

立命館大学「貧困の文化と観光」研究会

国際シンポジウム

社会的弱者の観光を通じての自立と自律

**International Symposium on
The Socially Deprived and Self-reliance through Tourism**

Organized by

Workshop on Culture of Poverty and Tourism

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**International Symposium on
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はじめに

本シンポジウムは平成18年~20年度にかけての2つの科学研究費補助金によるプロジェクト「社会的弱者の自立と観光のグローバライゼーションに関する地域間比較研究」（代表 江口信清）「マレーシアにおける貧困問題の地域的・民族集団的多様性に関する研究」（代表 藤巻正己）の成果報告の一部である。代表者それぞれが両プロジェクトに参加し、目的とするところもかなり重複しているために、共催という形をとることにした。

観光は、一時的に家を出て、非日常的な空間へ移動してなにか新しい刺激を経験し、再び家に戻るまでの一連の行為を指すとすると、私たち現代人の生活にとってほぼ不可欠な現象にまでなっており、民族や貧富の違いはあっても、何らかの観光行動をひんぱんにとってきた。もちろん、このような行為を実践するためには金と時間が必要だが、ますます多くの人たちが極寒の地から熱帯の地まで、地球規模で観光を実践している。ちなみに、世界観光機関(WTO)によれば、過去、テロ事件や地震や津波のような自然災害などの影響によって観光客が急減したような若干の例外的な年はあるものの、外国を訪れる観光客数は増加の一途をたどっている。2007年には、他国を訪れる観光客数は9億人近くまでになっている。この観光客の行き先は大きく分けて、ヨーロッパが最も多く、そしてアジア太平洋地域、南北アメリカ、中東、アフリカが続く。ヨーロッパの中では、南・地中海地域が第1で、西ヨーロッパ、中央・東ヨーロッパ、そして北ヨーロッパの順になっています。観光のグローバル化がますます進行し、近代的な観光客のまなざしは地球上の津々浦々まで浸透しつつあるということになる。

観光客が地球の隅々まで浸透する過程で、各地のエスニック・マイノリティ、極貧者、低位カースト、貧しい女性などの社会的弱者がこの過程にさまざまな形で巻き込まれ、観光の従者の地位に置かれてきた。このような人たちのために優しい、もう一つの観光（持続的な観光）が先進国主導の形で提唱され、途上国社会にまで伝播してきた。それらはエコツーリズムやグリーンツーリズムにはじまり、コミュニティ・ベースド・ツーリズムまで多様な形態や呼称を有している。自然環境にやさしく、観光客も楽しめ、しかも地元民に利益があるという、あたかも金の卵を産み続けるメンドリのような位置づけがなされてきた。しかしながら、多くの場合、理念と実践の間には大きな齟齬が見られ、あくまでも社会的弱者の多くが見られる対象であることにあまり大きな変化はなく、不平等を被りつつある場合も多いようだ。*Cultural Survival*誌などは早くからこういった傾向に対して警鐘を鳴らしてきた。NGOや各種支援機関の開発援助を得て、社会的弱者のある集団は支援の「依存症」的な症状にも陥ってきたものもあるようだ。

このような社会的弱者が、観光化を逆手にとって、自立化・自律化の途を進み、かつ喪失してきたプライドや「伝統」を回復することはできるのだろうか。今回のシンポジウムは、世界の多様な社会的弱者を取り上げ、この人たちによる観光化を逆手にとった社会的弱者の生存戦略のあり方と、その意味について検討する。

Preface

This symposium is a part of the results of two projects: "*Comparative Study on the Self-reliance of the Socially Vulnerable and the Globalization of Tourism*" (Project leader: Nobukiyo Eguchi) and "*A Study on Regional and Ethnic Diversities of Poverty Problems in Malaysia*" (Project leader: Masami Fujimaki) both supported by Grant-in-Aid for Scientific Research of Japanese Society for the Promotion of Science between April 2006 and March 2009. Since both leaders participate in both projects and themes themselves are pretty close, they decided to cosponsor today's symposium.

If we can tourism refers to a series of actions from departing home to experience something new and fresh at strange place and to coming home, it is a sort of basic phenomenon to our life. Regardless of difference in richness and ethnicity, we have been practicing tourism. Of course, we are required to have enough money and time more people have been visiting every corner on the earth from the coldest to the hottest. According to the World Tourism Organization, the number of international tourist arrival has been increasing steadily. The international tourist arrivals were 898 million in 2007. Europe is the biggest tourists receiving area, Asia-Pacific the second, Americas the third, Middle East the fourth, and Africa comes last. Globalization of the tourism has been moving on, and the modern tourist's gaze has been defusing to all over the world.

The socially vulnerable such as the ethnic minorities, the extremely poor, lower castes, women and the like have been involved in the process of tourism development and exploited. Alternative tourism (sustainable tourism) was proposed in the developed countries and has spread in the developing countries. However, big discrepancy was found between the idea and the practice, and most of the socially deprived people have continually been the object to be observed by the tourists and were low wage workers under the capital from the developed countries. Some scholars and journals such as Cultural Survival rang alarm bells against such phenomenon from 1980's. On the other hand, some of the socially vulnerable fell into a symptom of "the dependency" of the development assistance from various NGOs and other support organizations.

Is it capable for those people to become economically independent and to recover their prides and "the tradition" that they once lost, utilizing tourism development? This symposium takes up the ways of strategies for survival by the socially vulnerable through utilizing tourism development and examines the meaning of tourism.

社会的弱者の観光を通じての自立と自律

プログラム

11月1日（土）

10:00 挨拶と趣旨説明 江口信清（立命館大学）

第1セッション：エコツーリズムとコミュニティ・ベースド・ツーリズム(1)

- 10:15 「台湾のツォ族村落におけるエコツーリズム」 ティップスング・エ・ヴァヤヤナ、ペオンシ（国立台湾師範大学）
11:00 「ペルーとボリビアにおけるコミュニティ・ベースド・エコツーリズム」 デヴィッド・ピーティ立命館大学文学部）

11:45-12:45 昼食

第2セッション エコツーリズムとコミュニティ・ベースド・ツーリズム(2)

- 12:45 「エクアドル・ルナ・タパリにおけるコミュニティ・ツーリズム」 ジェラルドス・ドミニクス・カタリナ・ファン・ヴェールト（オランダ・ブレダ大学）
13:30 「北部カナダの異人、現地人、そして土地：生き方を継続して」 クラウディア・ノッケ（カナダ・レスブリッジ大学）
14:15 「島社会におけるエコツーリズム」 古村 学（龍谷大学）

15:00-15:15 休憩

第3セッション マレーシアのツーリズム

- 15:15 「「マレーシアにおける貧困問題の地域的・民族集団的多様性に関する研究」と社会的弱者およびツーリズム」 藤巻正己（立命館大学文学部）
15:30 「マレーシア・バハン州・キャメロン高原におけるエコツーリズムの開発—参加とオランアスリへの影響」 ノリザン・ビン・モハマド・ノール（マレーシア科学大学）
16:15 「マレー半島における漁村でのツーリズムの問題」 田和正孝（関西学院大学）
17:00 「ツーリズム：マレーシア・マラッカにおけるポルトガル人にとっての生存の鍵」 江口信清（立命館大学文学部）

17:45-18:25 ディスカッション

18:30-20:00 歓迎懇親会

11月2日（日）

第4セッション ツーリズムに関わる諸問題

- 10:00 「観光化と近代化の影響：フィリピン・イフガオ州バナウェの世界遺産の棚田とイフガオ族の農民を事例として」 四本幸夫（立命館大学）
10:45 「誰が山地民なのか：エスニック・マイノリティはエスニック・ツーリズムに参加して「よい生活」を得ることができるのか」 石井香世子（名古屋商科大学）
11:30 「ベンガルのパウルの適応戦略とツーリスト・スポットとしてのブルプール・サティネケタン」 村瀬 智（大手前大学）
12:15 「人間開発とツーリズムの役割：ケイパビリティ・アプローチの観点から」 池本幸生（東京大学東洋文化研究所）

13:00-14:00 **昼食**

- 14:00-14:20 コメント 山本勇次（大阪国際大学）
14:20-15:00 ディスカッション
15:00 シンポジウム閉幕

The Socially Deprived and Self-reliance through Tourism

PROGRAM

November 1 (Saturday)

10:00 Nobukiyo Eguchi (Ritsumeikan University)

Opening and Welcome

First Session: Ecotourism and Community-based Tourism (1) (chaired by Masami Fujimaki)

10:15 Tibusungu' e vayayana peongsi (National Taiwan Normal University)

Ecotourism among the Cou Village Community in Taiwan

11:00 David Peaty (Ritsumeikan University) *Community-Based Ecotourism in Ecuador, Peru and Bolivia*

11:45-12:45 LUNCH

Second Session: Ecotourism and Community-based Tourism (2)(chaired by David Peaty))

12:45 Gerardus Dominicus Catharina Van Weert (Netherlands, Breda University)

Community Tourism in Runa Tupari, Ecuador

13:30 Claudia Notzke (The University of Lethbridge)
The Stranger, the Native and the Land" in Northern Canada: Sustaining a Way of Life

14:15 Manabu Komura (Ryukoku Univertsity)

Ecotourism in Island Societies

15:00-15:15 COFFEE BREAK

Third Session: Tourism in Malaysia (chaired by Masato Ikuta)

15:15 Masami Fujimaki

Malaysia Research Project of "A Study on Regional and Ethnic Diversities of Poverty Problems in Malaysia" and the Socially Deprived and Tourism

15:30 Norizan Bin Md Nor (Universiti Sains Malaysia)

Ecotourism Development in Cameron Highlands, Pahang, Malaysia: Participation and Impact on Orang Asli

16:15 Masataka Tawa (Kwansei gakuin University)

Problems for Tourism in Fishing Villages of Malay Peninsula

17:00 Nobukiyo Eguchi (Ritsumeikan University)

Tourism: a Key for Survival of the Portuguese in Malacca, Malaysia

17:45-18:25 **General Discussion**

18:30-20:00 **BUFFET DINNER**

November 2 (Sunday)

Fourth Session: Issues concerning to Tourism Development (chaired by Yuji Yamamoto)

10:00 Yukio Yotsumoto (Ritsumeikan University)

The Effects of Tourization and Modernization: A Case of Rice Terraces of the World Heritage and Ifugao Farmers in Banaue, Ifugao Province, Philippines

10:45 Kayoko Ishii (Nagoya University of Commerce and Business)

Who Are the Hill-tribes?: Can Ethnic Minorities Gain a "Better Life" by Participating in Ethnic Tourism?

