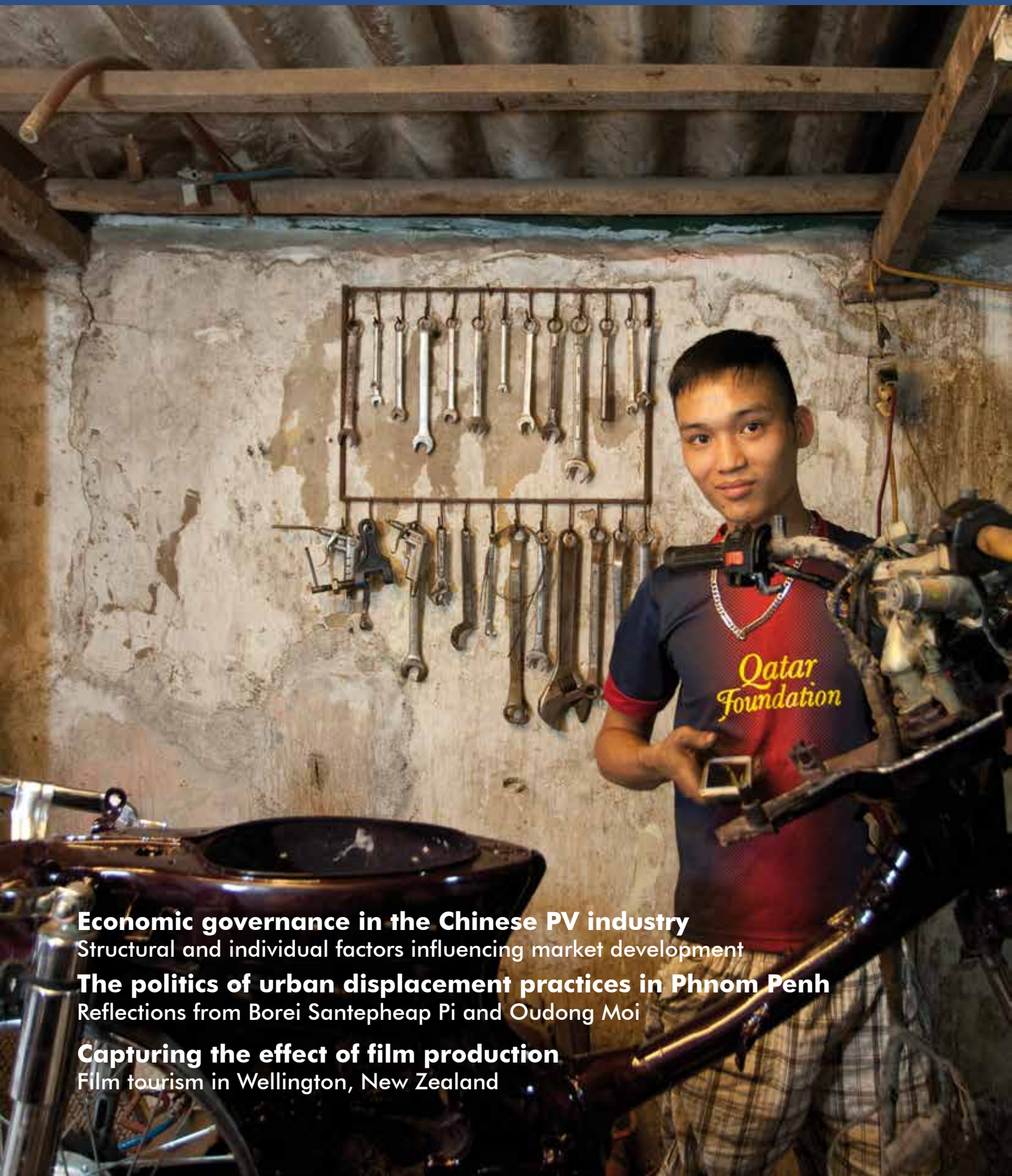# Pacific Geographies

Research | Notes | Current Issues from the Asia-Pacific Region

Economic governance in the Chinese PV industry
Structural and individual factors influencing market development

The politics of urban displacement practices in Phnom Penh
Reflections from Borei Santepheap Pi and Oudong Moi

Capturing the effect of film production
Film tourism in Wellington, New Zealand

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EDITORIAL

Dear readers,

This issue of *Pacific Geographies* covers a range of topics related mainly to economic geo-graphical concerns. Whilst the Chinese photovoltaic (PV) industry may be thriving from a German perspective (after all – it has put a number of local PV companies out of business!) its internal challenges are not well known. Laura Gross explains the political forces behind the development and governance of the PV industry in China. More obvious challenges are faced by the Cambodian tourism industries where so-called sustainable tourism is not well understood and implemented. Nhep Tinat considers possible indicators that could be used by public and private stakeholders in the transformation of Cambodia tourism. Cambodia is also the focus of Giorgio Talocci and Camillo Boano's article on urban displacement. Exploring displacement practices in Phnom Penh, the authors compare perspectives on the disruption of livelihoods as well as the resulting human rights violations. Also working within a qualitative paradigm, My Tran explores the film industry in New Zealand, using operators in Wellington as an example.

In case you are interested in guest editing a Special Issue of *Pacific Geographies*, please let us know your topic suggestion.

We hope you enjoy this new issue of *Pacific Geographies*.

Dr. Michael Waibel and Dr Julia N. Albrecht

Pacific Geographies

Pacific Geographies (PG), ISSN (Print) 2196-1468 / (Online) 2199-9104, is the peer-reviewed semi-annual publication of the Association for Pacific Studies. From 1992-2012 it was labelled Pacific News (ISSN 1435-8360). It is published through the Department of Human Geography of Hamburg University, Germany. The PG provides an interdisciplinary platform for an academic discussion of social, cultural, environ-mental, political and economic issues in the Asia-Pacific region.
In order to uphold scientific standards, the PG is implementing a peer-review process. Articles marked as „scientific papers" have been peer-reviewed by two external revie-wers. Articles marked as „research notes" have been peer-reviewed by one external reviewer and a member of the editorial board. All other articles have been reviewed by the editorial board.
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The Association for Pacific Studies (Arbeitsgemeinschaft für Pazifische Studien e.V., APSA) was founded in 1987 at the Department of Geography of the University of Technology in Aachen. Activities include workshops, conferences, public lectures and poster exhibitions. The book series Pazifik Forum was initiated in 1990. In 1992, it was complemented by the publication of the journal Pacific Geographies. The latter has developed into the major activity of APSA in recent years.
The APSA sees itself as one of the largest scientific networks in Germany for acade-mics and practitioners with an interest in the Asia-Pacific region as well as academic exchange.

Economic governance in the Chinese PV industry
Structural and individual factors influencing market development

Laura Gruss[1]

Project Management Agency, German Aerospace Center (DLR), European and International Cooperation, Heinrich-Konen-Str. 1 53227 Bonn, Germany[1]

Abstract: Since the beginning of the new millennium, the global production of photovoltaic (PV) modules has been experiencing a rapid growth. In 2008, China already had 50 times more producers than in 2001 and three Chinese companies ranked amongst the top 10 PV producers worldwide. However, overcapacities and international trade disputes have challenged the success story of the Chinese PV industry. In order to try to tackle the mechanisms which have fostered the overall development of the Chinese PV industry since the 2000s, I have conducted a qualitative case study on Chinese PV modules producers. Following the logic of a qualitative research design, theories on cluster development have been used as an analytical device for structuring the causal narrative. In a circular research process design, structural factors, such as local growth fetishism and rebalancing, as well as individual factors, such as herd behaviour and wishful thinking, have been identified as drivers along the line of the life cycle of clusters. In this respect, this paper contests the still popular idea of the Chinese central government as the omnipotent and rational director of the Chinese economy and takes the consequences of past decentralization policies as well as bounded rationality into consideration. Since the political emphasis of regional development for global competitiveness had similar policy effects in different countries, the findings call for a context sensitive comparison between industries and countries.

Since the reform and opening policy of the late 1970s, China's economy has experienced a rapid growth and shift to increased privatisation and economic empowerment. While still being compared to the early industrial stage in Europe, as of late, China is more engaged in so called green technologies like wind, solar and biogas, at first in their production and later in their consumption. The plan for the development of renewable energies as part of the twelfth five-year plan from 2012 sets the goal for the consumption of renewable energies in 2015 at 9.5 % (Plan for the Development of Renewable Energies of the Twelfth Five-Year-Plan 2012). However, it remains unclear on which level of government economic development is governed. Discussions on who governs the economy evolve around recentralisation, decentralisation, rebalancing and local regimes. Following Streeck's (2010) emphasis on the difference of industrial sectors, this paper focuses on a specific empirical case. Being an economic success story of green technology in the private sector and having experienced massive growth and later extensive problems, the photovoltaic industry is an interesting case in which to study current and situational economic governance. In this respect, this paper investigates the mode of governance over the PV industry during the last 15 years by using a qualitative research design. Thereby, I identified structural and individual factors influencing central and local governance.

Figure 1: PV Panels in North China

Source: Laura Gruss 2013

Methodology

The qualitative research design follows the logic of a causal narrative (Lange 2013). Distinguishable happenings are understood as causal factors for a specific outcome, while the historical context and timeline are of importance for determining the causality. In this respect, this method pays attention to the uniqueness of history as well as path dependencies and multiple causalities. The data was collected via 45 semi-structured qualitative interviews with important stakeholders and experts as well as during site visits in 2013 in Jiangsu and Shandong.

Theoretical Framework

A both popular and common approach for understanding the development of new industries which are clustered in specific areas is the idea of a cluster life cycle (Porter 1998a, Schramm-Klein 2005). Translating Vernon's (1966) notion of a product life cycle for cluster development, (1) a historical moment like the laying off of qualified employees, demand change or new technological possibilities (Porter 1998b, 84) can lead to the agglomeration of companies in one area if the local conditions, especially the infrastructure in form of transportation, human resources, natural resources, etc. provide a favourable basis. During this time, entrepreneurs rely mostly on existing networks, while, simultaneously, new networks between stakeholders of the area are created. Building on these favourable preconditions, (2) the cluster can grow, profiting from several factors: (a) local networks and proximity to cooperation partners, competitors, especially for getting tacit knowledge, growing with every new entrant to the cluster (Porter 1998b, 84), (b) signalling of their own competitiveness by producing in this cluster as well as signalling the locational advantages to other companies and by this pulling new companies into the cluster (Maggiono & Riggi 2008, 61). By and by, suppliers, service companies etc. locate in the cluster area. Following this virtuous circle, (3) an independent and innovative cluster is developed, profiting from local collective learning activities. (4) Due to lock-in effects, change in demand etc., the cluster will undergo a phase of transformation or decline.
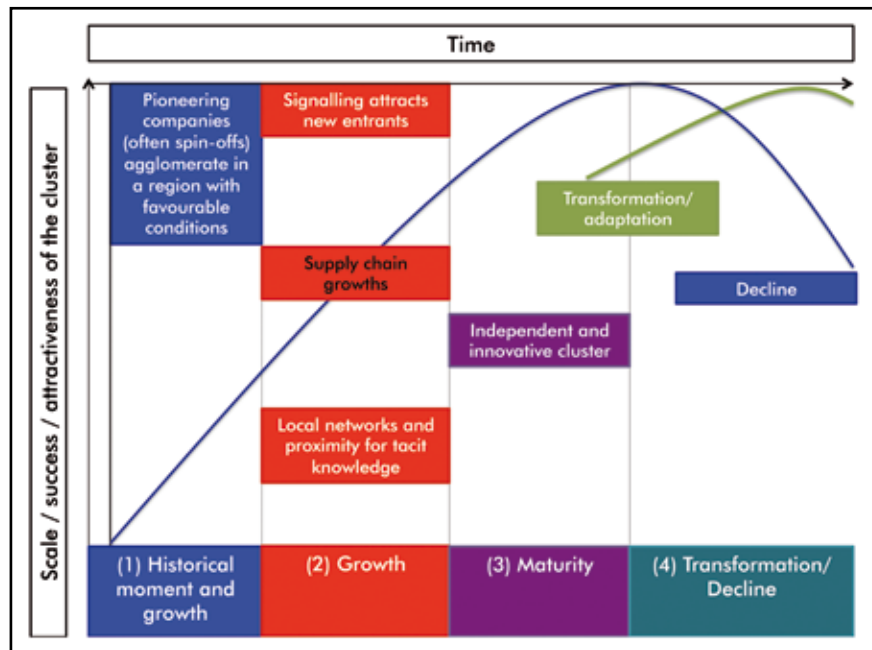
Figure 2: The life cycle of a cluster

The role of politics is described as being crucial for providing a favourable infrastructure and opportunities for localisation (Feldmann et al. 2005, 133). Also after the agglomeration of a cluster, the local government can react in form of e.g. stimulating policies (Feldmann et al. 2005, 140; Porter 1998b, 85). In this respect, cluster theories underline not only individual entrepreneurial activity and decision, but also policies and infrastructure as structural factors influencing the cluster development and by this calling for a special focus on these points during the analysis.

