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付属資料 1. Terms of Reference

D R A F T

NATIONAL TOURISM DEVELOPMENT PLANNING
PROGRAMME FOR KENYA

United Nations Development Programme
World Tourism Organization

2 July 1993

A. CONTEXT

1. Description of Tourism

Kenya has a substantially developed tourism sector which commenced in the 1960s. Growth was rapid during the 1970s and 1980s reaching 814,000 foreign tourist arrivals in 1990. There has been some decline of arrivals since then, due to both international and national influencing factors and constraints. The major tourist markets are in Western Europe with much lesser numbers from North America. The East Asian markets are not yet well developed.

Tourism is the leading foreign exchange earner for the country with a value exceeding combined earnings from coffee and tea exports. Tourism receipts were K£594 million in 1991 -- about 36.5 per cent of the total value of exports. Tourism provides direct employment in hotels and other tourism enterprises for more than 110,000 persons with a large number of persons indirectly supported by tourism in the supplying sectors.

There are close to 1,200 registered hotels in the country, many tour and travel agencies have been established and other facilities and services are available for tourists. The production and sale of traditional handicrafts are considerably developed. The quality level of most commercial tourist facilities is considered to be good, and generally meet tourists' expectations. However, the policy of allowing inclusive tour charter operations is controversial with respect to the overall benefits such tourists generate to the country, when compared to the impacts of "mass" tourism.

About one half of the tourism development is located in the coastal region and focused on beach recreation, although some coastal tourists also visit nearby game parks. The other major type of tourism is wildlife viewing, particularly in the popular parks and reserves of Tsavo, Amboseli, Masai Mara, Nairobi, Aberdare and Samburu. Other reserve areas are much less visited. Domestic tourism is beginning to develop, with holiday visits made by some Kenyans to parks, reserves and the coast, as well as elsewhere to visit friends and relatives. Many hotels and lodges offer low room rates for residents which encourages some domestic travel.

About eight per cent of the country is occupied by parks or some other form of protected area. Loss of wildlife has been a serious problem in the past, but considerable progress has been accomplished in recent years on conservation through the activities of the Kenya Wildlife Service. However, various pressures prevail on the natural environment and major

conservation efforts are still required and are being pursued. In addition to the continued need for conservation of the wildlife and scenic areas, environmental degradation of the coastal region and marine areas is of considerable concern.

Cultural tourism based on paleontological, archaeological and historic sites and traditional cultural patterns is not nearly as well developed as wildlife and beach tourism, and has much potential for expansion. Cruise ship tourism also has not appreciably developed.

The quality of infrastructure for tourism (as well as for general use) varies appreciably. Most international tourists arrive by air at the international airports near Nairobi and Mombasa. Improvements are required particularly at the Mombasa airport. Some local airfields in the country also need improvements. Direct air services are available from several European countries but not yet fully developed from North America and East Asia. Although the road network is fairly extensive, several of the access roads to and within the parks and reserves are seriously deteriorated and require immediate improvements. The railway needs to upgrade its tourist services to effectively serve tourist travel. Water supply and electric power are restricted, particularly in the coastal region, resulting in problems for the hotels there. Inadequate sewage disposal systems are generating some coastal pollution problems. Telecommunications are considered to be adequate.

Training for employment in the tourism sector has been carried out mostly by the Kenya Utalii College (KUC), well known as the most important regional tourism training centre. KUC has trained more than 10,000 Kenyan and 400 international (mostly from other African countries) students since its opening. At the present time, the college cannot fully meet the demand by both student applicants and the industry.

2. Host Country Strategy

The main objectives of tourism since independence, as stated in the tourism sector of the National Development Plans, have been to maximise net returns, subject to important economic, social, cultural and environmental considerations. A key priority in formulating the tourism sector development plans was the achievement of an orderly and manageable growth of tourism, balancing tourism demand with the supply of facilities and services. The two major constraints in developing tourism were recognized as being the availability of funds for investment and the vulnerability of tourism resources to over-exploitation.

Tourism development strategies have been related to: the types of tourism to be encouraged; increasing the contribution of tourism to gross domestic product and maximising retention of foreign exchange earnings; expansion of employment opportunities; and conservation of wildlife and water catchments. Various policies were adopted to implement these strategies, and considerable progress has been made.

The draft tourism sector paper of the National Development Plan of 1994-1998 presents several objectives for tourism development: conservation of the national parks and game reserves; diversification of the tourism product and tourist markets; ensuring a high level of retention of foreign exchange earnings; intensifying training of personnel in tourism; promoting international tourism; and promoting domestic and regional (East African) tourism. This sector paper emphasises the need for preparation of comprehensive national, regional and local level tourism planning which considers both physical and institutional elements in an integrated manner, in order to guide the future expansion of this sector.

3. Prior on On-going Assistance

The only on-going directly related technical assistance is the UNDP/ILO project, "Employment Generation in the Hotel and Catering Tourism Sector" (KEN/90/016). This project focuses on diversifying the country's tourism from the game reserves and coastal region to other parts of the country through development of small and medium sized hotels in rural areas. In the past, Utalii college has received considerable international assistance. Some related sectors are receiving various types of international assistance including the Kenya Wildlife Service, the Kenya National Museums and the infrastructure agencies.

4. Institutional Framework for Tourism

Tourism is under the Ministry of Tourism and Wildlife (MTW). The MTW is organized into the tourism department divided into the marketing and licensing divisions, the planning division, fisheries and administrative sections. The parastatals of the Kenya Wildlife Services (KWS), Kenya Tourism Development Corporation (KTDC), Kenya Utalii College (KUC) and the Catering Levy Trustees (CLT) are responsible to the MTW. An official proposal has been made, and is now being considered by the government, to establish a tourism board or authority. This would be an autonomous body responsible for marketing, product development and perhaps some other functions that would be transferred from the MTW. The MTW would retain policy, planning, regulatory and perhaps some other functions.

The KTDC has the responsibility for channelling investments into the tourism sector of the economy. It makes direct investments and provides financial assistance and loans for both new projects and renovation of existing enterprises. The KTDC has been proposed to be converted into a tourism development bank.

Private sector tourism associations include the following: Kenya Association of Tour Operators (KATO); Kenya Association of Travel Agents (KATA); Kenya Association of Hotelkeepers and Caterers (KAHC); Kenya Budget Hotels Association (KBHA); Mombasa and Coast Hotelkeepers Association (MCHA). All these associations are currently active.

B. PROGRAMME JUSTIFICATION

1. Problem to be Addressed

Kenya does not have any comprehensive development plan for tourism, except for the tourism sector of the five-year national development plans. A detailed comprehensive tourism plan is required to provide the guidance for future development of this sector with respect to both physical and institutional factors. Kenya is now at a crossroads of tourism development. In the past, tourism has developed mostly on an ad hoc basis, but it is currently facing several critical issues within the country. In addition, tourism is becoming increasingly competitive internationally and in the East African region. Unless the expansion of tourism is carefully controlled and present problems are remedied, Kenya will neither be able to compete effectively nor be in a position to remain as a leading partner on cooperative East African tourism development and marketing activities.

The several major issues which need to be addressed and resolved with respect to the tourism sector are well recognized by the government and private sector. These include the following:

- Over-utilization of a few national parks and reserves and under-development of other potential tourism areas, and the great need to diversify tourism in terms of the tourism product, tourist markets and geographic areas.
- Lack of a land use policy for tourism with no designation of tourism zones throughout the country, for example, strip development of hotels is becoming evident in the coastal region.

- Environmental degradation, especially pollution of the coastal waters, but also in some parks and reserves.
- Insufficient marketing abroad and over-dependence on the European markets.
- Need to further develop domestic tourism.
- Deteriorated tourist roads and inadequate supply of water and electricity in the coastal region, and need to improve the railway service for tourist use.
- Need to ensure that air access is easily available from all the major existing and potential market areas, and need to improve some of the airport facilities and services.
- Need to improve the organizational structure for tourism and the capabilities of public sector tourism management.
- Need to expand the training opportunities for private sector tourism personnel.
- Need to attract more investment in tourism development, especially for small and medium scale enterprises in new tourism areas.
- Insufficient knowledge of the economic costs and benefits of tourism as a basis for enhancing net benefits and deciding tourism policy.
- Need for more regional cooperation on the development and marketing of tourism.
- Other issues such as improving travel facilitation at the airports and controlling tourist health problems.

The planning programme will address all these issues in an integrated manner.

2. Expected End of Programme Situation

When the programme is completed, the government and private sector will have: a comprehensive national tourism plan which recommends a policy statement, physical development plan and infrastructure and institutional improvements; regional plans for priority development and improvement areas; a five-year action programme for tourism; a marketing strategy and promotion programme; pre-feasibility analyses for innovative tourism

projects; a functioning tourism information system and data base; a detailed economic analysis of tourism; and enhanced capabilities of tourism officials to effectively manage tourism. The programme therefore will provide the basis for the controlled expansion of tourism on a sustainable basis.

3. Target Beneficiaries

The immediate target beneficiaries are the Ministry of Tourism and Wildlife, other ministries and parastatals and the private tourism sector, which will have specific guidelines for expansion of the tourism sector. The ultimate beneficiaries are the people of Kenya who will receive increased benefits of employment and income with a minimum of environmental and socio-cultural problems.

4. Programme Strategy and Institutional Arrangements

The strategy to implement the programme will be contracting both international and national consultants to jointly carry out the programme activities. The international consultants will bring their international perspective and particular skills and experience to the programme, and the national consultants will contribute their knowledge of the country and also provide specific skills and experience. Counterparts will be assigned to assist the consultants and learn from them.

Institutionally, the programme team will coordinate closely with the Ministry of Tourism and Wildlife, its parastatals and other related agencies. The team will also coordinate with the tourism private sector associations. A Project Steering Committee will be appointed to be comprised of public and private sector representatives. This committee will provide general policy guidance to the programme team and specifically review and comment on all the draft and draft final programme reports. The programme team will make presentations to the committee of these reports and at other appropriate times during the programme execution.

5. Reasons for Assistance

The government does not have the financial or all the technical resources to carry out the programme, and therefore requires international assistance.

6. Special Considerations

There are several special considerations to be made in the programme as follows:

- a) As a general approach, tourism will be developed on a controlled and sustainable basis.
- b) Tourism will be improved and further developed to minimise any negative environmental impacts and promote the conservation of the natural environment and wildlife, including coastal and marine areas.
- c) Tourism will be improved and further developed to minimise any negative socio-cultural impacts, and promote the maintenance of the distinctive cultural character and identity of Kenyans.
- d) Tourism will be expanded with particular emphasis on spreading the benefits of this sector widely throughout the country and bringing these benefits to local communities and residents in the tourism areas.
- e) Continued development of tourism will generate substantial additional employment including for women and young people.
- f) The expansion of tourism will provide more opportunities for private sector enterprises.

7. Coordination Arrangements

The National Tourism Master Plan project will be coordinated by the Ministry of Tourism and Wildlife.

8. Counterpart Support Capacity

The Ministry of Tourism and Wildlife will provide a project coordinator and quite adequate counterpart support capacity for the relevant team member positions.

C. DEVELOPMENT OBJECTIVE

The development objective of this programme is to provide the guidance and capabilities for the controlled expansion and competent management of tourism in Kenya, in order to generate increased economic benefits to the country and its communities while maintaining the environmental and socio-cultural sustainability of this sector.

In addition to the present conventional forms of wildlife viewing and beach oriented tourism, the programme will give particular attention to diversification of the tourism product and tourist markets including development of special interest, eco- and other forms of tourism, and opening up of new tourism areas. Emphasis will also be given to improving existing tourism environments where needed, maintaining the quality level of tourism and involving local communities in tourism development.

D. IMMEDIATE OBJECTIVES

1. Immediate Objective 1

Preparation of long-range comprehensive Year 2010 national and regional tourism development policies and plans and related studies for both international and domestic tourism. These plans will be prepared within the framework of achieving sustainable tourism development that conserves and enhances tourism's natural and cultural resources, does not generate serious environmental or socio-cultural problems and integrates tourism into the overall development policies and patterns of the country.

1.1 Output 1

National tourism development policy and plan to include the plan elements as specified in the following activities.

1.1.1. Activity 1

Determination of the national tourism development objectives of what tourism is expected to achieve and the parameters of its development, with utmost consideration given to environmental and socio-cultural factors, as well as economic benefits. The objectives

will be determined in close coordination with the Project Steering Committee.

1.1.2 Activity 2

Conducting of background surveys and analysis including an overview of the history, geography, climatic patterns, cultures, economy, general land use patterns, transportation network, and other influencing factors of the country's development, and review of the present general and tourism development policies with particular reference to Kenya's Development Plan for 1994-1998, the draft 1993 Sessional Paper on tourism, previous WTO mission reports, and any other current plans and programmes that may affect the planning of tourism. This programme should not duplicate the findings and recommendations which have been made in other plans and studies that have been adopted and are current.

1.1.3 Activity 3

Survey, inventory and evaluation of the existing and potential tourist attractions and activities including natural (flora, wildlife, climate, scenic beauty and coastal and marine areas), paleontological, archaeological, historic, cultural, recreational and special types of features. Particular reference will be given to the information that has already been compiled by the Kenya Wildlife Service and Kenya National Museums. Attractions will be evaluated by type and whether of primary or secondary importance.

1.1.4 Activity 4

Survey, inventory and evaluation of existing and already planned accommodation of all types including characteristics and occupancy factors, and other tourist facilities and services including tour and travel agency operations, tourist restaurants, convenience and craft shopping, banking and money exchange services, medical facilities and services, postal services and any other

tourism-related facilities and services. It is expected that baseline data on some tourist facilities and services will be provided by the proposed tourism information system specified in Objective 3. This activity will include review of any tourist health problems and causes for these problems.

1.1.5 Activity 5

Survey and evaluation of the air transportation access to the country from the present and potential major tourist market countries, and of the internal air transportation network. The adequacy of airport facilities and travel facilitation procedures including immigration and customs will be reviewed including any plans for airport improvements to handle future traffic demands. Scheduled and charter airline access policies will also be reviewed with respect to how best to handle future traffic flows.

1.1.6 Activity 6

Survey and evaluation of road and railway access within the country with respect to serving tourism areas and tourist attractions, including connections between Kenya and neighbouring countries. Particular attention will be given to road improvements needed and to upgrading the railway system and service to serve tourism.

1.1.7 Activity 7

Survey and evaluation of other infrastructure required for tourism of water supply, electric power, telecommunication and sewage and solid waste disposal. Particular reference will be made to identifying existing problems as well as satisfying long-range needs. The current water supply master plan and any other infrastructure plans will be reviewed for provision of input into the tourism plan.

1.1.8 Activity 8

Analysis of international tourist markets including the present number, characteristics and satisfaction levels of tourists, recent tourism trends in the country, global and regional tourism trends (including review of the recent WTO study on tourism trends), and establishment of market targets by five-year periods to 2010. The market targets will be determined by general type of tourists and give due consideration to the tourism development objectives and the development of good quality, controlled, diversified and sustainable tourism, as well as general trends analysis. It is expected that baseline data will be provided by the proposed tourism information system specified in Objective 3 including a special survey of tourists. The market analysis will include interviews of major tour operators in the significant existing and potential market countries.

1.1.9 Activity 9

Analysis of the present type and level of domestic tourism and projection of the likely future development of domestic tourism based on policies and development aimed at encouraging domestic travel. This analysis will include youth tourism.

1.1.10 Activity 10

Review and evaluation of the potential for developing substantial cruise ship tourism including cruise ship stopovers which will allow inland tours, with input of cruise ship tourism patterns into the market analysis and tourism policy and structure plan.

1.1.11 Activity 11

Evaluation of the potential for expansion of regional East African multi-destination tours with Kenya as the transportation hub of regional tourism, with input of this evaluation into the market analysis and tourism policy and plan.

1.1.12 Activity 12

Review and integration into the tourism planning of the management plans of the Kenya Wildlife Service (KWS) including any carrying capacity studies conducted, and of the plans of the Kenya National Museums. These plans include a Policy Framework and Development Programme 1991-96 of the KWS and the Turkana Cultural Heritage Project Plan and Lamu Plan of the National Museums.

1.1.13 Activity 13

Formulation of the national tourism development policy for both international and domestic tourism, based on the objectives for developing tourism and the inputs of all the surveys and analyses. Alternative policies will be formulated and evaluated as the basis for determining the final optimum policies. This activity will be carried out in close coordination with the Project Steering Committee.

1.1.14 Activity 14

Preparation of the national tourism structure plan which will designate major specific tourist attractions, tourism development zones, the general type and extent of development within each zone, and the transportation linkages. The staging of development of the zones will be specified. Alternative structure plans will be prepared and evaluated with respect to economic, environmental and socio-cultural impacts and how well they reflect the tourism development objectives and policy, as a basis for determining the optimum plan. This activity will be carried out in close coordination with the Project Steering Committee.

1.1.15 Activity 15

Based on the recommended tourism development policy and plan, specification of general recommendations for improvements needed to tourist attractions, existing accommodation and other tourist facilities and services, transportation and other infrastructure, and

related recommendations such as on travel facilitation and tourist health. Some specific improvements needed will be identified in the five-year action programme described in Output 2.1. For convenience of plan text organization, these recommended improvements may be included with the survey and evaluation of these elements as integrated sections of the report.

1.1.16 Activity 16

Specification of development approaches to encourage and facilitate domestic tourism, in order for the maximum number of Kenyans to tour their own country.

