

第6章 既存資料

6-1 観光関連データ

1. データ種別リスト

入手済みの資料は次のとおりであるが、その他に、「Information Request」(P71)により、現在TDC等に対し資料を要求している。

また、在マレーシア日本大使館より、「資料の所在」P84のとおり、本調査にて必要と思われる各種資料の所在につき、回答を得ている。

入 手 濟 資 料

來訪外客

1. "Foreign Tourist Statistics to Peninsular Malaysia"
(1980, 1981, 1982, 1983, 1984, 1985=Jan-Apr) TDC
2. "Tourist Statistics in Brief 1983" TDC
3. Visitor Arrivals to Sabah & Sarawak (1979-1985)

海外旅行

1. Arrivals to Pacific Destinations from Malaysia 1984

國內旅行

1. "Great Value Holidays" Brochure TDC
2. Summary of Programme Performance TDC

旅行收入

1. Tourist Receipts to Peninsular Malaysia
2. Comparison of Tourism Earnings with Major Export Earnings, 1977-1985

宿 泊

1. "Supply of Rooms (1981-85)" TDC
2. "Average Occupancy Rate (1981-85)" -
3. "Distribution of Hotel Guests (1981-85)" -
4. "Distribution of Guest-Nights (1981-85)" -
5. "Average Length of Stay of Hotel Guests (1981-85)" -
6. "TRENDS 1984" Arthur Young & Co.

旅行業

1. No. of Registered Buses, Limousines, Hired Cars TDC
2. No. of Registered Tourist Guides -
3. "TDC Regulations 1982: Centrification & Control of Tourists Guides"
4. "TDC Regulations 1985: Tour Operating Business & Travel Agency Business"
5. "Directory of Registered Travel Agents 1986" -

航空

1. "Air Traveller Survey 1986" TDC
2. Flight Frequency (Sept. 1986) -

優遇作

1. Report "Special Incentives & Tax Breaks to Encourage Tourism" TDC

T D C

1. "TDC 1984 Annual Report" TDC

開発計画

1. "Desaru Tourist Complex Proposal for Privatised Integrated Development" (1986) Asahi View Int'l
2. "Report of Survey: Penang Island Structure Plan" Majlis Perbandaran Pulau Pinang
3. "Pelancungan" KEJORA

マスタープラン

1. List of National Master Plans

購 入 濟 資 料

- | | | |
|--|--------------------------------------|------|
| 1. Economic Report 1983/84 | Ministry of Finance | 1983 |
| 2. Malaysia National Budget 1986 | MDC | 1986 |
| 3. The 1986 Budget | Jabatan Penerangan | 1986 |
| 4. Malaysia's New Economic Polies | Malaysian Economic Association | 1985 |
| 5. Malaysia: Development Pattern and
and Policy | Singapore University Press | 1980 |
| 6. Development Policies and Income
Inequality in Peninsular
Malaysia | Universiti Malaya | 1986 |
| 7. Development and the Environmental
Crisis | Consumers' Association of Penang | 1982 |
| 8. Southeast Asian Affairs 1986 | Institute of Southeast Asian Studies | 1986 |
| 9. Asean Economies: Crisis &
Response | Malayan Economic Association | 1985 |
| 10. Information Malaysia 1986 | Berita Publishing | 1986 |

3) List of items sent to Tokyo JICA
S/Wミッション帰国後, TDCより送付のあったもの

- 1) Distribution of outgoing Peninsular Malaysians by points of Departures - 1980 to 1985
- 2) Foreign Tourist Statistics to Peninsular Malaysia - 1980 to 1984
- 3) Foreign Tourist Statistics To Peninsular Malaysia - January 1985 to August 1985
- 4) Supply of Rooms in Malaysia as at 31st Dec. 1979 to Dec. 1985
- 5) Occupancy Rates by Localty 1978 to 1980 (Revised)
- 6) Average Occupancy Rate of Hotel in Malaysia - 1981 to 1985
- 7) Visitors to Sarawak by Major Country of Nationality 1979
- 8) Arrivals to Pacific Destinations from Malaysia 1981 & 1984
- 9) Visitor/Tourist Receipts to Sarawak 1985
- 10) Visitor Receipts Earned by Sabah - 1980 to 1985
- 11) Visitors to Sabah by Major Country of Nationality 1979 to 1985
- 12) Tourist Arrivals to The Asean Countries (1980-1984)
- 13) Visitor Arrivals to Sabah by Country of Nationality (1979-1985)
- 14) Visitor Arrivals to Sarawak by Country of Nationality (1979-1984)
- 15) Tourists to Peninsular Malaysia by Major Market 1978 to 1984
- 16) Tourist Receipts to Peninsular Malaysia
- 17) Planned Hotel Inventory March 1986
- 18) Directory of Registered Travel Agents 1986 Malaysia
- 19) Malaysia Hotel Directory July 1986
- 20) Selamat Ke Malaysia
- 21) Road Map of Malaysia
- 22) Information Request Form Completed by TDC

(2) 本格調査での利用

既収集済みの資料から見る限り、国内旅行の動向などの基地的資料の不足、及び来訪外客の動態調査などの調査・分析資料が欠除しており、本格調査の段階では一層の資料の収集が必要とされるであろう。

6-2 関連調査報告書

(1) 報告書リスト

- ・「マレーシア観光市場調査」 (国際観光振興会)
- ・「シンガポール " "」 (同 上)
- ・「タ イ " "」 (同 上)
- ・「アセアンビーチリゾートの将来性と市場性に関する調査」 (ASEANセンター)
- ・「ASEAN 旅行市場調査」 (同 上)
- ・「第18回海外旅行者調査」 (毎日新聞社)
- ・「Study らは Porential Vacation Travel Fpom Japan
to The Asia/Pacific Area (PATA)

(2) 本格調査での利用

マレーシア人の海外旅行や、シンガポール及びタイの旅行市場を知る上で、国際観光振興会の調査資料は大いに役立つと思われる。

ASEANセンターの調査は、アセアン諸国のビーチ・リゾートを比較したもので、他のコンペティティブ・リゾートとの競合関係を知る上で貴重な資料である。

毎日新聞社の海外旅行調査は、日本人海外旅行者の動向の変化を知ることができる点において貴重である。

6-3 地図その他自然条件に関する資料

(1) 地図リスト・資料リスト

現在、TDC等に対し、別添①により、資料を請求中である。

(2) 本格調査での利用

TDC等よりの地図等資料の提供を待っていて、その利用につき検討する。

I N F O R M A T I O N R E Q U E S T

I. NATURAL CONDITIONS (1)

(1)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Topography								
Topographic maps (1:250,000 and 1:50,000)	Whole country and study areas							
Geographic Maps ()	"							
Charts of Sea Areas	Study areas							
Aerial Photos	Study areas							
Vegetation Maps (Characteristic species)	Whole country							
Wildlife Maps ()	Whole country							
Land Use								
Land use maps (1:50,000)	Study areas							
Town planning maps (1:50,000)	Study areas							
Land use guidelines	Study areas							
Building control guidelines	Study areas							
Design guidelines	Study areas							
Land ownership (Land availability)	Study areas							
Laws and regulations of land use and development	Whole country							

I. NATURAL CONDITIONS (2)

(2)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Climate	Whole country and study areas							
Temperature/Humidity (Monthly variations)	Whole country and study areas							
Periods, durations and intensities of rainfalls	Whole country and study areas							
Periods, durations and intensities of monsoons	Whole country and study areas							
Mean duration of sunshine	Whole country and study areas							
Ocenography								
Tidal current maps and tide levels	Whole country and study areas							
Wave statistics	Whole country and study areas							
Water quality	Whole country and study areas							
Natural Resources								
Water resources (lakes and rivers, waterfalls)	Whole country and study areas							
Mountain resources (highlands, hills and valleys)	Whole country and study areas							

II. SOCIO-ECONOMIC CONDITIONS (1)

(3)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Administration								
Administrative boundary maps (National and local government)	Study areas							
Hierarchy of main towns and resort centres (Decision-making authorities)	Study areas							
Population								
Population, land area and population density	Whole country and study areas							
Main economic activities	Whole country and study areas							
Population by age and by sex	Whole country and study areas							
Inter-regional migration/ emigration	Whole country and study areas							
Number of household	Whole country and study areas							
Number of workers by industrial groups	Whole country and study areas							

II. SOCIO-ECONOMIC CONDITIONS (2)

(4)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Economy								
Gross domestic product	Whole country and study areas							
Gross product by industrial groups	Whole country and study areas							
Average family income and expenditures	Whole country and study areas							
Distribution of families by income class	Whole country and study areas							
Wholesale price index and consumer price index	Whole country and study areas							
Leisure time trends and annual paid holidays	Whole country and study areas							
Expenditures and receipts								
Balance of tourist receipts of expenditures (1970-85)			Yes		TDC			
Employment								
Employment generated by tourism (on Hotels & Travel Trade only)			Yes	Research of Training Division	TDC			
Government revenues								
Government revenues from tourism (Taxes, rates, duties, etc.)								