China and the globalized PV industry

Currently, China is the main producer of PV panels and most of the top ten companies are headquartered in East China (Earth Policy Institute, status as of 2013). While PV production in China did rise steadily since the early 2000s – with a stagnation phase from 2011 until 2013 – the demand for the modules and hence the installation of PV capacity developed only after 2008 (see figure 3+4). Therefore, focusing only on the development of the Chinese PV module producers, the analysis of the Chinese PV industry shows that
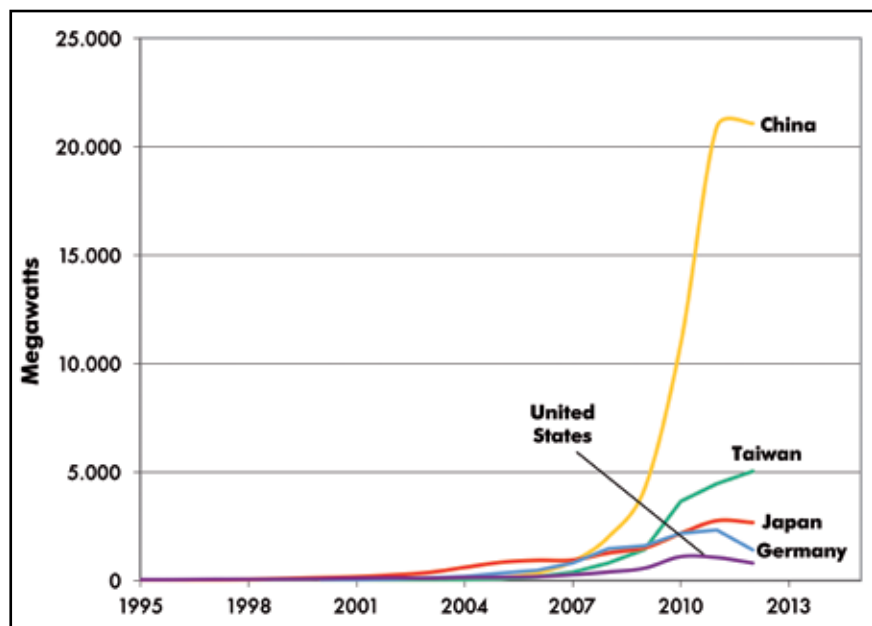
Figure 3: Annual solar photovoltaics production in selected countries, 1995-2012
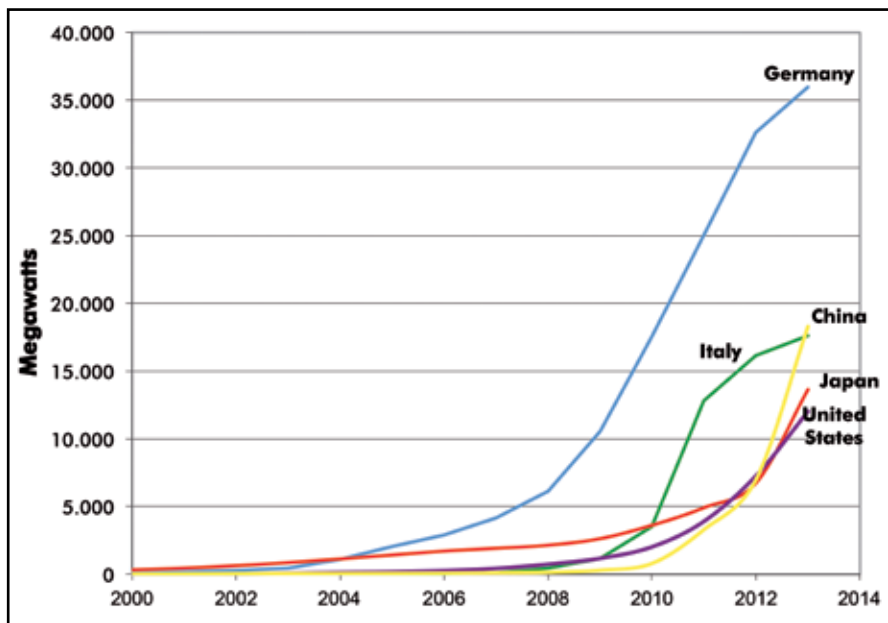
Figure 4: Cumulative installed solar photovoltaics capacity in leading countries, 2000-2013

the Chinese PV clusters in Jiangsu, Zhejiang and Shanghai were dependent on external demand for PV products.

The growing demand in Europe and the US, stirred by national funding programmes, was the necessary historical moment. Additionally, in the greater Shanghai region there was a favourable infrastructure and a favourable political environment for start-ups.

After the first start-up companies were located in the greater Shanghai region, more and more manufacturers came from and to the same region and build their factories using especially German machine tools, i.e. the first pioneer companies were still dependent on external providers. The success story of Wuxi's Suntech, which became the biggest PV module supplier in 2009, signalled the profitability of this industry, cluster and business strategy. After a time, more and more PV companies were founded in especially the greater Shanghai region, associations were organized, and the cooperation with universities was deepened. As stated by several informants the shift of focus of the central government to the successful Chinese PV industry in 2008 pushed the investment in this industry even further. A boost of illegal workers due to the big earthquake in 2008 in Sichuan helped with the supply of cheap labour. In this respect, all of the workers in a factory in Jiangsu came from Sichuan after the earthquake as I observed during a company visit 2013.

However, the overheated investments into the industry as well as declining demand in Europe and the US triggered a consolidation phase in which the Chinese PV cluster had to undergo a transformation process in order to survive. Yingli Solar, located in Hebei province, as the current market leader (Lian 2014, status as of 2013) leads to the assumption that the greater Shanghai region as hub for PV companies has declined in importance. However, the region still holds the most and very successful PV companies, like Trina Solar from Jiangsu, JA Solar from Shanghai and Jinko Solar with its production in Jiangxi and Zhejiang.

At this point, the analysis forces us to look at multiple actors: local governments which had invested heavily in the first PV companies and enabled the PV industry, the national government of China which provided the legal framework for the local governments to act as well as holds the capacities to regulate and create a Chinese market for PV products, but also international actors and policies which have a crucial impact on the development of the Chinese PV industry.

Structural factors influencing the market development

Governmental bureaucrats have an interest in private investments in their territory, especially local bureaucrats. In order to rise in the party hierarchy, economic factors such as development of the GDP and low unemploy-

ment as well as social peace play an important role. They are also integrated in the official evaluation theme for Chinese local governments. One consequence from the competition between the localities is a systematic interest of local politicians in the economic growth of their localities (ten Brink 2013, 137). Additionally, fostered by earlier decentralisation efforts since the reform and opening policy, local governments hold the important capacities to influence the local economy and draw in private investments. Following the logic of local growth fetishism (Gruss & ten Brink, forthcoming), these factors combined resulted in high investment of local governments in the PV industry (Grau et al. 2012, 30). In this sense, local growth fetishism becomes part of the Chinese political structure.

After the initial success of the photovoltaic industry due to the big export market, the central government had become more active. It signalled the importance of the PV industry by making it one of the seven strategic industries in 2010, formulating Feed-In-Tariffs in 2011 and granting loans via the China Development Bank (on the importance of signalling for the regulation of the Chinese economy, see Eaton 2013). In autumn 2012 the State Council proclaimed to fight against local protectionism and to introduce market forces (Sina Finance 2012). Simultaneously, the National Deve-

Source: Laura Gruss 2013

Figure 5: PV company in Jiangsu

lopment and Reform Commission pushed a legislative proposal concerning the expansion of the domestic market and the Ministry of Industry and Information Technology imposed new regulations for a 'healthy development' (Feng & Enkhardt 2013).

All three forms of influence, the provision of financial aid, specific guidelines for the development and support of the development of a domestic market, are in line with current efforts of the central state to rebalance its economy (McNally 2013). The success of the recentralisation and market creation efforts, however, remains unclear – especially considering hindering path-dependencies from the former decentralisation.

Local growth fetishism, therefore, was responsible for the rapid growth of the production of PV products. Due to lower sales numbers in the EU and the US this led to overcapacities. The Chinese central government stepped in, in an ad hoc manner, but in line with its overall tendency to rebalance, including recentralisation and market creation.

Individual factors influencing the market development

While considering structural factors for determining investment is very enlightening, factors on the individual level are as important. Individuals such as the politicians and investors are limited by information asymmetry. Following information asymmetry it is a highly accepted theory in economics that herd behaviour, e.g. following the successful example of another, can be a very rational strategy (Banerjee 1992). Expanding the theory to political actors, the positive example of for instance Wuxi had the effect on other local governments to copy this successful example, e.g. invest in their own PV companies.

Adding bounded rationality to the equation, wishful thinking can become an important factor influencing economic and political behaviour. This kind of driver of investment has already been identified by Piotti (2012). As has been stated by many informants when talking of the actors engaged in PV, the actors were characterized as being "irrational", "like bees who want the honey", and

"euphoric". Causing wishful thinking, the notion of "renewable energies", organised in clusters, which are supposed to help competitiveness (Porter 1998a), carry the idea of "future", "high-tech" and "innovation". In this sense, even the information the entrepreneurs and politicians could have gathered regarding for example the number of PV companies or the possible impact of the economic crisis of 2008 on environmental policies all around the world, have been ignored. By this, the amount of local investment due to system-inherent local growth fetishism has been increased by factors on the individual level.

Conclusion

By using Porter's cluster theory as analytical device, I used the causal narrative to tackle the development of the PV industry. This research design helped to identify the important actors of the development: government on different levels, entrepreneurs, and foreign actors. Taking a deeper look on the result of structural factors on the regulation of the PV market, local growth fetishism and rebalancing

Source: Laura Gruss 2013

Figure 6: Solar-powered lantern in China

have been identified as motivators for the actors. Taking the individual level into account, bounded rationality can lead to wishful thinking on part of entrepreneurs and politicians.