1.1.17 Activity 17

Evaluation of the positive and negative environmental impacts of tourism at present and possible impacts in the future, with recommendations made on ways to reinforce positive impacts and mitigate negative ones. Recommendations will make reference to solving present environmental problems and to the need to require environmental controls and procedures for future tourism development projects including application of environmental impact assessment procedures to proposed tourism projects. Impact evaluation will give particular attention to problems associated with pollution of the offshore waters and damage to marine environments, as well as impacts on protected land areas and wildlife. Specific reference will be made to the recently adopted National Environmental Action Plan (NEAP).

1.1.18 Activity 18

Evaluation of the positive and negative socio-cultural impacts of tourism at present and possible impacts in the future, with recommendations made on ways to reinforce positive impacts and mitigate negative ones. Particular consideration will be given to the best means of handling the interface of tourists and residents in culturally traditional areas. Ways of involving local communities in the tourism development process and bringing benefits of tourism to local communities will be identified, and

provide input to Output 1.3 on economic analysis. The problems resulting from the uncontrolled activities of "beach operators" will be addressed, and actions recommended to resolve this problem (the government is already attempting to control this problem). A prototype brochure of recommended tourist behaviour (do's and don't's for tourists) will be prepared. A public awareness programme on tourism and teaching of tourism in the school system will be elaborated with respect to appropriate approaches and general content.

1.1.19 Activity 19

Updating of the 1987 tourism manpower planning study to the tourism plan horizon year of 2010 with projection of the number of employees in tourism by job category and skill level, in both the public and private sectors. The training needs identified to satisfy the manpower requirements by Kenya Utalii College (KUC), will be reviewed and incorporated into this planning study. The use of the training levy will be reviewed with recommendations made on how to maximize use of this levy for funding training programmes. Review will be made of existing studies on training including the Manpower Training and Development report by KUC, the WTO mission report on KUC of July, 1992 and the consolidated KUC training needs report.

1.1.20 Activity 20

Review of the organizational structure of the Ministry of Tourism with recommendations made on improvements needed. This review will include the WTO mission report of January, 1992 on institutional and capacity building for tourism. Staffing requirements of the Department of Tourism and the proposed Tourism Authority or Board of Kenya (if it is established when this study takes place) will be specified, with job descriptions and minimum qualifications written for each different staff position. Particular consideration will be given to ways and mechanisms to achieve greater coordination between the public and private sectors of

tourism. The private sector tourism organizations will be generally reviewed with recommendations made on any modifications needed.

1.1.21 Activity 21

Review of the current investment policy and incentives for tourism development of accommodation and other tourist facilities, including for both larger and smaller scale accommodation and for various quality levels of accommodation. Recommendations will be made for any modifications that are desirable to the investment policy and incentives including for facilities designed to encourage domestic tourism and local entrepreneurship. Review will also be made of the functions and role of the Kenya Tourist Development Corporation (KTDC) with recommendations made for any desired modifications.

1.1.22 Activity 22

Review of the legislation and regulations related to tourism and associated administrative procedures, with recommendations made for any desirable modifications needed to these. This review and recommendations will include the procedures for approving and licensing new accommodation and tour and travel agencies. The hotel classification system and procedures will be generally reviewed but if major changes are necessary, this will be recommended to be carried out as a separate special study outside of this project.

1.1.23 Activity 23

Preparation of development standards and design guidelines for tourist facilities. Development and related environmental standards will include building setbacks from the high water line, roads and site boundary lines, maximum building heights in various environments, maximum site coverage by buildings, floor area ratios, landscaping, off-street parking and any other relevant standards. Environmental standards will

include requirements for adequate provision of roads, water supply, sewage and solid waste disposal and other on-site infrastructure. Design guidelines will include site planning principles and architectural design concepts and use of building materials that are well related to the various Kenyan environments.

1.1.24 Activity 24

Identification of other techniques (than referred to above) for implementation of the tourism plan and preparation of an implementation manual in diagrammatic form with explanatory text. The process for monitoring plan implementation and the overall tourism sector will be specified.

1.1.25 Activity 25

Preparation of draft, draft final and final tourism development plan reports with appropriate graphic illustrations and explanatory text, including the results of the reviews, surveys and analyses and the plan recommendations. The draft and draft final plan reports will be presented to the Project Steering Committee for its review and comment.

1.2 Output 2

Comprehensive regional tourism plans for selected development zones.

1.2.1 Activity 1

Selection of 3-5 priority tourism zones from the national tourism plan for more detailed regional planning. The zones selected may include some already developed areas (such as coastal zones) which require improvements, some partially developed zones which require improvements and guidance for expansion and some new tourism zones which should be planned for future development. The zones to be planned will be selected in close consultation with the Project Steering Committee.

1.2.2 Activity 2

Establishment of the regional tourism development objectives within the framework of the national tourism plan recommendations, and review of the type and level of development proposed in the region. Survey and analysis of background information of the zones in addition to that carried out in the national plan including general environmental, socio-cultural, land use and economic surveys, surveys and evaluation of existing tourism development and infrastructure, evaluation of existing and potential tourist attractions and identification of any particular opportunities and problems of developing tourism. General carrying capacity analysis for tourism development will be conducted where relevant.

1.2.3 Activity 3

Preparation of the regional tourism development policies and plans including specification of the type and extent of tourism development, the land use elements and the institutional considerations at the regional level. Maximum consideration will be given to environmental and socio-cultural, as well as economic, factors in preparation of the plans. Alternative plans will be formulated and evaluated as a basis for determining the optimum plans.

1.2.4 Activity 4

Preparation of an implementation programme for each of the plans including the respective responsibilities of the central and regional (provincial and district) governments in plan implementation.

1.2.5 Activity 5

Preparation of the draft, draft final and final regional plan reports with suitable graphic illustrations and explanatory text. The draft and draft final reports will be reviewed by the Project Steering Committee.

1.3 Output 3

A comprehensive economic analysis of tourism at present and based on the plan's recommendations for future development.

1.3.1 Activity 1

Establishment of baseline economic data including expenditure patterns. The special tourist survey referred to in Activity 1.1.8 will include questions on tourist expenditure patterns. A special sample survey may also be required of tourism enterprises to obtain economic data. The data will be compiled and processed in the tourism information system specified in Objective 3.

1.3.2 Activity 2

Preparation of a macro-level cost-benefit analysis of tourism and calculation of the standard economic measures of tourism including contribution to Gross Domestic Product, income, gross and net foreign exchange earnings and identification of the sources of foreign exchange leakages, multiplier effect, direct, indirect and induced employment generated, and contribution to government revenues. Incorporation of the tourism sector into input-output tables will be examined.

1.3.3 Activity 3

Review of the desirability and feasibility of privatization of commercial facilities presently owned by the government or parastatals, with recommendations made on this matter.

1.3.4 Activity 4

Review of the present government taxation policy of tourism, with recommendations made on a consistent policy that generates substantial government revenue without creating an economic handicap for the private sector.

1.3.5 Activity 5

Identification of ways in which economic benefits can be enhanced including reducing the foreign exchange leakage factor and encouraging increased tourist expenditures. Ways in which more economic benefits can accrue to local communities, such as the present revenue sharing policy at parks and reserves, will also be identified.

1.3.6 Activity 6

Incorporation of the economic data base and results of the analysis in the tourism information system so that the economic analysis can be periodically updated.

1.3.7 Activity 7

Preparation of the economic analysis draft and final reports with suitable graphic illustrations and explanatory text. The draft report will be reviewed by the Project Steering Committee.

2. Objective 2

Preparation of various strategies, programmes and studies to implement the first stage or five-year period of the national tourism plan.

2.1 Output 1

A five-year tourism action programme to include development projects and other actions required.

2.1.1 Activity 1

Selection of the public sector type projects required including attractions development and infrastructure, and preparation of brief descriptions of the projects, general cost estimates and the responsible development agency. Sources of funding will be indicated where relevant. The public sector projects will be selected with consideration given to existing plans and programmes such as those for infrastructure. Projects may also

include detailed plans and special studies required for implementation in future development programmes. Private sector development projects will be indicated in general terms with an overall general cost estimate prepared.

2.1.2 Activity 2

Determination of the other actions required such as adoption of certain regulations, for plan implementation with identification of the responsible agencies or private sector.

2.1.3 Activity 3

Preparation of the action programme with the projects and actions indicated by year, along with the cost estimates where relevant and the responsible parties.

2.1.4 Activity 4

Preparation of the draft, draft final and final action programme reports with suitable graphic illustrations and explanatory text. The draft and draft final reports will be reviewed by the Project Steering Committee.

2.2 Output 2

A marketing strategy and promotion programme for the first five years of the plan.

2.2.1 Activity 1

Formulation of the marketing strategy based on the market analysis and tourism development policy and plan. The marketing strategy will consider any need to improve the overall tourism image of Kenya as well as the policy related to diversification of tourism.

2.2.2 Activity 2

Review of the role and activities of the overseas tourism offices with recommendations made on any changes (in number, location, operations, etc.) of these offices.

2.2.3 Activity 3

Review of the location and operations of local tourism information services with recommendations made for any improvements needed to these offices.

2.2.4 Activity 4

Preparation of a promotion programme with specification of the types of promotion techniques and related cost estimates for each year of the five-year period, including costing of the overseas offices and local tourist information offices.

2.2.5 Activity 5

Preparation of draft, draft final and final reports on the marketing strategy and promotion programme. The draft and draft final reports will be reviewed by the Project Steering Committee.

2.3 Output 3

Pre-feasibility studies for approximately 8-10 specific tourism projects in a format suitable for submittal to potential investors or donor agencies.

2.3.1 Activity 1

Selection of priority tourism projects from the action programme to include a variety of types of projects from different geographic areas. Projects should mostly be oriented to new specialized forms of tourism, opening up new geographic areas, and bringing benefits to local communities. They may also include improvements to existing tourism areas. The projects may include, for example, small to medium scale commercial enterprises, community-based development projects, environmental and cultural/archaeological/historic heritage interpretation sites and ecotourism projects.

2.3.2 Activity 2

Site analysis and preparation of conceptual site plans with architectural concepts, engineering guidelines and project development programmes, with development and operational cost estimates and projected revenue generation.

2.3.3 Activity 3

Preparation of pre-feasibility cost-benefit analyses to the extent of determining that the projects will be financially or economically feasible. Some public-type projects, such as attraction features, may not be financially self-sustaining but will be economically justified by providing overall economic benefits to the area through the indirect generation of tourist expenditures. The analysis will include environmental and socio-cultural, as well as economic considerations.

2.3.4 Activity 4

Preparation of the pre-feasibility study reports in draft and final form, with review of the draft reports by the Project Steering Committee.

2.4 Output 4

Prototypical tour programmes for in-country and regional tours.

2.4.1 Activity 1

Selection of types of potential tour programmes which do not now exist, oriented particularly to special interest tours within the country and the Kenya segment of regional East African tours.

2.4.2 Activity 2

Elaboration of the selected tour programmes with the daily itineraries indicated, based on the national and regional plan recommendations.

2.4.3 Activity 3

Preparation of draft and final reports on the tour programmes, with review of the draft report by the Project Steering Committee.

3. Objective 3

Establishment of a tourism information system within the Ministry of Tourism and Wildlife.

3.1 Output 1

The tourism information system programme.

3.1.1 Activity 1

Determination of the types of tourism information to be incorporated into the system, the intended use of the system, and the hardware and software required. Review will be made of the WTO mission report on tourism statistics in Kenya of May, 1984. WTO statistical definitions and standards will be used in establishing the system.

3.1.2 Activity 2

Installation of the hardware and software and the computer programmes established.

3.2 Output 2

Tourism data to be incorporated into the system.

3.2.1 Activity 1

Collection of existing data on tourist arrivals and characteristics, accommodation and other tourist facilities and services and any other available relevant information.

3.2.2 Activity 2

Generation of additional information required through special surveys, including of tourist characteristics and accommodation and other tourist facilities and services. A special questionnaire survey will be made of tourists

before departing the country which will include tourist characteristics, attitudes about tourist attractions, facilities and services and expenditure patterns during their stay in Kenya. Special surveys may be required of accommodation and other tourist facilities and services.

3.2.3 Activity 3

Consolidation of the tourism data collected into the system in a format that can be updated as needed.

3.3 Output 3

Trained Ministry staff to operate and maintain the information system on a continuous basis.

3.3.1 Activity 1

On-the-job training of at least two Ministry statisticians and two economists in operation of the system. Training will include analytical methodologies and designing surveys.

3.3.2 Activity 2

Preparation of a manual explaining the operation and maintenance of the system.

4. Objective 4

Enhancement of the tourism management capabilities of the Ministry (and Tourism Authority) staff and government and public education about the tourism plan. Particular consideration will be given by the government to adopting a policy of permanently assigning tourism management staff who have received training to the Ministry of Tourism or Tourism Authority in order to maximize application of their training.

4.1 Output 1

Five tourism officials educated overseas in one-year masters degree programme in various aspects of tourism management.

4.1.1 Activity 1

Selection of the fellowship candidates who have at least their first degree, some experience in tourism and the motivation to make public sector tourism management their career.

4.1.2 Activity 2

Organization of the one-year fellowship programme to include nine months of academic education at an appropriate overseas English speaking university with an internationally recognized graduate level programme in tourism management, about two months of on-the-job attachment in a public type tourism office in the country where the university is located and an approximate one-month study tour related to the specializations of the fellowship recipients. Tourism management specializations to be studied will include tourism planning and product development, tourism marketing, tourism project evaluation and appraisal techniques and any other specializations that are needed. Various different universities can be selected for the academic education.

4.1.3 Activity 3

Preparation by each fellowship recipient of a report on their programme upon its completion. The usual government bonding procedures for fellowship recipients will be followed.

4.2 Output 2

Approximately ten tourism officials trained in overseas short courses in various aspects of tourism management.

4.2.1 Activity 1

Selection of the fellowship recipients based on their academic backgrounds, tourism experience and motivation.

4.2.2 Activity 2

Organization of the fellowship programme based on the availability of overseas courses and including a range of topics related to Ministry needs of management capabilities. Study tours may be included along with the course programmes. The courses will vary in length but average about two to three months.

4.2.3 Activity 3

Preparation by each fellowship recipient of a report on their programme upon its completion.

4.3 Output 3

About 75 tourism and related officials trained in-country on fundamentals of various aspects of tourism management. Some private sector participants may also be invited to attend the course.

4.3.1 Activity 1

Selection of the tourism officials and some officials in related ministries to participate in the training programme. Private sector participants may also be invited to attend the courses.

4.3.2 Activity 2

Organization of three training courses, of about three weeks each, to be held in Kenya, each with one or two international lecturers supplemented by local lecturers. Each course will have about 25 participants. One course will focus on tourism planning, another course on tourism marketing and the third course on hotel classification systems and procedures. Course content will include lectures, exercises and field visits.

4.3.3 Activity 3

Preparation of an evaluation report for each course.

4.4 Output 4

Two national tourism seminars focused on the recommendations of the national tourism plan and other components of the project.

4.4.1 Activity 1

Organization of the two national tourism seminars of approximately two to three days each. The first seminar will focus on the draft national plan recommendations and be aimed at introducing the draft plan recommendations to technical level government personnel and private sector representatives, and obtaining responses on the suitability of the recommendations. The second seminar will focus on the final plan recommendations and be aimed at higher level government officials, spokesmen for the private sector and selected community leaders. The seminars will include various speakers and topics related to planning tourism development. An international keynote speaker may be invited to the second seminar.

4.4.2 Activity 2

Encourage maximum publicity in the public media about the seminars and publish the seminar proceedings.

4.5 Output 5

Trained counterparts in various aspects of the tourism planning study.

4.5.1 Activity 1

Selection of suitable counterpart staff from the Ministry of Tourism for the principal study team members.

4.5.2 Activity 2

On-the-job training of the counterparts by the planning team members on a continuous basis during the course of the project. The counterparts will assist with project implementation as well as receive training from the planning team.

E. INPUTS

International Inputs

Personnel

International Consultants

	Man-months
Tourism Development Planner/Team Leader	18
Tourism Economist	6
Tourism Regional/Land Use Planner	5
Tourism Marketing Specialist	4
Tourism Statistician	4
Other specialists as needed, e.g. on institutional elements	3
TOTAL	40

National Consultants

Infrastructure Planners	12
- airport facilities	
- roads	
- railway	
- water supply	
- electric power supply	
- sewage and solid waste disposal	
- telecommunications	
Tourist Facility Architect/Site Planner	12
Tourism Economist	6
Tourism Sociologist/Anthropologist	6
Environmental Specialist	6
Tourism Project Feasibility Analyst	6
Other Specialists as needed	3
TOTAL	51

Provision of Incentive Payments to Counterparts

Equipment

3 vehicles -- two land cruisers and one sedan
Computers, printers and software for the tourism information
system and project operations
Photocopy machine
Fax machine

Training

5 one-year fellowships for overseas education in tourism management
10 fellowships for various overseas short courses
3 three-week in-country training courses
Support for 2 national tourism seminars

Miscellaneous

Production of the project reports
Sundry supplies and other expenses
Operation and maintenance of the project vehicles and other equipment
Payments to national surveyors to conduct the tourist survey, printing the questionnaire and other survey expenses.

Government Inputs

Office space and basic office equipment for the planning team
Counterpart staff for the major team member positions*
Organization of meetings and field trips
Provision of existing relevant documentation and data
Appointment of a Project Steering Committee with public and private sector representation

* The Team Leader's counterpart will function as the National Project Coordinator.