11:30 Satoru Murase (Otemae University)

Adaptive Strategies of the Bauls of Bengal and Bolpur-Santiniketan Area as a Tourist Spot

12:15 Yukio Ikemoto (University of Tokyo)

Human Development and the Role of Tourism- from Capability Approach

13:00~14:00 **LUNCH**

14:00-14:20 **Comments** by Yuji Yamamoto

14:20-15:00 **General Discussion**

15:00 **SYMPOSIUM ENDS**

The Socially Deprived and the Self-reliance through Tourism

Self-reliance through Ecotourism: story of a small river, *tanayiku*

tibusungu 'e vayayana (Wang Ming Huey)

“Te ahta anova c'o teomneni no mocmo te to cu peelui iachia hioa.”(in cou)

“We need not ask of permission from other whenever we are to make it by ourselves.”

“I will let saviki's people to be saviki's landlord forever!”

(pasuya 'e yataayungana/Kao cheng-sheng, founder of tanayiku.)

Abstract

As a member of cou tribe, the author wants to tell the history of *saviki*, which is a remote, poor, and outward migrated cou community, and how it collectively acted to restore the ecology of Ku fish to *tanayiku* River in a dilemma of economic policy failure, without any government support, and based on the traditional river knowledge and culture, in order to establish a natural ecological park. The community also developed eco-tour combining cultural performance and agricultural products marketing, thus created enormous business opportunities, turned community into market, overcame the economic blockage and exploitation of the middlemen, shared the profits collectively, contributed to the revival of tribal language, music, dance, and handicraft, provided educational funding and social welfare, including birth subsidies and elderly allowance, realized public infrastructure and environmental maintenance, strengthened the tribal identification and confidence, and even initiated the trend of community ecological preservation throughout Taiwan.

Keywords: cou tribe, indigenous peoples, indigenous knowledge, *tanayiku*, ecotourism

1. Introduction

Environmental protection and tourism in Taiwan have been independent fields and they are combined recently upon ecotourism. Although tourism has already been developed before the foundation of National Parks, there were strict exclusion and restriction with regard to human activities in National Parks, such as the compelling residential evacuation. Therefore, National Parks reveal the conflict between ecological protection and the locals' economic development. More importantly, ecological conservation policies of the government are not fulfilled and the exploitation still continues. Ecology out of National Parks tends to be in devastating conditions. For instance,

months ago the flood in Lushan Hot Spring area of Nantou County is caused by typhoons which swallow up the buildings and result in calamity¹. After the incident, people find out that almost all of the hotels are illegal buildings in Lushan. And hotels on Chingjing Farm nearby or Tungpu Hot Spring resort near Yushan National Park are developed illegally. The government is either the helpless one or the accomplice.

The residents in or near National Parks encounter the financial difficulties due to the regulation. Most of them are indigenous people in Taiwan. They are supposed to be the guardians of the land(Durning 1992); however, their traditional territory is forced to be arranged in National Parks or other state agents territories, such as the state forest. They further lose the reserves upon illegal trades. Besides, the large-scale economic crops cultivated with foreign capital also destroy the ecology. However, the economy is not as successful. The indigenous people are exploited by the firms involved and become subalternized and impoverished. In addition, their language and culture have been assimilated and they are further restricted by the national ecological conservation as the regulations such as National Park Act, Wildlife Conservation Act, Protecting Forest Act, Slop land Conservation and Utilization Act. However, they tend to be regarded by the majority as the ones who cultivate the conserved land or hunt for animals illegally. From the view of indigenous people, the impact on cultural ecology is more significant. With financial difficulty, ecological damage and ineffective national policies, the indigenous people can also count on themselves. However, how will self-reliance benefit them?

With regard to ecological damage, the land in Taiwan is high and precipitous which results in short rivers. In order to develop and use water resources, the reservoirs are constructed on almost all rivers. For protecting the reservoirs, upstream debris dams have increased to avoid the debris in the reservoirs. However, upstream river banks are full of debris which totally damages the water ecology. Downstream rivers are thus ineffective. Furthermore, the mouths to the sea are polluted by the factories or farms. The upstream residents are the indigenous people. In order to protect upstream reservoirs, the government restricts the indigenous people's land development and farming activities, which results in the outward migration and the destruction of traditional regulations. These people are also separated by the introduction of Christianity or political parties and they tend to violate the social regulations, such as catching the fish by electricity or poisoning the fish. The river ecology is thus significantly damaged. Thus, indigenous people should not only develop economy, but also

¹ Two typhoons have led in devastating results: Typhoon Sinlaku on Sep. 14 and Typhoon Jangmi on Sep. 28.

protect the rivers and forests. However, can they manage both at the same time? There is lack of in-depth studies by the officials and scholars in Taiwan and the answer is uncertain.

However, the remote and poor *savik* (*saviki*, or *tamayayaee* in Cou language) of Cou Tribe firmly respond to this issue by their own way out. They founded *tanayiku* Natural Ecology Park (TNEP) and successfully combine river ecological conservation and tourism, create enormous business opportunity and financial income, attract the people, reorganize the community and restore the cultural language and national confidence and dignity. In the past ten years, the unique experience of *tanayiku* has been leading different tribal communities and the government to deal with ecological conservation and ecotourism.

tanayiku in Cou language refers to the upstream branch of Zengwun River on the left bank. It belongs to *savik* village. Zengwun River is originated from Alishan and flows southwestward to the north of Tainan City into the sea. The left bank of the river is close to the mountains in the east which is the remote area for the Hans and the traditional taboo place for Cou Tribe. Therefore, comparing with the right bank in the west where betel nut and tea tree areas are largely developed, the east refers to more primitive forest which poor minority. However, in recent ten years, numerous visitors visit this place for ecotourism and lead to enormous financial incomes for *savik*. How do they succeed? This paper aims to find how an indigenous tribe independently develops river ecotourism, analyze the effect and discuss the problems as the criterion for the development of the indigenous people.

Imagined community of cou Tribe and *saviki*

According to the current statistics of Council of Indigenous Peoples, Executive Yuan, there are nearly 500,000 indigenous people in Taiwan (about 2% of Taiwan population). There are only 6541(2008) people in Cou Tribe (cou) and they are considered the minority of indigenous people in Taiwan (Table 1). Cou Tribe includes North Cou Tribe (Alishan Cou Tribe) which is the majority: *tfuya*, *tapangu* and *luhtu* (cou language is in italics below). In the past, there was also *imucu* in this tribe which was, however, extinct by smallpox in the early 20s. South Cou Tribe includes *kanakanavu* and *lha'a'rua* and there are totally around 1000 people who live in Kaohsiung County. The government in Japanese era forced another indigenous bunun population to the traditional territory of South Cou and *luhtu* of North Cou. Cou thus became the minority, and because of cohabitation and mixed marriage, their language was significantly intervened by Bunun and there was the confusion of ethic and ethnic identity.

tfuya and *tapangʉ* are independent subtribes with their own dialects, leadership-*peongsi*, military general-*yuozomu* and hunting territory-*hupa*, including fishing ground-*c'oeha* and a communal gathering house-*kuba*, located in the core settlement-*hosa*. They have their own ceremonies, such as annual millet harvest ceremony-*homeyaya* and comprehensive festival by the end of the year-*mayasvi*. The communities consist of the clans which are of same taboo- *cono peisia* groups, in which the intermarriage is strictly prohibited. Each clan has their own house of taboos-*emoo no peisia* also founded in *hosa*. North Cou includes 9 communities. *Saviki* of this study belongs to *tapangʉ*. In the annual *homeyaya* and *mayasvi*, the people should return *hosa* (*tapangʉ*) to contribute their agricultural and fishing gains and participate in varied labor works in *hosa* which allow them to maintain social relationship and strengthen the shared norms, ethics and ethnic identity. However, in the past years of being colonized, the traditional system of cou Tribe was broken down because of the political system and administrative district division of the government; the solid community structure was gradually divided and the tribe became independent and not as united.