In this respect, when analysing political strategies, the focus on buzz words like innovation and high-tech get into focus. For example, without defining innovation and high-tech they are also the main cooperation areas between China and Germany (action plan signed by Germany and China in October 2014). It is reasonable to assume that different actors have different definitions. Based on this research, this fact becomes even more interesting, leading to the assumption of politics based on

wishes. The findings can be used as a framework for future research on industry development in other countries, identifying similar and different patterns.

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Corresponding author: Laura Gruss [laura.gruss@dlr.de] is an independent researcher working as a scientific officer at the International Bureau of the Federal Ministry of Education and Research at the German Aerospace Center. Her research focuses on the development of the Chinese and German Photovoltaic industry and state-business relations. She has published, inter alia, Blurring the Lines: Strategic Deception and Self-Deception in Markets (2010, with Geny Piotti).

Indicators for sustainable tourism
The case of Cambodia

Nhep TINAT[1]

Victoria University of Wellington, New Zealand, 10 Kelburn Parade, Wellington 6012, New Zealand[1]

Abstract: Most research on tourism in Cambodia so far has focused on growth. There is very limited research on indicators for sustainability. A failure to create indicators for sustainable tourism may lead to short-term growth but the country will suffer in the long run. Sustainability really matters in tourism especially in a new destination like Cambodia. Cambodia has no clear indicators determining tourism sustainability. Cambodia's tourism is remarkably flourishing, but behind this growth some challenges exist: Cultural and environmental impacts, economic leakage, sex tourism, drug trafficking and disease transmission. These concern tourism sustainability. This research intends to fill a significant gap regarding challenges hampering sustainable tourism, particularly creating indicators, by studying the activities of Cambodia's tourism. The aim is to contribute to developing more comprehensive policies and measures that address problems by drawing on the activities and perspectives of the country's tourism stakeholders: These include public and private actors, NGOs, local people and tourists.

Keywords: indicator, sustainable tourism, tourism stakeholders, perspective, policy

Sustainability increasingly matters in tourism, especially in new destinations like Cambodia. Cambodia's tourism is currently flourishing but some challenges exist: These include cultural and environmental impacts, economic leakage, sex tourism, especially children, illegal drug trafficking and disease transmission. All of these points relate to tourism sustainability. Cambodia has not yet developed indicators for sustainable tourism. Proper indicators are urgently needed for the country to sustain this country's booming sector. At the moment, tourism is being developed and flourishes without direction. As supported by Ericson and Rönning (2008) it can be argued that without clear indicators, sustainable tourism development is non-existent and can any development can erase the country as a tourist destination from the world map. Seeing these concerns, conducting a study on sustainable tourism in Cambodia is essential to understand the depth and breadth of the tourism indicators and their challenges, and to contribute to the development of effective policies, measure and programs for sustainable tourism for the country.

This research intends to fill a significant gap about the challenges of sustainable tourism, particularly finding tourism indicators, by studying the activities in Cambodia's tourism. The aim is to contribute to the development of more comprehensive policies and measures that address the problems by drawing from the activities and perspectives of the country's tourism public (government), private (tourism business), International Organization (IO) and Non-Government Organization (NGO), local people and tourists. In Cambodia, the public sector is currently the monitor/ (law) enforcer with regard to tourism, the private sector is the operator/ implementer, NGOs and IOs are the observers, local people are the beneficiaries and tourists are the performers. Indicators are developed by assessing, among other things, how tourism is perceived as "sustainable" and what makes it "sustainable".

Figure 1: At Sihanoukville (beach tourism): Cambodia's beach has been included as the world's most beautiful bay and this is the only public beach (in the photo and around) that people can entertain while most of it is privatized by business tycoons.

Source: Nhep TINAT

Source: Nhep TINAT

Figure 2: At Sihanoukville (beach tourism): The products displayed at a beach of Sihanoukville. These are not local products. The revenues of sales will return to the neighboring countries where these products are produced.

Specific research aims

The study seeks to answer three key questions:

1) What are the indicators for sustainable tourism in Cambodia?
2) What are the challenges of sustainable tourism in Cambodia?
3) From these, how will Cambodia's tourism be sustained?

Data Collection & Analysis

Given the nature and scope of the proposed study, a qualitative study will be used as a research design. The study will rely on primary qualitative data collected from different sources, but particularly from the tourism stakeholders such as public and private actors, IOs and NGOs, local communities and people, and tourists. The primary data collection will involve in-depth interviews. These will probe major themes emerging from the data. In addition to primary qualitative data, an extensive literature review will be done to generate and analyze secondary data and compare my findings with existing knowledge.

A two-step technique will be used for collecting the data by in-depth in-terviews. During a pilot study in November and December 2015, 15 of the 47 in the sample will be visited. This will provide an opportunity to talk to key informants so as to assess the feasibility of future interviews and make adjustment on the questionnaires if any, and to build relationships with potential participants. The approval of a detailed research ethics submission (to the relevant University ethics committee) in relation to the main task of (open-structured) interviews will be required before commencing the interviews with a total sample of 47. Fieldwork continue in January 2016 while other information and statistics are also collected.

A qualitative method will be used to interpret the data. This will involve reviewing the answers to see the trends and factors towards sustainability and finding appropriate indictors. This will be in line with the supported scholarly written documents in the same field.

Sample

In Cambodia interviews are planned with a sample of 47 respondents: 3 government officials familiar with tourism, 15 people from the private sector and tourism businesses (hotels, travel agencies, and tourist transport companies), 3 IOs and 3 tourism NGOs, 3 community leaders and 15 people who are deeply involved in community tourism as well as tourists visiting the country.

Plan

The research will be carried out in three phases. In Phase 1 (the first year), the focus is on developing a detailed research proposal and conducting a pilot study in the target areas so as to assess the feasibility of the project and test the draft questionnaires. At this stage, between 10 and 15 participants will be informally interviewed, but no data will be collected. Subsequently, the proposal will be transformed into a PhD confirmation paper. In Phase 2 (the second year), extensive field work will be conducted for data collection. At this stage, literature review will be also extended. In Phase 3 (the third year), data analysis will be conducted.

Figure 3: At Ratanakiri (Eco-tourism): This is a natural lake called Boung Yaek Loam located at the Northeast of Cambodia. It would be a suitable location for eco-tourism. This is a question of sustainability.

Source: Nhep TINAT

Key research on indicators for sustainability

The WTO (2004) states that over 60 authors from more than 20 countries have conducted studies to find indicators of sustainable development for tourist destinations. This publication has served as the key research of indicators for sustainable tourism (WTO, 2004). Indicators first became a subject for attention from the tourism sector, as a response to the global focus on sustainability (Brundtland Commission, 1986 & Rio Earth Summit, 1992 in WTO, 2004, p. 13). WTO (2004) when it was argued that "in any destination, the best indicators are those which respond to the key risks and concerns regarding sustainability of tourism, and also provide information which can help clarify issues and measure responses" (WTO, 2004, p. 13). Indicators can make a difference in three main ways: through the information they generate; the partnerships they create; and the action they produce (WTO, 2004).

Indicators of sustainable development are needed to guide policies and decisions at all levels of society: vil-lage, town, city, county, state, region, nation, continent and world. Finding an appropriate set of indicators of sustainable development for a community, a city, or a country is not an easy task. The number of representative indicators should be as small as possible, but as large as essential. Indicators condense its enormous complexity to a manageable amount of meaningful information, to a small subset of observations informing our decisions and directing our actions (Bossel, 1999). Indicators are the main evaluation tools used to support sustainable tourism policy implementation (Choi & Sirakaya, 2006 & Miller, 2001 in George A. et al., 2011, p. 4), and "indicators act as a catalyst to support a planning process" (Mascarenhas et al., 2010 in George A. et al., 2011, p. 4).

Indicators perform many functions. They can lead to better decisions and more effective actions by simplifying, clarifying and making aggregated information available to policy makers. They can help measure and calibrate progress towards sustainable development goals. They can provide an early warn¬ing to prevent economic, so-cial and environmental setbacks. Indicators of sustainable development at the national level are often developed through dynamic interactive processes and dialogues among a wide range of stakeholders, including government representatives, technical experts and civil society representatives. The process allows participants to define sustainability from their own perspectives, taking locally relevant aspects as well as their own value systems into account (DiSano, 2007).

Even though sustainable tourism is studied in a globally widespread way and can therefore take different shapes, its indicators generally vary greatly or slightly from time to time and based geographical locations, this is not to mention political tendencies or affiliation. Sustainable tourism should encompass reasonable balance of three dimensions namely economic, socioculture and environment. Therefore, balancing these three dimensions is critically important because they are core issues of sustainable tourism.

Socio-cultural dimension

Social indicators are related to so-

Figure 4: North-Gate, Angkor Wat

Source: Michael Waibel 2009

cial integrity that should be assessed in terms of the subjective well-being of the host population while cultural indicators should measure cultural integrity in terms of diversity, individuality and beauty of cultures and heritage (Jovicic & Ilicand, 2010). It is difficult to measure directly social and cultural sustainability because most of the variables related to these are qualitative rather than quantitative (Farsari & Prastacos, 2001). And the rising number of travelers who take holidays at sensitive areas such as nature and cultural buildings may jeopardize nature conservation and violate cultures. Loss of culture is one of the negative impacts of tourism. Tourists are often unwilling to completely adapt themselves to the local culture; therefore in order to keep the custom, local people must adjust to their needs. Tourists can also lead to vandalism and crime (Behrendt, 2012).

Environmental dimension

Environmental indicators should measure environmental quality and the demands made by tourists in terms of different environmental media: water, air, biodiversity, landscape etc. (Jovicic & Ilicand, 2010). The sustaina-

bility of tourism development can be strengthened by effective use of Environmental Impact Assessment (EIA) as an obligation imposed on developers. It is an assessment of the possible positive or negative impact on the environment due to the development. The EIA can ensure that the environmental effects of major developments proposals are fully considered and understood before decisions are made on whether they should be proceed or not (Behrendt, 2012). The objective of sustainable tourism is to retain the economic and social advantages of tourism development while reducing or mitigating any undesirable impacts on the natural environment (Tourism Intelligence Unit, 2011). If we have learned to watch the relevant indicators, we can understand and cope with our dynamic environment (Bossel, 1999).