PRELIMINARY BUDGET
(in US\$)

Personnel	
40 Man/months of international consultants	480,000
51 man/months of national consultants	255,000
Incentive payments to counterparts	5,000
Total Personnel	740,000
Equipment	85,000
Training	
5 one-year fellowships for overseas education	150,000
10 fellowships for overseas courses	120,000
In-country training courses	45,000
Support for the national tourism seminars	10,000
Total Training	325,000
Miscellaneous	
Survey expenses	20,000
Report production	25,000
Vehicle maintenance and sundry supplies and expenses	25,000
Total Miscellaneous	70,000
Total project budget	1,220,000

* Note: National Consultants Fees will need to be confirmed when the budget is finalised.

Annex 1

PRELIMINARY WORK PLAN

	months
Pre-planning activities -- Tourist surveys and establishment of the tourism information system (Objective 3)	3
Preparation and reviews of the national and regional plans and related studies (Objective 1)	7
Preparation and reviews of the action and marketing programmes, project pre-feasibility analyses and related studies (Objective 2)	6
Production of the final reports	2
Training (objective 4) -- will take place throughout the project	
Total project time	18

Annex 2

JOB DESCRIPTIONS
OF
TEAM MEMBERS

Job Description

TOURISM DEVELOPMENT PLANNER/TEAM LEADER

Location: Nairobi, Kenya

Duration: 18 months

Responsibilities:

This position is responsible for overall coordination and successful execution of the programme, including preparation of an inception report and detailed work programme, coordination of team members and coordination with the government, private sector associations and the Project Steering Committee. Specific technical activities are as follows:

1. Prepare the national tourism development policy and structure plan including the necessary background studies and analyses and using input, where relevant, from other team members. This will include recommendations on general improvements to tourist attractions, facilities and services.
2. Formulate recommendations on institutional elements of the plan for those elements that are not prepared by other team members.
3. Prepare the tourism action programme including the necessary background studies and using input, where relevant, from other team members.
4. Work with the regional/land use planner and architect/site planner in preparation of regional plans and project conceptual plans and programmes, and the marketing specialist in preparation of prototypical tour itineraries.
5. Coordinate with the government on selection of training fellowship recipients and organization of project training courses.
6. Write the relevant sections of the project reports and review and edit where necessary all the project reports.
7. Work with and train a counterpart on a continuous basis.

Qualifications:

Substantial experience in preparing comprehensive national and regional tourism plans and in managing major tourism planning projects is required. Experience in developing countries is important and experience in Africa is preferable. Fluency in English and report writing and verbal presentation skills are essential.

Job Description

INFRASTRUCTURE PLANNERS

Location: Nairobi, Kenya

Duration: 12 months in total

Responsibilities:

In coordination with, and under the general direction of the programme Tourism Development Planner/Team Leader, the infrastructure planners are responsible for the infrastructure elements of the programme including airport and airfield facilities, roads, railway, water supply, electric power, sewage and solid waste disposal, telecommunications and any other infrastructure considerations. Specific activities are as follows.

1. For inputs into the national and regional tourism plans, review the present status and plans of all aspects of infrastructure relevant to tourism development, identify particular problems, and prepare recommendations on near-term and long-range improvements required for infrastructure to satisfactorily serve tourism. Existing infrastructure plans will be reviewed as input to the recommendations.
2. For input into the five-year tourism action programme, identify, describe and prepare general cost estimates and specify the responsible agencies for the infrastructure elements that will be included in the action programme.
3. For input into the specific tourism project pre-feasibility studies, prepare the infrastructure components of the projects with engineering standards to be applied and the development and operational cost estimates.
4. Prepare general environmental standards for tourist facility projects including for adequate provision of roads, water supply, sewage and solid waste disposal and telecommunications.
5. Write the relevant sections on infrastructure of the plan reports, including appropriate graphic illustrations.

Qualifications:

Various infrastructure planning specialists will be involved. Each one should have substantial experience in planning their type of infrastructure for development in Kenya. Familiarity with infrastructure needs for tourism is important. Fluency in English is essential and report writing skills are important.

Job Description

TOURISM ECONOMISTS

Location: Nairobi, Kenya

Duration: 12 months in total

Responsibilities:

In coordination with the programme Tourism Development Planner/Team Leader, these positions are responsible for preparation of a comprehensive economic analysis of tourism in the country at present and in the future based on the recommendations for development in the national tourism plan. Specific activities are as follows:

1. Establish baseline data. Some data on tourist expenditures will be provided from the programme survey which will be incorporated into the tourism information system set up by the programme. Other data will need to be collected. Data collection will be coordinated with the central statistics department.
2. Prepare a macro-level national cost-benefit analysis of tourism and calculate the standard economic measurements of tourism, including contribution to gross domestic product, gross and net foreign exchange earnings and identification of the sources of foreign exchange leakages, multiplier effect, direct, indirect and induced employment generated, and contribution to government revenues.
3. Review the desirability and feasibility of privatization of commercial tourist facilities presently owned by the government or parastatals, with recommendations made on this matter.
4. Review the present government taxation policy of tourism, with recommendations made on a consistent policy that generates substantial government revenues without creating an economic hardship for the private sector.
5. Identify ways in which economic benefits can be enhanced including reducing the foreign exchange leakage factor and encouraging increased tourist expenditures. Ways in which the benefits of tourism can accrue to local communities will be particularly examined and recommendations made.
6. Incorporate the economic data base and results of the analysis into the tourism information system.

7. Prepare the economic analysis report with appropriate graphic illustrations.
8. Prepare any economic analysis input to preparation of the regional tourism plans.
9. Work with and train counterpart staff on a continuous basis.

Qualifications:

Two economists will be used. Substantial experience on preparation of tourism economic analyses at the macro-national level and formulating ways to enhance the economic benefits of tourism is required. Experience in developing countries and Africa is highly desirable. Fluency in English and report writing skills are essential.

Job Description

TOURIST FACILITY ARCHITECT/SITE PLANNER

Location: Nairobi, Kenya

Duration: 12 months

Responsibilities:

In coordination with, and under the general direction of the programme Tourism Development Planner/Team Leader, this position is responsible for the architectural and site planning aspects of the programme. Specific activities are as follows:

1. For the national tourism plan, prepare development standards and design guidelines for tourist facilities. Development standards will include building setbacks from the high water line, roads and site boundary lines, maximum building heights in various environments, maximum site coverage by buildings, floor area ratios, landscaping, off-street parking and any other relevant standards. Design guidelines will include site planning principles and architectural design concepts and use of building materials that are well related to the various Kenyan environments. The project regional/land use planner will also provide input on development standards.
2. For the tourism project pre-feasibility studies, prepare conceptual site plans and architectural concepts, with development cost estimates. About 8-10 project studies will be prepared.

Qualifications:

Be a licensed architect in Kenya and have substantial experience in preparation of site plans and architectural designs for tourist facilities. Knowledge of development standards is important. Fluency in English and graphic illustration skills are essential.

Job Description

ENVIRONMENTAL SPECIALIST

Location: Nairobi, Kenya

Duration: 6 months

Responsibilities:

In coordination with, and under the general direction of the programme Tourism Development Planner/Team Leader, this position is responsible for the environmental input into the programme. Specific activities are as follows:

1. For the national tourism plan, evaluate the positive and negative environmental impacts of tourism at present and possible impacts in the future, with recommendations made to reinforce positive impacts and mitigate negative ones. Recommendations will make reference to solving present environmental problems and to the need for requiring environmental controls and procedures for future tourism development projects, including the application of environmental impact assessment procedures to proposed tourism projects. Impact evaluation will give consideration to pollution of the offshore waters, as well as to the protected areas and wildlife (in cooperation with the Kenya Wildlife Service).
2. Provide the environmental considerations and input into the preparation of the regional tourism plans.
3. Provide the environmental considerations and input into the preparation of the tourism project pre-feasibility analyses.
4. Write the relevant sections of the project reports.

Qualifications:

In-depth knowledge of environmental impact considerations of development and substantial experience in preparing environmental studies and impact assessments are required. Environmental knowledge of development in Kenya is important. Fluency in English and report writing skills are essential.

Job Description

TOURISM SOCIOLOGIST/ANTHROPOLOGIST

Location: Nairobi, Kenya

Duration: 6 months

Responsibilities:

In coordination with the programme Tourism Development Planner/Team Leader, this position is responsible for the socio-cultural input into the programme. Specific activities are as follows:

1. For the national tourism plan, evaluate the positive and negative socio-cultural impacts of tourism at present and possible impacts in the future, with recommendations made on ways to reinforce positive impacts and mitigate negative ones. Particular consideration will be given to the best means of handling the interface of tourists and residents in culturally traditional areas. Ways of involving local communities in the tourism development process and bringing benefits of tourism to local communities will be identified, and provide input to the programme's economic analysis. The problems resulting from the uncontrolled activities of "beach operators" will be addressed, and actions recommended to resolve this problem (if it has not yet been resolved when this study takes place).
2. Prepare a prototype brochure of recommended tourist behavior (do's and don't's for tourists).
3. Elaborate a public awareness programme on tourism and teaching of tourism in the school system with respect to appropriate approaches and general content.
4. Provide the socio-cultural considerations and input into the preparation of the regional tourism plans.
5. Provide the socio-cultural considerations and input into the preparation of the tourism project pre-feasibility analyses.
6. Write the relevant sections of the project reports.

Qualifications:

In-depth knowledge of the socio-cultural impact considerations of development and substantial experience in preparing socio-cultural studies of development are required. Knowledge of the cultures and sociological implications of development in Kenya is important. Familiarity with socio-cultural implications of tourism development in Kenya will be an advantage. Fluency in English and report writing are essential.

Job Description

TOURISM PROJECT FEASIBILITY ANALYST

Location: Nairobi, Kenya

Duration: 6 months

Responsibilities:

In coordination with, and under the general direction of the project Tourism Development Planner/Team Leader and working with the project Tourist Facility Architect/Site Planner, the position is responsible for the pre-feasibility studies of the project. About 8-10 tourism project pre-feasibility studies will be conducted. The projects will be designed by the architect/site planner and infrastructure planners of the project team. Specific activities are as follows:

1. Prepare pre-feasibility cost-benefit analyses of the projects to the extent of determining that the project will be financially or economically feasible. The analysis will include environmental and socio-cultural considerations with this input provided by other team members.
2. Write the cost-benefit analysis portion of the study reports in a format suitable for submittal to potential investors or donor agencies.

Qualifications:

Substantial experience in preparing project cost-benefit feasibility studies, preferably with experience in tourism project feasibility analysis is required. Experience in Kenya is highly desirable. Fluency in English and report writing skills are essential.

Job Description

TOURISM REGIONAL/LAND USE PLANNER

Location: Nairobi, Kenya

Duration: 5 months

Responsibilities:

In coordination with, and under the general direction of the programme Tourism Development Planner/Team Leader, this position is responsible for the following activities:

1. Prepare 3-5 regional tourism plans for priority tourism development zones identified in the national tourism plan. The zones may include both existing tourism areas which require improvements and new zones. The regional planning will involve background surveys and analysis, determination of the specific type and level of tourism development based on input from the national plan, preparation of the regional tourism plans identifying tourist attractions, development areas, roads and other infrastructure (infrastructure input will be provided by infrastructure planners). Utmost consideration will be given to environmental and socio-cultural, as well as economic, factors. Recommendations will be made on regional level institutional elements, and an implementation programme prepared within the framework of the national implementation programme. Tourism planning will be integrated into the overall development planning of the regions.
2. Write the regional planning sections of the programme reports, including appropriate graphic illustrations.
3. Provide land use planning input as needed to preparation of the conceptual plans for the programme pre-feasibility studies, and the development standards element of the national plan.

Qualifications:

Substantial experience in preparation of regional level tourism plans and some land use planning experience are required. Experience in Africa or other developing countries is highly desirable. Fluency in English is essential, and report writing and graphic illustration skills are important.

Job Description

TOURISM MARKETING SPECIALIST

Location: Nairobi, Kenya

Duration: 4 months

Responsibilities:

In close coordination with, and under the general direction of the programme Tourism Development Planner/Team Leader, this position is responsible for the marketing elements of the programme. Specific activities are as follows:

1. Prepare the market analysis element of the national tourism plan including research and analysis of the present market patterns and characteristics and global, regional and national market trends, and establish market targets by five-year periods to 2010 giving consideration to diversification of the tourism product and maintaining quality level tourism development. Visits or telephone/fax interviews will be made of tour operators in the major existing and potential market countries. Baseline data will be provided by the government tourism information system to be established in the programme.
2. Formulate a marketing strategy based on the market analysis and recommended tourism development policy and plan.
3. Prepare a detailed promotion programme for the first five-year period of the plan with promotion techniques and their cost estimates specified for each year.
4. Review the overseas promotion offices of Kenya and the in-country tourist information offices, and make recommendations on ways to improve these offices including their number, location and staffing. Selected visits may be made to the Kenyan overseas promotion offices in conjunction with the tour operator visits.
5. Prepare, in coordination with the Team Leader, prototypical tour programmes for new in-country and regional tour itineraries.
6. Write the relevant sections of the project reports.
7. Work with and train a counterpart on a continuous basis when in Kenya.

Qualifications:

Substantial experience in preparing market analyses and promotion programmes at the national level is required. Experience in developing countries is highly desirable and experience in Africa is preferable. Fluency in English is essential and report writing skills are important.

Job Description

TOURISM STATISTICIAN

Location: Nairobi, Kenya

Duration: 4 months with a possible extension if needed

Responsibilities:

In coordination with, and under the general direction of the programme Tourism Development Planner/Team Leader, this position is responsible for establishment of a tourism information system for Kenya. Specific activities are as follows:

1. Determine the tourism information system programme including the types of tourism information to be incorporated into the system, the intended use of the system, and the hardware and software required. Review will be made of the WTO mission report on tourism statistics in Kenya of May, 1984. WTO statistical definitions and standards will be used. Supervise installation of the system hardware and software.
2. Collect existing data on tourist arrivals and characteristics, accommodation and other tourist facilities and services and other relevant information. Generate additional information including designing and supervising a special tourist survey to determine tourist characteristics, attitudes towards Kenya's tourist attractions, facilities and services and expenditure patterns. Special surveys may also be required of accommodation and other tourist facilities and services.
3. Consolidate the information into the system in a suitable format for analytical purposes and continuous updating and monitoring.
4. Prepare a manual explaining the operation and maintenance of the system.
5. Work with and train counterparts on a continuous basis. Counterparts will likely include two statisticians and two economists.

Qualifications:

Substantial experience in the establishment and operation of tourism information systems at the regional or national level is required. Skills should include designing tourist surveys, sampling techniques and knowledge of IBM compatible hardware and software. Familiarity with WTO statistical standards is important. Experience in Africa or developing countries is an advantage. Fluency in English is essential and writing skills are important.

Annex 3

TRAINING COURSE OUTLINES

Course Outline

INTRODUCTION TO TOURISM DEVELOPMENT PLANNING

Global, regional and national tourism trends affecting planning

Importance of planning tourism

Types and levels of tourism planning

Concepts of tourism planning

- sustainable and integrated development approach
- comprehensive approach
- community involvement approach
- implementable approach

National and regional tourism planning

- planning process
- planning principles
- policy and plan formulation
- institutional elements
- plan implementation

Carrying capacity concepts

Resort planning -- process, principles and plan formulation

Planning for urban tourism

Planning for other forms of tourism

- special interest
- ecotourism
- cultural tourism
- cruise ship tourism
- residential tourism, etc.

Heritage site interpretation

Environmental and socio-cultural considerations in tourism

Economic considerations

Tourist facility development and design standards

Monitoring the progress of tourism and plan implementation

Organizing the tourism planning project

Tourism planning in Kenya (various aspects)

- Kenya Wildlife Service
- Kenya National Museums
- infrastructure planning
- land use planning
- environmental impact considerations and assessment
- socio-cultural impact considerations, etc.

The course will include lectures, exercises and short field trips to observe tourism development. The course will be conducted by an international lecturer supplemented by local lecturers.

Course Outline

INTRODUCTION TO TOURISM MARKETING

Global, regional and national tourism trends affecting marketing

Importance of market planning and promotion

Concepts of marketing

- matching the tourism product and tourist markets, etc

Market analysis techniques

- establishing baseline data
- trends analysis
- psychographic analysis, etc.
- determining market targets

Formulating the marketing strategy

Promotion techniques

- collateral material of brochures, posters, videos, etc.
- seminars with tour operators
- advertising
- mail distribution
- attendance at trade fairs, etc

Preparing the promotion programme

Costing of promotion

Establishing overseas tourism promotion offices

Organising tourist information services

Appropriate organisational structures for marketing

Respective roles of the government, tourism boards, the private sector and airlines in promoting tourism

Monitoring the effectiveness of marketing

Designing tourist surveys

Tourism marketing in Kenya

- public sector
- private sector
- airlines

The course will include lectures, exercises and short field trips. The course will be conducted by an international lecturer supplemented by local lecturers.

Course Outline

HOTEL AND RESTAURANT CLASSIFICATION -- SYSTEMS AND PROCEDURES

Introduction to hotels and restaurants classification

- international
- African
- Kenyan
 - the legal and statutory provisions
 - current classification system

Physical, architectural and aesthetic aspects of hotel buildings, lodges, tented camps and related establishments

- physical and architectural considerations
- landscaping considerations
- principles and concepts of interior design and decoration

Consideration of the various laws and statutory requirements

relating to the hotel, restaurant and lodge operations in Kenya

- safety and security considerations for town hotels, resort hotels, game lodges and tented camps
- laws and health regulations governing hotels, restaurants and other catering establishments in Kenya
- the personnel aspect of hotel, restaurant and lodge enterprises

Hotel food and beverage operations

- construction, layout and the organisation of a modern hotel kitchen
- evaluating the food and beverage service and sales system in hotels, restaurants, lodges and other catering services
- hotel stores, the storage system and their operation

Rooms Division of the hotel

- front office department
- housekeeping department

Supportive hotel departments and supplementary guest service amenities

- support departments for hotels and game lodges
- supplementary guest services and amenities.