II. SOCIO-ECONOMIC CONDITIONS (3)

(5)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
<p>Transportation</p> <p>Networks of railway, road, air water</p> <p>Time-table of railway, air, water and bus services</p> <p>Passenger-kilometers of railway, road, air and water transport</p> <p>Facilities, capacities and operations conditions;</p> <p>Railways</p> <p>Roads</p> <p>Ports</p> <p>Airports (Length of Runways)</p> <p>Ferries</p> <p>Car ownership</p>	<p>Whole country and study areas</p> <p>Whole country and study areas</p> <p>Whole country and study areas</p>							
<p>Protection</p> <p>Environmental protection and preservation of natural beauty (Policies, authorities concerned)</p>	<p>Whole country and study areas</p>							

III. REGIONAL DEVELOPMENT (1)

(6)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Present situation								
Telecommunication networks (Availability, Reliability, Quality, Total Capacity)	Whole country and study areas							
Energy supply Electricity Gas	Whole country and study areas							
Water supply	Study areas							
Sewerage and refuse disposal (Means of control, standards, effectiveness)	Study areas							
Park zones (green zones)	Study areas							
Activities polluting air and water	Study areas							
Removal of industrial dereliction	Study areas							
Laws, regulations and Guide- lines of regional development	Whole country and study areas							

III. REGIONAL DEVELOPMENT (2)

(7)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATA	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Future plans								
Future development projects of: transportation facilities telecommunications energy supply water supply	Whole country and study areas							
Airport expansion and construction plans	Whole country and study areas							
Sewerage and refuse disposal projects	Study areas							
Expansion and construction of parks and green zones	Study areas							
Construction and operation cost								
Publication of material price at present	Study areas							
Publication of construction equipment price at present	Study areas							
Publication of minimum wages at present	Study areas							

IV. TOURISM CONDITIONS (1)

(8)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Resources			Yes	Marketing Division	TDC		As Requested & as what is available.	English French Japanese Arabic German & Others
Distribution map of tourist resources and facilities (Visitor attractions, unique monuments, spectacular features, dramatic landscapes)	Whole country and study areas							
Accessibility of main tourist or recreation sites	Whole country and study areas							
Capacities of main tourist or recreational sites	Whole country and study areas							
History and legends	Study areas							
Traditions	Study areas							
Cyclical attractions (festivals, carnivals, etc.)	Study areas							
Fishing/hunting areas	Study areas							
Recreation facilities	Study areas							
Catering facilities	Study areas							
Sports facilities	Study areas							
Manpower available for tourism services and training facilities	Whole country and study areas							

IV. TOURISM CONDITIONS (2)

(9)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
(Hoteliers)	No. of hotels (1979-86) Capacities (1970-85) Room rates (1970-85) Occupancy rates (1978-85) List of hotels Projected supply and its occupancy rates (1985-2000)		Yes - - Yes Yes - -	Library Library " } MOT	TDC TDC TDC		Supply of Rooms in Malaysia. Occupancy Rates of Hotels Hotel Directory	English English "
(Air carriers, Bus, railway companies)	List Main routes Fares (Normal and promotional) Policies Turnover (1970-85) No. of passengers (1970-85) Passenger-kilometers (1970-85)							
(Tour operators, Travel agents, ground handlers)	Numbers (1985) List No. of staff and offices (1985) Turnover (1970-85)		Yes " " -	Enforcement Division " "	TDC " " "		As Requested	English
	No. of tourist guides (1985) Distribution by location and language Guide fee (1970-85)		Yes - -	Enforcement Division	TDC		Registered Tourists in Malaysia	English

IV. TOURISM CONDITIONS (3)

(10)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATA	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Tourist Product (Foreign arrivals 1970-85)	No. of foreign arrivals		Yes	Library	TDC		Tourists Arrival Statistics	English
	By country of origin		"	"	"		"	"
	By main motivations		"	"	"		"	"
	By range of expenditure		"	"	"		"	"
	By type of travel		"	"	"		"	"
	By main destinations		-	"	"		"	"
	By main facilities used		Yes	"	"		"	"
	By means of transport		"	"	"		"	"
	By duration of stay		"	"	"		"	"
	Projected no. of foreign arrivals (1985-2000)		-					
(Domestic travellers 1970-85)	No. of domestic travellers		No	(Some information is available, please contact Research and Training Officer)				
	By main motivations							
	By range of expenditure							
(Malaysian travellers overseas 1970-85)	No. of Malaysian travellers overseas		Yes	Research & Training Division	TDC		As Requested and due to availability.	English
	By main motivation							
	By range of expenditure							
	By type of travel							
	By main destinations							
	By main facilities used							
	By means of transport							
Projected no. of Malaysian travellers overseas (1985-2000)								

IV. TOURISM CONDITIONS (4)

(11)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Marketing								
Marketing and promotion of tourism in Malaysia	At home and abroad							
Government tourism policies	At national and regional levels							
TDC priority projects (1970-85)								
TDC budgets and resources (1970-85)								
Market information								
Surveys/assessments of Singapore, Thailand and Japanese markets								
Analyses of competitive resorts in other countries								
Authorities in charge of tourism development (Development organizations)	Whole country and study areas							
Laws, regulations and guidelines of tourist development	Whole country and study areas							
Projects of tourism and recreational development	Whole country and study areas							

IV. TOURISM CONDITIONS (5)

(12)

I T E M	SCALE	TIME REQUIRED	AVAILABILITY		AUTHORITY	SUBMIT DATE	TITLE OF DATA	LANGUAGE
			YES/NO	PLACE OF DATA				
Government policies of tourism development (Administration, budget, subsidies, etc.)	Whole country and							
Incentives to the private sector	Whole country and study areas							
List of major constructors (Name, address, capital)	Whole country and study areas							
List of major consultant companies for tourism development (Name, address, no. of staff.)	Whole country and study areas							

Study Areas

1. Kuala Lumpur
2. Johor Bahru
3. Desaru
4. Tioman Island
5. Kuantan
6. Cherating
7. Kuala Terengganu
8. Kota Bharu
9. Langkawi
10. Penang Island
11. Kota Kinabalu
12. Kuching
13. Pangkor Island
14. Malacca
15. Tanjung Jara
16. Tanjung Aru
17. Damai Beach (Sarawak)

資料の所在

1. "Tanjung Rhu Beach Resort Development Plan & Preliminary Engineering
-1981"
..... TDC
2. "Economic Report 1984/85 and 1985/86"
..... Treasury (Economic Division)
3. "Malaysia Visitor Development Programme"
..... TDC
4. "Domestic Tourism Survey"
..... TDC
5. Reports of the Cabinet Committee on Tourism
..... not available
6. "New Investment Fund"
..... EPU
7. Information about "Tourist Police Unit"
..... KDN
8. Information about "Prompt Resort Development Sdn. Bhd"
..... Negotiable
9. Information about Expenditures and Routes of Foreign Visitors to Malaysia
..... TDC
10. Budgets and No. of Staff of TDC 1980-1985
..... TDC
11. Information about International Airports and Future Development Plans
..... EPU (Infrastructure Section)
12. Information about Railway Networks, incl. KTM Rail Guide
..... KTM

13. Information about Highway Networks

..... Malaysian Highway Authority

14. Information about Sea Currents, Wind, Temperature and Monsoon

..... easily available

第7章 本格調査の概要

7-1 本格調査の目的及び概要

本調査実施の目的は、マレーシア国の観光産業を促進、外国人観光客を誘地し、これによって国際収支の改善を図り、また、これをテコに雇用の促進、ひいては、地域経済の活性化を図ることにある。従って、ここでいう観光開発とは、第一に、海外からの観光客を対象としたものである。具体的には、日本、アジア・太平洋地域（特にアセアン、香港、台湾、ニュージーランド、オーストラリア）北米、ヨーロッパ及びイギリスが主要に市場と想定される。

本調査は、2フェーズに分けられ、フェーズIでは、ガイドラインの作成と観光開発可能性のある地域（複数）の選定を行う。

ガイドラインは、全国レベル及び個別プロジェクトレベルにおける観光開発計画策定に資することを目的とするものであり、具体的には、観光開発の方法論の検討及び、開発の方針、規模の検討が、その主要な柱となる。

フェーズの調査の流れは、図-1に示す通りであるが、ここで見られるように、ガイドラインの作成（方法論に関する部分）と、開発可能性のある地域（複数）の選定（どの地域を、どのように開発すべきかという、実戦部分）は、理論サイドと、実地サイドとして、平行に行われるものと考えられる。

尚、ガイドラインは、単に方法論のみならず開発の具体的な方針、規模等も含め、フェーズIにおける調査内容全体を取りまとめたものとする。

フェーズIにおいては第1に、観光政策、既存調査の見直しを行う。ここにおいては、観光開発を行っていく上で、整備の必要な行政的諸制度につき、抜本的検討を加えることとする。特に、今後の開発には海外からの投資が必要であるとの観点から、このような際の行政面における投資環境の整備という点に重点をおく必要がある。

第2に、マレーシアの観光資源の評価及び、観光開発のポテンシャルの検討を行う。これにあたっては、始めに評価、検討の方法論につき検討を行った上で、具体的な観光地（及び潜在的観光地）についての評価を行うものとする。この段階では、観光地を評価ののち類型化するまでを行う。

第3に、重要予測及び動向分析に関する調査を行う。ここにおいても、調査は方法論的側面及び、実際の需要予測、動向分析の実施という二面より成る。すなわち、一般的需要予測方法及び、動向分析手法に関する検討を行った後、日本、アジア、太平洋地域、北米、ヨーロッパ及びイギリスからマレーシアへの観光需要、動向分析を実施する。この調査の実施は、マレーシア国内と同時に、日本国内においても行うものとする。その他の国に関しては、可能な範囲で資料収集を行うことにより、対応するものとする。

需要予測においては、主たる競争国と考えられる、アセアン諸国におけるマレーシアの位置付けを明確にする必要がある。すなわち、アセアン全体への観光需要のうち、どの部分がマレーシアに来る

Phase I

(a) Preparation of guidelines

(b) Identification of potential areas

1. Study on general/policy prospect and existent study.
(i) To review the policies for tourism and regional development.
(ii) To review the related studies completed in the past.