Economic dimension

Endeavour to balance between economic outcome and the negative impacts on tourism, is not yet possible worldwide. Economically, tourism is booming business. It produces almost 5% of the world's economy, employs around 200 million people worldwide

and is the fastest growing industry (Europarc Federation, 2012). Tourism development brings money to the region and improvements of the local facilities such as roads, water supplies, transportation system as well as electricity and telecom service. Tourism can also create new recreational or entertainment facilities, better health system, restaurants and other public spaces. The longer tourism thrives the more improvement will be made (Behrendt, 2012). According to the WTO (1998) as cited in Lin and Guzman (2007) claimed that tourism contributes over 2% of gross domestic product (GDP) and 5% of exports to the economies of 11 of the 12 developing countries that are home to 80% of the world's poor (WTO, 1998, in Lin and Guzman, 2007, p. 1). But economic leakage is the most pressing issue. Most of income generated will not shift to national budget but to the foreign countries since most investors are not Cambodians and local people get minimum benefits from this sector. Samdach Hun Sen, current Cambodian Prime Minister (2005) as cited in Chheang (2010) said that it is estimated that approximately 30% of revenue from tourism … leaked out of

Figure 5: At Siem Reap (cultural tourism): A man is observing the sculpture on wall of Elephant Terrace, at the Angkor Wat complex which attracts millions of tourists per year.
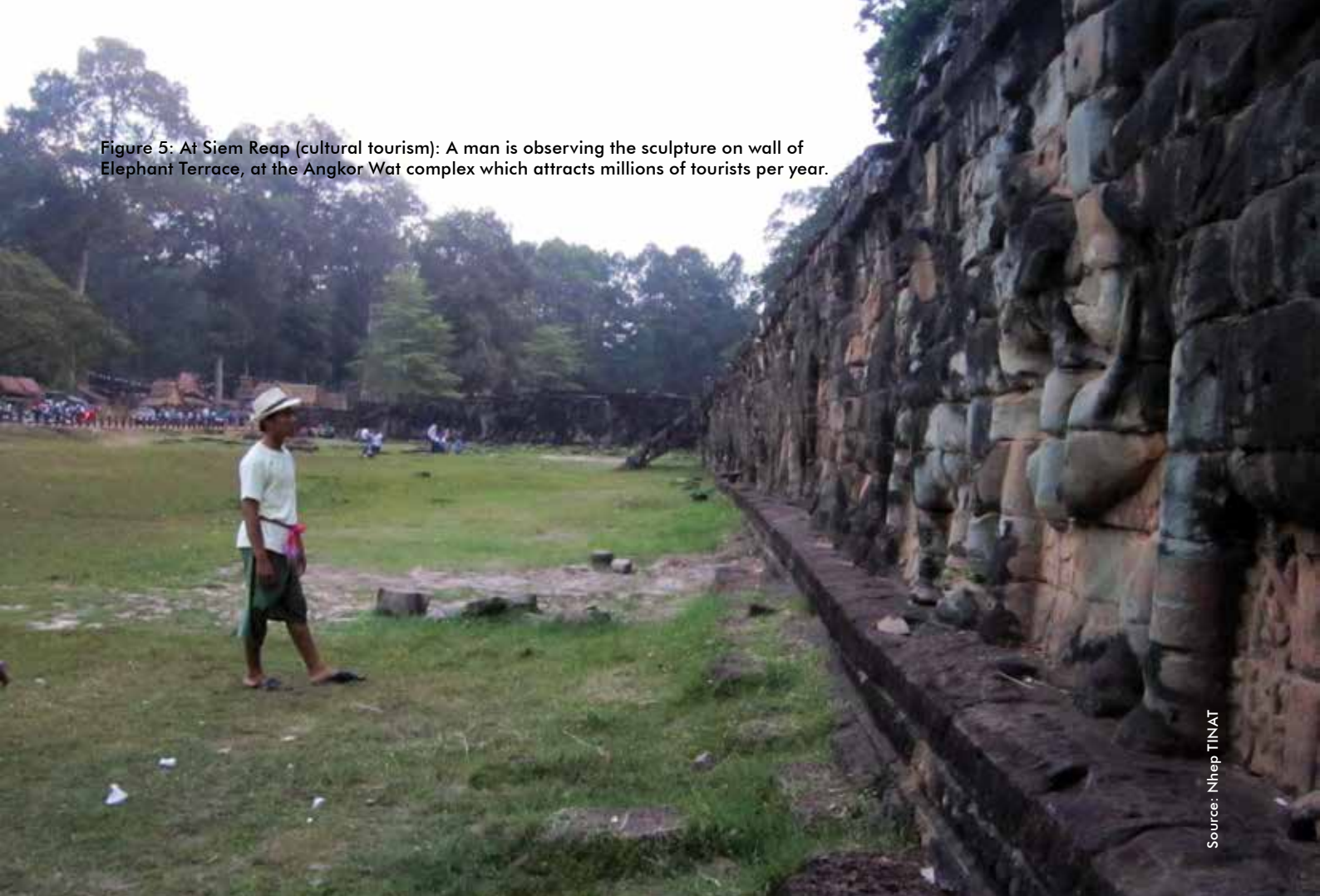
Source: Nhep TINAT

the country through imported foreign goods to serve tourism sector in Cambodia (Chheang, 2010).

There are many hidden costs of tourism and they can have both bad and good (economic) effects. Often rich countries are better suited to profit from tourism than poor ones (Behrendt, 2012). The indicators, the linkages between tourism and the environment, social and cultural dimensions, are not easily available (Jovicic & Ilicand, 2010). Finally, efforts to assess great losses on tourism negative effects have been unsuccessful. What is apparent is that the revenues made from the industry greatly outweigh the resources devoted to it. Although the lost resources cannot be measured in monetary unit, countries may spend more billions to heal the spoilt resources than earn from the industry or, loss, in the worst scenario, loss cannot be replaced. Tourism business is profit-oriented: the greater profitability of the industry, the greater expenditures for its loss.

Sustainable tourism & its indicators: current knowledge

Beyond the above authors, there are many authors (whose work was reviewed) arguing about the positive impacts of tourism. They discuss the number of job created, the amount of generated income, the number of tourist arrivals. It almost appears as though tourism were the main factor in economic development. They appear to suggest that tourism draws from renewable resources, in some extreme cases, a magic wand to help the welfare of the world population. However, many neglect the negative impacts of tourism on society. Some consider only what negative impacts there are and neglect the question of how to achieve sustainability in tourism. No single paper on tourism in Cambodia is devoted to "how" to make tourism sustainable, especially indicators for sustainable tourism development are lacking.

Indicators for sustaining Cambodia's tourism

The indicators and sustainability mentioned above do not fully reflect the tourism in Cambodia. The arguments are partly correct. Clear indicators determining sustainable tourism are not yet available in Cambodia, although the country has regarded tourism as the main income genera-

tor and attempts to sustain tourism. Cambodia's tourism has been threatened by remarkable challenges such as i) lack of tourism infrastructures/ facilities, ii) environmental degradation, iii) sex tourism, iv) weak carrying capacity, v) economic leakage, and vi) safety and security shortages (Tinat, 2011). Therefore, indicators for the country's tourism are not yet revealed unless a study is conducted.

Contribution and conclusion

The existing data is abundant in tourism but effected by many limitations in the indicators for it. First, the use of different sustainable tourism definitions by various studies makes accurate data comparison difficult. Second, due to the covert nature of indicators, effort to generate reliable estimations on the indicators of sustainable tourism and development is difficult for the country. Third, different methodologies have been employed in research on indicators for sustainable tourism. For instance, most of the commonly cited statistics on tourism sustainability were not based on the WTO definition. Additionally, many studies are based on a series of assumptions rather than evidence.

This resulted in different crude estimates on the number of indicators. Fourth, the reliability of the data is often questionable because different agencies involved in data collection have distinct agendas and interests which are compounded by different interests and agendas on the side of data suppliers. Finally, in some countries including Cambodia, a centralized data repository is not available, and as shown earlier on indicators for sustainability, is inconsistent and unreliable.

To date, the Ministry of Tourism in Cambodia has not commissioned a study to review any knowledge on useful tourism indicators for the country. Although the review by other scholars found an abundance of research on tourism and related issues, they have not produced a real accumulation of knowledge about the patterns, extent, and consequences of ways of sustaining tourism in Cambodia. The study concluded that most of the data collected by research conducted over the past decade in Cambodia were available but the information on indicators for sustainable tourism was patchy, inconsistent and not practical, and the studies were often confusing. There was a lack of independence in the research process because, in most cases, the studies reflected the program interests of the organizations working in this field or research-funded projects. Another pressing concern is that among all Development Partners (DP), only Asian Development Bank (ADB) assisted the MOT to conduct a study on Greater Mekong Sub-region (GMS) Tourism Development Project (2010-2013) but the study was not totally concerned with Cambodia's tourism, this is not to mention about sustainable tourism per se. Tourism is the main income generator of the country but it is neglected by all DPs. In Cambodia, for instance, out of hundreds of tourism related studies that were reviewed in Tinat (2011) and this article, not a single one was fully devoted to studying what indicators used to sustain tourism.

These disadvantages have hampered sustainable tourism growth of the country where tourism is still rather new to the people, and questions on indicators for sustainability exist. Cambodia's tourism legal frameworks are scarce and, if exist, too broad for implementation or left unimplemented or loosely-regulated. Without proper indicators, this will result in the devastation of the country's tourism.

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Corresponding author: Nhep TINAT [tinatjame11@gmail.com] is a PhD student at the School of Management, Victoria Business School, Victoria University of Wellington, New Zealand. This research note addresses ongoing work, and any feedback is highly welcome.

The politics of urban displacement practices in Phnom Penh

Reflections from Borei Santepheap Pi & Oudong Moi

Giorgio Talocci[1] & Camillo Boano[1]

Giorgio Talocci, giorgio.talocci.11@ucl.ac.uk & Camillo Boano, c.boano@ucl.ac.uk,
The Bartlett Development Planning Unit (UCL), 34 Tavistock Square, WC1H 9EZ London / UK[1]

Abstract: With the specific ethnographic research conducted in two relocation sites (Borei Santepheap Pi and Oudong Moi) in the outskirts of Phnom Penh, Cambodia, the paper aims to contribute to the massive body of literature on urban displacement and to the current debate on Phnom Penh's fierce evictions and forced relocations. In so doing, we aim to offer an alternative vision that, deliberately, decides not to focus simply on the dynamics of socio-spatial segregation and exclusion intrinsic in the process of displacement: rather, the paper wants to reflect on the politics of designing displacement processes, on its discourses and practices. The current evidence allows us to say that relocation sites are configuring as big peripheral holes: giant planning and urban design failures where populations strive to survive or that decide to abandon to search for more secure livelihoods closer to the centre. Looking at two very different attempts to design relocation sites, from scratch, as new polities, the paper advocates for practices that could contest the current mode of urban development, and enable old and new urbanites to re-appropriate the act of designing, producing and governing their spaces.

Phnom Penh, marketed by authorities as 'the charming city' (PPCH, 2014), has seen 85 forced evictions between 1990 and January 2012 (STT, 2007, 2011a, 2012a). Enormous economic pressures over land in central areas have propelled demolitions of informal settlements and expulsions of the inhabitants in order to make room for new upper-class developments, malls and, in a few cases, new infrastructure and services (Paling, 2012; Percival & Waley, 2012; Tudehope, 2012). Often particularly brutal, evictions have fed a collective imagery about unscrupulous authorities and developers, heightening the level of contestation toward the authorities and the private sector (Adler, Ketya & Menzies, 2008; Springer, 2009, 2011). Also, the level of international attention to human and housing rights abuses against the evicted populations has increased and led to concerns amongst donors and investors (Amnesty International, 2011; UNHR, 2012). There is now much support by foreign activists, artists, photographers and directors.[1] The most widely broadcast evictions have probably been linked to the redevelopments of Boeung Kak and Borei Keila, and to the Railway Rehabilitation Project: these were perceived as an environmental disaster as well as a social one (as in Boeung Kak – STT, 2010; Schneider, 2011; Water & Ket, 2012) as there was apprehension related to the relocation of families with HIV-positive members from what has been renamed as an AIDS colony (as in Borei Keila and its relocation site Tuol Sambo – Licadho, 2009; Thiemann, 2012; McCurry, 2009; Jackson & Vandy, 2014). There was further disbelief in the involvement of international donors and cooperation agencies in the violation of the evictees' basic rights (as for the Railway Project, massively funded by the Asian Development Bank and Australian Aid – STT, 2011b, 2012b, 2012c; BABC, 2012; Carmichael, 2013).