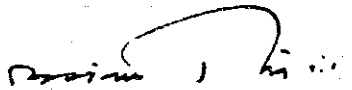
This course outline may be amended when it is specifically organised. The course will include lectures, exercises and field visits. The course will be conducted by international lecturer supplemented by local lecturers, especially from Kenya Utalii College.

付属資料 2. Scope of Work

SCOPE OF WORK
FOR
THE STUDY ON THE NATIONAL TOURISM MASTER PLAN
IN
THE REPUBLIC OF KENYA

AGREED UPON BETWEEN
MINISTRY OF TOURISM AND WILDLIFE
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

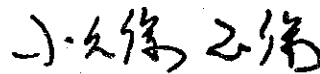
Nairobi, November 24th, 1993



Permanent Secretary
Ministry of Finance
The Republic of Kenya



A.M.H. Sharawa
Permanent Secretary
Ministry of Tourism and
Wildlife
The Republic of Kenya



Mr. Masayasu Kokubo
Leader
Preparatory Study Team
Japan International
Cooperation agency

I. Introduction

In response to the request of the Government of the Republic of Kenya, the Government of Japan has decided to conduct a Study on the National Tourism Master Plan in the Republic of Kenya (hereinafter referred to as "the Study"), in accordance with the relevant laws and regulations in force in Japan.

Accordingly, the Japan International Cooperation Agency (hereinafter referred to as "JICA"), the official agency responsible for the implementation of the technical cooperation programs of the Government of Japan, will undertake the Study in close cooperation with the authorities concerned of the Republic of Kenya.

The Ministry of Tourism and Wildlife (hereinafter referred to as "MOTW") shall act as counterpart agency to the Japanese Study Team and also act as coordinating body in relation with other relevant organizations for the smooth implementation of the Study.

The present document sets forth the scope of work with regard to the Study.

II. Objectives of the Study

1. To formulate a comprehensive National Tourism Development Strategy in Kenya.
2. To formulate National and Zonal Tourism Development Plans with the target year of 2010 and 2000 respectively.

III. Scope of the Study

In order to achieve the objectives, the Study shall cover the following items :

1. Review and analysis of the existing data and information
To collect, review and analyze available data, information, reports, plans present policies and programs of the government relevant to the study.
2. Evaluation of tourism resources

3. Analysis of tourism demand forecast
 - (1)market survey
 - (2)socio-economic framework
 - (3)analysis of tourism demand forecast
4. Formulation of comprehensive National Tourism Development Strategy
5. Formulation of National Tourism Development Plan
 - (1)tourism policy
 - (2)tourism promotion plan
 - (3)tourism facility plan
 - (4)traffic network
 - (5)conservation plan of natural environment and wildlife
 - (6)preparation of standards for development, design of facilities and environment
6. Zoning and selection of priority zones
7. Study on tourism information plan
8. Formulation of zonal tourism development plan
 - (1)tourism promotion plan
 - (2)tourism facility plan
 - (3)conservation plan of natural environment and wildlife
 - (4)traffic network
 - (5)land utilization and infrastructure facilities
 - (6)initial environmental examination
 - (7)tourism development plan
9. Preparation of preliminary cost estimate
- 10.Preparation of implementation program
- 11.Formulation of investment plan
- 12.Management, operation and organization plan
- 13.Economic and financial evaluation
- 14.Formulation of 5-year action program
- 15.Selection of priority 5-year action program
- 16.Preparation of guideline for the priority 5-year action program
- 17.Preparation of typical tour program

IV. Study Schedule

The whole work shall be carried out in accordance with the attached tentative study schedule (APPENDIX-A).

V. Reports

JICA shall prepare and submit the following reports in English to the Government of the Republic of Kenya.

1. Inception Report

Thirty (30) copies

At the beginning of the Study in Kenya

2. Progress Report

Thirty (30) copies

Within three (3) months after submission of the Inception Report

3. Interim Report(I)

Thirty (30) copies

Within three (3) months after submission of the progress report

4. Interim Report(II)

Thirty (30) copies

Within seven (7) months after submission of the Interim Report (I)

5. Draft Final Report

Thirty (30) copies

Within three (3) months after submission of the Interim Report (II)

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

6. Final Report

Thirty (30) copies

within two (2) months after the receipt of the comments on the Draft Final Report.

VI. Undertaking of the Government of the Republic of Kenya

1. To facilitate smooth conduct of the Study, the Government of the Republic of Kenya shall take necessary measures:
 - (1) To secure the safety of the Japanese study team (herein after referred to as "the Team").
 - (2) To permit the members of the Team to enter, leave and sojourn in Kenya for the duration of their assignment therein, and exempt them from foreigner registration requirements and consular fees;
 - (3) To exempt the members of the Team from taxes, duties and other charges on equipment, machinery and other materials brought into and out of Kenya for the conduct of the Study;
 - (4) To exempt the members of the Team from income taxes and other charges of any kind imposed on or in connection with any emoluments or allowances paid to the members of the Team for their services in connection with the conduct of the Study;
 - (5) To provide the necessary facilities to the Team for remittances as well as utilization of funds introduced into Kenya from Japan in connection with the conduct of the Study;
 - (6) To provide medical services as needed and its expenses will be chargeable on the members of the Team;
 - (7) To secure permission for entry into private properties or restricted areas for implementation of the Study; and
 - (8) To secure permission for the Team to take all data and documents (including photographs) related to the Study out of Kenya to Japan.

2. The Government of the Republic of Kenya shall bear claims, if any arises, against the members of the Team resulting from, occurring in the course of, or otherwise connected with, the discharge of their duties in the implementation of the Study, except when such claims arise from gross negligence or willful misconduct on the part of the members of the Team.

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3. MOTW shall, at its own expense, provide the Team with the following, in cooperation with other relevant organizations,
- (1) available data and information, related to the Study including aerial photographs and maps,
 - (2) counterpart personnel, and
 - (3) credentials or identification cards,

VII. Undertaking of JICA

For the implementation of the Study, JICA shall take the following measures:

- (1) to dispatch, at its own expense, the Team to the Republic of Kenya, and
- (2) to pursue technology transfer to the Kenyan counterpart personnel in the course of the Study.

VIII. Others

JICA and MOTW shall consult with each other in respect of any matter that may arise from or in connection with the Study.

Appendix A

Tentative Schedule

Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
Work in Kenya																			
Work in Japan																			
Report																			

IC/R: Inception Report

PR/R: Progress Report

IT/R: Interim Report

DF/R: Draft Final Report

F/R : Final Report

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付属資料 3. Minutes of Meeting

MINUTES OF MEETING
FOR
THE NATIONAL TOURISM MASTER PLAN
I N
THE REPUBLIC OF KENYA

AGREED UPON BETWEEN

MINISTRY OF TOURISM AND WILDLIFE
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

Nairobi, November 24th, 1993



A.M.H. Sharawe
Permanent Secretary
Ministry of Tourism and
Wildlife
The Republic of Kenya



Mr. Masayasu Kokubo
Leader
Preparatory Study Team
Japan International
Cooperation Agency

The Japanese Preparatory Study Team organized by Japan International Cooperation Agency, headed by Mr. Masayasu KoKubo visited the Republic of Kenya from November 17th, 1993 for the purpose of discussing the Scope of Work for "THE STUDY ON THE NATIONAL TOURISM MASTER PLAN" in the Republic of Kenya (hereinafter referred to as "the Study").

The Japanese Preparatory Study Team exchanged views and had a series of discussions with representatives of the Ministry of Tourism and Wildlife (hereinafter referred to as "MOTW") and the organizations concerned. And also the Japanese Preparatory Study Team carried out field visits/reconnaissance from November 19th to 22nd, 1993.

Through these discussions and observations, both sides (ANNEX 1) prepared the Minutes of Meeting as follows.

1. Both sides agreed to use "The National Tourism Master Plan in The Republic of Kenya" as the name of the Study.
2. The Study should be conducted in accordance with the Scope of Work, duly signed on November 24th, 1993.
3. Japanese side requested to secure the safety of the Japanese Study Team.
Kenyan side promised to arrange required measures for Japanese Study Team in cooperation with relevant organizations.
4. Both sides agreed that the Government of the Republic of Kenya would establish a Steering Committee consisting of following organizations under the chairmanship of the Ministry of Tourism and Wildlife.

- (1) Ministry of Planning and National Development
- (2) Ministry of Finance
- (3) Ministry of Local Government
- (4) Ministry of Environment and Natural Resources

- (5) Ministry of Transport and Communications
- (6) Ministry of Public Works and Housing
- (7) Ministry of Reclamation, Regional and Water Development
- (8) Ministry of Energy
- (9) Kenya Wildlife Service, Kenya Tourist Development Corporation,
and Kenya Utalii College
- (10) Private Organizations in the Tourism Industry

5. Kenyan side requested that Kenyan counterpart personnels take advantage of training in Japan related to the Study to promote an effective technology transfer.

Japanese side promised to convey this request to JICA Headquarters in Tokyo.

6. Kenyan side requested JICA to provide appropriate office space with necessary equipment in Nairobi and appropriate number of vehicles with drivers. Japanese side promised to convey this request to JICA Headquarters in Tokyo.

7. Both sides recognized the necessity of the initial environmental examination for the Master Plan Study. JICA will carry out the necessary environmental study during the course of the Study.

8. Kenyan side requested that Local Consultants should be involved in the Study as subconsultants in order to keep smooth implementation of the Study.

Japanese side promised to convey this request to JICA Headquarters in Tokyo.

9. Kenyan side requested that the Full Scale Study Team should have a Workshop at the submission of the Draft Final Report in order to present the report to organizations concerned.

Japanese side promised to convey this request to JICA Headquarters in Tokyo.

ANNEX 1

ATTENDANCE LIST

KENYAN SIDE

A.M.H.Sharawe	Permanent Secretary, Ministry of Tourism and Wildlife
S.N.Otonglo	Deputy Secretary, Ministry of Tourism and Wildlife
M.M.Mbui	Deputy Director of Tourism, Ministry of Tourism and Wildlife
Z.E.Gichohi	Deputy Chief Economist, Ministry of Tourism and Wildlife
A.Gichu(Ms)	Senior Assistant Secretary, Ministry of Tourism and Wildlife
L.O.Aketch	Senior Economist / Deputy Head of Planning Div., Ministry of Tourism and Wildlife
E.L.Namwalo	Economist I . Ministry of Tourism and Wildlife
R.W.Njuguna(Ms)	Assistant Secretary, Ministry of Finance

JAPANESE SIDE

M. Kokubo	Leader, Preparatory Study Team, Japan international Cooperation Agency (JICA)
R. Nomachi	Member of Team, JICA
Y. Nakamura	Member of Team, JICA
K. Uegaki	Member of Team, JICA
Y. Ohashi	Member of Team, JICA
Y. Niimura	Member of Team, JICA
S. Shibata	Assistant Resident Representative, JICA Nairobi Office

附属資料 4. 对 処 方 針

ケニア共和国全国観光開発計画調査
事前調査対処方針

項 目	対 処 方 針	備 考
1. 事前調査の目的	<p>①先方政府の意向確認（他計画との関連、資金手当ての用途等）</p> <p>②要請背景、内容の確認 （調査対象、調査実施上の問題点、受入体制）</p> <p>③現地踏査</p> <p>④情報収集 （関連報告書、ローカルコンタクトの能力等）</p> <p>⑤環境予備調査 （関連資料収集・分析、スクリーニング及びスコーピング）</p> <p>⑥S/W協議・署名</p>	
2. 調査名	<p>和文名を「ケニア国全国観光開発計画調査」とし 英文名を「^{Study on} The National Tourism Master Plan in the Republic of Kenya」とする。</p>	
3. 本格調査の開始	<p>本格調査開始時期については、1994年2月中旬を目途とするが、明言しない。</p>	
4. 協議機関	<p>（政府機関）</p> <p>○ 観光・野生生物省（MOTW）</p> <p>○ ケニア・ワイルド・サービス（KWS）</p>	

5. 具体的作業内容

(1) 先方政府の
意向確認

事業実施時の資金目途等、先方政府の意向を確認し、当方の本件調査協力に関する考え方を説明する。当ミッションとケニア共和国政府機関との合意事項については先方と事前調査団とが S/W, M/M に署名し、確認する。

(2) 要請背景、
内容の確認

本件調査の要請に至るまでの経緯とその内容を確認する。

a) 調査対象

ケニア国全域とする。

b) 調査実施上の
問題点の確認

調査実施に際して問題となる、治安状況、気象状態、連絡手段、交通手段、宿泊施設等を確認する

c) 受入体制

①ケニア共和国政府の全行政機構の中でのカウンターパート機関の位置付けとその確認

②関連機関の協力体制（役割と機能）の確認
（各国ドナー機関も含む）

③調整委員会（Steering Committee）の必要性の有無を確認

(3) 現地踏査

調査対象地域の現況把握および本格調査の実施計画策定に必要となる現地情報を入手する。

(4) 情報収集

Q/N に基づき関連情報を収集する。

(5) 各国ドナー会議

世銀を始めとする各国のドナーに対し、本件調査の要請背景、目的、調査内容、プロジェクト実施後の効果等について説明するとともに関連情報の収集を行う。

(6) 環境予備調査

環境影響に関する資料の収集・分析を行うと共に環境予備調査を環境配慮ガイドライン（観光編）に基づき実施する。

今回事前調査の現地踏査対象地域として
・ウガンダ国境地域
（Mt. エルゴン）
・ビクトリア湖周辺
（キスム博物館／ホマベイ）
・ナクル湖周辺
・Mt. ケニア周辺
・海岸地域（モンバサ、マリンディ）
・アンボセリ、ツァボ国立公園
・ナイロビナショナルパーク
等が挙げられる。

(7) S/W 協議・署名	<p>下記の項目について協議を行い、その結果をM/MまたはS/Wで確認する。</p> <ul style="list-style-type: none"> ・協力の目的及び範囲 ・調査の内容 ・調査期間及び工程 ・報告書 ・ケニア側、日本側が取るべき措置 ・その他協議
a) 本格調査の 目的	<p>ケニア国全土を対象とした観光開発戦略を策定し、全国及びゾーン別観光開発計画（目標年次：2000年、2010年）を策定する。</p>
b) 本格調査の 対象地域	<p>ケニア国全域</p>
c) 本格調査の 内容と項目	<p>①資料収集及び分析</p> <p>下記に示す資料の収集及び分析を行う。</p> <ul style="list-style-type: none"> ・歴史、地勢、気候、文化、経済、社会等 ・関連開発計画及び政策 ・社会経済条件 ・土地利用計画 ・土地利用状況 ・交通ネットワーク、アクセス ・観光資源（植物、野生生物、気候、景観、臨海・海洋地域） ・環境及びその保護政策 ・観光政策 ・野生生物の棲息状況、保護政策及び法規制 ・民間観光セクター産業 ・観光客の保健／衛生対策 ・土産品調査 <p>②現地踏査</p> <p>計画対象地域の現況を把握するため、現地踏査を行う</p>

③観光資源評価

- ・既存の観光資源を評価
- ・新商品（目玉商品）の発掘及びその評価

例) ^{トワイブ、ワグ、}新種の動植物、
温泉等など

④観光需要分析

- ・市場調査（旅行目的、目的地、客数、特徴、満足度、傾向、特性）
- ・観光需要予測（2000年、2010年）
- ・観光需要分析

※具体的調査事項
・ナイロビ空港にて外国人観光客に対してアンケート調査を実施
・ケニア・ウタリ・カレッジ及びナイロビ大学の学生を対象に観光意識調査
・旅行会社へのヒアリング

⑤全国観光開発戦略の策定（開発計画の指針）

上記調査結果を踏まえ、またケニア国側と十分協議したうえ、観光開発計画策定の基となる全国観光開発戦略を策定する。（計画ベース、商業ベース、管理・運営・組織体制ベース）

例) 地域一体型観光開発計画の策定

⑥全国観光開発計画の策定（目標年次：2010年）

上記戦略にもとづいて

- ア．観光政策
 - イ．観光振興計画
 - ウ．観光施設設計
 - エ．交通ネットワーク
 - オ．環境保全計画
 - カ．各種基準の設定
 - キ．投資計画
- を策定する。

※環境保全計画に際しては世銀の実施した「野生生物保護計画」等、十分にレビューする。

⑦ゾーニング及び優先ゾーンの選定

上記計画の結果を基に、ケニア全域のゾーニングを実施しその中で優先ゾーンを選定する。

検討

⑧観光情報システムの確立

全国の主要観光地をカバーする観光情報システム（宿泊施設、アクセス、観光資源、有名土産品等）のオンライン計画を策定する。

優先ゾーンの数についてはケニア側と協議のうえ決定するが、当方としては3～4ゾーンで考える。

⑨ゾーン別観光開発計画の策定（目標年次：2010年）

- ア. 観光振興計画
- イ. 観光施設設計
- ウ. 環境保全計画
- エ. 交通ネットワーク
- オ. 土地利用・基盤施設
- カ. I E E
- キ. プロジェクト計画の立案

⑩概算コストの算出

プロジェクト計画ごとに概算コストを算出する

⑪事業実施計画の作成

各計画ごとに事業実施計画を作成

⑫投資計画の策定

各事業実施計画ごとに投資計画を策定

⑬管理・運営・組織体制

各地方の博物館等の管理・運営・組織体制も考慮

⑭経済/財務分析

全国レベル及びゾーンレベルのプロジェクト別
マクロ経済/財務分析及び財務分析を行い、事
業の評価を行う。

⑮5か年アクションプログラムの策定

(目標年次: 2000年)