2. Study/evaluation of status-quo and potentiality of tourism.
(iii) To analyse the inadequacy and shortcomings which form the current constraints
(iv) To lay down criteria upon which existing and potential resources for tourism development will be classified and/or evaluated in the light of the development level of the area concerned.

The classification and evaluation of potential areas.

3. Study on method of demand forecast and its attribute
(v) To develop means for forecasting the current and future demand on the resources.
(vi) To develop means for forecasting the present and future preference and pattern of Japanese tourists.

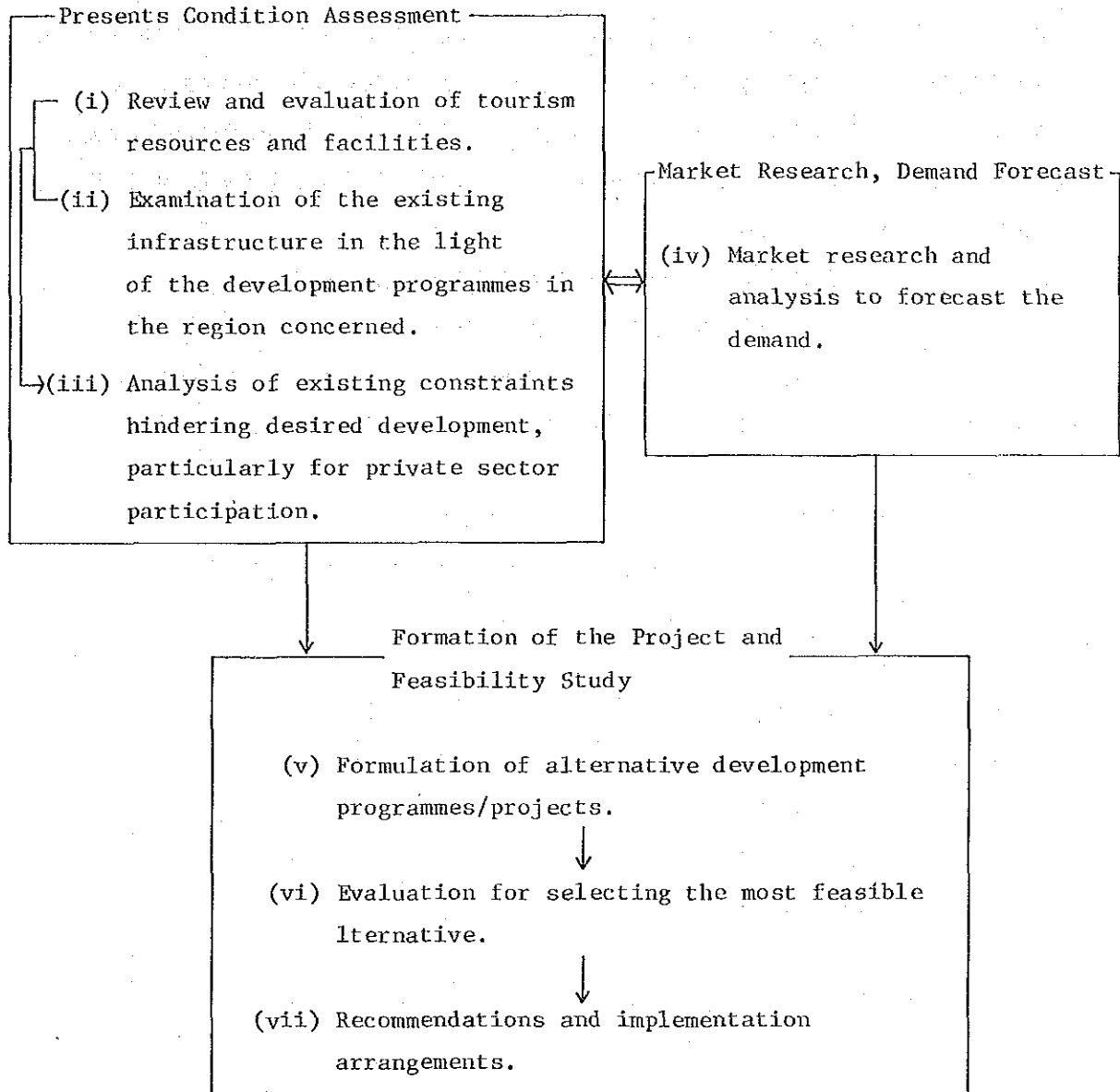
4. Study on methodology of selection and formulation of individual programme.
(vii) To develop a method by which the priority order will be determined upon for the tourism development of Japanese tourists in Malaysia.
(viii) To formulate a method to plan an individual action programme/project for development as mentioned in (vii) above.

Determining and establishing priority for development of the selected areas, taking into account the current and future demand.

4. Study or methodology of selection and formulation of individual programme

Area selection

Phase II



か、またマレーシアに来る要因はなにであるかを数量的に明らかにする必要がある。このことは、マレーシアは国際観光地として、どの部分が欠けているか、どの部分を整備すればマレーシアへの観光客が増えるか、を明らかにすることになろう。

動向分析においては、第一に、日本人を対象とした観光パターン（目的、旅行形態、旅行期間、旅行シーズン、支出パターン）及び、その変化、目的地を選定する要因の分析を行う。これらの調査結果は、日本人の観光におけるマレーシア観光を位置付けるとともに、アセアンへ行く日本人観光客の中で、マレーシアへ行く観光客はどのような部分を占めるかを明らかにする。これに引き続いて日本以外の国を対象として、動向分析を実施するとした場合の一般的方法について検討を加えておく。

第4に、フェーズⅠの最終段階として、日本人観光客を対象とした観光開発における開発優先度決定方法の開発及び個別開発計画策定指針の作成を行う。これは、現状及び開発可能性の評価結果、及び、需要予測結果を開発という観点に立ってむすびつける作業と考えられる。

この段階業、観光開発可能性のある地域（複数）の選定及び、選定されて地域のエバリュエーション、プライオリティ付けという実施的作業によって補完される。

尚、フェーズⅠにおいては次に行うフェーズⅠ対象地域を特定するまでを行うものとする。右地域の特定にあたっては、フェーズⅠ全体の調査結果及びマレーシア側の意向を十分に反映するものとする。

フェーズⅡは、上で特定された地域を対象とした、観光開発計画の策定及びフィジビリティ調査の実施である。これについては、対象地域が未定であるため、ここでは、その調査項目についてのみ以下に示す。

- 1) 観光資源及び既存施設の評価
- 2) 基盤整備状況の検討
- 3) 開発障害要因の分析
- 4) 需要予測及び市場調査
- 5) 観光開発計画代替案の設定
- 6) 代替案の評価と最適案の選定
- 7) 開発実施のための提言

尚、フェーズⅡの調査フローは図-2の通り。

7-2 調査スケジュール

調査全体の項目別フローは図-3の様に想定され、またS/Wにおける調査スケジュールは、図-4に示す通りである。

尚、図-2における、(a) Preparation of Guidelines は、マレーシア観光開発の総論、方法論的検討であり、(b) Identification of Potential Areas は具体的観光地についての調査を表す。

マレーシアの國境越境合則発計画調査

年度	61			62										63									
	月	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	
調査項目		1c/R							P/R			1L/R1						1L/R2					F/R
レポート		▼	■						▼			▼						▼					▼
Phase I																							
1. 事前作業																							
2. 政策・地域計画 既存調査検討																							
3. 現状及び潜在性 調査																							
4. 市場調査																							
5. 国内作業																							
6. P/R 説明・協議																							
7. 個別計画策定法 調査 (1L/R)																							
Phase II																							
8. 現状及び潜在性調 査																							
9. 需要予測																							
10. 1L/R2説明 協議																							
11. 特定計画策定																							
12. D/F 説明・協議																							
13. f/R 作成																							

TENTATIVE SCHEDULE OF THE STUDY

Year and Month Item	1987						1988															
	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	
Reports		Ic/R						P/R														
Phase I																						
(a) Preparation of guidelines																						
(b) Identification of potential areas																						
Phase II																						
Feasibility study on the tourism development in the area identified.																						

 in Malaysia
  in Japan

Ic/R Inception Report P/R Progress Report It/R1 Interim Report 1 It/R2 Interim Report 2

D/F Draft Final Report F/R Final Report



7-3 本格調査の分野構成

本格調査の実施にあたっては、下記の分野をカバーする必要がある。

- 総括
- 観光振興計画
- 観光行政
- 観光施設計画
- 重要予測
- 市場調査
- 財務・事業計画
- 地域計画
- 観光基盤調査
- 交通計画
- 経済社会インパクト評価