Table 1 Demographic statistics of indigenous people in Taiwan

gender	Total	Amis	Tayal	Paiwan	Bunun	Rukai	Puyuma	Cou	Saisyat	Yami	Thao	kavalan	Toroko	Zakilaya	Other unregistered
total	490,765	176,160	82,010	84,851	49,719	11,584	11,192	6,541	5,663	3,482	643	1,145	24,257	310	1,056 32,152
Male	242,624	87,913	39,502	41,591	24,401	5,684	5,522	3,216	2,812	1,706	321	592	11,860	156	542 16,806
Female	248,141	88,247	42,508	43,260	25,318	5,900	5,670	3,325	2,851	1,776	332	553	12,397	154	514 15,346

Source: Council of Indigenous Peoples (2008/10)

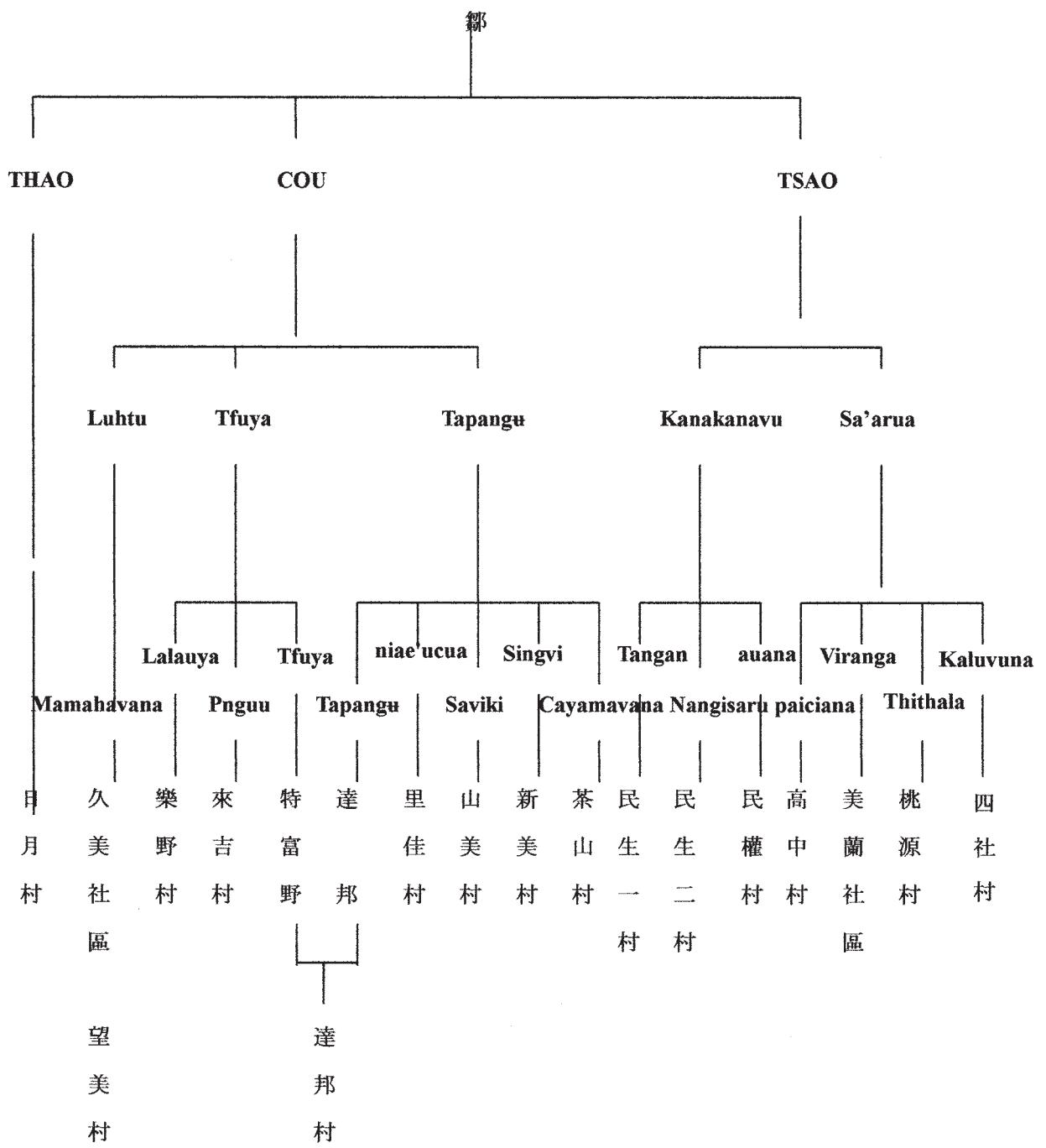


Figure 1 System of cou Tribe

Source: Wang 2001

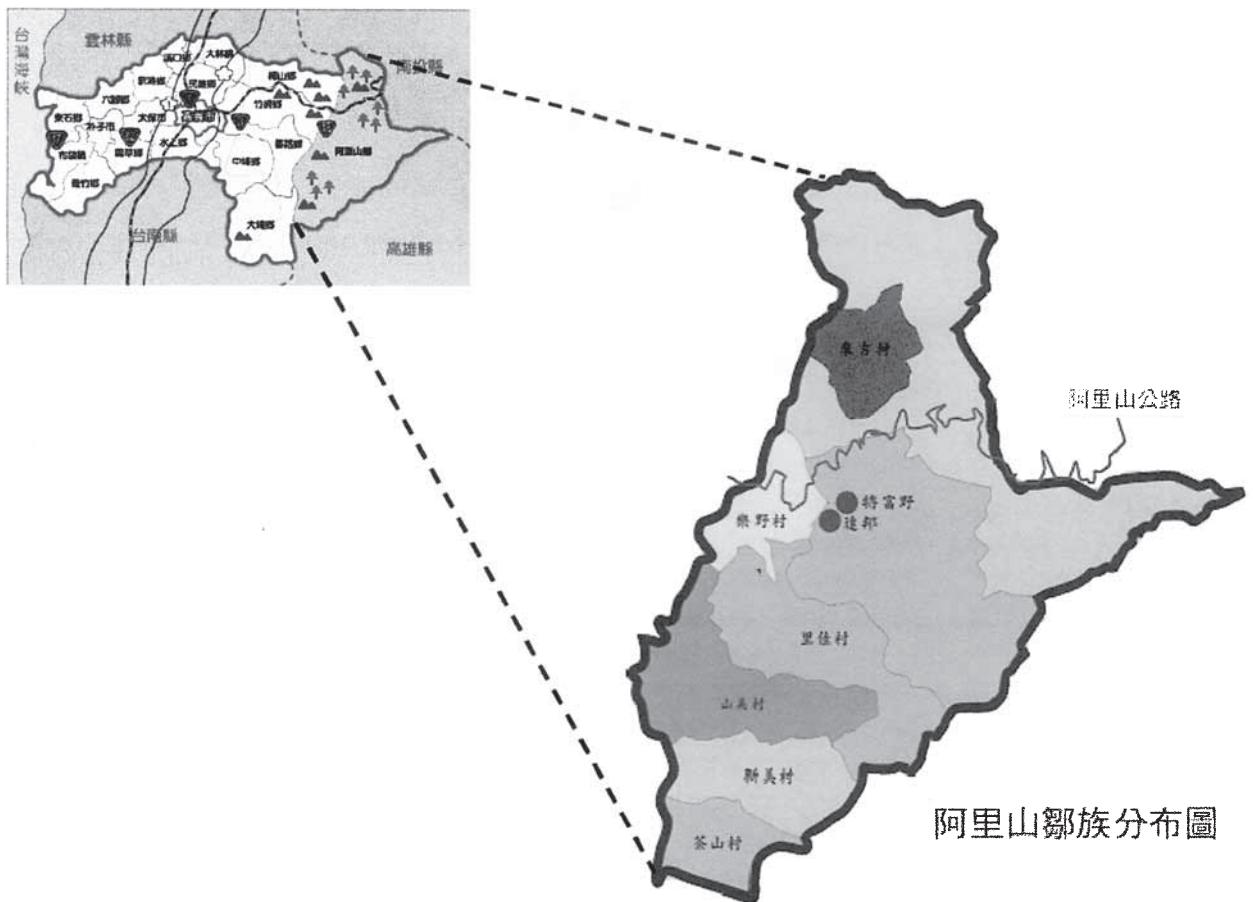


Figure 2 Location of Saviki Tribe and tanayiku river

In 1991, the International Ecotourism Society defined ecotourism as the responsible tourism in natural areas which can protect the environment and result in local people's welfare. Ecotourism tended to be related to nature, wildlife and adventure tourism (Honey 1999; trans. by Lee et al., 2001). In *Real Ecotourism*, Kutay suggested that "it is the tourism to enjoy and appreciate the nature" which involved the most insignificant environmental and cultural impact, facilitated community protection and development, environmental education and political consciousness and establish the different operational regulations on visitors and tourism industry (Kutay 2002).

Tanayiku phenomenon in Taiwan

The successful establishment of *tanayiku* natural ecology park of Cou Tribe immediately turns the park into the model of Taiwan. Other Cou communities also actively restore the rivers and plan ecotourism. Tayal smangus and cimspu also treats the rivers and primitive Chinese cypress as the content of ecotourism. Besides, Tayal Lunpei community in Ta Tung Township of Yi-Lan county, Saisyat in Nanjhuang Township of Miaoli County, Bunun in Hsinwulu River of Taitung County and Rukai in Maolin of Kaohsiung also develop similar ecological conservation combined with tourism.