事業実施計画のなかで特に優先度の高い5か年
アクション・プログラムを策定

16優先5か年アクションプログラムの策定

17優先5か年アクションプログラム概要書の作成

- ア. 優先5か年アクションプログラムの概要
- イ. 概算コスト
- ウ. I E Eの結果
- エ. 事業評価

※ J I C Aケニア事
務所より提案のあっ
たビデオ、パンフレ
ット等の作成につい
てはケニア側と具体
的内容等協議したう
え検討したい。

18ティピカルツアープログラムの作成

- ア. 東アフリカ周遊ツアー
- イ. コースト地域と動物公園を一体化させたツ
ア- /人類発生の地/熱帯雨林/火山地帯
- ウ. クルージングツアー (コースト地域)

等

d) 調査期間

概ね19ヶ月程度 (T O Rは19か月)

e) 報告書

報告書は英文とする。

①Inception Report (英文)

・調査実施方針・スケジュールを記載

着手報告書

本格調査開始時

②Progress Report (英文)

進捗報告書

	・全国観光戦略の策定	調査開始後3ヶ月
	③Interim Report (I) (英文) ・全国観光開発計画の策定	中間報告書 (I) 調査開始後6ヶ月
	④Interim Report (II) (英文) ・ゾーン別観光開発計画の策定	中間報告書 (II) 調査開始後13ヶ月
	⑤Draft Final Report (英文) ・5か年アクションプラン策定及び概要書の作成	最終報告書 (案) 調査開始後16ヶ月
	⑥Final Report (英文) ・⑤に対するコメントを踏まえた最終報告書	最終報告書 コメント受領後2ヶ月
	レポートの部数の変更に関する要請があった場合は、協議のうえ決定する。	
f) 協議内容に 基づくS/W、M/M の締結	署名者 ① 日本側 事前調査団長 ② ケニア側	ケニア側サイナーに ついて確認要
(8) 本格調査に 必要な確認事項	①調査の実施規模、必要期間、ローカルコンサル タントの能力、公的機関及び民間企業の協力 ②現地再委託調査に関する積算資料	

6. 請訓事項等

- ① Undertakingsの内容に係る事項については必要に応じて請訓するが、次に挙げる項目については調査団の裁量により変更可能とする
- ・現地調査用車両及び運転手の提供
 - ・ナイロビ市内の現地作業用オフィスの提供
 - ・私有地、立入制限区域への立入
 - ・収集資料の国外への持ち出し
 - ・サポーティングスタッフ等の提供
 - ・車両以外の交通機関、通信手段の提供
- ② 調査内容における大幅な変更については請訓する。
- ③ C/P研修およびセミナーの開催の要請があった場合は要請の伝達にとどめる
(M/M に記載は可とする)
- ④ 本格調査実施にあたり調査用機材の要請があった場合、必要と判断されるものについては、日本側へ伝達する旨M/M に記載する。
- ⑤ 収集資料の第三者への公開について、問題が生じる可能性がある場合はM/Mに記載する。
- ⑥ 事業実施段階における資金調達に関しては、調査団の権限範囲外である旨、相手側に伝える。
- ✓ ⑦ 治安については、本格調査実施期間中、ケニア側が、警察、地方政府などと協力し、調査団の安全を図るべく最大限の努力を払うよう申し入れる

7. 事前調査団員

の担当事項

(1) 総括／観光政策

- ・ 調査業務全般の総括
- ・ 先方政府の意向確認
- ・ 要請の背景及び内容の確認
- ・ 現地踏査
- ・ ドナー会議への参加・説明
- ・ S/W協議、署名
- ・ 本格調査の基本方針のとりまとめ
- ・ S/W協議（案）、対処方針（案）の検討
- ・ Q/Nの検討
- ・ 事前調査報告書（観光政策）の作成

(2) 観光開発計画／ 観光資源評価

- ・ 主に観光開発計画及び観光資源評価に関する情報収集・整理を行う。
- ・ 現地踏査
- ・ ドナー会議への参加・説明
- ・ 新たな観光資源発掘可能性調査を実施する。
- ・ S/W協議
- ・ S/W協議（案）、対処方針（案）の検討
- ・ Q/Nの検討
- ・ 事前調査報告書（観光開発計画／観光資源評価）の作成

(3) 観光振興計画

- ・ 観光振興計画に関する情報収集・整理
- ・ 現地踏査
- ・ ドナー会議への参加・説明
- ・ S/W協議
- ・ S/W協議（案）、対処方針（案）の検討
- ・ Q/Nの検討
- ・ 事前調査報告書（観光振興計画）の作成

(4) 調査企画

- ・ 調査業務全般の企画、調整
- ・ 関連機関、在外公館等の調整
- ・ 現地踏査

	<ul style="list-style-type: none"> ・ドナー会議への参加・説明 ・事前調査報告書のとりまとめ ・S/W(案)、対処方針(案)の作成
(5) 観光インフラ	<ul style="list-style-type: none"> ・観光インフラ施設に関する情報収集・整理 ・現地踏査 ・ドナー会議への参加・説明 ・ローカルコンサルタントの能力に関する情報収集 ・現地再委託調査に関する積算資料の収集 ・S/W協議 ・S/W協議(案)、対処方針(案)の検討 ・Q/Nの検討 ・事前調査報告書(観光インフラ)の作成
(6) 環境調査	<ul style="list-style-type: none"> ・環境予備調査 ・現地踏査 ・ドナー会議への参加・説明 ・S/W協議 ・S/W協議(案)、対処方針(案)の検討 ・Q/Nの検討 ・ローカルコンサルタントの能力に関する情報収集 ・現地再委託調査に関する積算資料の収集 ・事前調査報告書(環境調査)の作成
8. 議事録等	<p>①あらかじめ作成したS/W(案)を基に説明協議し、合意の後、双方の代表者が署名する。</p> <p>②S/W及び調査の実施に関する協議内容をM/Mとしてとりまとめ、双方の代表者が署名、確認する。</p>
9. 報告書	<p>事前調査報告書・目次(案)に従って、各担当者により作成する。</p>
10. 使用言語	<p>S/W、M/M、報告書は英文で作成する。</p>

付属資料 5. Questionnaire

QUESTIONNAIRE

November, 1993

JAPANESE PREPARETORY STUDY TEAM

ON

THE NATIONAL TOURISM MASTER PLAN

IN

THE REPUBLIC OF KENYA

JAPAN INTERNATIONAL COOPERATION AGENCY

(JICA)

THE LIST OF NECESSARY DATA / INFORMATION

I. NATURAL CONDITIONS (1)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
1. Topography	(1) Topographic Maps (1:250,000 and 1:50,000)	Y E S	C. B. S Survey of Kenya	Topographical Mapping/Ann. Re
	(2) Geographic Maps (1:250,000 and 1:50,000)	Y E S	Survey of Kenya	
	(3) Charts of Sea area	Y E S	C. B. S/Survey	Territorial Wa ter Charts
	(4) Aerial Photos	Y E S	C. B. S/KREMU	Kenya National Atlas
	(5) Vegetation Maps (Characteristics species)	Y E S	C. B. S/Survey	Kenya National Atlas
	(6) Wildlife Maps (Characteristics species)	Y E S	C. B. S/KWS	
	2. Land Use	(1) Land Use Maps	Y E S	C. B. S
(2) Town planning maps		Y E S	C. B. S/Survey	-Township Map.
(3) Land use guidelines		Y E S		Topographical Mapping
(4) Building control guidelines				
(5) Design guidelines				
(6) Land ownership (Land availability)				
(7) Laws and Regulations of land use and development				

I . NATURAL CONDITIONS (2)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
3. Climate	(1) Temperature/Humidity (Monthly variations) (2) Periods, durations and intensities of rainfalls (3) Periods, durations and intensities of monsoons (4) Mean duration of sunshine	Y E S	Meteriological Dept.	Ann. Report/Farming Weather/ K.S.D
4. Oceanography	(1) Tidal current maps and tide levels (2) Wave statistics (3) Water quality	Y E S	C. B. S/Meteriological Dept.	Ann. Report/Farming Weather/ K.S.D
5. Natural Resources	(1) Water resources (coastals, lakes and rivers, waterfalls) (2) Mountain resources (highlands, hills and valleys) (3) wildlife resources (national parks, reserves and conservation area)	Y E S	Min. of Water	E.S/D.P
		Y E S	Min. of Natural Resources	E.S/D.P
		Y E S	Min. of Tourism & Wildlife/KWS	E.S/D.P KWS NEWS Management Plans for Various National Parks

II. SOCIO-ECONOMIC CONDITIONS (1)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
1. Administration	(1) Administrative boundary maps (National and local government) (2) Hierarchy of main towns and resort resort centers (Decision-making authorities)	Y E S	C. B. S./Survey of Kenya	Administrative Mapping Town Maps.
		Y E S	C. B. S./Survey of Kenya	
2. Population	(1) Population, land area and population density (2) Main economic activities (3) Population by age and by sex (4) Inter-regional migration/emigration (5) Number of household (6) Number of workers by industrial groups	Y E S	C. B. S	E. S./S. A./Kenya Statistical Di -gest Population and Development
			World Bank	

E. S - Economic Survey
D. P - Development Plan
S. A - Statistical Abstract

II. SOCIO-ECONOMIC CONDITIONS (2)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
3. Economy	(1) Gross domestic product (National and local government) (2) Gross product by industrial groups (3) Average family income and expenditures (4) Distribution of families by income class (5) Wholesale price index and consumer price index (6) Leisure time trends and annual paid holidays	Y E S	C. B. S Government Printer	E. S/S. A
		Y E S	Government Printer	E. S/S. A
		Y E S	Government Printer	E. S/S. A
		Y E S	C. B. S/Gov. Printer	Kenya Statistical Dept.
		Y E S	C. B. S/C. B. K	E. S
		Y E S	M. O. T. W	Quarterly Economic Review Tourism Development in Kenya (Sirclain) E. S
4. Expenditures and receipts	(1) Balance of tourist expenditures and receipts (1981-90)	Y E S	C. B. S/C. B. K	E. S
5. Employment	(1) Employment generated by tourism (on hotels and travel trade only)	Y E S	M. O. T. W	Quarterly Economic Review Tourism Development in Kenya (Sirclain) E. S
6. Government revenues	(1) Government revenues from tourism (taxes, rates, duties, etc.)	Y E S	C. B. S/M. O. F/C. B. K	E. S

II. SOCIO-ECONOMIC CONDITIONS (3)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS	
		YES/NO	PLACE OF DATA AVAILABLE		
7. Transportation	(1) Networks of railway, road, air, water (2) Time-table of railway, air, water and bus services (3) Passenger-kilometers of railway, road, air and water transport (4) Facilities, capacities and operations conditions: · Railways · Roads · Ports · Airports (Length of Runways) · Ferries (5) Car ownership (6) Protection Environmental protection and preservation of natural beauty (Policies, authorities concerned)	Y E S	Railways Public Works	Annual Report	
		Y E S	Kenya Railways/Vario us Airlines/Kenya Po rts Authority/Embaka si/Bus Companies "		
		Y E S	Kenya Railways		
		Y E S	Transport/Public Works		
		Y E S	Kenya Ports Authority		
		Y E S	C.B.S./Transport		
		Y E S	Kenya Ferry Authority		
		Y E S	C.B.S		Kenya Statis.D igest/Road Aut hority Ann. Re.
		Y E S	MOTW/City Council & Municipal Councils/ Min. of Regional Dev. & Natutal Res.		Paper on Eco- tourism

III. REGIONAL DEVELOPMENT (1)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
1. Present situation	(1) Telecommunication networks (Availability, Reliability, Quality, Total Capacity)	Y E S	MOT Kenya Posts & Teleco mmunication	Annual Report
	(2) Energy supply Electricity Gas	Y E S	Min. of Energy Kenya Power & Light- ing/East African oxy gen Company	Annual Report
	(3) Water supply	Y E S	Min. of Water/City Council Municipal Council/Local Authorities	
	(4) Sewerage and refuse disposal (Means of control, standards, effective -ness)			
	(5) National Park (Reserves and conservation Area)	Y E S	Kenya Wildlife Servi ce	Development Pl -ans for Vari ous Parks
	(6) Activities polluting air and water	Y E S		
	(7) Removal of industrial dereliction	Y E S		
	(8) Laws, regulations and guidelines of regional development	Y E S	MOND	Development Pl -ans

III. REGIONAL DEVELOPMENT (2)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
2. Future plans	(1) Future development projects of ; · transportation facilities · telecommunications · energy supply · water supply · Sewerage and disposal facilities	Y E S	MOT	7th Dev. Plan
		Y E S	Kenya Posts & Telecom	
		Y E S	Min. of Energy/KPL	Annual Report
		Y E S	Min. of Water	
3. Construction and operation cost	(2) Airport expansion and construction plan	Y E S	Local Authorities/ City Council	
		Y E S	Kenya Airport Authority	Dev. Plan
		Y E S		
		Y E S	Kenya Wildlife Service	Dev. Plan
	(3) Sewerage and refuse disposal projects	Y E S		
		Y E S		
		Y E S		
	(4) Expansion and construction of parks and green zones	Y E S		
		Y E S		
		Y E S		
	(1) Publication of material at present	Y E S		
		Y E S		
		Y E S		
	(2) Publication of construction equipment price at present	Y E S	C. B. S	E. S
		Y E S		
		Y E S		
	(3) Publication of minimum wages at present	Y E S	C. B. S	E. S
		Y E S		
		Y E S		

MOT - Ministry of Transport

MOND - Ministry of Planning and Natural Development

KPL - Kenya Power and Lighting Company

IV. TOURISM CONDITIONS (1)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
1. Resources	(1) Distribution map of tourist resources and facilities (Visitor attractions, unique monuments, animals, spectacular features and dramatic landscapes)	Y E S	Min. of Tourism & Wildlife	Touist Map of Kenya
	(2) Accessibility of main tourist or recreation sites	Y E S	Min. of Tourism & Wildlife	Tourism Market Report
	(3) Capacities of main tourist or recreation sites	Y E S	Government Press Kenya Wildlife Service	Kenya Gazzette E. S
	(4) Safari			
	(5) Traditions	Y E S	MOTW/Museums of Kenya/KWS/Bomas of Kenya	Market Report Annual Report General Info.
	(6) Cyclical attractions (Festivals, carnivals, etc.)			
	(7) Fishing / hunting areas	Y E S	MOTW/Fisheries Dept.	
	(8) Recreation facilities			
	(9) Catering facilities	Y E S	Various Hotels	Bronchures
	(10) Sports facilities	Y E S	Kenya Utalli College	General Info. X. Utalli Coll.
	(11) Manpower availability for tourism services and training facilities			

IV. TOURISM CONDITIONS (3)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
3. Tourist Product	<p>(1) Foreign arrivals 1981-1990</p> <ul style="list-style-type: none"> • No. of foreign arrivals • By country of origin • By main motivations • By range of expenditure • By type of travel • By main destinations • By main facilities used • By means of transport • By duration of stay • Projected no. of foreign arrivals (1992-2000) <p>(2) Domestic travellers 1986-1992</p> <ul style="list-style-type: none"> • No. of domestic travellers • By main motivations • By range of expenditure • By type of travel • By main destinations • By main facilities used • By means of transport • By duration of stay • Projected no. of domestic travellers (1993-2000) 	<p>Y E S</p> <p>Y E S</p> <p>Y E S</p> <p>Y E S</p> <p>Y E S</p> <p>Y E S</p>	<p>Min. of Tourism C.B.S</p> <p>Min. of Tourism & Wildlife C.B.S</p>	<p>Market Report Dev. Plan/E.S/ S.A</p> <p>Dev. Plan/E.S/ S.A/Kenya Stat istical Digest</p>

MOTW - Ministry of Tourism & Wildlife
Dev. Plan - Development Plan

IV. TOURISM CONDITIONS (4)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
4. Marketing	(3) Kenyan travellers overseas 1986-1992	Y E S	C. B. S	E. S/S. A
	<ul style="list-style-type: none"> • No. of Kenyan travellers overseas • By main motivations • By range of expenditure • By type of travel • By main destinations • By main facilities used • By means of transport • By duration of stay • Projected no. of Kenyan travellers overseas (1993-2000) 	Y E S		
	(1) Marketing and promotion of tourism in Kenya	Y E S	MOTW Private Sector	Market Report
	(2) Government tourism policies	Y E S	MOTW	Dev. Plan E. S
5. Market information	(3) MOTW priority projects (1986-1992)	Y E S	MOTW	PIP Dev. Estimates Dev. Estimates
	(4) MOTW budgets and resources (1986-1992)	Y E S		
	(1) Analyses of competitive resorts in other counties	Y E S		
	(2) Authorities in charge of tourism development (Development organizations)	Y E S	K. W. S/K. T. D. C	Annual Report

PIP - Public Investment Programme
K. T. D. C - Kenya Tourist Development Corporation

IV. TOURISM CONDITIONS (5)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
6. Others	(3) Laws, regulations and guidelines of tourist development	Y E S	Government of Kenya	Kenya Gazzette
	(4) Projects of tourism and recreational development	Y E S		
	(1) Government policies of tourism development (Administration, budget, subsidies etc.)	Y E S	C.B.S	E.S/Dev.Plan
	(2) Incentives to the private sector	Y E S	Investment Promotion Centre	Investors Guide to Kenya
	(3) List of major constructors (Name, address, capital)	N O		
(4) List of major consultant companies for tourism development (Name, address, no. of staff)				
(5) Promotion Pamphlets		Y E S	MOTW	Market Report