付 録

1-1 コンタクトミッションの構成と日程

構 成

新井 俊一	総 括・運輸省国際運輸・観光局国際協力課課長
黒田 憲司	協力政策・外務省経済協力局開発協力課
永里 恒昭	施設計画・運輸省国際運輸・観光局観光部振興課レクリエーション計画室専門官
柴田 聡	輸送計画・運輸省国際運輸・観光局観光部企画課国際業務室国際協力係長
土屋 渉	資源計画・国際観光振興会事業第一部調査役
福永 昭	観光振興計画・国際観光振興会企画調査部
三好 皓一	業務調整・国際協力事業団社会開発協力部開発調査第一課課長代理

日 順	月 日	曜 日	行 程	調 査 内 容
1	9/21	日	東京 →クアラルンプール (JL719・MH616)	
2	22	月	クアラルンプール	大使館, JICA事務所打合せ, EPU協議
3	23	火	"	TDC協議, JICA事務所打合せ
4	24	水	クアラルンプール →ジョホールバル (MH381) (車) →テサル	ジョホール州SEPU/TDC意見聴取 現地踏査 KEJORA意見聴取
5	25	木	テサル →メルシ →ティオマン (車) (水中翼船)	ホテル関係者意見聴取, 現地踏査
6	26	金	ティオマン →メルシ →クアンタン (水中翼船) (車)	現地踏査
7	27	土		パハン州SEPU/LKN意見聴取

I 班 (永里, 福永, 三好団員)

7	27	土	クアンタン →チェライ (車)	ホテル関係者意見聴取 (地中海クラブ)
8	28	日	チェライ →クアラトレンガヌ (車)	トレンガヌ州 SEPU/TDC/SEDC 意見聴取
9	29	月	クアラトレンガヌ →コタバル (車)	現地踏査 ケランタン州 SEPU/SEDC 意見聴取
10	30	火	コタバル →アロスター →アロスター MH311 (フェリー)	ケダ州 SEPU意見聴取 ランカウイ島現地踏査
11	10/1	水	ランカウイ →ペナン (フェリー, 車)	
12	2	木	ペナン →クアラルンプール	ペナン PDC/TDC意見聴取 現地踏査

団長及びⅡ班（黒田，柴田，土屋団員）

7	27	土	クワンタン (MH157) →クアラ Lumpur	
8	28	日	団長帰国(CX720, CX500) クアラ Lumpur →クワン MH507	現地踏査
9	29	月		サラワク州SEPU/TDC意見聴取
10	30	火	クワン MH069 →コタキナバル	サバ州SEPU/TDC意見聴取
11	10/1	水	コタキナバル	キナバル国立公園現地踏査
12	2	木	コタキナバル →クアラ Lumpur (MH672)	

13	3	金	クアラ Lumpur	EPU/TDC協議 記者会見
14	4	土	クアラ Lumpur MH683 JL710	大使館, JICA事務所報告
15	5	日	→ 東京	

1-2 S/Wミッションの構成と日程

構成

新井 俊一 付録1-1（コンタクトミッションの構成と日程）の通り。
 黒田 憲司 〃
 柴田 聡 〃
 原 智佐 業務調整・国際協力事業団社会開発協力部開発調査第一課

日程

日 順	月 日	曜 日	調 査 内 容	
			午 前	午 後
1	11/27	水	東京	→クアラ Lumpur JL 721
2	/27	木	EPUにて, S/Wにつき協議	ゲンティン・ハイランド現地踏査 団内打合せ
3	/28	金	TDCにて, 便宜供与につき協議 EPUにて, M/Mにつき協議	団内打合せ
4	/29	土	EPUにて, S/W及びM/M署名	パンコール島現地踏査
5	/30	日	パンコール島現地踏査	
6	12/1	月	JICA事務所報告, 打合せ	大使館報告 クアラ Lumpur →シンガ ポール MH 617
7	/2	火	チャンギ・ポイント周辺現地踏査	JICA事務所・大使館報告 シンガポール →東 京 JL 710

2. 関係機関及び面会者

Economic Planning Unit

Gan Khuan Poh	Director of Industry Section
Wong Peg Har	External Assistance Section
Harvinder Kaur	Industry Section
Ong Yew Chee	Industry Section

Tourist Development Corporation Malaysia

Kamarudin Ahmad	Deputy Director-General
Encik Zamhot Hassan	Director, Development & Project Management Division
Sharin Aminullah	Tourist Officer
K.H. Chear	Assistant Director

Ministry of Trade and Industry

Encik Jamros Mohd Noor

Tourist Development Corporation/Johore

Ahmad Kosnan	Senior Tourist Officer
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The Johore Tourist Association

Abdul Halim Bin Shukor

Desaru View Hotel

Hiroaki Kowada	Director & General Manager
Y. Kobayashi	General Manager
Ted. T. Nakazato	Asst. General Manager

Merlin Inn Resort Desaru

Anuar Bin Ahmad	Asst. Manager
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Tioman Island Resort Sdn. Bhd.

Goh Lian Pung	Management Executive
Hamal A. Rahman	Assistant Manager

Pahang State Development Corporation

Dato Long Ahmad	Managing Director
Malek Bin Ismail	Deputy General Manager
Yusuf Bin Zakaria	Deputy Manager
Raihana Bt Khudri	Public Relation Officer

Hyatt Kuantan Malaysia

Kamel Zayati	General Manager
Beatrice Lee	Public Relations Manager
Kazuyo Nakamura	Japanese Tour Co-ordinator

Terengganu State Economic Development Corporation

Mohd Zaki Haji Yusoff	Manager
Tengku Mohamad T. Jalil	Senior Asst. Manager

Tourist Development Corporation/Terengganu

Wan Zawawi Mohammed	Senior Tourist Officer
Lim Kien Yee	Tourist Officer

Pantai Primula Hotel

Tg. Maimun Tg. Hitam	Public Relations Executive
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Kelantan State Economic Development Corporation

Jaafar A. Bakar	General Manager
Noorzam Binti Haron	Asst. Tourism Officer

Kelantan State Economic Planning Unit

Tengku Shahbuddin Maasum Deputy Director

Kedah State Economic Planning Unit

Moho Puat B. Moho Ali Asst. Director

Langkawi Island Resort

Ahmad Rashidi Ahmad Din General Manager

Mohammad Bokhari Bin Shariff

Tourist Development Corporation/Penang

Shuib B. Hussain Manager

Penang Development Corporation

Cheah Lee Kooi Public Relations Officer

Che Puteh Daud Public Relations Officer

Rasa Sayang Hotel

T. S. Cheah Sales Executive

Tourist Development Corporation/Sarawak

Idris Osman Senior Tourist Officer

Tourist Development Corporation/Sabah

Abd. Halim Mohd Anuar Senior Tourist Officer

Susan Jayasuria Board Member

Sabah Tourism Promotion Corporation

Timothy M. Pianzin General Manager

Discovery Tours

Beatrice Mei Wang International Relations

Tanjung Aru Beach Hotel

Madeline Regis Sales & Marketing Manager

Chai Moi Len Public Relations Manager

Shinichi Tajima Guest Relations Manager

Pan Pacific Resort Pangkor Philip Leung

General Manager

Steve Teh

Front Office Manager

在マレーシア日本大使館

橋本	公使
小山田	書記官
大西	書記官

JICAマレーシア事務所

松崎孝雄	所長
岩佐光男	次長
林典伸	次長
香川敬三	所員

在シンガポール日本大使館

村山	公使
中崎	書記官

JICAシンガポール事務所

田中洋	所長
米田博	所員

3. 会議議事録

1. 日 時：1986年9月22日（月） 15：45～16：45

場 所：EPU会議室

出席者：（マレーシア側） Dr. GAN 他4人

（日本側） 新井団長及び団員6人，JICA2人，大使館1人

議事内容：

(イ) マレーシア側は当方提案について基本的に了解したが、次の3点につき、希望が述べられた。

① 日本におけるカウンターパート研修の実施（リサーチ部門，マーケティング部門及び開発部門より各1名の受け入れ）

② 日本のみならず他の国の市場についてもマーケット・リサーチを実施する。（Phase II - iv 関係）

③ 調査内容にマレーシアの観光開発に対する民間の参加促進等について分析を加える。

(ロ) 続いて三好団員より，コンタクト・ミッション→S/Wミッション→本格調査という手順につき説明があり，また調査期間が18カ月程度となっていることについて了解を得た。

(ハ) 新井団長より，マレーシア側の3点の要望に対し，①についてはS/Wの際に正式に検討する，②については，TDC側より資料の提供を受けることが出来れば，それらの国の傾向分析を行う，③については，①マレーシア政府の民間に与えるインセンティブ施策の分析，及び②日本の民間投資を行う際の問題点の分析も行う，と回答し マレーシア側の了解を得た。