Figure 1: The homogenous array of self-built low-cost housing (about 600USD per unit) in Oudong Moi (Tang Khiev)

The reality on the ground is probably even harsher than the one displayed in the international media. The eviction and relocation have rarely occurred in an agreed manner (STT, 2006); most situations suggest opaque negotiation processes with the communities, bribery of community leaders, lack of agreement and resistance that often culminates in bulldozing entire informal settlements and the use of violence to placate riots.

The evictees have been moved, scattered, and their original sites re-composed in 54 extra-peripheral spaces, 20 to 50 km away from the city centre (STT, 2011a, 2012a). The act of emptying the urban fabric in the city centre corresponds with the use of peripheral (and therefore cheap) land to relocate informal populations. Although forced displacements are in contrast with both national and international legal frameworks (Lindstrom, 2013), at least until 2012[2] authorities found no problems in enacting eviction orders. Disregarding how forced displacement de facto means the complete disruption of livelihoods and social networks[3] – with high rates of alcohol abuse amongst adults and of school dropout for children (UNHR, 2012) – authorities and developers have used it as the most important tool to govern the city's transformation and pursue their objectives of land speculation[4] and social cleansing, toward building the image of a 'charming', globalised and competitive city.

People are loaded on improvised trucks, often along with some scrap materials they have managed to save from their previous home. At the end of their journey, as if landing in a desert landscape, they find a flat virgin land: sometimes, but not necessarily, crossed by naked roads, sometimes with water and electricity connections, often with low lines of bricks to indicate their future plots, other times with awkward rectangular shapes – the toilette blocks around which they will have to build their future home. In the luckiest cases, an NGO (see for instance: Caritas Cambodia, 2012) or – with bitter irony – the developer who contributed to their eviction might have already provided roofed rectangular blocks ready for them (7NG, 2010). Most often though, at their inception, relocation sites resemble a landscape of plastic tents and wooden sticks (Vink, 2012a, 2012b). Then

they will grow and change, some people with savings will start building stronger houses, and these same houses will get a second floor at some point, and a third one. The older relocation sites (see for instance Aphiwat Meanchey – STT, 2006) are today part of an urban fabric that has in the meantime grown till reaching and swallowing them, partially overcoming the spatial isolation they were initially born in. Nevertheless, year by year, poor have been shifted toward the outer districts[5] (STT, 2009) – often isolated, stigmatised and very hard to reach.

The eviction of Dey Krahorm settlement

In this article we will consider two relocation sites, Borei Santepheap Pi and Oudong Moi: Both originated from the eviction of Dey Krahorm[6] a central informal settlement developed in the middle of the area formerly known as Tonle Bassac Tribune[7] and evicted on the 24 January 2009 (Bredy & Neth, 2009) to make room for a new development[8] by 7NG Group (7NG, 2010). 7NG Group is one of the most important construction and investment companies in Cambodia, often allegedly linked back to government members. It is also involved in activities including microfinance geared toward poor families, and it has presented itself as working along with the government in a wider national strategy for reducing poverty (ibid.). After the failure of a land-sharing proposal for Dey Krahorm (Rabé, 2005, 2010), 7NG Group offered a land-swap to the community, a relocation site far from the city centre where the families would have been given a housing unit for free after entering a savings programme (Licadho, 2008; 7NG, 2010).

The whole story of Dey Krahorm – of the alleged bribery of community leaders and of the legal case that eventually declared 7NG as the rightful part – is beyond the scope of this article. In short, only few families agreed to voluntary relocate to Borei Santepheap Pi (some 20km out of the city centre) and most did so only after a forced eviction (Mgbako et al., 2010; Amnesty International, 2011; UNHR, 2012). Some of them were not entitled to a flat in the new site because they had not been long-term tenants; these ended up squatting on the land next to Borei Santepheap Pi before under-

going another relocation (STT, 2012), this time to Oudong Moi, 55km North from the city centre.

Despite sharing a common origin (and a common 'landlord', 7NG) Borei Santepheap Pi and Oudong Moi present almost opposite stories – the former being a relocation site where everything (housing, infrastructure, services, education, employment, microfinance) was provided by 7NG (although with many irregularities); the latter merely virgin land where people were literally dumped. We will continue this comparison in the conclusion. The following two sections will explore the sites' architectural forms and at the discourses that have given them shape. The data is one of the outcomes[9] of the nine-month doctoral research fieldwork of one of the authors, and it is based upon on-site observation, semi-structured interviews with a number of stakeholders, desk and archive research through secondary sources.

Borei Santepheap Pi (Domnak Trayoeung)

Borei Santepheap Pi (literally 'peace village two') is situated about 20km South-West of Phnom Penh in the locality called Domnak Trayeoung (the name by which locals refer to it) along a road that is easily accessible from the National Highway passing along the city's international airport. It is hardly near the centre of the city – by motorbike it can take around 45 minutes; most roads are in bad condition and even worse during or after rainstorms. The site is very large; it accommodates 2000 households on over about 25 hectares, and although it was created to host the families evicted from Dey Krahorm it has 'collected' people evicted from other places, significantly also from Boeung Kak (Mgbako et al., 2010), over time. It is also a commercial development by 7NG, with a percentage of houses sold at market prices – mechanism that contributed to cross-subsidise the construction of units assigned to the evictees for free, basically just paying facilities through the savings mechanism[10].

The first impression suggests that it is in the middle of nowhere. It is a big section of flat land with many factories (though developing very sparsely) and small villages, most of them very much smaller of Borei Santepheap Pi and surrounded by agricultural or idle

Source: Giorgio Talocci

Figure 2: Neglected open spaces in Borei Santepheap Pi. In the background, the housing units (originally conceived as 'incremental') are slowly growing.

land. At the entrance of the site there is just a gas station selling also basic goods, the only official 'gate' to the site. There is no further structure nor a board[11], Beyond the gate, there is an infinite array of houses, with the same typology repeated endlessly, although the units do not all reach the same height and present many variations in the styles and finishing of their façades. The housing stock was in fact designed as incremental: every family would have received exactly the same rectangular unit, in armed concrete, and then be able to expand in height in the future. The units have big entrance doors, topped by a narrow horizontal window. The bare construction was then covered by white plaster and the gate closed through a shutter before being delivered to a family. The rationale behind this wants to recreate the conditions for the successful typology of the shop-house, which has long and established tradition in Phnom Penh and still today is the most sought after by the middle class because of its flexibility. It derives its name exactly by the possibility of opening a shop at the ground floor, and then to have the more private family spaces at the upper floors.

So far though, economic activities have not flourished at all in Borei Santepheap Pi, and the general impression is one of a ghost city, as if the site were partially abandoned.[12] It is interesting to investigate the profound contrast between the current situation

and the way 7NG Group (2010) was proudly introducing the site in a slideshow presentation a few years ago. The new development was presented as a sort of promised land: the place where parents find work, children have access to education, and there are proper health clinics – as opposed to the situation in Dey Krahorm, rather described as unhealthy, dangerous, and even immoral. The slides of the presentation speak of "occupation, small businesses, market, factory works" (ibid.:24) while defining the context of Dey Krahorm as "anarchic, jobless, conflictual" (ibid.:15). The presentation shows how the on-site facilities work efficiently, using pictures of a market, a classroom, a paediatric clinic, a factory, all built by 7NG. The images convey a feeling of tidiness and efficiency, of happiness to a certain extent: "happiness" (ibid.:44) is precisely the word that is used to describe the mood and state of mind of the residents that had chosen to resettle voluntarily, while images of the raffle to assign the several units are shown. The presentation follows showing images of the voluntary dismantling of the housing units on Dey Krahorm by some families, and of their apparently easy trip to the relocation site. Such images are juxtaposed to pictures of families that had chosen to resist and try to remain on the original land: "a small problem [that] remains and will be solved peacefully" (ibid.:56), as a few slides

showing people shouting and fighting against bulldozers state, amongst exclamations like "Please stop living like this! We have prepared a very good living place for you! Come to live with us!" (ibid. 60-61), or "Suggestion: please stop let your children playing here without going to school anymore! Come to live with us here, your children will have opportunity [to go] to school!" (ibid.:62-63).

The reality though is very different from the one portrayed by 7NG in its presentation. Many houses were never occupied, or have been left empty after a short period of occupancy by their 'owners'[13] which in the meantime have moved back to more central areas because of the general impossibility of finding a job in Borei Santepheap Pi and its surroundings, and the lack of convenience in commuting daily to the centre of the city. Some of the 'returners' sublet their units, while others sell them informally and below a reasonable market price, because of the urgency to move back toward the centre soon. In the northern part of the settlement, four dull public spaces, two squares with a market and other public facilities (a small school and the clinic provided by 7NG), couple with other two squares-to-be – now just leftover spaces covered by uncut grass. On the Northern-West tip lies a garment factory owned by the company itself,[14] providing employment, although at very hard conditions. Several NGOs are now working to provide as-

sistance to the population and an alternative to the system of employment, education and care put forward by 7NG. People Improvement Organisation, for instance, have started classes for children from 5 to 10 years old, after having done the same in several other areas of the city (PIO, 2014).

Oudong Moi (Tang Khiev)

Oudong Moi[15] is a much smaller relocation site in Oudong, Kandal Province, 55km North of Phnom Penh (about 70km from Borei Santepheap Pi): it takes about one hour and a half on a road constantly under maintenance and often blocked by traffic. Once arrived, we are in a different world if we compare it to Borei Santepheap Pi: the setting is rural, with naked and often muddy roads leading to a number of two-storey houses (again looking all alike) and a couple of bigger buildings. The 'grey' of Borei Santepheap Pi's asphalt and concrete squares is here replaced by the brown and green of the natural environment.

We can understand the origins of Oudong Moi through the words of one of its inhabitants. She is a middle-aged woman who had originally moved to Dey Krahorm, through advice from a friend, from the province of Svay Rieng, in search for a livelihood that only a more urban life could have given her. She does not get flustered while remembering the dawn of the eviction[16] when her family's house was destroyed and they could not save anything since they had been almost caught during their sleep. She had moved to Borei Santepheap Pi, where she found solid houses in concrete that were not meant for them, but only for those who could afford to participate in the savings programme organised by 7NG and were entitled to do so (she was not since she was simply a tenant in Dey Krahorm). They then settled in makeshift tents in an area in front of the 'official' settlement in the vain hope of being allocated a home. She lasted only a couple of months in this situation, then preferring to rent a room near the central Orussey Market, because she had found work as a cleaner in a club near the market, and because one of the village leaders at Borei Santepheap Pi had made clear that she and her family were not welcome. After about a year, in 2009,

also thanks to the support of some NGOs[17], the company 7NG proposed transfer to Oudong. The woman decided to move, because the husband had no fixed job and paying the rent was becoming complicated. Besides the fact they had no choice, the subtle blackmail was implicit in the assurances of 7NG who claimed that the move was economically sound. A poor family is obviously lured by the possibility of becoming owner of the land (although very small and tens of kilometres far from the city centre). However, they cannot imagine the rural isolation that they will have to face at the end of their trip; nor what kind of legal loopholes they will have to go through to be assigned the title of the property owner on the land, that perhaps will never arrive – forcing many people to trade it at bargain prices. Arriving in Oudong, along with the rest of the community, she found herself desperate and with no sources of income. Her group was the last one arriving therefore she could find only three lots available and had to bribe with some savings one of the employees of the company. The 'first version' of her house was built by her family with scrap materials, while many people were still finding shelter below plastic tents.