With ecological restoration of the rivers, *saviki* turns from remote village into the tourist spot. How does *saviki* succeed? It is the issue targeted by many visitors, researchers, environmental people, scholars, experts and officials who concern about the indigenous people. The scholars tend to start the studies from the views of ecological wisdom, environmental justice, resource management, ecotourism, community construction and national economy. For instance, the study of S.S. Wang (1997) was based on overall cultural view. The study of J. Fu (1998) and planning study of indigenous people's economic system (Ma, 1998) were upon national economy. Chi-yu Shih(1999) targeted on national economy, politics and psychological issues. Y.W. Huang (2000), Y.W. Huang, H. Wang, C.C. Huang(2001) focused on the indigenous people's concept or model of ecotourism. H.C. Tang (2001) was based on welfare community. In addition, there was the personal description of Gao Chen-sheng, the major promoter in *savik* (Gao,1997). The reports promoting community construction include local resident Ying-jie Wen (Wen, 1997, 1998) De-sheng Gao upon environmental ecology(Gao, 1998) and Chi-wei Yang from the view of indigenous people's autonomy (Yang, 1999). In recent years, there are the papers of geographic scholars such as D.J. Lu(2001, 2006), B.K. Liang (2005, 2006), B.K. Liang, C.Y. Chang (2007) and international ones, including Hipwell(2007), Toresa Tao(2007), Tao, C.-H., Eagles, P.F.J., and Smith, S.L.J. (2004).

This study modifies the author's field study around 2000 and the past literatures (Wang, 2001, 2004) and further updates new information. This paper will focus on how *saviki* gradually constructs community-based ecotour-economy independently and examine their achievement and difficulties and future possible development. This study will first briefly review the economic development of Cou Tribe to show the social and economic environment of *tanayiku*.

2. Background of TANAYIKU Natural Ecology Park:

(1) Financial difficulty and economic struggle experience of Cou Tribe

The economic status of indigenous people in Taiwan is better than that before. However, comparing with the majority, this study still finds the structural difference. According to 2006

economic survey of Council of Indigenous Peoples, in 2002, average family incomes of indigenous people was NT\$463,980 which was even less than half (44%) of overall average family incomes (NT\$1,082,168) of Taiwan. In 2006, indigenous people's family incomes did slightly increased; however, it was still less than half of overall family incomes (47%), as shown in Table 1.

Table 2 Comparison of the household incomes of indigenous families and overall Taiwanese families

	Aboriginal families (A)		Taiwanese families (B)		Comparison (A/B)
	NTD	%	NTD	%	
Incomes of employed personnel and employers	466,144	91.5	792,409	73.2	
Transfer income	22,401	4.4	179,313	16.6	
Property income	5,856	1.1	46,789	4.3	
Imputed rent income	2,992	0.6	63,480	5.9	
Miscellaneous income	12,319	2.4	177	0.0	
Total income in 2006 (D)	509,712	100.0	1,082,168	100.0	0.471
Total income in 2002 (C)	463,980		1,064,153		0.436
Different (D-C/C)	+9.9%		+1.7%		-

Source: "Taiwan Aboriginal Economic Status Survey Report" (2002) by Council of Indigenous Peoples,

Executive Yuan; "Household Income Survey Report" (2001, 2005) by Directorate-General of Budget,

Accounting, and Statistics, Executive Yuan.

Table 2 shows different family total family incomes in different tribes. It seems that the Paiwan Tribe has better incomes which are even higher than the cities non-indigenous people. The data is based on sampling survey which, although is not general survey, I doubt whether it could accurately reflects the reality.

Table 2 Analysis of the total income of indigenous families

	2006 Total income (NTD)	2002 Total income (NTD)	2002-2006 Growth rate (%)	2005 Total family (NTD)	Relative multiple to the overall families
Total household Administrative zones	509,712	463,980	+9.9%	1,082,168	0.471
Aboriginal	453,622	422,880	+7.3%	N/A	N/A
Plain aboriginal townships	385,105	389,520	-1.1%	N/A	N/A
Non-aboriginal townships	614,935	548,352	+12.1%	N/A	N/A

Taipei City	769,932	571,116	+34.8%	N/A	N/A
Kaohsiung City	600,623	578,796	+3.8%	N/A	N/A
Tribes					
Amis	484,038	436,932	+10.8%	N/A	N/A
Atayal	558,733	465,972	+19.9%	N/A	N/A
Paiwan	496,150	498,876	-0.5%	N/A	N/A
Rukai	557,365	513,564	+8.5%	N/A	N/A
Bunon	480,557	464,148	+3.5%	N/A	N/A
Saishiat	482,529	520,020	-7.2%	N/A	N/A
Yamis	466,523	300,588	+55.2%	N/A	N/A
Puyuma	545,720	487,428	+12.0%	N/A	N/A
Cou	716,463	604,704	+18.5%	N/A	N/A
Thao	755,040	N/A	N/A	N/A	N/A
Taroko	492,204	N/A	N/A	N/A	N/A

source: "Taiwan Aboriginal Economic Status Survey Report" (2002) by Council of Indigenous Peoples, Executive Yuan; "Household Income Survey Report" (2001, 2005) by Directorate-General of Budget, Accounting, and Statistics, Executive Yuan.

In the 60s and 70s, the economic condition might be even more difficult. Using *saviki* as an example, although there were access roads in the 70s, the people did not have cars and they could only walk. Three stores of the Hans in the community possessed the cars and these stores were located after World War II. The business activity was limited in these three stores which not only sold the daily articles, salt, oil, cigarette, wine, cans, but also provided tools. Besides, these stores purchased the mountain products, including palms, mushrooms, dried mushrooms, tung tree seeds, camellia, bananas, bamboo shoots, gingers and sold these products to the markets in plains. Because of financial difficulty, the indigenous people were allowed to buy the products on account or credit. Sometimes the residents borrowed money from the stores for their medical and educational expenses, or the marriage and funerals. The people promised to pay back by their harvests of crops. However, the prices were manipulated by the stores. When the value of the harvests did not equal to their debts, they would have to pay by their lands. These stores thus manipulated the economy of the tribe: the prices of the crops were low, the people lost their lands and were in financial difficulties. In early times, in order to sell the crops with higher prices, *saviki* people usually carried the goods on the head with traditional Cou baskets at dawn. When they reached the village of the Hans in the plain, it was the sunset. They then looked for the Han buyers who tended to purchase the products after sunset since they knew *saviki* people must sold the crops they had carried the whole day. Therefore, cou people were not allowed to bargain and they sold the goods with the prices slightly higher than those in the stores of the tribe. They then bought the salt, fish, pork and wine with the money and walked back to the tribe until midnight.

The situation changed in the early 80s when Alishan highway was in service. The people could afford the motorcycles or trucks which reduced the transportation costs. However, the transportation improvement did not significantly reinforce the economy. After the prevalence of the cars, the financial condition was still difficult. The reason was in the inconvenience of transportation. The people lived far away from the markets. However, the key was that the people only concern about delivering the goods to the plain and never imagined that the consumers could come shopping on the mountains. Another reason referred to the social and cultural distance (ethnic border). It seemed that after improving the transportation, the tribal people could reach the plain easily. However, it was difficult to have transactions with the Hans both in the tribe and in the plains since the businessmen in the Han society controlled the market knowledge and culture and manipulate the prices of the products. The tribal people who were lack of the related knowledge would certainly suffer losses after trading with the Hans. In other words, the tribal border referred to the enclosure of the majority on indigenous people's economy. The transactions out of the tribal border would result in the profits for the Han businessmen. However, it was the suggestion of economics. I suggested that at the time, Cou Tribe could only regard the transaction as the goods exchange and at least, they had food, tools or wine. Besides the reasons above, the agricultural policy of the government also failed and the agricultural economy led by the official Farmers' Association(FA) was ineffective.

saviki people were not the only victims. Most of Cou people had similar experience. Community such as *lalauya* which had more convenient transportation access and frequent contact with the Hans had even more difficult conditions. Since early 50s, there has been the rise of economic movement for improving the poverty and overcoming the manipulation of the businessmen. Furthermore, the Catholics and Christians founded the churches in the almost every community. The foreign fathers and priests found the financial difficulty in the tribe and people's debts to the stores, they introduced credit unions in Alishan Township and established these unions in the churches as the centers for small loans or emergency. They successfully carried out the function of cooperation. These unions were the only financial support community in cou Tribe. Although the Farmer's Association provided financial service and had more capital, it was similar to the banks and it was not easy for indigenous people to borrow money from the banks. Credit unions provided the people convenient and friendly financial service which is still stably operated nowadays.