(ニ) また，今回の調査旅行にTDC職員が動向すること，各地のコンタクト・リストの提供などについても合意された。

2. 日 時：1986年9月23日（火） 15：00～17：30

場 所：TDC会議室

出席者：（TDC側） Mr. Kamarudin Ahmad (TDC副総裁) 他3人

（日本側） 新井団長及び団員6人，大使館2人，JICA2人

議事内容：

(イ) 両者あいさつの後，カマルディン氏より，本件については“Market Aspect”を協調したいとの前置きがあり，また，当方の用意したドラフト・メモランダムに対し，下記の修正を加えたい旨，要望があった。

① 全国マスタープランの作成をTDCは希望しているが，ドラフト・メモランダムではこの点が抜けているので考慮願いたい。

② F/S対象地域を1カ所ではなく，2～3カ所にて実施願いたい。

- ③ 調査対象を日本市場のみではなく、より広い範囲で行ってほしい。
 - ④ プライベート・セクターの参加について特に検討してほしい。
 - ⑤ 若干の字句修正
- (p) 以上に対し、日本側は打合せの後、次のとおり回答した。
- ① については、費用及び期間等から勘案し、応じることが困難であるという年次協議の回答に沿って説明し、ガイドラインと言えども全体を検討するものであり、できるだけ早くプロジェクトの実現を図るとの方針をとった、との点でTDC側の了解を得た。
 - ② については、同じく、年次協議の線に沿い対象地域は1カ所とする旨、回答し、了解を得た。
 - ③ については、日本を含む他の国からの観光客についても、統計的分析を行うことは当然であるが、我方の趣旨は、日本人の旅行性向を勘案することにより、より具体的対応が可能となることから、その点を加味した分析を行い、それは日本人客誘致に資することになる旨、説明し、日本人については特に詳細に行うことで了解を得た。
 - ④ Phase Iの(i)及び(viii)、IIの(vii)において必要な検討を加える。また、④マレーシア政府の民間にあたるインセンティブ施策の分析及び、⑤日本の民間投資を行う際の問題点の分析も行うと回答し、了解を得た。
 - ⑤ については先方の希望に沿い、修正した。
- (h) 現地踏査のコンタクト先については、追って通知する旨、連絡があった。
- (i) 資料については、当方の帰国までに、TDCが用意することで了解を得た。
- (k) 日本におけるカウンターパート研修については、S/Wミッションにて検討することで了解を得た。

3. 日 時：1986年11月27日 9：00～

場 所：EPU会議室

出席者：別紙出席者リストの通り

議事内容：

S/Wに関する質疑及び回答。

・タイトルについて

マレーシア側 (Dr. Gan) より、タイトルより "Comprehensive" を取り除きたい、との希望がだされた。(理由としては、"Comprehensive" とした場合、全国13州各々についてプランを作るように理解されるが、実際にはそうではないから。)

これについて、当方より、ガイドラインは、観光開発のゴール、方向、方法論を含む "Comprehensive" なものであるため、これを取り除く必要はないと考える旨述べ、さらにタイトルは、コンタクトミッション時に了承されたものであり、これを変更することは困難である旨

のべた。マレーシア側は、変更が困難であれば、現在のタイトルで合意するが、マレーシアにおいては、各州の独自性が強く、それぞれが観光開発のプランを必要としていることを理解してほしい、とのことであった。

(実施段階になって、各州用のプロジェクトがないと困る、というのは、マレーシアの国内的な問題であるということに一致)

・フェーズ I (3) Preparation of guide lineについて

Selected Countries という表現は一般的(あいまい)であるので、Specify したい、との要望がマレーシア側より出された。具体的には、アジア・太平洋地域、米国、英国、とのことであった。

これについては、ミニッツで言及することで合意した。

ただし、これを行うには、資料(特に Arrival 及び Departure に関するもの)が必要になり、また、資料によつて統計が違うので、EPUとして統一的なものを出してほしいこと、その他、関連の情報は当方に教えてほしいこと等を確認した。

・フェーズ I (b) Identification of Potential Areas の本文中に Within the context of Countries Cultural Value を入れてほしい、との要望がマレーシア側より出された。

(ここで、例として、カジノはマレーシアの伝統的文化とはいえない、との発言あり。)

これに対し、当方より文化的側面は他の側面とともに、当然考察されるものであるが、ミニッツに記載することで合意した。

・フェーズ II (v) Formulation of Project について

マレーシア側は、Cultural and Natural Resources 及び Non Accommodation Facility (公園文化施設等)に重点を置いてほしいこと。

ホテル(特に高級ホテル)は過剰なのでホテル面ばかり強調しないでほしいことを述べた。これについては、考慮すること及びこれをミニッツに記載することで合意した。

・調査スケジュールについて

当方より、調査スケジュールにつき、説明を行った後、先方より調査終了までの期間が長すぎる。具体的には、現行5カ年計画は1990年までであるので、現スケジュールでは調査終了後、18カ月しかなく、同計画をのがしてしまふ。I t/Rを3月に出すようにしてほしいとの要望が出された。

これに対し、当方は、技術的には18カ月間程度必要であること、また、4・5月の予算の空白期間の取扱については、調査団の権限外であるが、要望は関係期間に伝えることで合意した。

・カウンターパートについて

マレーシア側は、カウンターパートとして Research 分野(Director)1名、Marketing 分野1名をフルタイムでアサインする。これに関し、調査の継続性という観点から、日本における作業にも参加したい。との希望であった。これについては、C/P予算の可能な範囲で対応する

こととした。

・ファイナルレポート部数について

マレイシア島よりF/Rは全国13州の関係機関にも配るので、100部としてほしいとの希望が出され、これを了承した。

4. 日 時：1986年11月28日 8：30～10：00

場 所：TDC会議室

出席者：(TDC側) Mr. ZAMHOT

(日本側) 新井, 黒田, 柴田, 原 (以上調査団)

大西 (大使館)

香川 (JICA事務所)

議事内容：

マレイシア側の Undertaking の具体的内容について

・オフィススペースについて

作業室 (10人用) は、TDC内に用意する。尚、使用時間は、8：30～19：00 (TDCの就業時間は16：45までであるので、それ以降は延長ということになる。)

・補助要員について

TDCは、調査補助要員としてクラーク1名、タイピスト (及びタイプライター) フルタイムで1名、忙しい時期に追加1名、及びメッセンジャーボーイ1名につき予算要求を行う。

・事務機器等について

当方は、調査用事務機器として、現在必要と考えられるものとして、電話 (内線及び外線)、コピーマシン、ワープロ機能付きパソコン、ファクシミリを要求した。これに対し、TDCは予算要求を行う。

補助要員及び事務機器については、今後TDCが予算要求を行うものであり、現時点でどこまでを措置できるかコミットできないとのことであった。(ZAMHOT氏の言によれば、70%がベストとのことであった。)

・交通手段について

クアラルンプールにおける交通手段については調査団にて手当する旨、当方より述べたが、マレイシア側でも、車一台を予算要求するとのことであった。地方での交通手段の手配 (東海岸における船のチャーター、タマンネガラにおけるヘリコプターのチャーター) について当方より要求し、TDC側はこれを行うことで合意した。ただし、これにかかる費用については、日本側で手当する。

・地方における作業室の確保について

作業期間を通じ、クアラルンプール以外に作業室を必要とする場合に、この確保が可能か質

問したところ、準備すべく努力する旨の回答であったが、現時点では具体的にどこで作業室が必要となるか、はっきりしないため、確保の有無については、不明である。

・カウンターパートの旅費について

カウンターパートが調査団と一緒に地方へ旅行する必要がある場合、カウンターパートの旅費は、マレーシア側にて支給される旨、確認した。

・(本格調査開始までの)資料請求について

当方より、本格調査にあたって、当面必要と考えられる資料に関するリスト(詳細参照)を提出、記入を依頼し、先方はこれを記入次第、当方に送付する旨、了承した。また、同リスト中、本格調査開始前に入手可能なものについては、これを送付するとのことであった。

TERMS OF REFERENCE FOR A COMPREHENSIVE
NATIONAL TOURISM DEVELOPMENT PLAN.

I. INTRODUCTION

The tourism industry has been accorded high priority by the Government in view of its potential in redressing the country's adverse balance of payments position. It has developed to be an important foreign exchange earner occupying the fifth place after rubber exports in 1985. The industry also formed an important source of growth and employment generation for the country.

2. The industry will continue to be geared and developed to enable it to make further contributions to the economy. The private sector is expected to play an increasingly active role in the development of the industry while the public sector will be mainly responsible for providing the basic infrastructure. In the development of tourist areas, a selective approach will be undertaken to ensure maximum benefit from limited resources allocated to the sector. Priority will be given to the enhancement of existing destinations of Kuala Lumpur and Penang and secondary destinations such as Langkawi, Terengganu, Melaka, Port Dickson, Desaru, Tioman, Kuching and Kota Kinabalu. New areas identified are the south east coast areas of Peninsular Malaysia especially around Rompin, Mersing and Desaru by virtue of their proximity to Singapore. In addition, the natural tourist resources particularly the national parks will be aggressively promoted as tourist destinations.

3. In addition to promoting further foreign tourist inflow into the country, local residents will be encouraged to spend more of their vacation within the country rather than overseas so as to reduce the foreign exchange outflow.

4. Themes for promotional campaigns as identified under the Fifth Malaysia Plan will be mounted capitalizing on four subjects viz, conventions, vacations, sightseeings and special interests.