V. TOURISM ADMINISTRATION / POLICY

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
1. Tourism Administration / Policy	(1) Organization of Tourism Administration (Outline, organizational chart)	Y E S	MOTW	Organizational Chart
	(2) Outline of MOTW (Ministry of Tourism and wildlife) (Organization, functions, budget, etc.)	Y E S	MOTW/MOND/C.B.S	E.S/D.P/Dev.Es timates/PIP
	(3) Tourism Development Corporation/Fund at national/provincial level, if any	Y E S	K.T.D.C	Annual Report
	(4) Organization/System for Tourism development/operation (other than MOTW)	Y E S	I.P.C	
	(5) Organization/System for Tourism promotion (other than MOTW)	Y E S	Private Sector/KATO/KATA/MCTA	Marketing Reports for Various Organizations for Tourism Promotion
	(6) Laws and regulations to tourism (eg. Tourism Basic Law, Travel Agency Law, Law for Improvement of International Tourist Hotel Facilities, if any)	Y E S	Government of Kenya Min. of Tourism	Kenya Gazette
	(7) Laws and regulations concerning tourism development	Y E S	K.T.D.C	Kenya Gazette
	(8) Incentive measures/preferential treatment concerning tourism development/promotion (tax reduction, subsidy, etc.)	Y E S	Min. of Finance	Budget Speech

VI. TOURISM DEVELOPMENT PLAN

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
1. Tourism Development Plan	(1) National Economic and Social Development Plan (the 6th and 7th)	Y E S	C. B. S	7th National Dev. Plan
	(2) Existing tourism development (Outline, executing body, etc.)	N O		

I. P. C - Investment Promotion Centre
 KATO - Kenya Association of Tour Operators
 KATA - Kenya Association of Travel Agents
 MCTA - Mombasa & Coast Tourism Association

VI. ENVIRONMENTAL ISSUES (1)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
1. Legislation	(1) Law/guidelines on environmental impact assessment (2) Quality standards	Y E S	National Environment Secretariat	Annual Report
2. International conventions on environmental conservation	(1) Bilateral convention (2) Multilateral convention	Y E S Y E S	National Environment Secretariat Green Belt Movement	
3. Present situation of the project area	(1) Socio-economic environment <ul style="list-style-type: none"> • Number of people to be resettled and plan of resettlement or compensation • Experience of resettlement in previous projects • Main industry or source of income of the residents • Number and distribution of schools, hospitals, religious facilities • Location of the community which might be split by the project • Cultural property or archaeological site • Use of river/lake water, i.e. domestic industrial and agricultural • Existence of common land • History of epidemic disease • Coverage of water supply system and sewerage system • Solid waste collection and disposal system 	N O N O Y E S Y E S N O	C.B.S. C.B.S.	E.S. E.S.

VI. ENVIRONMENTAL ISSUES (2)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
	(2) Natural environment <ul style="list-style-type: none"> • Availability of meteorological data • Availability of land use and vegetation map • History of natural disaster, landslide earthquake and flood • Areas affected by soil erosion • Change of water level of rivers and lakes in recent years • Location of environmentally vulnerable areas such as mangrove forest, coral reef, wetland, tideland • Availability of oceanological data such as littoral drift, oceanological map • Species of valuable animals and plants living in the project area • Location of particular areas officially protected such as national parks and natural parks • Distribution of important landscape or-scenery for tourism 	Y E S Y E S Y E S Y E S Y E S Y E S Y E S	Meteriological Dept. Survey of Kenya Irrigation Board of Kenya Kenya Soil Surbey Min. of Regional Rec- omation & Water Dept. Kenya Wildlife Servi ce/Primate Record In stitute	Farming Weather Annual Report Aerial Photo. Annual Report

VI. ENVIRONMENTAL ISSUES (3)

I T E M	DESCRIPTION	AVAILABILITY		NAME OF MATERIALS
		YES/NO	PLACE OF DATA AVAILABLE	
	(3) Quality of life • Present air quality • Regulation on emission gas • Present water quality • Regulation on effluent • Present condition of soil contamination • Regulation for prevention of soil contamination • Present condition of noise and vibration • Regulation for prevention of noise and vibration	N O N O N O N O N O N O		

付属資料 6. 収集資料リスト

収 集 資 料 リ ス ト

I 経済統計書

1. 名称 : Economic Survey 1993, May
著者 : Office of the Vice President and Ministry of Planning and National
Development Central Bureau of Statistics
内容 : 経済統計書
形態 : オリジナル A4 199頁
2. 名称 : Statistical Abstract, 1991
著者 : Central Bureau of Statistics, Ministry of Planning and National
Development
内容 : 1985～1990年の主要経済指標
形態 : オリジナル A4 277頁

II 観光案内

1. 名称 : Wildlife and Conservation and Tourism in Kenya
著者 : Daniel Musili Nyeki, Senior Education Officer, KWS
内容 : ケニア野生生物公社による野生動物保護と公園の案内及び動物に関する情報
形態 : オリジナル A5 134頁
2. 名称 : The Beauty of Kenya
著者 : Mohamed Amin, Duncan Willetts
内容 : 写真によるケニア観光地の案内
形態 : オリジナル B5 128頁
3. 名称 : People of Kenya
著者 : Mohamed Amin, Duncan Willetts, Brain Tetley
内容 : 写真によるケニアにおける部族の案内
形態 : オリジナル B5 128頁
4. 名称 : Animals of Kenya
著者 : Mohamed Amin, Duncan Willetts, Brain Tetley

内容： 写真による野生動物の案内
形態： オリジナル B5 128頁

5. 名称： Birds of Kenya
著者： John Karmali
内容： 写真による野鳥の案内
形態： オリジナル B5 128頁

6. 名称： Kenya Coast
著者： Mohamed Amin, Duncan Willetts
内容： 写真によるインド洋沿岸の観光スポットの案内
形態： オリジナル B5 128頁

III KWS 5ヶ年計画報告書

1. 名称： A Policy Framework and Development Programme 1991-1996
著者： Kenya Wildlife Service
内容： KWS 5ヶ年計画の本報告書
形態： コピー 220頁

2. 名称： Annex 1 Organizational Structure and Management
Annex 2 Revenue Sources
著者： Kenya Wildlife Service
内容： KWS 5ヶ年計画の付属書
形態： コピー 21頁

3. 名称： Annex 3 Development and Management of Tourism in Parks
著者： Kenya Wildlife Service
内容： KWS 5ヶ年計画の付属書
形態： オリジナル 47頁

4. 名称： Annex 4 National Park and Reserve Planning
著者： Kenya Wildlife Service
内容： KWS 5ヶ年計画の付属書
形態： コピー 83頁

5. 名称 : Annex 5 Wildlife Education and Visiter Services
著者 : Kenya Wildlife Service
内容 : K W S 5ヶ年計画の付属書
形態 : コピー 41頁

6. 名称 : Annex 6 Community Conservation and Wildlife Management Outside Parks
and Reserves
著者 : Kenya Wildlife Service
内容 : K W S 5ヶ年計画の付属書
形態 : コピー 181頁

7. 名称 : Annex 7 Special Issues:The Conservation of Elephants and Rhinos
著者 : Kenya Wildlife Service
内容 : K W S 5ヶ年計画の付属書
形態 : コピー 54頁

8. 名称 : Annex 8 Research Programme
著者 : Kenya Wildlife Service
内容 : K W S 5ヶ年計画の付属書
形態 : コピー 26頁

9. 名称 : Annex 9 Analysis of Capital Investment Needs
著者 : Kenya Wildlife Service
内容 : K W S 5ヶ年計画の付属書
形態 : コピー 110頁

10. 名称 : Annex 10 Land-use Planning and Management in Kenya
著者 : Kenya Wildlife Service
内容 : K W S 5ヶ年計画の付属書
形態 : コピー 72頁

11. 名称 : Annex 11 Programme Impact:Three Case Studies
著者 : Kenya Wildlife Service
内容 : K W S 5ヶ年計画の付属書
形態 : コピー 24頁

12. 名称 : Annual Progress Report (1 July 1992 - 30 June 1993)
著者 : Kenya Wildlife Service
内容 : KWS 5ヶ年計画の付属書
形態 : コピー 135頁

IV 関係法規

1. 名称 : The Tourist Industry Licensing Act, Chapter 381, 1990
形態 : コピー 15頁
2. 名称 : The Hotels and Restaurants Act, Chapter 494, 1986
形態 : コピー 40頁
3. 名称 : The Wildlife (Conservation and Management) Act, Chapter 376, 1977
形態 : コピー 69頁
4. 名称 : The Forests Act, Chapter 385, 1982
形態 : コピー 42頁
5. 名称 : The Statistics Act, Chapter 112, 1982
形態 : コピー 53頁

V 関連報告書

1. 名称 : Manpower and Training Survey of the Hotel, Catering and Tourism Sector,
July 1987
著者 : A. Kebiri, ILO Consultant
形態 : コピー A4 18頁
2. 名称 : Sessional Paper on Tourism Development, December 1991
著者 : MOTW
形態 : コピー A4 58頁
3. 名称 : World Tourism Organization Mission Report, 20th-30th Jan. 1992
著者 : UNDP Mission Consultant : Roger Withers
形態 : コピー A4 26頁
4. 名称 : Report of World Tourism Organization Sectoral Mission to Kenya Utalii
College, July 1992
著者 : John Westlake, WTO
形態 : コピー A4 52頁
5. 名称 : Tourism Market Report 1991, 1992
著者 : MOTW
形態 : コピー A4 39頁, 40頁
6. 名称 : Tourism and Wildlife Development in Kenya, Review of the Performance,
Problems and Development Strategies
著者 : E. L. Mamwalo, Economist MOTW
形態 : コピー A4 26頁
7. 名称 : Negative Aspects of Tourism Development, What Costs Does the Nation
and People of Kenya Incur?
著者 : E. L. Mamwalo, Economist MOTW
形態 : コピー A4 7頁
8. 名称 : Kenya Railways Annual Report 1992
著者 : Kenya Railways
形態 : オリジナル A4 71頁

VI 調査票/MOTWデータ・バンク資料

1. 名称 : Hotel Classification
著者 : MOTW
内容 : 地域毎ホテルのリスト、住所、ベット数、格付データ
形態 : コピー A4 7頁

2. 名称 : ナシ
著者 : MOTW
内容 : District別、宿泊施設 (ロッジ、キャンプ、レストランを含む)、住所、
ベット数、格付データ
形態 : コピー A4 26頁

3. 名称 : Logical Framework, National Tourism Master Plan Project
著者 : MOTW
内容 : UNDP Logical Frameworkによる当該プロジェクトの説明表
形態 : コピー A3 1頁

4. 名称 : Entry, Departure Declaration Form
著者 : ケニア政府
内容 : 出・入国カード
形態 : オリジナル B6 2葉

5. 名称 : Monthly Survey of Visitors to National Parks
著者 : ケニア政府
内容 : 国立公園への入場者に関する調査票
形態 : オリジナル A4 1葉

6. 名称 : Monthly Survey of Hotels, Lodging and Rooming Houses
著者 : ケニア政府、計画国家開発省統計局
内容 : 国別宿泊客に関するアンケート調査票
形態 : オリジナル A3 1葉

7. 名称 : Application for Licence, or for Variation of Licence, to Carry on a
Regulated Tourist Enterprise
著者 : 観光野生生物省
内容 : ホテル、レストラン等の営業許可申請書
形態 : オリジナル A4 6頁

**付属資料 7. TOR for Study on KWS Pricing Policy and
Tourism Development**

TERMS OF REFERENCE FOR STUDY ON
KWS PRICING POLICY AND TOURISM DEVELOPMENT

RATIONALE AND OBJECTIVES

Kenya Wildlife Service has embarked on a large programme to rehabilitate and develop the parks and reserves and to make wildlife conservation in Kenya socially sustainable and financially self-supporting. Tourism is the financial mainstay of KWS and tourism receipts have already increased four-fold since KWS was formed. KWS now intends to appoint a Commercial Manager who will be responsible for analysing, identifying and implementing opportunities for revenue generation.

The Commercial Manager is not expected to be in place until August/September. He will need to move rapidly into action, because KWS urgently needs to strengthen and expand its revenue base through developing a more rational pricing structure and providing a framework and impetus for initial tourism development. Recent fluctuations in tourism emphasise the need to make Kenya's wildlife a more marketable range of tourism products, able to earn tourism revenue reliably in spite of unfavourable external factors. This study, which is likely to start at approximately the same time that the Commercial Manager takes up his post, is intended to meet the above needs. It should enable the Commercial Manager to get off to a "flying start" and it must be responsive to the needs he identifies. Its objectives are:

- a) To provide the Commercial Manager with a comprehensive review of revenue generation options and their relation to KWS's conservation objectives.
- b) To prepare an initial tourism development strategy, acceptable to KWS, which will allow KWS to progress on new initiatives without compromising its long-term options for ecotourism.
- c) To plan with KWS the revenue-related measures it will implement in the near future, particularly in relation to revenue obtained from tourists visiting parks.

Note that there have been previous studies of revenue generation in general. The present study should make full use of the work already done but should concentrate on actions which will make a significant difference to revenue, which are consistent with KWS policy, and which KWS staff have the capability and confidence to implement soon. A large number of specific tasks are listed, indicating the thought that has already gone into the issue of tourism development in KWS. Consultants are free to suggest additional tasks that should be added to the list, if they consider that important aspects have been omitted. The Commercial Manager, once in post, may give particular urgency to certain tasks, so schedules should be reasonably flexible. If it turns out that the Commercial Manager's appointment is cancelled or delayed, KWS will nevertheless proceed with the study, because of the urgent need.

SPECIFIC TASKS

EXISTING REVENUE GENERATION AND ANALYSES

1. Review earlier studies by KWS (Zebra book Annex 3 and the trial tourist demand study), Bellhouse Mwangi Ernst and Young, T. Sinclair, Akili Enterprises and the Economist Intelligence Unit, the draft lodge site "prospectus", the ongoing negotiations with coastal hotels, the preparations for establishment of a Trust Fund, and any others reports of relevance. Highlight those elements with most potential for implementation.
2. Evaluate the cost effectiveness of ongoing revenue generating activities and identify bottlenecks within Kenya Wildlife Service delaying the realization of commercial opportunities.
3. Suggest new systems for charging for park access, which will be simple and fair to the tourist, less prone to corruption, and practical for KWS. Review the gate receipt procedures devised by Price Waterhouse, the credit card system to be tried soon, the bulk sale of tickets to KATO, and the suggestion to charge non-residents in hard currency. Evaluate the pros and cons of alternative systems, including auction-based systems for low volume, high quality tourism experiences, and a hotel-based fee system (already proposed for marine parks).

NEW INITIATIVES AND FUTURE POTENTIAL

4. Advise on the extent to which KWS should participate in promotion of wildlife-based tourism, locally and overseas.
5. Provide a brief overview of the status and trends of current and potential tourism markets. Include an assessment of the preferences and sources of satisfaction (or dissatisfaction) of tourists who visit Kenya's parks and reserves. Assess which segments of the market have significant potential for expansion for KWS and how they might be targeted. Identify any kinds of high potential tourism which may be threatened by ongoing or planned development of the parks and reserves.
6. Assist KWS to categorize the parks and reserves, according to relevant criteria, such as potential touristic activities, accessibility and environmental sensitivity.
7. Assess how pricing and other factors affect the competitiveness of Kenya's wildlife areas (terrestrial and marine) as tourist destinations. What advantages and disadvantages does Kenya have relative to direct competitors, such as Tanzania and southern Africa? In

this task, liaise with the Centre for Social and Economic Research in the Global Environment, if their proposed research on the "demand function" for wildlife parks is sufficiently advanced.

6. Assess the financial opportunities, constraints and complications arising from the variety of agreements being worked out with Forest Department and the County Councils, and from the continuing independent pricing of some reserves.
9. Propose a strategy of differential pricing for park access (or activities), which will help disperse tourist away from over-utilized parks and reserves (or parts of a park or reserve) and at the same time raise revenue for Kenya Wildlife Service. Include consideration of options for varying charges with respect to time (of day, week, year) and zones within a park.
10. Suggest other ways to encourage private sector investment in less utilised protected areas, such as the "northern circuits", whilst ensuring adequate environmental impact assessment of any proposed developments.
11. Propose specific actions in respect of other significant commercial opportunities which are readily available to Kenya Wildlife Service. They may be based on existing activities and contracts or on new markets and activities. This might include, amongst others, donation programmes, sponsorship by businesses, the establishment of a Trust Fund (or Funds), the stimulation of demand by the proposed visitor centre at Nairobi, and the establishment of cartel pricing with competitors in Kenya or abroad.

TAKING ACCOUNT OF KWS POLICIES AND PRIORITIES

12. Propose a strategy for increasing visits to Parks and Reserves by Kenyan citizens, including the less wealthy.
13. In consultation with KWS's community wildlife programme, assess the interactions between KWS's revenue generating policies and its policy of promoting wildlife-based income generation by rural communities (usually through tourism). Suggest how these policies can be reconciled, paying attention to:
 - ways in which parks and neighbouring tourism areas may either compete or help each other profit (e.g. joint promotion);
 - the relation between prices charged within and outside the parks and reserves;
 - possible environmental impacts within or near to the parks and reserves;
 - the possibility of special contracts or park access agreements with neighbouring enterprises;
 - the costs and benefits for KWS of community work.

14. Propose specific steps that KWS should take in areas where it has recently taken over management and needs, if possible, to stimulate wildlife-based economic activity in the near future. This includes reserves for which KWS has a management agreement, forests covered by the Memorandum of Understanding with Forest Department, and certain parks which have been neglected in the past.