Here starts the story of the site as we see it today. After the transfer of 510 families (STT, 2012) from Borei Santepheap Pi to Oudong Moi (the size of which is about 2 hectares) was completed by a volunteer from an NGO of Christian inspiration (Manna4Life) began to help the population, raising funds for the purchase of blue tarpaulins to repair from the rain during the rainy season. Although the tarps were sold soon by the population to make some money, they eventually gave the name to the site, from those days known as Tang Khiev, precisely 'blue tents'. The volunteer kept working with the community, achieving reasonable results after almost five years. Saving groups have started, and through these funds all houses have been totally self-built by the community, using a simple design that rejects the 'expensive' models proposed by other NGOs[18] and that well interprets – through a wooden structure – the traditional rural family house in Cambodia, elevated from the ground to repair from floods, and making use of the covered space on

the ground floor for activities such as cooking, eating, resting, working or simply as a deposit for what does not find space upstairs.

Although most of the original 510 families, not different from Borei Santepheap Pi, have now left the site (a total of 104 families have stayed – STT, 2012), the community has kept thriving, and recently has built also a school and a centre for the promotion of agriculture, in an attempt to generate an income. In one of the public spaces, quite on the border of the site, there is a church: apparently an exogenous 'object' in a Buddhist community, but in the words of the volunteer definitely part of an effort to give hope to a group of people otherwise at risk to fall into depression because of the displacement they have undergone. "It was somehow relieving to have the opportunity to start all from scratch, you can almost plan an ideal community: we do not want K-TVs here, otherwise alcohol and prostitution will start again... We can use differently our collective energy" (Knight, 2013:1).

Conclusion

Much has been written already on Phnom Penh's evictions and relocation sites: articles and reports have focused mostly on the logics of spatial segregation and exclusion intrinsic in the dynamics of forced displacement, and on the constant and harsh violation of housing and human rights perpetrated against the evicted populations, on the disruption of their livelihoods and so on. Here though, we have tried to abstract ourselves and shift the focus of the discussion on two different sets of discourses – one coming from a powerful developer, the other one from a Christian NGO – which has produced different (though comparable) outcomes.

In both cases, the ideal behind the 'design' of the relocation site has been one of working toward the creation of new 'polities' – self-sufficient within their boundaries, with attempts to start education and savings programmes and create sources of income; with self-built housing (or self-expanded housing in the case of Borei Santepheap Pi) gathering around a few public spaces hosting the programmes for the collective activities. The 'ingredients' used by two completely different actors (in this case 7NG and the

Figure 3: Oudong Moi: in the course of time housing has diversified and improved. Families with better income have expanded their units on the ground floor, although this could represent a problem in case of flooding.

NGO Manna4Life) have not been so different after all, although this must obviously be read as a provocation. In fact, while on one side we have a big developer strictly involved in the government of the city and its transformation, on the other side we have found an NGO (next to many others, for instance the ones now acting in Borei Santepheap Pi) that is trying to work in the cracks left by the failure of the governmental plans carried on by authorities and private sector.

The current evidence allows us to say that in the coming years it is likely that most of the relocation sites will configure as big peripheral holes: giant planning and urban design failures where populations strive to survive or that decide to abandon to search for more secure livelihoods closer to the centre. Although with many contradictions, the example of Tang Khiev in Oudong tell us that a new urbanity is being born in Phnom Penh's outskirts. Possibly another one will be born soon in Borei Santepheap Pi and in other relocation sites too, but this can happen only at the condition of inventing practices that could contest the current mode of urban development, and enable old and new urbanites to re-appropriate the act of designing, producing and governing their spaces.

Endnotes

[1] Evictions have been the main focus of the work of photographers such as John Vink, that through its website and publications has documented the 'quest for land' going on in Phnom Penh (Vink, 2012a / 2012b).

[2] The last eviction happened in Borei Keila on the 3rd of January 2012. After that event the eviction processes seem to have temporarily stopped, probably due to the upcoming political elections in July 2013 and the subsequent weakness of the ruling party (Cambodian People Party).

[3] In a report on Tuol Sambo for instance, many interviewees mentioned the distance between their work place and the city centre as a main problem, especially because of the money they were spending on gasoline (UNHR, 2011).

[4] The Land Laws of 1989 and 2011 were de facto conceived as instruments to facilitate land speculation.

[5] A report by STT (2009) highlights how in the 12 years between 1997 and 2009 figures have reverted between the 4 inner Khans (districts) and the 8 outer ones, with two thirds of the urban poor populations living in the outskirts of the city today while it was exactly the contrary in 1999. The report speaks of over 100,000 families displaced since 2000. STT has been probably the most active organisation in documenting the eviction processes over the last 15 years: The issues 11, 19, 21 of 'Facts and Figures', the periodic publications of STT, refer to evictions at the urban scale, helping to understand the process through tables and maps (STT, 2009; 2011a; 2012a).

[6] The name of the settlement in Khmer means 'Red Land'.

[7] For a thorough account of the monumental project for the Tonle Bassac Tribune (about 1963) see: Grant Ross & Collins, 2006.

[8] The development has never been built. Today, Dey Krahorm settlement has been replaced by a much smaller and slowly proceeding construction site.

[9] The research has focused on the cases of Borei Keila, Railway Rehabilitation Project, and Dey Krahorm (along with the so called White Building next to it). The work on the relocation sites is considered partial and can open future streams of research.

[10] The use of cross-subsidies from commercial developments had already been used by Phan Imex Company in Borei Keila.

[11] This absence is significant considering Borei Santepheap Pi has been developed by a private company: in Cambodia most of such private developments have almost monumental entrances, sometimes emphasised by an arch.

[12] Foucault's definition of 'dispositif' (Foucault, 1980) is used as model for understanding urban governmental mechanisms in the doctoral research mentioned above.

[13] 'Owner' is not the correct term since land title will (or might) be issued only after 5 years of stable occupations.

[14] It now appears as property of the garment

industry company "The Willbes Cambodia & Co. Ltd.'– as stated in the entrance gate. This research has not been able to verify possible linkages of this company with 7NG.

[15] The translation simply reads as 'Oudong One': three more relocation sites have been built in its close surroundings in the following years (STT, 2012).

[16] It is a custom in Cambodia to wait for 6am to start bulldozing a settlement.

[17] Mainly STT and Licadho.

[18] Habitat for Humanity for instance proposes a typology (deemed too 'Western' by many communities) that costs about 2000 USD, while in this case the cost of each single unit was about 600 USD.

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Corresponding authors: Giorgio Talocci [giorgio.talocci.11@ucl.ac.uk] is an architect and educator. He is Teaching Fellow at The Bartlett Development Planning Unit, University College London, where he is currently co-directing the MSc Building and Urban Design in Development. He is in the process of completing a PhD thesis on 'inoperative' spaces and urban 'failures' in Phnom Penh.

Camillo Boano [c.boano@ucl.ac.uk] is an architect, urbanist and educator. He is Senior Lecturer at The Bartlett Development Planning Unit, University College of London (UCL), where he directs the MSc in Building and Urban Design in Development and co-direct of the UCL Urban Laboratory.

Capturing the effect of film production:
A qualitative perspective on film tourism in Wellington, New Zealand

My Nguyen Diem Tran[1]

My Nguyen Diem Tran, 191 Le Thanh Nghi, Hoa Cuong ward, Hai Chau District, Da Nang City, Vietnam[1]

Abstract: Film tourism as one of the Special Interest Tourism types has increasingly been noted in New Zealand since the success of The Lord of The Rings trilogy. By undertaking a case study of tour operators in Wellington, this paper aims at highlighting opportunities which film production can bring to local tourism businesses (tour operators), and how they are differed at different production stages. A Qualitative method involving in-depth interviews with several tour operators, i-SITEs and Regional Tourism Organizations were employed. The case study demonstrates that film production brings various opportunities for tour operators including business establishment, product development and modification, and non-film tourism interest generation. The number of opportunities is also different at each production stage. A model that illustrates how opportunities for tour operators are created by film productions is developed as a result of this research.

Media coverage often has a significant impact on promoting a destination's image. Buchmann, Moore and Fisher (2010) state that film production places an emphasis on the supporting role of landscape and scenery to illustrate the story's elements. Many movies have contributed to making particular places become attractive tourist destinations such as New Zealand (The Lord of the Rings), or Anlwich Castle in Northumberland (Harry Potter).

The film industry in New Zealand has made a great contribution to the national economy. According to Statistics New Zealand (2011a), the number of businesses in the screen industry rose from around 2,250 in 2008 to just over 3,000 in 2010 with about 6,700 employees in total by 2010. More than 45 films and telefeatures were filmed in New Zealand between 2008 and 2011 (Statistics New Zealand, 2011b). Moreover, market research shows that 6% of visitors to New Zealand in 2004 cited The Lord of the Rings (LOTR) as being one of their main reasons for visiting (Tourism New Zealand, 2013). Wellington, for example, was chosen to film several scenes in LOTR and many other movies such as King Kong and Avatar (Film Wellington New Zealand, n.d). Wellington tourism has successfully attracted many domestic and international visitors, represented by 1.4 million commercial domestic and over 680,000 international guest nights in 2013 (Wellington Absolutely Positively, 2014). Given the impact of LOTR trilogy and the first of The Hobbit films released recently, tourism is once again expected to bloom in Wellington.

Figure 1: World premiere of The Hobbit in Wellington, November 2012 with permission by 3 News

Source: 3 News, 2013.

Film tourism is often looked at from the demand perspective, whereas the supply side has not been explored widely. This study attempts to obtain a better understanding of film tourism's supply side by examining the three following questions:

- What opportunities does film production bring to tourism businesses?
- Do these opportunities change over time at different stages of the film production?
- How do the city tour operators perceive the potential opportunities of The Hobbit and how do they prepare for it?

The research employs a case study approach, which assesses film tourism in Wellington through the relationship between film production and its opportunities for tour operators. Film production is divided into different stages and its effects on the tourism industry can be varied from one stage to another. The case also intends to assist tour operators around Wellington in realising the benefits of film production and capturing them effectively.

Film Production Stages and Tourism Opportunities

Tourism opportunities brought by film production are associated with the increase in the number of visitors due to the influence of the film. Tooke and Baker (1996) state that film can attract more tourists, both domestic and international, to visit the screened locations. Especially, international movies have affected the demand flow of tourism worldwide because they offer a great advantage to promote the filmed locations among millions of people (Saltik, Cosar & Kozak, 2011). The growth of tourism demand benefits the local businesses across various sectors such as accommodation, restaurants, tour operators and retailers. For example, statistics show that since 2004 (after LOTR films), an average of 47,000 visitors each year have visited a film location in New Zealand (Tourism New Zealand, 2013).

Beeton (2005, p.97) suggests that the effect of film tourism is a process and should be studied over time. Hudson (2011) divides film production into four main stages:

- Before the production
- During the production
- During the release of the film, and
- After the release

In the 'before the production' stage, film producers start looking for potential locations to film. Destination Marketing Organisations (DMOs) and Regional Tourism Organisations (RTOs) should be aware of potential collaborations at this stage. According to Hudson (2011), films solely used for promoting tourism due to their profit-driven purpose do not contain much meaning and hence, might not create a considerable effect. Appropriate policies to attract film producers and early marketing strategies from the local government in this stage may help generate opportunities for local tourism businesses afterward.

'During the production' is the time when the film is actually shot. This period continuously generates publicity for the location itself. According to Busby and Klug (2001), filming not only provides short-term employment and publicity for the chosen location, but also long-term tourism opportunities. Film producers can be seen as long-stay visitors which means a potential market for the local tourism businesses (Ward and O'Regan, 2009; Young and Young, 2008). By considering film crews as business travellers, the business opportunities may go mostly to the hospitality enterprises.