5. In view of the above, the Government of Malaysia is desirous of engaging a team of consultant to undertake a selective approach in studying and planning tourism development of the nation which optimises on the existing and potential resources available within the country. The consultant shall also identify priority projects for Governmental and private sector involvement to promote overall tourism development potential of the nation taking into consideration the existing and potential tourists generating markets to the country. The Development Plan Study shall provide a clear overview of the present and future background situations of the tourism sector and a general direction for future tourism development planning. It shall also make full use of existing data and information, and shall take into proper consideration all existing proposals, plans recommendations and developments associated with the tourism sector with emphasis on the implementation aspect.

A. The Project Area

6. Malaysia is a federated monarchy of thirteen States with two federal territories. Its territory which totals about 330 thousand square kilometers in land area is geographically separated into two parts, East and West Malaysia by the South China Sea.

7. East Malaysia comprises of Sabah and Sarawak which are located in the north and northwest of Borneo Island respectively. West Malaysia, also known as Peninsular Malaysia, consists of eleven States. It occupies the southern part of the Malay Peninsula.

8. The Federal Territory of Kuala Lumpur is located in the centre of the State of Selangor, and the Federal Territory of Labuan is an offshore island area located east of Sabah.

9. Malaysia extends over roughly between 1'N and 7'N in latitude. In longitude they extend roughly from 100'E to 119'E.

10. The entire territory by and large falls within the tropical rain forest climate zone according to Koppen classification, except the inland highlands and mountain areas where the climate is temperate. Rainfall is abundant throughout the country. Its characteristics vary from place to place but the mean annual rainfall generally falls within the range between 1,500 to 4,000 mm.

11. Its population totals about 15 million, and features vast varieties of historical, social and cultural heritage. Its standard of socio-economic

development and living environments are by far higher than most of the neighbouring Southeast Asian countries.

12. It is naturally endowed with an extensive inventory of attractive terrestrial and marine landforms and a rich storage of tropical fauna and flora. These together create high potential for the development of the tourism sector.

B. Present Volume of International Tourist Visit

13. During the year 1982, Malaysia received a total of about 791,000 of international tourist arrivals. This figure which ranked number 56 in the same year among all nations in the world probably represents a mere fraction of the potential market.

14. The estimated number in international visits received by all the six ASEAN countries in the same year are as follows:-

<u>World Bank</u>	<u>Country</u>	<u>Yearly Total of International Tourist Visits</u>
25	Singapore	2,828 thousands
31	Thailand	2,016
54	Philippines	939
56	<u>Malaysia</u>	791
59	Indonesia	600
82	Brunei	287

III. STUDY OBJECTIVES

15. The objectives of this study are as follows:-
- 15.1 To formulate a tourism development plan for the country that will optimise on the country's resources, and taking into account also of the inadequacies and shortcomings constraining the development of the sector.
 - 15.2 To identify specific programmes and projects to be undertaken by the Government and the private sector that will give optimum impact on the development of the tourism industry of the country taking into consideration the existing and potential resources available and demand from the tourist generating markets to the country.

IV. SCOPE OF STUDY

16. In pursuance of the above objective, the consultants shall:
- 16.1 Assess and make an inventory of major tourism resources, attractions and facilities available within the country.
 - 16.2 Assess the inadequacies and shortcomings constraining the healthy development of the tourism industry in the country.
 - 16.3 Conduct market research and analysis and determine existing and potential future demand for travel to and within the country.

- 16.4 Identify the potential visitor markets and determine their respective travel characteristics with the view towards the formulation of a selective action-oriented development and promotional strategy which would yield optimum results for the country.
- 16.5 Develop alternative options for the development of the industry.
- 16.6 Conduct prefeasibility/detailed feasibility studies on the projects identified under the proposed alternative development options and recommend the alternative that is most appropriate for the country.
- 16.7 Recommend measures to overcome the inadequacies and shortcomings identified in the study.

V. DURATION AND TIMING OF THE STUDY

17. It is estimated that the study will take 10 months to complete commencing as soon as possible.

VI. REPORTING

18. The consultants shall prepare and submit the following reports in English;

18.1 An inception report (25 copies) containing a detailed statement of the consultants' proposed procedures and work schedule which would be submitted within 1 month of the date of commencement of the study.

18.2 Interim report (25 copies) giving a summary during the investigation period, an outline of the work performed during the period and indicating the work under each major subhead of the terms of references, to be submitted within 3 months from the date of notice to proceed.

18.3 Draft final report (25 copies) summarising all work performed during the study and the findings and recommendations of the consultants, including maps, plans, tables and diagrams not later than 6 months from the date of notice to proceed.

18.4 A final report (30 copies) after the views of the Government has been ascertained. (Amount of time to be provided shall be mutually agreed upon between the consultants and TDC).

19 The study team should ensure that all data, information, maps, materials and findings connected with the study are kept confidential and not disposed of or revealed to any third party except with the prior written consent of the Government of Malaysia. Such maps and aerial photographs are to be returned to the Government of Malaysia immediately upon completion of the study. All reports when finalized and submitted to the Government of Malaysia shall remain the property of the Government of Malaysia.

VII. CONSULTANTS QUALIFICATION AND EXPERIENCE

20. It is expected that the study will require the services of a multi-disciplinary team of experts such as economists, architects, tourism planner etc. with the necessary background and experience in the field of tourism.

VIII. DATA, MATERIALS AND LOCAL FACILITIES TO BE PROVIDED

21. The following supporting staff and local facilities will be provided by the Tourist Development Corporation (TDC) to assist the experts:-

- 21.1 Local counterpart/staff, coordinating officer
- 21.2 Office space, furniture, equipment and office supply
- 21.3 Internal transportation where necessary
- 21.4 Utilities, telephone, postage and telegraph services

22. The TDC has undertaken a number of statistical surveys, reports, masterplans and other publications relevant to the study and these will be made available to the consultants. Other relevant information, data kept by other Government agencies will also be made available for this study.

IX. RELATED STUDIES

23. A number of related studies which can be used as basis for this study are available within the TDC and other Government agencies. These are as follows:-

- 23.1 Tourism Development Plan - TDC 1976
- 23.2 Langkawi Visitor Destination Plan - TDC 1977
- 23.3 East Coast Masterplan - TDC 1979
- 23.4 Sabah Masterplan - TDC 1979
- 23.5 Sarawak Masterplan - TDC 1979
- 23.6 Pangkor and Lumut Masterplan - TDC 1979

Other relevant studies done by other Government agencies will also be made available to the consultants.

X. PROJECT STUDY COORDINATION/MONITORING


24. The Economic Planning Unit of the Prime Minister's Department will be the main coordinating body for this study and the TDC will be the counterpart agency. Relevant Government agencies/organisation will be invited to be members of the Steering Committee to monitor the progress of the study.

5. MINUTES OF MEETING 及び SCOPE OF WORK

MINUTES OF MEETING
PRELIMINARY SURVEY
ON
THE STUDY ON A COMPREHENSIVE NATIONAL
TOURISM DEVELOPMENT PLAN
IN
MALAYSIA
AGREED UPON BETWEEN
THE ECONOMIC PLANNING UNIT
OF
THE PRIME MINISTER'S DEPARTMENT
ON BEHALF OF
THE GOVERNMENT OF MALAYSIA
AND
THE JAPAN INTERNATIONAL COOPERATION AGENCY

KUALA LUMPUR

27 SEPTEMBER, 1986



(MR. KOUICHI ARAI)
Leader,
Japanese Contact Mission,
Japan International Cooperation Agency.



(DR. GAN KHUAN POH),
Director of Industry,
Economic Planning Unit,
Prime Minister Department,
on behalf of the
Government of Malaysia.

I. INTRODUCTION

1.1 In response to the request of the Government of Malaysia, the Government of Japan dispatched the contact mission for the Study on A Comprehensive National Tourism Development Plan from 21 September, 1986 to 4 October, 1986 through the Japan International Cooperation Agency (JICA).

1.2 The mission, headed by Mr. Kouichi Arai made field visits to several potential tourism areas and had a series of discussions with the Malaysian authorities concerned.

1.3 In connection with the above, a meeting was held on 22 September, 1986 between the Economic Planning Unit (EPU), Ministry of Trade and Industry, Tourist Development Corporation on the Malaysian side and the JICA contact mission on the Japanese side.

1.4 Members of the Malaysian and Japanese sides who attended the meeting on 22 September, 1986 in the EPU are listed in Attachment I.

Kouichi Arai

2. MATTERS DISCUSSED

2.1 Objectives of the Study

The objectives of the study are threefold:

- (i) Preparation of guidelines for a national tourism development plan.
- (ii) Identification of potential areas to be developed.
- (iii) Undertaking feasibility study of the selected area.

2.2 SCOPE OF THE STUDY

In order to achieve the objectives mentioned above the study shall be carried out in two phases, covering the following items:

Phase I: Preparation of guidelines and identification of
----- potential areas.

(a) Preparation of guidelines

The guidelines shall be formulated for planning tourism development at the national level as well as at the individual project level. It shall cover the goals,

W. S. Chandra

directions, and methodologies for the development of tourism. Analysis will be placed on the existing and future trend of tourists from selected countries and in particular those from Japan.