Afterwards, in the 1970s, thanks to the easy access to information from the outside and the increasingly convenient traffic, *lalauya* in closest vicinity of the Hans, where the agricultural

training school was located during the Japanese rule, got the agricultural business knowledge more easily. Thus, a few young people of the community established the “Agriculture Team”(AT) to jointly grow vegetables, resulting in unexpected success and making great money to encourage them to carry on. A cou Roman Catholic pastor along with a Tayal pastor in Nantou County, funded by a university professor, actively prepared to establish Alishan Cooperation Farm(ACF), expecting to break through the long term monopoly and exploitation of sales and transportation of mountain products by middlemen through joint transportation and sales. They proclaimed not to rely on political parties but themselves. Therefore, they officially established the in *lalauya* in 1979 by working with members of the AT. They mainly skipped the middlemen by signing the agricultural purchase agreements at reasonable price between the ACF and the market and transporting the agricultural products by trucks of their own to the market for direct sales. Although the sales prices were not the highest, the profits of the farm members had been greatly improved. It was a huge success at the beginning. Shortly afterwards, the ACF extended to tribes including *tfuya*, *tapang*² and *saviki*. In addition to summer vegetables, the crops jointly transported for sales also included *dendrocalamus* and *Phyllostachys* bamboo shoots, which were highest in output, and even the horseradish in the 1980s, with an annual sales volume more than 40 to 50 thousands NTD. Some villages even set up Consumer Departments to sell products at prices lower than store prices. However, in the late 1980s, the middlemen whose business had been impacted stroke back to purchase crops at prices higher than those offered by the cooperation farm. A few farm members were attracted for better personal gains to violate the farm agreement, resulting in less farm purchase volume and the eventual decomposition of the ACF out of mutual distrust of its members. In the end of 1980s, the farm finally came to an end. *tanayiku* emerged right after the failure of the ACF.

(2) The new way-out of *Saviki* community economy: *yoskuu aulu*

In addition to the *savik* community, *saviki* includes four surrounding neighborhoods of *cacaya*, *tiukuana*, *yamakayua* and *paayai*. It was not developed at the early time due to its inconvenient traffic. After the opening of the Alishan road in early 1980s², only the areas along the road benefited. However, the road does not run through *saviki*. The bamboos or sugimura woods originally along the Alishan road were immediately replaced with tea trees. Afterwards, the Alishan mountain tea developed into the most popular and most precious tea in Taiwan. However, *saviki* has an area around 50 hectares close to *cacaya* suitable for tea trees while the economy of villagers had

² In fact, the Alishan Road and Alisan Railroad do not actually run through any Cou village, the villages along are all Hans communities. Therefore, except for the name “Alishan” coming from a Cou hunter *avalivayi*, tourists to Alisan can hardly meet with any real Cou indigenous people, and there will be no arrangement of any tribe tour.

no progress at all because of the traffic improvement. Only the bamboo shoots on the roadsides had to be harvested to make a balance. After the failure of Alishan cooperation farm, the sales and transportation of mountain products had become even more difficult. Thus, the original and long term scenario of control and monopoly by middlemen and village stores came back. The then villager chief *pasuya 'e yataayungana* believed the past economic measures of the government had totally failed. Therefore, *saviki* people should think about how to manage *Saviki* by self-reliance, making the tomorrow of *saviki* better? They came to realize why not let the people living in cities to buy here on the mountain instead of transporting the local products for all the long way to the level ground areas. Hence, all the ideas and actions were taken in this direction.

Pasuya and tanayiku forbidden lands

pasuya 'e yataayungana in Chinese was Cheng-sheng Gao. He was bitten by a poisonous snake and was taken to a wizard instead of a doctor, causing him disabled from an early age. He became a converted Christian and then a preacher. In 1971, a priest from Jiayi preaching in *saviki* communities believed that it was absolutely feasible to coordinate develop the scenic spots or scenic areas of Alishan cou tribes under the management of local residents. This inspired *pasuya* 's idea to develop economy by using natural resources. He had once been to South Africa as a church representative to care the indigenous crew members and visit the river ecology of certain ecology park in South Africa. He hit the idea upon Saviki's *tanayiku*. As *saviki* people believed that there was *hicu*(ghosts and spirits) in *tanayiku*, there should be no hunting or fishing activities. When passing by, *saviki* and *nia 'ucna* villagers would tie their dogs and guns so as not to wake up the ghosts and gods there, resulting in a genuine natural preservation area with water sources (*nsoo*)³ for various big wild animals. As the cou legends goes, there is a nearby place named *ngibiei*, which was the gathering house of *noacachiana* family, the owner of the land. The land owner was once invited for dinner, however he was not honored for the drink. The guest was outrageous and toast to the local mountains in *topeohu* rite. Shortly afterwards, the *ngibiei* collapsed at the call to directly fall into the *tanayiku*. And the local ghost mountain *vayangasana* was thus regarded by Cou people as the land of the ghost named *tancahae*, who specifically visits landslide areas. Men would get lost for no reason when passing by *tobongkoya* and would all of a sudden find back to the routes again. Shortly after WWW II, a Han carrier (*tampu*) from Lijia died suddenly on the route. And an American priest named Anderson was once found lost and unable to move by the villagers who had to carry him on back to the foot of the mountain. A member of mountainous region service Corp

³ *Nsoo* refers to the fountains regularly visited by animals in gather. It differs from general springs (*esbabuka*) as being generally in the deep mountains with pure quality and certain pleasant taste to animals.

from Fu Jen University had fallen from here, making *saviki* believe this was a ghost haunted place.

tanayiku, like other rivers in the Alishan region, is the ecological environment of the “real fish” (*yoskuu aulh*) as termed by Cou people. The real fish is actually the Gu fish as regarded by Cou people as the most delicious and cherished fish. When C.S.Gao was about 8 years old, fish in *tanayiku* could be caught in rock cracks due to water shortage in winter. In daytime, silver white fishes could be found eating algae on rocks to present a special ecological view. Till September and October *yoskuu aulh* would find some appropriate place to give birth. And *yoskuu aulh* would jump at places of big water fall. C.S.Gao believed, if such ecological views could be restored to ancient times for sustainable use, the Hans people would come to visit and the products of the village could thus be sold. Therefore, the blueprint for *tanayiku* Natural Ecology Park yet came into being. However, When the Village chief Gao proposed to develop the land for tourism, most *saviki* did not believe the tourism values of the land (Gao, 1999).

Traditional river knowledge and culture

However, the river was traditionally the fishing grounds of tribes. Like other branches of Zengwen River, the fishing rights belong to tribes as listed in black and bold characters in the following table (Table 3). *tanayiku* river from its upstream *nia 'ucna* to downstream is about 18 km, being divided into 9 fishing grounds held respectively by different families⁴. The fishing rights were not limited by the administrative regions. Namely, each member of the same tribe in villages is the owner and user of the fishing rights. The fishing grounds were the common places of tribe members to get various types of fish. For each year, various families of the same river section would use the poisonous ivy *otofhana* and “creek tree” *evi no c'oeha* to poison fish⁵, which was only implemented in major tribe activities or rites of worships and was forbidden usually. Before 1970, *saviki* and *nie 'ucna* kept the common fishing system, that is, the land common proprietorship.

pasuya convinced all the traditional tribesmen along the river. However, the real issue was the permit of state laws and regulations. *tanayiku* and the mountains along it were owned by the

⁴ Family such as *yasiungu*, Fang Family, *tapangu*, Yang Family *yakumangana*, Ang Family *yasiugmu*, Wen Family *e'utsna*, Fang Family *tapangu*, Wen Family *e'ucna*, Wang Family *peongsi*, Zhuang Family *noacachiana*. And Ang, Fang and Wen Family respectively had two sections of fishing grounds at an average length of 2 kilometers. Wang Minghui 1990: 134-7.

⁵ The two plants are crushed to poison the river water. However, as the poison is not strong and the water is flowing, the fishes in the river will be escaping or shock temporarily. Thus, the fishes will be caught by net. With the poisonous liquids flow away, the river water will be restored and the fishes will come back.

Republic of China, including the state-owned forests and indigenous people reservations. Therefore, legally speaking, the traditional tribe ownership and rights to use were void and it would equal to challenge the state authority by restoring the common business management by tribesmen. The *saviki* villagers had to convince the state agents including the Forestry Bureau, Water Resource Administration or the downstream Zengwen Reservoir Administration. Prior to this, the actions of *saviki* people were illegal. Although, up to now, it is supported for convenience based on reasonable causes including ecological conservation, it will be a potential issue of the future.

Table 3 Cou fishing areas

River	Communities	Ethnic Sub-groups (in upstream-downstream sequence)
c'oeha	tfuya	<i>peongsi, niahosa, e'ucna, yaisikana, yasiungu, tiaki'ana, yasiungu, yaisikana, yatauyongana, toskʉ, poicomʉ, yulunana, poicomʉ, peongsi</i>
c'oeha	tapangʉ	<i>toskʉ, e'ucna, tapangʉ, noacachiana, toskʉ, peongsi, noacachiana, yakumangana, yulunana, peongsi, e'ucna</i>
c'oeha	lalauya	<i>Tiaki'ana, peongsi, mʉknana, uyongana, peongsi, mʉknana yulunana, luheacana, yasiungu, mʉknana, toskʉ, peongsi</i>
c'oeha	saviki	<i>yasiungu, yakumangana, e'ucna, peongsi, yakumangana noacachiana, yakumagnana</i>
toicunsu	tfuya	<i>voyuana, yaisakiei, peongsi, yulunana, voyuana, yaisikana, taskʉ, yaisikana, peongsi</i>
yiskiana	tfuya	<i>yakumangana, toskʉ, noacachiana, toskʉ, yaisikana, e'ucna, noacachiana, yasiungu, toskʉ, noacachiana, akuyana, e'ucna, yasakiei, e'ucna</i>
tanayiku	nia 'ucna	<i>e'ucna, yakumangana, peongsi noacachinana, peongsi</i>
tanayiku	saviki	<i>yasiungu, tapangʉ, yakumangana, yasiungu, e'ucna, tapangʉ, e'ucna, peongsi, noacachiana</i>
nia 'ucna	nia 'ucna	<i>tapangʉ, yakumangana, yasiungu, e'ucna, tapangʉ, e'ucna, peongsi, noacachiana</i>
c'oeha	lalauya	<i>mʉknana, yasiugmʉ, peongsi, yulunana, yavaina, peongsi</i>

Note: river sections are in upstream-downstream sequence.