'During the release' covers the period from the end of the filming until the launch of the final product worldwide. In this stage, marketing partnerships and advertising campaigns are implemented to attract public attention. One significant event in this stage is the movie premiere. Film premiere contributes considerably to the advertisement of the destination, yet has not been strongly noted by either tourism organisers or professionals (Beeton, 2005). In the case of LOTR, the premiere of the final part was held in Wellington and brought a considerable profit of NZ $2 million to NZ-government (Beeton, 2005, p.182).

Finally, once the movie has finished being shown in the theatres, the production enters the 'after the release' stage. In this period, local tourism organisations and businesses get involved in marketing activities designed to convert the audiences' interest in a film into commitments for future visits, and capitalise on additional visitors brought in through the film. Ward and O'Regan (2009) argue that effects of film production on tourism often happen after the making of the production and during the initial release of the film. After the film is shown, more people are exposed to the scenes and motivated to visit the locations. Occasionally, a film that may not be a huge box office success can still be a significant boost for the tourism industry, such as the movie "Australia". Young and Young (2008) conclude that the likelihood of a tourist making a visit to a destination is only impacted to some degree by the result of the screen products. Accordingly, the echo of film production on tourism businesses after the release is different in terms of time and scope.

In general, the literature has showed that film production can generate a range of opportunities for many local businesses. These benefits have been examined mostly at the destination level. There is a need for further investigation of the opportunities for particular types of tourism businesses. The current research focuses on tour operators and examines the benefits of film production at its different stages.

Methodology

This research is a case study of The Wellington region that employs a qualitative method with in-depth interviews. Although the study was originally developed to examine tour operators, research participants were expanded to i-SITEs and RTOs. Pearce (2004, p.8) defines i-SITEs as "a clearly labelled, publicly accessible, physical space with personnel providing predominantly free of charge information to facilitate travellers' experience". The reason for including i-SITEs and RTOs in this research is primarily the limited number of tour operators in Wellington. However, it is also driven by the intention to achieve a more diverse perspective.

The structured interviewing questions were developed separately for tour operators, i-SITEs and RTOs Each interview lasted approximately 30-45 minutes on average, was digitally recorded and manually transcribed. The main source of data is seven interviews with the managers or owners of three tour operators, three i-SITES and one RTO in Wellington. The research also utilises the information from secondary data such as tourism reports, periodicals and online webinars.

Data analysis

The collected information was analysed using theme coding system by

clustering the data into the themes related to the study (Minichiello, Aroni, Timewell & Alexander, 1990). The analysis was also based on an analytical framework developed according to the research questions. In the first theme, the relationship between film production and tourism is examined. Within this theme, tourism benefits and opportunities resulting from film production are discussed. Secondly, tourism opportunities brought by film production are analysed according to different production stages. The third theme takes a more detailed approach to examine film tourism in The Wellington region in terms of scale, demand and the potential opportunities brought by The Hobbit premiere.

Limitations

There are several limitations which should be acknowledged in this research. First, it is time constraint that contributes to the difficulty of arranging interviews. Another shortcoming is the limited number of tour operators in Wellington. Some tour operators refused to participate in this research due to the perceived irrelevance when their businesses have no film tourism product. In addition, some information related to The Hobbit's premiere was purposefully not disclosed during the interviews due to its secrecy. Most of the previous film tourism studies were done after the release stage, whereas this research was conducted before that. While interviewees reveal their personal opinions on the topic, some of them either refused or were cognitively cautious talking about their preparation for The Hobbit's premiere.

Results: Film production & tourism opportunities

Results once again confirm the strong relationship between film production and tourism development, agreed by all interviewees.

Obviously, film is an amazing way to sell our country to the world. If you look at what Lord of The Rings has done for us. I think we can spend hundred thousands of dollars on brochures and printed materials might not be as effective as producing a film with New Zealand scenery in it. Also, films have a huge number of followers so if we can get more films out there, it would be incredible. (i-SITE C)
Film and tourism has a big and very

important relationship. It really puts Wellington and New Zealand on the map. (Tour Operator B)

Movies and their created stories have significant impacts on promoting the destinations to the tourism market (Riley, Baker & Van Doren, 1998; Hudson & Ritchie, 2006). They influence the potential market's decision making and encourage visitors to come. Increased demand would lead to a larger number of tourism opportunities. Croy (2011) agrees that films can make economic contributions to the destination, yet has not specified which opportunities in particular. This study identified several opportunities for the tour operators that are described as followed.

First, movies can create a call for the development of more film-related tourism businesses such as film tour operators.

I am sure someone would want to start up a business in film tourism. There are quite a few places that have been used in the films which people don't know about. So perhaps there is a potential opportunity for something like that. (i-SITE C)

The establishment of new film tour operators is important as it means a better ability to cater for the growing demand of tourists. Moreover, visitors' expectations are varied according to their availability of time, money and interest. Therefore, more tour operators mean more options for them to choose from.

In addition to creating the main theme for some tourism businesses, film production can also help develop more related products or expand the current business.

It [film tourism] created our core business, and allows us to expand. . . . If this [The Hobbit] movie is a series, we will definitely look at developing a separate tour to work on something like this. We know the opportunities are out there. It just depends on what are available. (Tour Operator A)

One film can be used to develop one or more related tour products. Accordingly, the more films there are, the more tours can be developed. Film tourism products also need to be renewed and modified to meet various

customer expectations.

Furthermore, tour operators other than those of the film tourism related businesses can also benefit from film production. Although the main motivation of film tourists is associated with the film, there are potential opportunities for the generation of other interests, as stated by Tour Operator B who does not have dedicated film tours:

I guess it brings more people to Wellington, so then it generates interest in any other tour. People come here, even if their main objective is to see the film sites, they will still want to do something else. So that means more tourism opportunities for us.

According to Macionis (2004), not all film tourists have primary motivations to visit film sites. Depending on their length of stay, they might participate in other tourism products such as scenic tours. This means a potential market for the tour operators that do not offer film tours.

In addition, the study found that the existence of film sites is very important to the tour operators. It is associated with the perceived opportunities from film production and certainly, influences their attempt to achieve the corresponding benefits. The more film locations there are, the more opportunities they can see. Some of them actually consider available film site as 'a must' for the generation of tourism opportunities. Tours of the Hobbiton Movie set that are based on a beautiful farmland transformed into The Shire in LOTR films is an example (Discover the Real Middle-Earth, n.d.). This finding suggests an implication for the public sector regarding their negotiation with the film producers in the pre-production stage. The destination may ask to be more involved in the film to have a higher chance of getting more benefits from it.

Overall, the results illustrate that film production creates different opportunities for the local tour operators including: business development, product development and modification and the generation of other tourism interests. By taking on these opportunities, the destination can enhance visitor satisfaction and improves its own image. Regional development such as building up the local capacity and infrastructure that primarily serve film

tourism should also be noted. Although the tour operators may not directly benefit from such development, it helps them achieve a better overall customer satisfaction. For example, more public transportation that connects the city central and different film sites may reduce some burden for film tour operators.

Tourism opportunities in different phases

a. Pre-production
Not many tourism opportunities were found for the tour operators in the pre-production stage. The opportunities that do exist often relate to the public sector.

I think there is not much in the pre-production stage, but there is quite a bit during the filming. (Tour Operator B)
In the pre-production stage, the Wellington region, including us, are trying to make it easy for the film producers to come by having plans and policies that encourage filming in the city. (i-SITE B)

Another observation is that the pre-production stage was often disregarded by the interviewees. When being asked about their perspective on tourism opportunities across different stages, they tended to talk more about 'during the release' and 'after the release'. Some of them did not even mention the first two stages until promoted by the researcher. The first stage is perceived more about the relationship between the public sector and film producers, where film-friendly policies come to play and potentially generate varied benefits in the future.

b. During the production
Opportunities for tour operators start appearing in this stage though not often. In fact, various opinions were found. One participant stated that there is no opportunity at all for tour operators in this stage.

I don't see much opportunity for tourism businesses in the first two stages mainly because of the secrecy. There is significant control of released information. Although the preparation is huge, it is really difficult to capture any money, or may do anything in the earlier stages. (Tour Operator A)

Some other interviewees believe that tourism opportunities do exist during the filming process, maybe not for the tour operators but other tourism businesses such as accommodation providers and restaurants.

I think they [film crews] still generate benefits for local tourism businesses in some ways. They still need to eat and do things such as entertainment. (Tour Operator B)

There are two main reasons which explain the limited benefits in this period. First, it is the confidentiality of the production. The restricted accessibility to the information leads to little attention from the public and thus, only a small influence on visitor numbers is made. Second, it is the tight schedule of the production team that gives them no time to undertake local tours. However, Tour Operator B provided a different view on this matter. Ward and O'Regan (2009) consider film producers as long-stay business travellers. As long as the film crews are at the place, they would need to have some kind of entertainment and that creates a market opportunity for the local tour operators to capture. The tour operators who have film related products do not see much opportunity during this stage, whereas the ones without any film tours do.

One thing mentioned by an RTO officer was the effect of celebrities on the destination:

Those stories of celebrities about their tourism experience here in Wellington or New Zealand can have an impact on the destination. The impacts have been both economically and socially positive. (RTO)

The actors and actresses during the filming may not have time to undertake many tourism activities or entertainment. However, their stories and experiences at the destination are often noticed by the public and can attract people to come. As Hudson and Ritchie (2006) indicate, publicity can be generated around the activities of the actors while being on the location. That is why information about where they are, what they do and what they think about the place may have an indirect impact on its tourism industry.

c. During the release
The period between the actual completion of the film and its release is the time when the destination increasingly receives public attention. As a result, out-of-town tourists start arriving more often, which leads to various opportunities discussed previously. There is a difference between the views of tour operators and i-SITEs.

The economic benefits can happen during the premiere and afterward, and that really depends on how the film is received. (Tour operator A)

The reality is that I don't believe the movie premiere is there for people to make money. On that day, there isn't gonna be many tours operated. As I said, the operators have had their tours and we don't have any filming location [of The Hobbit]. (i-SITE A)

Both groups agree that this period will draw a lot of people to the region. For tour operators, this is the opportunity for them to take advantage of the bigger marketing campaigns such as "100% Middle-earth, 100% Pure New Zealand" (Tourism New Zealand, 2012). In other words, they may not need to do a lot of advertising but still get considerable exposure. The tour operators seem to be convinced that economic benefits will be achieved through the overall promotion of the location. Differently, the i-SITEs think that tour operators would not be able to have much business during the release. Instead, the market's attention would likely be centered on the movie itself and the premiere related events.

The initial release of the film plays an important role in the future success of the film because it is when much of the excitement is generated. Ward and O'Regan (2009) suggest that effects of films on the local tourism industry occur after the completion of the production and the initial release. An increased number of tourists can be expected during the release. The publicity of the destination may reach its highest during the premiere due to a huge amount of both national and international media. The city tour operators can definitely benefit from such marketing activities.

d. After the release
Among the four stages of film production, 'after the release' seems to

be the most promising period for city tour operators. All participants agree that many benefits come after at this stage.

After the release, there is a noticeable increase of visitor numbers. For "The Hobbit", I think it will increase pretty highly for a few months around December, January and Feb. There will be people out here that are interested. They want to see the site, and so may go on some tours. However, after that it slowly flattens down. (Tour Operator B)

People are often motivated to see the film sites and know more about other relevant information such as stories from behind the scenes. The echo of the initial release still remains for a few months afterward and is then gradually lessened.