The methodological part of the guidelines shall, among others, include the following components:-

- (i) To review the policies for tourism and regional development.
- (ii) To review the related studies completed in the past.
- (iii) To analyse the inadequacies and shortcomings which form the current constraints.
- (iv) To lay down criteria upon which existing and potential resources for tourism development will be classified and/or evaluated in the light of the development level of the area concerned.
- (v) To develop means for forecasting the current and future demand on the resources.

Kanchi Rao

- (vi) To develop means for forecasting the present and future preferences and pattern of Japanese tourists.*
- (vii) To develop a method by which the priority order will be determined upon for the tourism development of Japanese tourists in Malaysia.
- (viii) To formulate a method to plan an individual action programme/project for development as mentioned in (vii) above.

(b) Identification of potential areas

Based on the guidelines prepared, first, the classification and evaluation of potential areas will be done. This will be followed by determining and establishing priority for development of the selected areas, taking into account the current and future demand.

* Note: As part of counterpart training, the selected methodology, where possible, should be applicable, with suggested modifications, to forecasting the preferences and patterns of tourists from other countries.

Inclusion of this matter will be discussed during scope of work mission visit to Malaysia.

Kwachi Chan

Phase II: Feasibility study on tourism development
----- in the potential area identified.

As regards to the area identified above, the feasibility study shall be conducted to cover the following areas:-

- (i) Review and evaluation of tourism resources and facilities.
- (ii) Examination of the existing infrastructure in the light of the development programmes in the region concerned.
- (iii) Analysis of existing constraints hindering desired development, particularly for private sector participation.
- (iv) Market research and analysis to forecast the demand.
- (v) Formulation of alternative development programmes/projects.
- (vi) Evaluation for selecting the most feasible alternative.
- (vii) Recommendations and implementation arrangements.

K. S. Chandra

ATTENDANCE LIST

JAPANESE SIDE

1. Mr. Kouichi Arai
(Mission Leader) International Cooperation Division,
International Transport and Tourism
Bureau, Ministry of Transport
2. Mr. Kenji Kuroda Development Survey Division,
Economic Cooperation Bureau,
Ministry of Foreign Affairs
3. Mr. Kouichi Miyoshi First Development Survey Division,
Social Development Cooperation
Department, JICA
4. Mr. Tsuneaki Nagasato Department of Tourism,
International Transport and Tourism
Bureau, Ministry of Transport
5. Mr. Satoshi Shibata International Affairs Office,
Department of Tourism,
International Transport and Tourism
Bureau, Ministry of Transport.
6. Mr. Wataru Tsuchiya Promotion Department,
Japan National Tourist Organisation.
7. Mr. Akira Fukunaga Planning and Research Department,
Japan National Tourist Organisation.
8. Mr. Yasuhiro Oyamada Embassy of Japan in Kuala Lumpur.
9. Mr. Hirofumi Ohnishi Embassy of Japan in Kuala Lumpur.
10. Mr. Takao Matsuzaki JICA, Kuala Lumpur.
11. Mr. Mitsuo Iwasa JICA, Kuala Lumpur.

Kouichi Arai

MALAYSIAN SIDE

1. Dr. Gan Khuan Poh Economic Planning Unit
 (Industry Section)
2. Encik Jamros Mohd Noor Ministry of Trade and Industry .
3. Encik Zamhot Hassan Tourist Development Corporation
4. Mdm. Wong Peg Har Economic Planning Unit
 (External Assistance Section)
5. Ms. Harvinder Kaur Economic Planning Unit
 (Industry Section)
6. Mr. Ong Yew Chee Economic Planning Unit
 (Industry Section)

Kowin Chan

SCOPE OF WORK

FOR

THE STUDY ON A COMPREHENSIVE NATIONAL
TOURISM DEVELOPMENT PLAN

IN

MALAYSIA

AGREED UPON BETWEEN

ca THE ECONOMIC PLANNING UNIT OF
THE PRIME MINISTER'S DEPARTMENT

ON BEHALF OF

THE GOVERNMENT OF MALAYSIA

AND

THE JAPAN INTERNATIONAL COOPERATION AGENCY

KUALA LUMPUR

29 NOVEMBER, 1986

ca 

(TAN SRI RADIN SOENARNO AL-HAJ)
DIRECTOR GENERAL
ECONOMIC PLANNING UNIT
PRIME MINISTER'S DEPARTMENT
ON BEHALF OF
THE GOVERNMENT OF MALAYSIA



(MR. KOUICHI ARAI)
LEADER
PRELIMINARY SURVEY TEAM
ON BEHALF OF
THE JAPAN INTERNATIONAL
COOPERATION AGENCY

I. INTRODUCTION

1. In response to the request of the Government of Malaysia, the Government of Japan has decided to conduct a Study on a Comprehensive National Tourism Development Plan in Malaysia (hereinafter referred to as "the Study"), and in accordance with the relevant laws and regulations in force in Japan, the Japan International Cooperation Agency (hereinafter referred to as "JICA"), the official agency responsible for the implementation of the technical cooperation programmes of the Government of Japan, will undertake the Study in close cooperation with the authorities of Malaysia.

2. The present document sets forth the Scope of Work with regard to the Study.

II. OBJECTIVES OF THE STUDY

3. The objectives of the Study are threefold:

- (i) Preparation of guidelines for a national tourism development plan;
- (ii) Identification of potential areas to be developed; and
- (iii) Undertaking feasibility study of the selected area.

CCA



III. SCOPE OF THE STUDY

4. In order to achieve the objectives mentioned above, the Study shall be carried out in two Phases, covering the following items.

Phase I: Preparation of guidelines and identification
of potential areas.

(a) Preparation of guidelines

The guidelines shall be formulated for planning tourism development at the national level as well as at the individual project level. It shall cover the goals, directions, and methodologies for the development of tourism. Analysis will be placed on the existing and future trend of tourists from selected countries and in particular those from Japan.

The methodological part of the guidelines shall, among others, include the following components:-

- (i) To review the policies for tourism and regional development;
- (ii) To review the related studies completed in the past;
- (iii) To analyse the inadequacies and shortcomings which form the current constraints;

(Ca)



- (iv) To lay down criteria upon which existing and potential resources for tourism development will be classified and/or evaluated in the light of the development level of the area concerned;
- (v) To develop means for forecasting the current and future demand on the resources;
- (vi) To develop means for forecasting the present and future preferences and pattern of Japanese tourists;
- (vii) To develop a method by which the priority order will be determined upon for the tourism development of Japanese tourists in Malaysia; and
- (viii) To formulate a method to plan an individual action programme/project for development as mentioned in (vii) above.

(b) Identification of potential areas

Based on the guidelines prepared, first, the classification and evaluation of potential areas will be done. This will be followed by determining and establishing priority for development of the selected areas, taking into account the current and future demand.

ICA



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Phase II: Feasibility study on tourism development
in the potential area identified.

629
As regard to the area identified above, the
feasibility study shall be conducted to cover the following
areas:-

- (i) Review and evaluation of tourism resources and facilities;
- (ii) Examination of the existing infrastructure in the light of the development programmes in the regions concerned;
- (iii) Analysis of existing constraints hindering desired development, particularly for private sector participation;
- (iv) Market research and analysis to forecast the demand;
- (v) Formulation of alternative development programmes/projects;
- (vi) Evaluation for selecting the most feasible alternative; and
- (vii) Recommendations and implementation arrangements.

IV. STUDY SCHEDULE

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5. The whole work will be conducted in accordance with the attached tentative schedule.

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V. REPORTS

6. JICA shall prepare and submit the following reports in English to the Government of Malaysia.

1. Inception Report
Thirty (30) copies.
At the commencement of the study in Malaysia.
2. Progress Report
Thirty (30) copies
Within eight (8) months after the commencement of the study.
3. Interim Report 1
Thirty (30) copies
Within ten (10) months after commencement of the study.
4. Interim Report 2
Thirty (30) copies
Within sixteen (16) months after the commencement of the study.
5. Draft Final Report
Thirty (30) copies
Within eighteen (18) months after the commencement of the study.

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The Government of Malaysia will provide JICA with its comments within one (1) month after the receipt of the Draft Final Report.

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6. Final Report

One Hundred (100) copies

Within two (2) months after the receipt of the Government of Malaysia's comments on the Draft Final Report.

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7. The Study team should ensure that all data, information, maps, materials and findings connected with the Study are kept confidential and not disposed of or revealed to any third party except with the prior written consent of the Government of Malaysia. Such maps and aerial photographs are to be returned to the Government of Malaysia immediately upon completion of the Study. All reports when finalized and submitted to the Government of Malaysia shall remain the property of the Government of Malaysia.

