk is not too strong and that investing in rubber is worth the expense. Furthermore, they do not express a fear of lack of food when investing into rubber, as they still have food crops. The contrast between literature and farmers rationale relates thus to the current stage of livelihoods transition.

If pessimistic predictions have not yet become realized, there are several reasons to be concerned for the bulk of the peasantry in the near future. First, indigenous populations' optimism might result from a mis-judgment of the pressure on land that is likely to increase, as they do not have much information about decision-makers' plans and lack the capacity to influence them. At best, only local elites are likely to be able to anticipate policy implementation and adapt their strategies and investments. Findings from the field research confirms the argument developed by Bourdier that the general optimism might also be symptomatic of a "short-term vision" or the perception that they (farmers) have no choice other than to 'try rubber'. Second, not all indigenous households have managed to plant rubber trees yet, and for those explaining that they do not have the land, neither the financial capital, one can hardly envisage that they will manage to gather the required resources. Those households are rather in a process of becoming more vulnerable, as their agricultural output is stagnating and might not suffice to satisfy increasing needs. Some have sold most of their land and are then deprived, whereas non-farming alternatives are not promising. Their vulnerability is contrasted with the growing presence of Khmer migrants. Indeed, the vulnerability of the former relates to inter-relations with Khmer migrants who are buying lands and have already taken control of non-farming business. Third, although rubber plantation and production may be successful, a major concern relates to its commercialization: farmers are right that it will not be difficult to find buyers for their crop, but the current monopoly-type control of rubber trade leaves producers without power to negotiate prices or alternative markets and they may consequentially fail to achieve the incomes they expected when they first invested in rubber.

The ongoing process of agrarian change in Ratanakiri shows that the debate around land grabbing should not focus only on 'foreign investor vs. local populations' competition. Land redistribution happens not only between foreign land concessions and indigenous populations, but also between indigenous populations and Khmer immigrants, as well as among indigenous populations to a lesser extent. New patterns of differentiation have

rapidly emerged with local elites who were the first and participated the most in the rubber boom, as well as a fraction of the Khmer immigrants who acquired land. On the other side, developing rubber remains very uncertain for the bulk of indigenous populations and seems already out of reach for the poorest among them.

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