Within the post-release stage, DVD release is considered an important phase by an RTO officer. However, it does not receive much attention from other interviewees.

I think there are a lot of opportunities that we underestimate around the post-production stage and DVD release time as well. (RTO)

The DVDs bring the movie to a wider range of audiences and consequently, the potential market of film tourism is increased. Different from the box offices, DVDs often have extra features about the film making process such as the box set and the cast commentary. They provide the audiences with more information about the movie and therefore, can generate a strong interest in film tourism. Unfortunately, the importance of this phase has not been evaluated thoroughly by both the industry and the literature. A better examination of DVD release period is needed and may help discover more tourism opportunities in the last stage of film production.

Overall, the number of opportunities which film production brings to tour operators can be described through the diagram in Figure 2. It shows how the scale of tourism opportunities for tour operators as a result of film production differs from one stage to another.

Figure 2 resembles the Tourism Area Life Cycle (TALC) model by Butler (1980). The curve represents

Figure 2: Film production and opportunities for tour operators
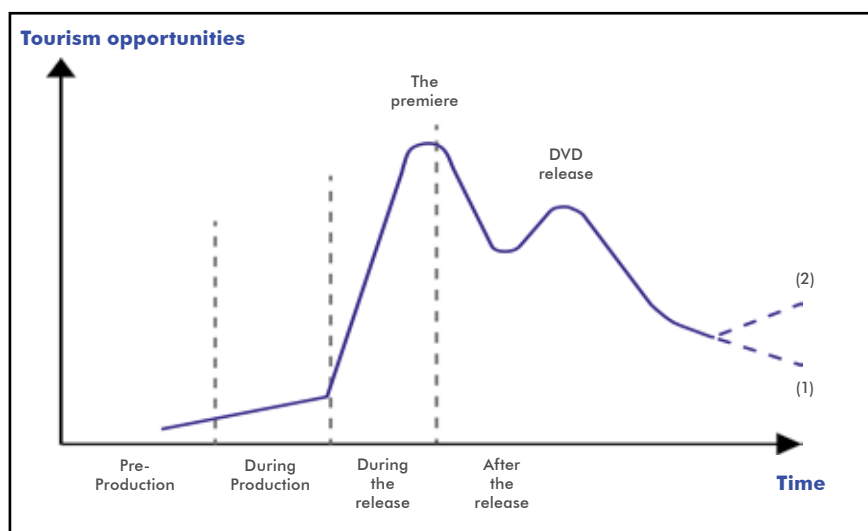
Source: Adopted from Butler (1980).

one film production. As it illustrates, in the pre-production stage, there are very few opportunities found for city tour operators. The potential opportunities start emerging, yet remain unclear during the filming period. After the completion of the film and during the initial release, they begin to increase quickly as the premiere approaches. Finally, they bloom and reach the peak right after the release, then gradually decline. That is until the DVDs release, when tourism opportunities rise up again and slowly decrease afterward. If there is no other movie, the opportunities for tour operators might progressively drop as displayed through the dotted line (1). If there are more new films, the relationship between film production and tourism could be refreshed and the opportunities might start over, illustrated by the dotted line (2).

The Hobbit stirs up Wellington

Most of the interviewees state that film tourism in Wellington is an important sector. Movies such as the LOTR trilogy have put New Zealand and Wellington on the world map. Though it has been almost 15 years since the first movie came out, tourists still come and ask for LOTR tours.

I think it's a real growing thing here, because Peter Jackson is based here, his studio is here. That means that we have the huge amount of opportunities here for films. And James Cameron just moved here… I think of going forward, there are a the huge amount of opportunities for the council and everyone as we can see from The Hobbit. (Tour Operator A)

It appeared that The Hobbit has no filming location in The Wellington region. However, this shortage is made up by the movie's world premiere. Various opinions regarding its tourism opportunities are obtained.

The premiere will bring many people to Wellington which is great. The unfortunate thing is that we have absolutely no new Hobbit locations to show passengers. (Tour Operator C)

We will be able to approach that market obviously. Hopefully, there will be thousands of people here and then, give us the opportunity to market ourselves, probably not specifically related to film tourism but something you can do while you are here. (Tour Operator B)

According to Aldermand, Benjamin and Schneider (2012), one place can be transformed into another by the effect of films. With the release of The Hobbit, the city renamed itself as Middle of Middle-Earth and spent approximately NZ $1.1 million to decorate the city for the premiere event (Huff Post, 2012). That enriched the capital's image and helped promote Wellington to the global market.

Since there is no filming location within the region, city tour operators have nothing particularly related to the movie that excites people. Also, as i-SITE A indicates in the earlier quote, people come mainly for the premiere and so, they would probably be involved in the premiere related activities instead of taking tours around the city. Nevertheless, some others perceive the premiere as a chance to approach

the potential market and try to encourage visitors to participate in their existing tours.

Conclusion

In general, the connection between film production and tourism is demonstrated through this research. Film production brings various opportunities to tour operators, and each production stage contains a different number of opportunities. Very little tourism opportunity is found in the first two stages. The argument of seeing the film production team as a potential tourism market is arguable. Tourism opportunities resulted from film production for tour operators emerge more obviously 'during the release' and increase rapidly through the 'after the release' stage. The premiere is a great film event which can increase publicity of the destination and draw in a significant number of visitors. The release of DVDs also plays an important role after the initial release. Furthermore, the relationship between film and tourism should be refreshed by more film productions to maintain the relevant positive outcomes.

Through the case of film tourism in Wellington, it is clear that the development of film-friendly policies and available film sites should be encouraged to maximise the opportunities generated by film productions. Although "The Hobbit" has no filming location in Wellington, the city was still able to capture the benefits of the movie by establishing the image of "Middle of Middle-Earth". Moreover, Alderman, Benjamin and Schneider (2012) state that local business owners in the film destination often create special film themed attractions and tours to capture the film tourism market. The idea of developing film museums in Wellington would contribute to diversify the local film related tourism products and suit the growing demand of film tourism.

Given the importance of film tourism nowadays, there is a need to have more research on this area. Some potential directions for further studies could be to focus on the early stages of film production, or the significance of DVDs release phase, or the role of celebrities. While this paper only focuses on tour operators, an examination

of other stakeholders would be very useful to obtain a better understanding of the topic. Nevertheless, future studies can build upon this research and continue to explore the relationship between film production and tourism.

Acknowledgement

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Corresponding author: My Nguyen Diem Tran [mytnd@danang.gov.vn] holds a Master degree in Tourism Management at Victoria University of Wellington, New Zealand. Her research interests include tourism and migration, tourist behaviour and film tourism. My currently works for Da Nang Department of Culture, Sports and Tourism in Vietnam.

Book Review

Land tenure, Conservation and Development in Southeast Asia, by Peter Eaton, 2012 (Paperback), 2004 (Hardback), xii + 178 pp., $48.95 (Paperback), ISBN 978-0-415-64957-5 (Paperback), Routledge Curzon Contemporary Southeast Asia Series, Abingdon, Routledge

Anna Huebner

Protected areas have received increasing political and environmental policy attention in the past decades. This is also because the conventional thought that protected areas constitute a 'cornerstone of biodiversity conservation' (CBD, 2014) has further developed to that protected areas and surrounding buffer zones also inherit imperative socio-economic values and 'productive importance'. Land tenure, conservation and development in Southeast Asia by Peter Eaton explores the connections that exist - as the title suggests - between aspects of rural 'development' (including traditional land tenure and land-use practices) and conservation, with specific focus on protected areas and surrounding environments in the Southeast Asian archipelago. The volume features four parts which are further divided into 10 chapters. The book was first published in hardback in 2005; a paperback came out in 2012.

Part I provides the reader with an overview of customary land tenure systems and territorial concepts, considering land usage, colonial/historical evolutions of landownership, intrinsic values of land and traditional conservation practices and relations to protected areas. Eaton highlights rural communities' subsistence reliance on local natural resources and wider implications on local societies while also pointing out consequences of changes in the (human and natural) environment which may have rationalized other ways of landownership and which may have adversely affected indigenous practices. Yet, he also describes an increasing recognition to integrate indigenous knowledge and practices into decision-making processes and conservation policy-making as legal pluralism in land tenure, dual economies, forest changes and population pressures on natural resources increasingly evolved as critical issues for sustainable development and conservation. Part III thus largely exemplifies the effective integration of indigenous knowledge into natural resources management based on protected area 'case studies'. The cases presented have faced similar difficulties in establishing and enforcing forest or environmental policies due to persisting resource conflicts, lack of prevention planning for natural disasters, or stakeholder complexities, politicized agendas and hierarchical structures. Part IV concludes with a critical review of attempts to promote integrated conservation and development. Education / awareness raising and development of local leadership, increased involvement of local NGOs as well as boundary-setting and registration, recognition, and the mere recording of mapping and/or documentation of customary land titles, according to Eaton, could better facilitate 'integration' and inform policy formulation and project planning.

Oddly, land tenure, conservation and development in Southeast Asia was reprinted in paperback seven years after its first publication in hardback in 2005 without any added revisions or comments on experiences and advances made during this time. This may have added valuable and timely insights into critical discussions on integrated development concepts and on new concepts or technologies which have further developed and on how these may have influenced land-use planning, sustainable practices and planning.
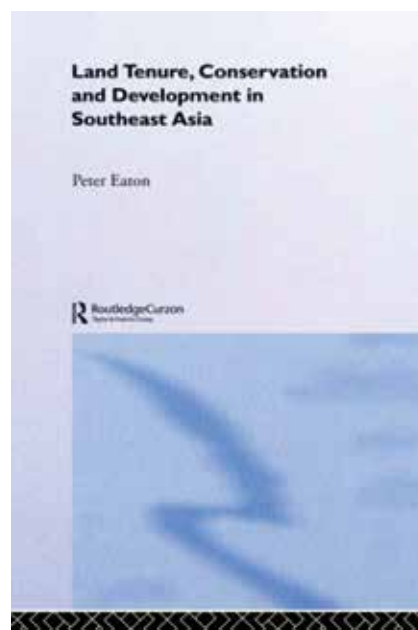
Eaton's arguments for indigenous tenure and the 'sustainable' use practices of indigenous people around protected areas into decision-making processes at relevant project and national policy-making levels are still very valid, yet his argumentative links and, partially, assumptions (case studies indicate that protected areas and development projects often assume achievement of conservation objectives when contributions to local livelihoods were made and vice versa) between land tenure and conservation are all too often being repeated and not convincingly elaborated on; connections drawn to 'development' are weak, if at all.

Yet, the volume refreshingly draws largely on the author's personal conservation and development experiences in the Southeast Asian archipelago and makes a pleasant to read book. Particularly, its first two parts provide a good overview of critical issues in customary land tenure and local sustainable practices around protected areas, especially for those new to the topic area.
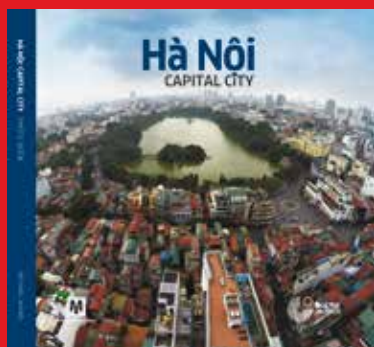
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Corresponding author: Anna Huebner [to.annah@t-online.de] completed her graduate studies in tourism at Aalborg University Copenhagen, Denmark. She currently works with the German Corporation for International Development (GIZ) in Sustainable Tourism Development and Knowledge Management in the Phong Nha - Ke Bang Region, Central Vietnam.