DATA COLLECTION REQUIREMENTS

15. Assist KWS to improve its collection of data needed for entry fee revenue projections and planning. Necessary data may include:
 - Average length of stay for different categories of visitors in the major parks;
 - Relative number of citizens and resident non-citizens visiting the parks;
 - Sensitivity of different categories of visitor to price increases at various parks;
 - Proportion of revenue due to Kenya Wildlife Service which it fails to collect;
 - Sources of visitor satisfaction or dissatisfaction and visitors' suggestions for improvements or diversification.

Where possible data should be obtained from more than one source to allow cross checking.

16. Draw up plans for further collection of data critical for decisions on pricing and the planning of revenue generation and design a system for Kenya Wildlife Service to collect routine data on park visitors.

INTEGRATING ALL ASPECTS INTO AN OVERALL STRATEGY

17. On the basis of the above, work with KWS to produce:
 - a) A tourism pricing action plan. This should include schedules for changing entry fee levels, introducing new collection methods, monitoring success, and routinely reviewing prices. The plan should cover all the areas and touristic activities for which KWS will charge.
 - b) An initial revenue strategy for KWS, taking full account of its remit and policies, all its assets, the need to achieve financial self-sufficiency, and the need to have a reliable income despite the fluctuations in the tourism business.
 - c) An initial tourism development strategy, which will provide a framework for expanding touristic activities, planning lodge development, opening new circuits, and promoting wildlife-based tourism. The strategy must take account of all KWS's policies.

OUTPUTS

The Consultant will produce, in collaboration with KWS, a series of reports covering the above tasks. The Consultant should propose a sequence and structure for the reports. One identifiable component should be the tourism pricing action plan, which is required under the GOK agreement with the World Bank.

Each component report, and a final summary report, should be submitted on disk and in hard copy (20 copies). The principal conclusions presented in the report should be discussed and agreed with KWS prior to writing the report. Points of disagreement may be presented separately as recommendations by the Consultant which are not (or not yet) fully accepted by KWS.

In addition the Consultant will produce at least 300 copies of a very short, illustrated, smartly produced report summarising KWS's strategy for tourism development and revenue generation. This should be aimed at people who may take an active part in tourism development and revenue generation e.g. tour operators, potential investors, potential contributors to a Trust Fund, potential tourism enterprises on ranches next to parks, County Councils etc.

PRINCIPAL CONTACTS IN KWS

The Consultant's team leader will report to the KWS Commercial Manager. Pending his arrival in post, the key contact for this study is the Personal Assistant to the Director of KWS. The Consultant team will work closely with the Financial Advisor, the Financial Controller, the Policy & Planning Advisor of KWS, KWS Planning personnel, park wardens and other senior KWS staff.

A KWS committee will review periodically the progress of the study and to follow up on any interim recommendations.

The Consultant's team will also liaise with the tourism sector, especially KATO and the Department of Tourism, with County Councils, and with other ongoing tourism sector studies, including the one financed by the World Bank and the proposed "tourism master plan".

付属資料 8. Hotel Classification

MINISTRY OF TOURISM AND WILDLIFE

HOTELS CLASSIFICATION

S/NO	NAME OF ESTABLISHMENT	DISTRICT	ADDRESS	NUMBER OF BEDS	STAR RATE
1	NORFOLK HOTEL	NAIROBI	BOX 40064, NAIROBI	220	5
2	NEW STANLEY HOTEL	NAIROBI	BOX 30680, NAIROBI	425	5
3	WINDSOR GOLF HOTEL	NAIROBI	BOX 45587, NAIROBI	260	5
4	HOTEL INTER-CONTINENTAL	NAIROBI	BOX 30353, NAIROBI	880	5
5	SAFARI PARK HOTEL/C. CLUB	NAIROBI	BOX 45038, NAIROBI	408	5
6	NAIROBI HILTON HOTEL	NAIROBI	BOX 30624, NAIROBI	688	5
7	NAIROBI SAFARI CLUB	NAIROBI	BOX 43564, NAIROBI	154	5
8	NAIROBI SERENA HOTEL	NAIROBI	BOX 46302, NAIROBI	384	5
9	FAIRVIEW HOTEL	NAIROBI	BOX 40842, NAIROBI	170	4
10	UTALII HOTEL	NAIROBI	BOX 31067, NAIROBI	100	4
11	JACARANDA HOTEL	NAIROBI	BOX 14287, NAIROBI	250	4
12	LENANA MOUNT HOTEL	NAIROBI	BOX 40943, NAIROBI	100	3
13	SILVER SPRINGS HOTEL	NAIROBI	BOX 61362, NAIROBI	248	3
14	BOULEVARD HOTEL	NAIROBI	BOX 42831, NAIROBI	140	3
15	CASTLE INN	NAIROBI	BOX 74411, NAIROBI	10	3
16	AMBASSADEUR HOTEL	NAIROBI	BOX 30399, NAIROBI	187	3
17	HOTEL MILIMANI	NAIROBI	BOX 30715, NAIROBI	146	3
18	PANAFRIC HOTEL	NAIROBI	BOX 30468, NAIROBI	256	3
19	HOTEL SIX EIGHTY	NAIROBI	BOX 43436, NAIROBI	680	3
20	ORIENTAL PALACE HOTEL	NAIROBI	BOX 72237, NAIROBI	230	3
21	HOTEL CHIROMO	NAIROBI	BOX 394221, NAIROBI	80	2
22	SUNCOURT INN	NAIROBI	BOX 51454, NAIROBI	80	2
23	HOTEL HERMES (NBI)	NAIROBI	BOX 49153, NAIROBI	80	2
24	HERON COURT HOTEL	NAIROBI	BOX 41848, NAIROBI	89	2
25	PARKSIDE HOTEL	NAIROBI	BOX 53104, NAIROBI	109	2
26	OAKWOOD HOTEL	NAIROBI	BOX 40683, NAIROBI	40	2
27	MERIDIAN COURT HOTEL	NAIROBI	BOX 30278, NAIROBI	154	2
28	SOLACE HOTEL LTD	NAIROBI	BOX 48867, NAIROBI	57	2
29	WESTVIEW HOTEL	NAIROBI	BOX 14680, NAIROBI	32	2
30	HURLINGHAM HOTEL	NAIROBI	BOX 43158, NAIROBI	20	2
31	NGONG HILLS HOTEL LTD	NAIROBI	BOX 40485, NAIROBI	70	1
32	SAGRET HOTEL (EQUATORIAL)	NAIROBI	BOX 18324, NAIROBI	69	1
33	SAMAGAT HOTEL	NAIROBI	BOX 10027, NAIROBI	75	1
34	FIG TREE HOTEL	NAIROBI	BOX 31938, NAIROBI	61	1
35	KENYA CONTINENTAL HOTEL	NAIROBI	BOX 73893, NAIROBI	62	1
36	KWALITY HOTEL	NAIROBI	BOX 44275, NAIROBI	26	1
37	SIRONA HOTEL	NAIROBI	BOX 20320, NAIROBI	78	1
38	PERSONIC HOTEL	NAIROBI	BOX 28783, NAIROBI	80	1
39	KARANGI HOTEL	NAIROBI	BOX 22765, NAIROBI	51	1
40	SAGRET HOTEL	NAIROBI	BOX 18324, NAIROBI	69	1
41	HILLCREST HOTEL ANNEX	NAIROBI	BOX 14284, NAIROBI	18	1
42	HILLCREST HOTEL	NAIROBI	BOX 14284, NAIROBI	65	1

S/NO	NAME OF ESTABLISHMENT	DISTRICT	ADDRESS	NUMBER OF BEDS	STAR RATE
43	IMPALA HOTEL	NAIROBI	BOX 14144, NAIROBI	42	1
44	KENYA INTERNATIONAL HOTEL	NAIRO BI	BOX 22411, NAIROBI	72	1
45	ABBEY HOTEL	NAIROBI	BOX 75260, NAIROBI	68	1
46	ESPERIA HOTEL	NAIROBI	BOX 14642, NAIROBI	28	1
47	HOTEL MERCURY	NAIROBI	BOX 13083, NAIROBI	26	1

MOMBASA DISTRICT

1	SERENA BEACH HOTEL	MOMBASA	BOX 90352, MOMBASA	344	5
2	PARADISE BEACH HOTEL	MOMBASA	BOX 81443, MOMBASA	308	5
3	NYALI BEACH HOTEL	MOMBASA	BOX 90581, MOMBASA	413	5
4	INTER CONTINENTAL HOTEL (MSA)	MOMBASA	BOX 83492, MOMBASA	360	5
5	DOLPHIN HOTEL	MOMBASA	BOX 81443, MOMBASA	224	5
6	MOMBASA BEACH HOTEL	MOMBASA	BOX 90414, MOMBASA	302	5
7	SHANZU BEACH HOTEL	MOMBASA	BOX 81443, MOMBASA	238	5
8	SILVER STAR HOTEL	MOMBASA	BOX 81443, MOMBASA	246	5
9	FLAMINGO BEACH HOTEL	MOMBASA	BOX 81443, MOMBASA	274	5
10	WHITESANDS HOTEL	MOMBASA	BOX 90173, MOMBASA	652	5
11	SAFARI BEACH HOTEL	MOMBASA	BOX 90690, MOMBASA	418	4
12	BAHARI BEACH HOTEL	MOMBASA	BOX 81443, MOMBASA	198	4
13	PLAZA BEACH HOTEL	MOMBASA	BOX 88299, MOMBASA	176	4
14	SILVER BEACH HOTEL	MOMBASA	BOX 81443, MOMBASA	224	4
15	SEVERIN SEA LODGE	MOMBASA	BOX 82169, MOMBASA	390	4
16	PALM BEACH HOTEL	MOMBASA	BOX 81443, MOMBASA	400	4
17	AFRICAN SEA LODGE	MOMBASA	BOX 84616, MOMBASA	332	4
18	JADINI BEACH HOTEL	MOMBASA	BOX 84616, MOMBASA	320	4
19	REEF HOTEL	MOMBASA	BOX 82234, MOMBASA	8	4
20	CORAL BEACH HOTEL	MOMBASA	BOX 81443, MOMBASA	400	4
21	TRAVELLER'S BEACH HOTEL	MOMBASA	BOX 87649, MOMBASA	460	4
22	CASTLE HOTEL	MOMBASA	BOX 84231, MOMBASA	112	3
23	KENYA BEACH HOTEL	MOMBASA	BOX 95748, MOMBASA	200	3
24	OUTRIGGER HOTEL	MOMBASA	BOX 82345, MOMBASA	90	3
25	GIRIAMA BEACH HOTEL	MOMBASA	BOX 86693, MOMBASA	144	3
26	MANOR HOTEL	MOMBASA	BOX 84851, MOMBASA	108	3
27	BAMBURI BEACH HOTEL	MOMBASA	BOX 83966, MOMBASA	300	3
28	OCEANIC HOTEL	MOMBASA	BOX 90371, MOMBASA	200	3
29	NEPTUNE BEACH HOTEL	MOMBASA	BOX 83125, MOMBASA	156	3
30	SAPPHIRE HOTEL LIMITED	MOMBASA	BOX 1254, MOMBASA	-	2
31	OCEAN VIEW BEACH HOTEL	MOMBASA	BOX 81127, MOMBASA	216	2
32	SHELLY BEACH HOTEL	MOMBASA	BOX 96030, MOMBASA	266	2
33	HOTEL HERMES LTD	MOMBASA	BOX 98419, MOMBASA	38	2
34	SHIMO LA TEWA HOTEL	MOMBASA	BOX 81443, MOMBASA	180	1
35	HOTEL SPLENDID	MOMBASA	BOX 90482, MOMBASA	74	1

S/NO	NAME OF ESTABLISHMENT	DISTRICT	ADDRESS	NUMBER OF BEDS	STAR RATE
<u>KILIFI DISTRICT</u>					
1	HEMINGWAYS HOTEL	KILIFI	BOX 267, WATAMU	102	5
2	SUN 'N' SAND BEACH HOTEL	KILIFI	BOX 2, KIKAMBALA	-	4
3	SILVERSAND VILLAS	KILIFI	BOX 91, MALINDI	-	4
4	SILVERSAND B.C. (VILLA)	KILIFI	BOX 91, MALINDI	-	4
5	TROPICAL VILLAGE	KILIFI	BOX 68, MALINDI	6	4
6	TURTLE BAY BEACH HOTEL	KILIFI	BOX 457, MALINDI	-	4
7	EDEN ROCK HOTEL	KILIFI	BOX 350, MALINDI	4	4
8	WATAMU BEACH HOTEL	KILIFI	BOX 1, WATAMU	8	4
9	LE SOLEIL BEACH RESORT	KILIFI	BOX 84737, MOMBASA	142	3
10	BOUGAN VILLAGE	KILIFI	BOX 721, MALINDI	-	3
11	BLUE MARLIN HOTEL	KILIFI	BOX 54, MALINDI	2	3
12	MONKEYS SEA LODGE	KILIFI	-	-	3
13	BLUE BAY BEACH HOTEL	KILIFI	BOX 162, WATAMU	-	3
14	LAWFORDS HOTEL	KILIFI	BOX 20, MALINDI	4	3
15	AFRICAN DREAM VILLAGE	KILIFI	BOX 939, MALINDI	-	3
16	MNARANI HOTEL	KILIFI	BOX 14, KILIFI	-	3
17	WHISPERING PALMS HOTEL	KILIFI	BOX 5, KIKAMBALA	-	3
18	PALM TREE CLUB (MALINDI)	KILIFI	BOX 180, MALINDI	4	3
19	KIVULINI VILLAGE BEACH HOTEL	KILIFI	BOX 142, MALINDI	2	3
20	BARACUDA INN	KILIFI	BOX 59, WATAMU	8	2
21	WHITE ELEPHANT SEA LODGE	KILIFI	BOX 948, MALINDI	5	2
22	COCONUT VILLAGE	KILIFI	BOX 868 MALINDI	2	2
23	SCOPIO VILLAS (ENTREPRISES)	KILIFI	BOX 368, MALINDI	-	2
24	DRIFTWOOD CLUB LTD	KILIFI	BOX 63, MALINDI	-	2
25	YATCH CLUB MNARANI	KILIFI	BOX 14, KILIFI	4	2
26	OCEAN SPORTS LTD	KILIFI	BOX 100, WATAMU	-	1
27	CROCODILE TENTED LODGE	KILIFI	BOX 500, MALINDI	-	1

<u>KWALE DISTRICT</u>					
1	NEPTUNE PARADISE	KWALE	BOX 83125, MOMBASA	184	5
2	LEOPARD BEACH HOTEL	KWALE	BOX 34, UKUNDA	-	5
3	SOUTH BEACH LEISURE LODGE	KWALE	BOX 84383, MOMBASA	280	5
4	KAZKAZI HOTEL	KWALE	BOX 135, UKUNDA	-	5
5	LEISURE LODGE HOTEL	KWALE	BOX 84383, MOMBASA	280	5
6	LEISURE LODGE CLUB	KWALE	BOX 84383, MOMBASA	226	5
7	GOLDEN BEACH HOTEL	KWALE	BOX 31, UKUNDA	4	5
8	DIANI REEF HOTEL	KWALE	BOX 35, UKUNDA	-	5
9	ROBINSON BOABAB CLUB	KWALE	BOX 32, UKUNDA	-	4
10	TWO FISHES HOTEL	KWALE	BOX 23, UKUNDA	8	4
11	DIANI SEA LODGE	KWALE	BOX 37, UKUNDA	-	3
12	SHIMBA HILLS LODGE	KWALE	BOX 90581, MOMBASA	48	3
13	DIANI BEACH COTTAGES	KWALE	BOX 14, UKUNDA	-	3
14	BLACK MARLIN HOTEL	KWALE	BOX 80, BWENI	144	3
15	DIANI SEA RESORT	KWALE	BOX 37, UKUNDA	-	3
16	LAGOON REEF HOTEL	KWALE	BOX 82234, MOMBASA	228	3
17	NEPTUNE VILLAGE	KWALE	BOX 83125, MOMBASA	184	2
18	SEASCAPES BEACH VILLAS	KWALE	BOX 77, MSAMBWENI	6	2
19	TRADE WINDS HOTEL	KWALE	BOX 8, UKUNDA	6	2
20	SHIMONI REEF FISHING CLUB	KWALE	BOX 82234, ASA	32	1

S/NO	NAME OF ESTABLISHMENT	DISTRICT	ADDRESS	NUMBER OF BEDS	STAR RATE
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LAMU DISTRICT

1	LAMU PALACE HOTEL	LAMU	BOX 83, LAMU	6	3
2	PEPONI HOTEL	LAMU	BOX 24, LAMU	1	2
3	KIWAYU SAFARI VILLAGE	LAMU	BOX 48287, NAIROBI	40	1
4	PETTLEY'S INN	LAMU	BOX 4, LAMU	2	1

TAITA TAVETA DISTRICT

1	TAITA HILLS LODGE	TAITA TAVE	BOX 31, NGWAMBWA	5	5
2	KILAGUNI LODGE	TAITA TAVE	BOX 2, MTITO ANDEI	100	4
3	TAITA HILLS SALT LICK LODGE	TAITA TAVE	BOX 30624, NAIROBI	185	4
4	NGULIA SAFARI LODGE	TAITA TAVE	BOX 42, MTITO ANDEI	104	4
5	SALT-LICK SAFARI LODGE	TAITA TAVE	BOX 30624, NAIROBI	192	4
6	TAITA HILLS SALT LICK LODGE	TAITA TAVE	BOX 31, NGAMBWA	8	4
7	VOI SAFARI LODGE	TAITA TAVE	BOX 30471, NAIROBI	100	4
8	LAKE JIPE SAFARI LODGE	T/TAVETA	BOX 151, T/TAVETA	4	3
9	TSAVO GAM. RANCH SAF. COTTA.	T/TAVET	BOX 3, VOI	-	2