Source: Wang, 1990: 135.

3. The establishment of Tanayiku Natural Ecology Park(TNEP)

In 1985, *saviki* village finally established *saviki* Tourism Development Research Panel" to start the tourism resource investigation. The comprehensive tourism development planning report was proposed in 1986. The village chief of *Pasuya* applied to the county government to promote the program, which was rejected on the ground of having no fund for implementation. Later on, he turned to Alishan township government to propose the general planning of tourism development of Aishan Township. The township governor gave the answer of having no funds and pointed out "the planning fees shall be paid by villagers themselves, and you shall find a way out by yourselves." Finally, the *saviki* community villagers had to rely on themselves in research and study.

In 1987, *pasuya* proposed for the second time in the village meeting and carried out a second resource investigation. Consequently, he believed that there were rare animals in the upstream including leopard cats ('*aho*), black bears and hundred-step snake as well as waterfalls such as *suocici* and *kazu*.

In 1988, under the leadership of *pasuya*, promotional meetings were started to persuade the tribesmen to support and back up the *tanayiku* Natural Ecology Park. And special personnel were invited to help convincing seniors of the tribes families of donating their fishing grounds. After three times of consultations and explanations, C.S.Gao with pork and wine, tried to convince elders by the reasons that their family rights were in effect non-existent and invalid as the river was legally the property of the state and the new generations would not recognize the laws of ancestors. In addition, after the opening of the road, people from outside the region to poison and electrify fish were able to come and leave freely. Therefore, only concentrated management could prevent the illegal transgressors. The seniors finally agreed to surrender the river management rights. However, they did not know what tourism was. C.S.Gao just said it was to let the Hans be our *yoapeisui*—namely, taking their money. It was said that it cost about one year to go through communications.

In 1989, the *saviki* village assembly officially passed a resolution to support the *tanayiku* Program. C.S.Gao delivered the well-prepared speech, stating that the establishment of the river ecology tourism was to pass on the *saviki* community traditions to young tribesmen and underlining the collective spiritual meanings of cou people in transition. The Gu fish was stressed as the future of the community. It won the unanimous support of the community residents at last.

Then, the village convention was made to clearly state the purpose of establishment to develop tourism and promote the economic growth of *saviki*. The convention contents reflected basic views of the community such as that *tanayiku* was expressly defined as the common property of *saviki*

villagers and the highest authority lied in the villagers general assembly. The development, business and management shall be with the authorization of the villagers general assembly. And the outside financial group investment shall be rejected. Moreover, *saviki* villagers aged between 18 to 50 had the responsibility to protect *tanayiku*. Prohibited acts included hunting, fishing by poisoning, fishing by electricity and general catching of fish and shrimps in the river as well as plucking plants and medicinal plants in the park. These acts were liable to fines in great sum.

Collective Fish Care Action: From church volunteers to youths in the village

After artificial cultivation, Gu fish ecology was restored in *tanayiku* in one year and the river had to be “sealed off” with guarding and patrols around the clock. *pasuya* set an example by taking part in the river protection with his three sons and a few youths from the Presbyterian Church. Students began to pour in till winter holidays to protect rivers in turn. Shortly afterwards, about forty young people joined and voluntarily became members of the ecological conservation team. Then, the ecological conservation patrol team increased to 70 people with the help of the police station. The male members of the community aged between 15 to 50 all took part in the ecological conservation team (Gao, 1997). Thanks to the around-clock patrol and fish protection of the community residents, the villagers had been used to hang about in *tanayiku*. It thus became the topic and identity symbol of the people. Some young people even regarded *tanayiku* as a recreational gathering place in the evenings. During the night shift patrol, there were often tens of young people who gathered together. It also became a new social interaction space. The fish protection activities during these four years were almost unpaid except for free working meals. Instead, it may cost extra money of the patrolling personnel and cost their chances to make money.

Media report

Since 1990, *saviki* fish protection action is gradually reported by media, regardless of ecological conservation, sightseeing tour, leisure farming, economy, *cou* culture or community empowerment aspects, almost all reports are positive and praising, such as “*saviki* Village saves *tanayiku* River”, “*tanayiku* Legend”, “New haven of peace and happiness in Taiwan”, so that *tanayiku* fame spreads afar, refined graphic reports in both Chinese and English were covered in international pages, so that conservation action of *saviki* people was internationally recognized, and *saviki* became example of success in Taiwan community ecological conservation. Through media report, *tanayiku* attracts successive tourists to visit, ticket revenue became more, over one million people visited *tanayiku*, only less than Alishan Forest Recreation Area (See Appendix) according to tourist statistics of the past six years. Then, the government began to play active role in assistance and tutoring, in 1992, *pasuya* got the first honor from government—nature ecological conservation

model.

In 1994, *saviki* Village Community Development Association(SVCDA) was established, and *saviki*'s *tanayiku* Nature Ecology Park (TNEP) was finally set up, beginning to open fish viewing, fishing activities, and selling admission ticket at NT\$50 each in the name of clean and maintenance fee, which is now NT\$100. Meanwhile the conserved river sections were extended from park tributary to four kilometers at upper stream of Tseng-Wen River, three fish viewing zones were set up in the park, linking neighboring scenic spots such as ancient trails, valleys, waterfalls, cliffs, there are agricultural product sales zone, community canteen and *cou* song and dance culture performance venue in park, and outside the park, there are barbecue & camping area, and parking lots, expanding year by year. After formal operation of TNEP, the revenue of the first year was NT\$791,004, and NT\$1,663,520 in 1996, immediately more than doubled. All revenues except exclusive employee salaries are planned and used by the community together (Wen, 1997: 163).

4. Collective profit sharing system

In 1995, *saviki* was selected as “rich and beautiful village” planning area, the only aboriginal community of the whole Taiwan at that time. In 1996, *saviki* community co-sponsored “Treasure Island Catfish Festival” event with media. The event contains units like “*tanayiku* fish viewing”, “*cou* flavor food”, “*cou* special farming product bazaar”, “*cou* traditional song and dance performance”, “Dredging creek and drawing water at noon of the Festival”. It was the first time to combine *tanayiku* conservation with *cou* culture and show to the public. In 1997, the community was honored “Cross-century Agriculture Development Plan” aboriginal area agriculture comprehensive development planning area (Wen, 1997: 164).

Due to TNEP success, *saviki* Community Development Association can develop well, *saviki* villagers above 20 years of age shall be the compulsory members, the association consists of three departments, including (1) Park Administration Station, with Environment Sanitation Team, Engineering Team, Conservation Team and Landscaping Team; (2) the Agriculture Team has Tea Art Class, Herbal Medicine Class, Flower Class, Fruit Tree Class and Vegetable Class; (3) Culture Education Team has Community Scout, Traditional Knitting Class (Mother Classroom), Traditional Crafts Class (Father Classroom), Community *tamayayaee* Choir and Community Song and Dance Troupe (Tang, 2001: 113). All these are supported by increasing ticket revenue of the park, since *saviki* established river Ecology Park officially, ticket revenue was amounted to NT\$12 million in 2000, 24 folds after seven years' growth (Table 4), tens of million revenue per year is absolutely

budget of general conversation, in particular, this was just aboriginal community. This is a community previously lived by three or four hundred people, such success can only be called wonder.

Table 4 *saviki* Community Development Association budget and final settlement over years

Revenue budget	1995	1996	1997	1998	1999	1999	2000	2001
Revenue	32100	24200	24000	24000	24000	24000	21800	--
Final revenue	1994	1995	1996	1997	1998	1999	2000	2001
Revenue	32100	24200	24000	24000	0	0	--	--
Community living income	51580	839398	1835691	1557435	3125921	6810901	--	--
Governmental authority subsidy	37000	20000	950000	3576000	4574487	4640900	--	--
Current asset	0	48728	38395	54808	72550	73017	--	--
Others	70000	78033	271893	382486	781361	--	--	--
Total	98790	101035	3119979	5594729	8702191	1152481	16775752	--
Final expenditure	1994	1995	1996	1997	1998	1999	2000	2001
Personnel expense	0	210000	949480	1099034	1655070	2118811	--	--
Office allowance	0	188316	483816	384024	420737	614691	--	--
Operating expense	86235	286600	1093358	1668266	3303907	2846316	--	--
Social service	0	126200	268781	1394944	2014684	1332749	--	--
Switch-in fund	10000	20000	0	243100	--	--	--	--
Total	96235	831116	2795435	4789368	7394398	7863827	13640345	

Source: Wang(2001)

In terms of independent financial revenue budget, as seen from Table 5, the largest revenue source is clean fee, or ticket, and parking lot, toll station beverage, fries and fish meal incomes, the ratio of government subsidy over revenue falls year by year with independent financial revenue, the maximum occurred in 1996 and 1999, over four million, these two years are the very years of Typhoon Herb and 921 earthquake, where two million dollars were surpassed every year, it falls to NT\$2.50 million in 2000, about one fifth.