VI. UNDERTAKINGS OF THE GOVERNMENT OF MALAYSIA

8. To facilitate the smooth conduct of the Study, the Government of Malaysia shall take the following necessary measures:-

CCA



1. To inform the members of the Study team of any existing risk in the Study area and to take any measures deemed necessary to secure the safety of the Study team;
2. To secure the necessary entry permits for the Study team to conduct field surveys in Malaysia and exempt them from consular fees;
3. To exempt the members of the Study team from taxes and duties, as normally accorded under the provision of Malaysian General Circular No. 1 of 1979, on equipment, machinery and other materials brought into and out of Malaysia for the conduct of the Study;
4. To exempt the members of the Study team from Malaysian income tax on their official emoluments in respect of their period of assignment in Malaysia in connection with the conduct of the Study but the Government of Malaysia shall retain the right to take such emoluments into account for the purpose of assessing the amount to be applied to income from other sources;

LCG




5. To provide the necessary facilities to the Study team for remittance as well as utilization of funds introduced into Malaysia from Japan in connection with the conduct of the Study;
6. To secure permission for entry into private properties or restricted areas for the conduct of the Study;
7. To provide the Study team with medical services when needed but the expenses will be chargeable to the members of the Study team;
8. To make arrangements for the Study team to take back to Japan the data, maps and materials connected with the Study, subject to the approval of the Government of Malaysia, in order to prepare the reports;
9. To provide the Study team with available data, maps and information necessary for the execution of the Study;
10. To appoint counterpart personnel to the Study team during the Study period;

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11. To provide the Study team with suitable office space with clerical service and necessary office equipment in Kuala Lumpur;
12. To provide the Study team with adequate means of local transport for official travel only;
13. To indemnify any member of the Study team in respect of damages arising from any legal action against him in relation to any act performed or omissions made in undertaking the Study except when the two Governments agree that such a member is guilty of gross negligence or wilful misconduct; and
14. To nominate Tourist Development Corporation to act as counterpart agency for the Study and the Economic Planning Unit as the main coordinating body in relation to other relevant Governmental and non-Governmental organizations.

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VII. UNDERTAKINGS OF JICA

9. In order to conduct the Study, JICA shall take the following measures:-

1. To dispatch, at its own expense, the Study team to Malaysia; and
2. To pursue technology transfer to the Malaysian counterpart personnel in the course of the Study.

VIII. CONSULTATION

10. JICA and the Government of Malaysia shall consult each other in respect of any matter that is not agreed upon in this document and which may arise from or in connection with the Study.

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APPENDIX

部院

TENTATIVE SCHEDULE OF THE STUDY

Year and Month	1987												1988									
	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	
Reports	Ic/R							P/R			It/R1					It/R2			D/F		F/R	
Phase I																						
(a) Preparation of guidelines																						
(b) Identification of potential areas																						
Phase II																						
Feasibility study on the tourism development in the area identified.																						

in Malaysia
 in Japan
 Ic/R Inception Report P/R Progress Report It/R1 Interim Report 1 It/R2 Interim Report 2
 D/F Draft Final Report F/R Final Report

MINUTES OF MEETING

SCOPE OF WORK

ON

THE STUDY ON A COMPREHENSIVE
NATIONAL TOURISM DEVELOPMENT PLAN

IN

MALAYSIA

AGREED UPON BETWEEN

THE ECONOMIC PLANNING UNIT

OF

THE PRIME MINISTER'S DEPARTMENT

ON BEHALF OF

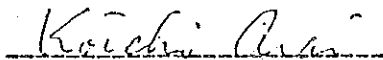
THE GOVERNMENT OF MALAYSIA

AND

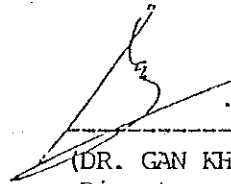
THE JAPAN INTERNATIONAL COOPERATION AGENCY

KUALA LUMPUR

29 NOVEMBER, 1986



(MR. KOUICHI ARAI)
Leader,
Preliminary Survey Team,
on behalf of
The Japan International
Cooperation Agency.



(DR. GAN KHUAN POH),
Director, Industry Division,
Economic Planning Unit,
Prime Minister's Department,
on behalf of
The Government of Malaysia.

I. INTRODUCTION

1.1 Following the visit of the Contact Mission for the Study On A Comprehensive National Tourism Development Plan (hereinafter referred to as "the Study") from 21 September to 4 October, 1986, JICA dispatched a Preliminary Survey Team to Malaysia from 26 November to 1 December, 1986.

1.2 In connection with the above, a meeting was held on 27 November, 1986 between the Steering Committee of the Study, led by the Economic Planning Unit (EPU) of the Prime Minister's Department on the Malaysian side, and the JICA Preliminary Survey Team on the Japanese side (Attendance as in Attachment I) to discuss the proposed Scope of Work of the Study drafted by JICA.

II. MATTERS AGREED

2.1 Both the Japanese side and the Malaysian side agreed, in principle, to the scope of study as contained in the Scope of Work document. An agreement reached on the elaboration of a number of items are as follows:

2.2 Scope of the Study

2.2.1 Item Phase I(a) "Preparation of Guidelines"

In the analysis of existing and future trend of tourists from selected countries, while not excluding other countries, the Study should give priority and emphasis to countries in the Asia-Pacific region, namely Hong Kong, Taiwan, New Zealand and Australia.

2.2.2 Item Phase I(b) "Identification of Potential Areas"

In the evaluation of potential areas, the Study Team will take into consideration Malaysia's cultural values and, hence, evaluate the potential of the areas in the context of practical and implementable projects.

2.2.3 Sub-item Phase II(v) "Formulation of Alternative Development programmes/Projects"

In formulating development projects, emphasis should be given to the development of cultural aspects, natural resources and other non-accommodation projects.



2.3 Study Schedule

The JICA Preliminary Survey Team agreed in principle to consider the proposal by the Malaysian side to shorten the Tentative Schedule of the Study period for the Interim Report 2 to the end of March, 1988. This matter will be confirmed during the Inception Report Stage.

2.4 Reports

2.4.1 Sub-item 6 of Para V. "Final Report"

At the request of the Malaysian side, JICA agreed to increase the number of copies of the Final Report from fifty (50) to one hundred (100).

2.5 Undertakings of the Government of Malaysia

2.5.1 Sub-item 9 of Para VI.

The Malaysian side will provide the necessary information/data to the Study Team, these being, though not limited to the following:

- (a) Incentives - New Investment Fund and Promotion of Investment Act, 1986;

- (b) Statistics on domestic tourists;
- (c) Statistics of tourists from selected countries;
- (d) Indication of special areas of study; and
- (e) Other available information as requested from time to time.

2.5.2 Sub-item 10 of Para VI.

Two local counterpart personnel, one each from the Research and the Marketing Divisions of the TDC will be assigned full-time for the Study. They will be fully involved in all areas of the Study, particularly the development of the Methodologies and analysis. The full involvement and participation of the two personnel, both in Malaysia and Japan, is considered highly necessary in line with the concept of transfer of technology. The JICA Team agreed, in principle, to the concept of joint-study/collaboration between the two parties. The Team appreciated the necessity of counterpart training in Japan and will convey the proposal by the Malaysian side to the relevant authorities in Japan.

2.5.3 Sub-items 11 and 12 of Para VI.

The Study Team will be provided with office space and the necessary office equipment and means of local transport for official travel, the details of which will be further discussed between the Tourist Development Corporation of Malaysia (TDC) and the JICA Preliminary Survey Team.

2.6 OTHERS

2.6.1 Itemizing the Inception Report

The Inception Report should spell out the details relating to the Methodology and items in the Study.

III. The meeting ended at 11.15 a.m.

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ATTENDANCE LIST

JAPANESE SIDE

1. Mr. Kouichi ARAI
(Team Leader) Director, International Cooperation
Division,
International Transport and
Tourism Bureau,
Ministry of Transport.
2. Mr. Kenji KURODA Development Survey Division,
Economic Cooperation Bureau,
Ministry of Foreign Affairs.
3. Mr. Satoshi SHIBATA International Affairs Office,
Department of Tourism,
International Transport and Tourism
Bureau, Ministry of Transport.
4. Miss Chisa HARA First Development Survey Division,
Social Development Cooperation
Department, JICA.
5. Mr. Yasuhiro OYAMADA Embassy of Japan, Malaysia.
6. Mr. Hirofumi OHNISHI Embassy of Japan, Malaysia.
7. Mr. Takao MATSUZAKI JICA, Malaysia.
8. Mr. Keizo KAGAWA JICA, Malaysia.

ka

MALAYSIAN SIDE

1. Dr. Gan Khuan Poh
(Leader) Director of Industry Section,
Economic Planning Unit,
Prime Minister's Department.
2. Miss Boey Siew Leng Economic Planning Unit,
Industry Section.
3. Mr. Mohamed Misaddik
Abdul Majid Economic Planning Unit,
External Assistance Section.
4. Mr. Arisfadilah Sariat Economic Planning Unit,
Infrastructure Division.
5. Miss Latifah Khalid Implementation Coordination Unit,
Prime Minister's Department.
6. Mdm. Norlian Abbas Implementation Coordination Unit,
Prime Minister's Department.
7. Mr. Subhas Chandran Treasury, Budget Division.
8. Mr. Salehan Hj. Suru Ministry of Culture, Youth and Sports.
9. Mr. Zamhot Hassan Tourist Development Cooperation
of Malaysia.
10. Mr. Abdullah Yusof Department of Statistics,
Prime Minister's Department.
11. Mdm. Robieyah Mat Department of Statistic,
Prime Minister's Department.
12. Mr. Mustapha Kamil
Hj. Abdullah Department of Wildlife and
National Park,
Ministry of Science, Technology
and Environment.
13. Mr. Jamros Md. Nor Ministry of Trade and Industry.
14. Mr. Ong Yew Chee
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