NAKURU DISTRICT

1	LAKE NAIVASHA HOTEL	NAKURU	BOX 15, NAIVASHA	8	3
2	SAROVA LION HILL LODGE	NAKURU	BOX 30680, NRBI	130	3
3	LAKE NAKURU LODGE	NAKURU	BOX 561, NAKURU	-	3
4	MIDLAND HOTEL	NAKURU	BOX 908, NAKURU	3	2
5	SAFARILAND LODGE	NAKURU	BOX 72, NAIVASHA	2	2
6	SAFARILAND CLUB LTD.	NAKURU	BOX 72, NAIVASHA	-	2
7	HOTEL EEL	NAKURU	BOX 36, ELBURGON	6	2
8	WATER BUCK HOTEL	NAKURU	BOX 3327, NAKURU	-	2
9	DELAMERE CAMPS LTD.	NAKURU	BOX 48019, NAKURU	2	2
9	ISLAND CAMP (LAKE BARINGO)	NAKURU	BOX 1141, NAKURU	8	1
10	HIGHLANDS LODGE	NAKURU	BOX 142, MOLO	-	1
11	STEM HOTEL	NAKURU	BOX 1076, NAKURU	8	1
12	PIVOT HOTEL	NAKURU	BOX 1369, NAKURU	-	1
13	GREEN GARDEN HOTEL	NAKURU	BOX 84, MOLO	7	1

BARINGO DISTRICT

1	LAKE BARINGO CLUB	BARINGO	BOX 40075, NAIROBI	96	3
2	KABARNET HOTEL	BARINGO	BOX 109, KABARNET	-	2

KAJIADO DISTRICT

1	AMBOSELI SERENA LODGE	KAJIADO	BOX 48690, NAIROBI	192	5
2	MASAI SAFARI LODGE	KAJIADO	BOX 81443, MOMBASA	66	4

S/NO	NAME OF ESTABLISHMENT	DISTRICT	ADDRESS	NUMBER OF BEDS	STAR RATE
<u>KAJIADO DISTRICT</u>					
3	KILIBUFF LODGE	KAJIADO	BOX 30139, OBI	200	4
4	AMBOSELI NEW LODGE	KAJIADO	BOX 30139, OBI	216	4
5	TEA HOTEL KERICHO	KERICHO	BOX 75, KERICHO	7	4
6	KILIMANJARO SAFARI LODGE	KAJIADO	BOX 30139, OBI	200	4
7	AMBOSELI SAFARI LODGE	KAJIADO	BOX 30139, OBI	120	4
8	KIMANA SAFARI LODGE	KAJIADO	BOX 30139, OBI	112	2
9	MID WEST HOTEL	KERICHO	BOX 1175, KERICHO	2	2
<u>LAIKIPIA DISTRICT</u>					
1	SWEET WATERS TENTED CAMP	LAIKIPIA	BOX 763, NANYUKI	-	4
2	OL PAJETA HOTEL	LAIKIPIA	BOX 763, NANYUKI	2	4
3	NANYUKI RIVER HOTEL	LAIKIPIA	BOX 101, NANYUKI	-	1
4	SPORTSMAN ARMS HOTEL	LAIKIPIA	BOX 3, NANYUKI	2	1
<u>NAROK DISTRICT</u>					
1	ARADISE MARA LODGE	NAROK	BOX 44067, NAIROBI	164	4
2	PATA INVESTMENT	NAROK	BOX 58892, NAIROBI	40	5
3	EKOROK GAME LODGE	NAROK	BOX 40075, NAIROBI	158	4
4	ARA SERENA LODGE	NAROK	BOX 48690, NAIROBI	146	4
5	ARA BUFFALO CAMP	NAROK	BOX 81443, MOMBAASA	130	3
6	ICHWA TEMBO	NAROK	BOX 74797, NAIROBI	102	3
7	ARA SOPA LODGE	NAROK	BOX 72630, NAIROBI	144	3
8	ARA INTREPID CAMP	NAROK	BOX 74888, NAIROBI	60	3
9	IANA SPRINGS (COTTARS CAMP)	NAROK	BOX 74957, NAIROBI	76	3
10	ARA SAROVA CAMP	NAROK	BOX 30680, NAIROBI	150	3
11	ITTLLE GOVERNORS TENTED CAMP	NAROK	BOX 48217, NAIROBI	36	2
12	ASAI MARA RIVER CAMP	NAROK	BOX 48019, NAIROBI	2	2
13	OVERNORS CAMP (SENIOR)	NAROK	BOX 48217, NAIROBI	76	2
<u>SAMBURU DISTRICT</u>					
1	AMBURU GAME LODGE	SAMBURU	BOX 40075, NAIROBI	141	4
2	ARALAL SAFARI LODGE	SAMBURU	BOX 70, MARALAL	2	2

S/NO	NAME OF ESTABLISHMENT	DISTRICT	ADDRESS	NUMBER OF BEDS	STAR RATE
<u>UASIN GISHU DISTRICT</u>					
1	IRIKWA HOTEL	UASIN GISH	BOX 3361, ELDORET	-	3
2	LDORET WAGON HOTEL	UASIN GISH	BOX 2408, ELDORET	-	2
3	LDORET NEW LINCOLN HOTEL LTD.	UASIN GISH	BOX 551, ELDORET	-	1
4	OY COUNTRY CLUB	TRANS NZOI	BOX 2, SOY	-	1
<u>KIAMBU DISTRICT</u>					
1	ENTMERE CLUB	KIAMBU	BOX 39508, NAIROBI	29	3
2	DANGA HOTEL	KIAMBU	BOX 235, RUIRU	-	2
3	AGRET EQUATERIAL HOTEL	KIAMBU	BOX 18324, NAIROBI	69	2
4	ECEMBER 12TH (1963) HOTEL	KIAMBU	BOX 156, THIKA	7	2
5	IKUYU COUNTRY CLUB	KIAMBU	BOX 9, KIKUYU	5	1
6	EW BLUE POSTS HOTEL	KIAMBU	BOX 42, THIKA	2	1
<u>KIRINYAGA DISTRICT</u>					
1	KIRINYAGA SAFARI LODGE	KIRINYAGA	BOX 173, KERUGOYA	6	1
<u>NYANDARUA DISTRICT</u>					
1	HOMSON FALLS LODGE	NYANDARUA	BOX 38, NYAHURURU	6	1
<u>NYERI DISTRICT</u>					
1	MT. KENYA SAFARI CLUB	NYERI	BOX 35, NANYUKI	2	5
2	ABERDARE COUNTRY CLUB	NYERI	BOX 449, NYERI	-	4
3	MOUNTAIN LODGE	NYERI	BOX 123, KIGANJO	4	4
4	THE ARK	NYERI	BOX 449, NYERI	7	4
5	OUTSPAN HOTEL	NYERI	BOX 24, NYERI	8	4
6	NARO MORU RIVER LODGE	NYERI	BOX 18, NARO MORU	8	3
7	GREEN HILLS HOTEL	NYERI	BOX 313, NYERI	7	3
8	TREE TOPS HOTEL	NYERI	BOX 24, NYERI	4	3
9	KARATINA TOURIST LODGE	NYERI	BOX 23, KARATINA	5	2
10	CENTRAL HOTEL	NYERI	BOX 446, NYERI	-	2
11	BATIAN GRAND HOTEL	NYERI	BOX 12465, NYERI	1	2
12	ELEPHANT CASTLE	NYERI	BOX 370, KARATINA	-	1
13	NYERI INN	NYERI	BOX 159, NYERI	8	1
14	WHITE RHINO HOTEL	NYERI	BOX 30, NYERI	3	1
<u>EMBU DISTRICT</u>					
1	IZAAK WALTON INN	EMBU	BOX 1, EMBU	7	2
2	THUCHI RIVER LODGE	EMBU	BOX 4, RUNYENJES	4	1

<u>S/NO</u>	<u>NAME OF ESTABLISHMENT</u>	<u>DISTRICT</u>	<u>ADRESS</u>	<u>NUMBER OF BEDS</u>	<u>STAR RATE</u>
<u>ISIOLO DISTRICT</u>					
1	SAMBURU SERENA LODGE	ISIOLO	BOX 48690, NAIROBI	144	4
2	BUFFALO SPRINGS LODGE	ISIOLO	BOX 71, ISIOLO	92	3
1	TSAVO SAFARI CAMP	KITUI	BOX 30139, NAIROBI	64	2
1	HUNTERS LODGE	MACHAKOS	BOX 77, MAKINDU	-	2
1	MERU MULIKA LODGE	MERU	BOX 484, MERU	-	3
2	MERU FOREST LODGE	MERU	BOX 1200, MERU	8	2
3	PIG & WHISTLE HOTEL	MERU	BOX 1809, MERU	4	1
1	KISII MWALIMU HOTEL	KISII	BOX 2427, KISII	3	1
2	SAKAWA TOWERS HOTEL	KISII	BOX 541, KISII	5	1
1	SUNSET HOTEL	KISUMU	BOX 215, KISUMU	-	3
2	IMPERIAL HOTEL LTD	KISUMU	BOX 1866, KSMU	-	3
3	GULFSTREAM HOTEL	KISUMU	BOX 4120, KISUMU	2	2
1	HOMA BAY HOTEL	S/NYANZA	BOX 521, HOMA BAY	-	2
2	GILLY HOTEL	S/NYANZA	BOX 831, SUNA RI	58	1
1	PARK VILLA HOTEL	BUNGOMA	BOX 1000, WEBUYE	-	2
1	GOLF HOTEL	KAKAMEGA	BOX 118, KAKAMEGA	120	3

付属資料9. 国立公園・動物保護区

国立公園・動物保護区

ケニアのサファリパークは、日本にあるそれとはスケールやその他の面でも全く異なっている。例えば、ツァボ国立公園は四国より広い面積を持っており、無数の動物が棲息している。有史以前から延々と受け継がれている弱肉強食の大自然のドラマを見ることが出来る。ケニア政府はその恵まれた大自然の環境や野生動物を保護する目的で40ヵ所の国立公園と動物保護区と国立保護区を決めている。

国立公園

管理官やロッジ従業員以外の居住が禁じられた、国が管理する特別指定地域。

動物保護区

動物と部族が共存している地域を地方自治体が管理し、その保護にあたる。

国立保護区

部族の住居はなく、野生の動植物を保護する目的で国が直接管理する。

それぞれには動物管理官とその下で働くレインジャー（動物監視官）がいる。またレインジャーは必要に応じてサファリガイドとして雇うこともできる。

アンボセリ国立公園 (Amboseli N.P.)

ナイロビから南へ 230km。サファリカーで約3時間30分程の行程。万年雪を頂くアフリカ第一の霊峰キリマンジャロ山を背景に、大自然のドラマが展開されており、写真を撮るには最適な場所の一つ。面積は3270平方キロメートル。この地区の中心部は広大な半砂漠のようになっており、乾季にはよく蟹気楼がち、雨期になるとこの辺一帯は浅い湖のようになる。ライオン、サイ、キリン、シマウマ、ゾウ、ゲレヌク、オオミミギツネ、アフリカ水牛、レイヨウ類などがよく見られ、運がよければチーターも見ることができる。これらの動物の背景に白雪輝くキリマンジャロ山を写し込むフォト・サファリの醍醐味は訪れた者の特権だろう。また公園の周辺には、古来の伝統をそのまま守って生活しているマサイ族の集落があり、そこを訪れてみるのもアンボセリの大きな魅力の一つになっている。ここからのキリマンジャロ山の眺めがもっとも美しい。

マサイ・マラ動物保護区 (Masai Mara N.R.)

ケニアで最も数多く動物が棲息している地区。タンザニアのセレンゲティ国立公園と隣接しており、ビクトリア湖とグレートリフトバレーにはさまれた南西国境ぞいに位置している。面積は1800キロ平方メートルで大阪府とほぼ同じくらいの広さ。ナイロビの南西260km、サファリカーで約4時間の行程。この地区では、見渡す限りのサバンナに数万頭の

シマウマ、ヌーやガゼルなどのレイヨウ類、アフリカ水牛やゾウなどの大群がよく見られる。この保護区では熱気球に乗って上空からゆっくりと大草原や動物を眺めるバルーンサファリが人気を呼んでいる。熱気球は、気温が低くて微風の時に限られるので、早朝に出発する。浮遊高度は平均40～50mで、飛行は約1時間。熱気球はフィッグリツェロッジ、その他主なロッジに合計20基以上ある。

ナクル湖国立公園 (Lake Nakuru N.P.)

ナイロビ北西 150kmサファリカーで約2時間半の行程にあるナクル湖は、幅65kmに渉って落ち込んでいるグレートリフトバレー（地溝帯）に添っていくつかある湖の一つ。鳥類保護区としては世界的に誇れる湖で、湖一面ピンク色に化するほどの100万羽を越えるフラミンゴの大群やペリカン、サギなど100種類以上にも上る水鳥の宝庫である。バリンゴ湖、ボゴリア湖などでも多くのフラミンゴが見られる。

ツァボ国立公園 (Tsavo N.P.)

ナイロビの南東 360km。モンバサハイウェイを飛ばして約4時間半の行程。世界最大級の国立公園で面積は四国を一回り大きくしたぐらいの広さを誇り20618平方キロメートルもある。モンバサハイウェイをはさんでツァボ・イースト国立公園とウェスト国立公園に大別されている。この地区は数百頭のゾウの大群を見るチャンスが多いことで有名。赤土のため、ここにいるゾウは赤味を帯びているので、すぐツァボのゾウだと分かる。そういったゾウの大群を目の当たりにするのは壮観。他にも、ライオン、バッファロー、サイ、マンダース、ハイラックス等、レイヨウ類、鳥類などが見られる。面積が広いため、棲息している数が減少しているチーターやサイのめぐり合うには運が良くなければならない。ウェストにはキリマンジャロの雪解け水がわき出たムジマスプリングスがあり、泉の下手には大きな池と川になっている。ここでは必ず数十頭のカバを見られる。この他ワニや淡水魚などが棲息しており、その生態を水中に作ったガラスの展望室から観察できるようになっている。

サンブール国立保護区 (Samburu N.R.)

ナイロビの北約 300km。舗装された道路をサファリカーでケニア山の麗を走り抜け、イシオロ・バッファロー・スプリングスを経て、約4時間30分の行程。面積は100キロ平方メートルで、それほど広くないが、動物が多く棲息し、特にグレービーゼブラ、ゲレヌク、オリックス、ディクディクやアミメキリン、ソマリアダチョウなど珍しい動物が見られることで有名。

ナイロビ国立公園 (Nairobi N.P.)

ナイロビの町を一步出ると雄大なサバンナが広がり、南へわずか8kmサファリカーに乗って12、3分も走ればそこはもうナイロビ国立公園。面積は117平方キロメートル。ゾウを

除けばかなりの種類は見られる。遠くまでサファリに行く余裕の無い人には便利なサファリコースである。数多く見たいのなら、彼らが最も活動する朝6時～9時、夕方4時～7時の時間を選ぶ方が賢明。正門脇には、孤児になった動物達を育てている”動物孤児園”がある。

メルー国立公園 (Meru N.P.)

ケニア山の北東 100km。ナイロビからサファリカーで6時間ぐらいの行程。この国立公園は故ジョウ・アダムソンの”野生のエルザ”の故郷としても有名で、年間を通じて雨量が多く、一年中深い緑に被われている。また他の国立公園では味わえない徒歩サファリが楽しめる。広大な範囲にわたり車の乗り入れが一切禁止されている地域を熟練したレンジャーの護衛で、ポーターにテントや食料を担がせて何キロも歩く。指定場所でキャンプをして本格的サファリを味わえる。この地区ではケニアで見られる動物をほとんど見ることができ、絶滅に瀕している白サイを見ることがもできる。

ケニア山国立公園 (Mt. Kenya N.P.)

ナイロビの北 150km。サファリカーで約3時間走ると、標高5199mケニア最高峰の死火山がある。この地区はいわば山岳公園で、海拔3350m以上が国立公園に指定されている。頂上はバディアン峰、ネリオン峰の双子型になっており、いずれも専門のガイド付きで熟練した登山家なら登頂可能。期間は12月中旬から3月中旬まで、または6月中旬から10月中旬まで。この地区には東アフリカ随一豪華なマウント・ケニア・サファリがある。さまざまなスポーツ施設があり、いろいろな種類の野鳥や孔雀が遊んでいる。

アバーディア国立公園 (Aberdare N.P.)

ナイロビの北 160km。サファリカーで約2時間30分走ると、面積 767平方キロメートルの山地と森林が入り混じった、アバーディア山脈一帯を含む森林公園がある。滝や川や熱帯には珍しい高山植物があり、シロクロコロブスモンキーなどバラエティに富んだ野生動物が棲息している。そして他の公園ではまず見ることのできないボンゴを見られるのはここだけ。この地区には世界的にも有名な、ツリートップホテルがある。ここは元来、動物研究の専門家が木の上に設けた箱のような観察小屋だったが、そのうち一般の旅行者も泊まり込むようになり、それが発展してユニークなロッジとなった。樹上のロッジは他にジ・オーク・ロッジがある。これらのすぐ下には塩やリン酸等の鉱物質を含む池になっていて、水を飲みに来る動物たちをロッジの中にながら観察することができる。夜、サーチライトに照らし出された動物たちの様子は実に神秘的だ。フロントに頼んでおけば、自分の見たい動物が来たら、真夜中でも知らせてくれる仕組みになっている。