In regard to expenditure, except basic expenditure like personnel expense and office allowance, the most important ones are operating expense and social service expense, operating expense supports 14 aspects such as park preservation, community landscaping, community preservation, NT\$2.56million in total; social service expenditure covers 13 aspects like Longevity Club, father and Mother Classroom, scholarship for children, culture activity, emergency assistance, NT\$1.93

million in total. Besides, due to huge number of members, Traditional Song and Dance Troupe got support of about NT\$1.9 million; other subsidy expenses have NT\$1.62 million.

Table 5 Revenue/expenditure budget from the second half of 2000 to 2001

Item	Title	2001 budget	2000 budget	Remark
1	Revenues	15,684,948	16,775,752	
1	Member revenue	1,000		
2	Permanent membership fee	20,800		
3	Community productive income	12,259,621	15,457,287	18 months
1	Clean fee	9,407,448	12,156,740	(Ticket)
5	Governmental authority subsidy	2,500,000		Please refer to Summary of subsidies
5	Current asset	96,122	84,911	
1	Community fund interest (time)	79,122	57,241	
2	Banking interest (current)	17,000	27,670	
6	Others	807,405	426,149	
	Others		426,149	Subsidy repayment
	Balance of previous year	807,405		1999
	Balance of this year	3,135,407		2000
2	Expenditure	13,640,345		
1	Personnel expense	5,054,000	4,446,188	
2	Office allowance	1,429,948	1,169,518	
3	Operating expense	2,413,000	2,567,548	
4	Social service	3,288,000	1,932,168	
1	Longevity Club	378,000	366,366	Annuity NT\$600/month per old person above 65 of this village
2	Mother classroom	150,000	108,221	Daycare center, elementary school, Mother Classroom
3	Father dancing hall	150,000	80,250	
4	Scout and youth activity	150,000	69,108	
5	Parent/child activity	100,000	68,034	
6	Carry out All-people Sport	150,000	75,000	Sport games at village

					or township level
7	Traditional culture activity	100,000	80,383	Family activities	
8	saviki scholarship for children	450,000	293,950	2000.3000.6000	
9	Birth subsidy	120,000	156,000	12000*10	
10	Marriage fund	300,000			
11	Land rental	300,000	249,834		
12	Emergency assistance	100,000	189,000	Funeral subsidy added	
13	Talent training	200,000	196,022		
5	Community traditional singing and dancing troupe	2,000,000	1,904,362		
6	Subsidies (misc.)	1,500,000	1,620,561		

Source: Wang (2001)

saviki can be the best social service community over Taiwan, any old person of this community above 60 years of age will have NT\$600 senior allowance every month. Youth and children scholarship is NT\$1,000 for each national middle school student, NT\$2,000 for each high school student, NT\$3,000 for each college student, and NT\$4,000 for each university student, NT\$20,000 subsidy will be issued in case of marriage or funeral. There is also marriage subsidy, if both are of *cou* tribe, then a marriage subsidy of NT\$20,000 will be released to encourage them, besides, mutual fund for marriage of NT\$300,000 is provided to whoever lacks money to hold wedding, and returned after the ceremony for use of next pair of spouses. Additional NT\$20,000 will be granted if the parent have one birth, and NT\$30,000 if they have the second birth, in order to encourage birth to extend *cou* people life. Seemingly all community ideals are practiced here.

Notably, community annual balance and other current capital saving management is divided into community cooperative time deposit, current deposit (ca. NT\$1 million) and bank deposit, the former indicates *cou*'s support to saving cooperative they themselves establish, the latter is to facilitate money appropriation. As capital of community public and private departments increases greatly, capital management application becomes a very important step, if community capital keeps accumulating, financial treatment will be core of community economy, capital management will decide whether economy profit can be well maintained and more profit can be created, or economy independence indices.

Over the past decade, except storm and earthquake disasters bringing short-time damage and less

tourists, *tanayiku* tourists increase steadily, the government began to assist in infrastructure construction, e.g., expanding original road linking *saviki* to Alishan, towards *cayamavana* community to the south, the road from *cayamavana* to Sanmin Township completed tarring and was open to traffic in 2000, it can be connected to Kaohsiung, Tainan Tseng Wen Reservoir scenic area, tourist origin area is widened, traffic time is shortened, system of two days off per week is implemented, *tanayiku* cou sentiment, river catfish ecology get closer, and there are more tourists. The next problem is how the previously non-business *saviki* cou face spiking tourists, and how to face life impact from sightseeing?

5. Problems Saviki cou people face

In terms of river ecological conservation, community empowerment and money earned, *saviki* is very successful in the past decade, and just like “catfish is the very future of ours” mentioned before, catfish is relied on to nourish *saviki* economy, or attracting tourist to go uphill for ecology sightseeing, leave money, buy mountain products. But some problems are encountered, roughly detailed as follows:

(1) Aboriginal community governance vs. country governance: legitimacy

National authority does not acknowledge land right of indigenous people; although in 2005, the government passed Indigenous People's Basic Law, expressly acknowledging land right of indigenous people, and shall return traditional territory for autonomy, up to now government authority seemed not to implement actively. Establishment of *tanayiku* Natural Ecology Park was before passing of basic law, it is illegal behavior in perspective of country law, defining river scope and management operation, in fact, violates Water Law and Forest Law, as *tanayiku* lies at upper stream of Tseng Wen Reservoir, which in fact is against Reservoir Water Zone control regulation, and community becoming main object of operational sightseeing also challenges existing national sightseeing tour area rule, in particular, private ticketing is against the Profit-making Enterprise Law and Income Tax Law, and cou's collective behavior of closing river and protecting from fishing challenges national police justice system, and challenge liberalism human right value in democratic country, for example, one senior police official ever spent the holiday in fishing in Tanayiku, and was arrested by community patrol guard and transferred to local police office, notwithstanding, all these community unlawful actions were recognized, praised and even honored and subsidized by Taiwan due to *tanayiku* success in independent restoration of river ecology, subsidy, it even led the conservation wave of all Taiwan communities, in contrast to failure of national management regulation on river ecology, the government has not take any punitive measure up to now. How it will go in future has to be further observed.

(2) Independent sightseeing vs National Scenic Area Administration Office: sightseeing profit plundering and culture reshaping

Right after *tanayiku* success in 2000, in order to double sightseeing tourists, the government established Alishan National Scenic Area Administration Office(ANSAAO), covering the whole Alishan Mountain, and highlighting *cou* culture as key point of sightseeing development. About in 2003, *lalauya* tribe built a *cou* culture park near Alishan Road, and organized *cou* song and dance troupe to perform regularly, what astonished *cou* people most was to copy the legendary ritual of female *cou* being insulted, *mefo'na*, Beans of Life Festival in English, but new performance implication was granted, that is, group marriage to promote population reproduction. All these conflicted with *cou* sightseeing benefit, culture interpretation and culture authenticity imagination. If a tourist visits the culture park, he/she may not go to *tanayiku* and other *cou* communities, hence, tourists decreased indeed in recent years. Host of Park *cou* Song and Dance Troupe is not of *cou* clan, so there is problem of culture subjectivity, furthermore, to please audience, new songs and dances were created, even songs and dances not of *cou* tribe were performed, the culture encountered the dispute between tradition and innovation.

(3) *tanayiku* nature, culture and ecology imagination and practice

The first purpose of *tanayiku* Nature Ecology Park is to be kept natural, but too many tourists, too many facilities and buildings built, negate nature rule. *cou* handicraft culture performance to tourists aroused culture commodification dispute and culture authenticity suspicion; and for fish viewing, fodder was sold to tourists to feed catfishes, and gradually catfishes live on fodder, they were no longer wild catfishes, all these were criticized by ecologists.

(4) Traditional community life culture vs commerical culture

Surging tourists drive many tribe people to peddle, the past primitive sharing value in farming, fishing and hunting was gradually transformed into community culture of money value, a person represents a ticket, tourist tide means money tide, *cou* tribe value boundary became ambiguous. Rising profit of *tanayiku* was allocated as fair and open as possible, but there were frictions and open or hidden struggles within community organization for processing huge profit, dissociating group solidarity. Park peripheral profits such as homestay, peddlers, store opening opportunities easily flew to politician elites, resulted in birth of classes and family profit distribution disparity. *cou* people do not trade according to Hans commercial culture, leading to tourist complaints.

The last issue is relation of *saviki* community economy with *cou* economy, in terms of ethnic

economy, *saviki* economy should belong to a larger *cou* economy entity, but, for one thing, the *cou* economy entity has not yet been formed, for another, *saviki* economy has been changed from simple *cou* economy to economy entity organized by Community Development Association, only so-called legal entity can be recognized by the country, there is no *cou* economy in the scope of national law and regulation, which need longer time to be solved.

6. Concluding remark

saviki is the first community in Taiwan to make fortune on river ecology conservation success, the first to grant annuity, the first to release marriage subsidy, birth subsidy, schooling subsidy, work-study grant and so on, what succeeds is to transform place of origin to market, saving transportation cost of agricultural products, meanwhile river management is modified on the basis of traditional *cou*'s river ownership system and culture, and in this new market, various mountain forest and agricultural products halted due to inconvenient traffic, be it cash crops or traditional crops or even preys, or emerging handicrafts, find their sale outlets, in the meantime, although *cou* food, *cou* songs and dances, *cou* culture seem to face commodification, a comprehensive monopoly enterprise is born out of Taiwan leisure market.

saviki cou uses tribe group to define tribe ecotour, positive, doubtful or criticizing, in terms of Taiwan, no doubt *Tanayiku* is the most exploring and inspiring, she led all Taiwan in a revolution of ecology restoration and community empowerment, in terms of economy profit, it is also the most achieved, and most fruitful in culture; from above *tanayiku* experience of *saviki cou*, some facts that are simple yet easy to ignore can be concluded, maybe able to give partial answer to their success reason:

- (1) Persistence in traditional river culture, likelihood to river and creek and treasure of real fish—catfish.
- (2) Respect *cou* territory ownership and resource management norms, taboos and maintain and make full use of *cou* traditional knowledge.
- (3) Collectivism among *cou* clan organization is successfully transformed into community collective joint action, co-management and new community systems and values of sharing.
- (4) Personality character of initiator and community leader in challenging country authority firmly and bravely.
- (5) Executors' command of environment ecology and capital market economy knowledge and adoption of right strategy, and adherence to ideal, “Do by ourselves even without labor or

money” mindset and behavior.

Alternatively, maybe we can explain why other indigenous people appeared not so successful in river conservation and ecotourism.

In the 21st century, influenced by *saviki*, other *cou* communities are mobilized in a row to build their own community economy industries, showing the rosy scene, in the future not far ahead, when every community has a certain scale of economy industry, certain traffic facility and complete infrastructure construction, community industry economy alliance will be set up on the basis of *cou*’s collective effort, coordinating and supplementing each other, thus forming the comprehensive *cou* economy industry, if some appropriate financial agency such as saving cooperative supports *cou* industry and life improvement, then *cou* ethnic economy community will emerge.

ANSAAO is going to include *tanayiku* and *cou* culture in resource management, and introduce to every *cou* community step by step according to expert and supervisor comments, Beans of Life Festival will be held by the end of this year, in light of remarkable ticket revenue of *saviki* people, the National Taxation Bureau has been studying taxation possibility, all this represents countermeasure of country power, furthermore, traditional distributors and new stronger consortiums are coveting nearby and waiting for opportunity, then how will *saviki* reacts? How will *cou* people do? I believe, the answers are still in social practice of *cou* peoples.

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Appendix

Population, number of households of Alishan Township

Population as of Aug., 2008

Population by the end of Aug., 2008

Village	Number of neighborhoods	Number of households	Male	Female	Total
Shitze Village	6	126	231	169	400
Jhunshan Village	6	162	229	199	428
Hsianlin Village	9	93	136	119	255
Fengshan Village	5	117	215	165	380
Chungcheng Village	5	94	117	109	226
Lijia Village (niac'ucna)	4	99	201	138	339
Laiji Village(pnguu)	5	121	221	212	433
Shanmei Village (tanayiku)	7	197	366	341	707
Chashan Village (cayamavana)	5	150	244	203	447
Hsinmei Village (sinvi)	5	111	202	180	382
Dabang Village (tapangu)	12	359	604	527	1131
Leyeh Village (lalaauaya)	9	324	545	486	1031
Total	78	1953	3311	2848	6159

Note: the first five villages are Hans habitats

Table Population of aborigines and Hans in Alishan Township

Population of Alishan Township	Gender	Total	Regional non-aboriginal population	Aboriginal population		
				Total	Plain aborigines	Mountain aborigines
Total	Total	6159	2332	3827	14	3813
	Male	3311	1289	2022	6	2016
	Female	2848	1043	1805	8	1797

(1) 2002.1-2007.6 tourists to Tanayiku and neighboring regions

Year / Month	Alishan Forest Recreation Area	Tanayiku	Rui Tai Service Center	Total Alishan region
2007-6	38,226	7,069	4,510	100,152
2007-5	44,869	6,761	6,570	117,557

2007-4	126,863	9,179	6,903	332,381
2007-3	171,579	8,126	6,888	449,537
2007-2	104,112	13,048	7,687	272,773
2007-1	38,167	9,441	2,833	99,998
2006-12	61,641	9,080	4,355	161,499
2006-11	59,075	12,201	6,403	154,777
2006-10	75,187	17,608	7,756	196,990
2006-9	48,786	11,974	6,758	127,819
2006-08	70,244	17,245	5,766	184,039
2006-07	52,993	12,798	4,187	138,842
2006-06	31,027	6,170	4,307	81,291
2006-05	51,766	14,829	5,739	135,627
2006-04	140,301	24,776	7,003	367,589
2006-03	219,159	19,884	5,642	574,197
2006-02	113,786	19,172	7,262	298,119
2006-01	70,332	13,620	6,687	184,270
2005-12	61,041	16,942	4,608	159,927
2005-11	56,454	18,924	4,922	147,909
2005-10	53,490	17,490	5,973	140,144
2005-09	31,991	6,834	2,937	83,816
2005-08	45,401	13,924	4,169	118,951
2005-07	61,111	23,835	6,261	160,111
2005-06	32,390	8,881	5,263	84,862
2005-05	37,230	14,682	6,604	97,543
2005-04	84,377	19,191	7,461	221,068
2005-03	134,797	11,522	5,457	353,168
2005-02	85,085	16,843	8,530	222,923
2005-01	40,834	9,559	4,657	106,985
2004-12	36,986	12,611	3,232	93,575
2004-11	34,833	14,893	3,985	88,127
2004-10	25,564	13,927	4,960	64,677
2004-09	11,491	3,711	1,889	29,072
2004-08	30,802	13,685	3,004	77,929
2004-07	10,466	5,797	1,819	26,479
2004-06	47,052	22,661	6,296	119,042

2004-05	51,207	27,179	9,699	129,554
2004-04	119,255	22,745	5,659	301,715
2004-03	200,008	20,890	4,555	506,020
2004-02	59,207	12,099	4,398	149,794
2004-01	68,372	17,278	7,284	172,981
2003-12	36,390	14,876	0	92,067
2003-11	43,735	20,345	0	110,650
2003-10	48,958	23,795	0	123,864
2003-09	35,620	14,540	0	90,119
2003-08	52,213	17,288	0	132,099
2003-07	49,150	15,467	0	124,350
2003-06	20,683	4,213	0	52,328
2003-05	18,816	10,069	0	47,604
2003-04	61,234	17,390	0	154,922
2003-03	168,566	28,356	0	426,472
2003-02	117,948	33,974	0	298,408
2003-01	46,455	13,472	0	117,531
2002-12	49,424	23,735	0	125,043
2002-11	45,841	29,069	0	115,978
2002-10	52,288	20,275	0	132,289
2002-09	32,927	19,482	0	83,305
2002-08	57,566	27,000	0	145,642
2002-07	47,072	24,500	0	119,092
2002-06	33,317	15,972	0	84,292
2002-05	33,019	16,200	0	83,538
2002-04	120,633	25,500	0	305,201
2002-03	192,337	35,000	0	486,613
2002-02	89,226	27,048	0	225,742
2002-01	38,045	11,630	0	96,254
	4,429,020	1,088,280	230,878	11,407,232

Source: Alishan National Scenic Area Administration Office – tourism statistics (2008.10.05)

<http://www.ali-nsa.gov.tw/tc/intro/account.php?pn=7>

Community-Based Ecotourism in Ecuador, Peru & Bolivia

David Peaty

要約

コミュニティを基盤とした観光プロジェクトは、貧困緩和の可能性を有する。次世代に向け環境を保護するためには、これらはまた持続可能であることが求められる。本研究は、特に実績を上げていると思われる CBT プロジェクトに着目し、2006 年 8 月（エクアドル）、2007 年 8 月（エクアドル、ボリビア）、2008 年 8 月（ペルー）における地域調査の結果を報告、分析するものである。

キーワード：コミュニティツーリズム、エコツーリズム、ツーリズムによる影響、先住民

Abstract

Community-Based Tourism projects have the potential to alleviate poverty. In order to protect the environment for future generations, they also need to be ecologically sustainable. This study reports and analyzes the results of field research on CBT projects which was conducted in August 2006 (Ecuador), August 2007 (Ecuador and Bolivia) and August 2008 (Peru), with a particular focus on projects perceived to be successful.

Key Words: community tourism; ecotourism; tourism impacts; indigenous peoples

Tourism and Poverty

Worldwide, billions of people suffer from poverty, hunger and disease. The Millennium Development Project was supposed to help these people, but the governments of rich countries have failed to keep their promises.

The UNWTO claims that global tourism can help alleviate poverty. For example, tourism creates jobs for hotel and restaurant workers, guides, taxi drivers, and for those who supply food and drink to hotels & restaurants. It provides work for street vendors, the souvenir industry, artisans, and shoe-shine boys. Trekking tourism employs guides, porters and donkey drivers. Tourism also provides temporary employment in the construction industry, building hotels, restaurants, airports, and so on. And when these people spend their extra income, further jobs are created.

In 2008, foreign tourists spent around \$250 billion in developing countries. (That amount could have been much greater, but according to UNEP, as much as 80% of the money spent on trips to developing countries never reaches them, being paid to airlines, international hotels, travel agencies and western food suppliers.)

\$250 billion is a very significant sum. On the other hand, tourism also causes many problems: environmental (overuse of water, sewage, garbage, deforestation, and so on), economic (inflation of rents and food prices, for example), human rights (such as the eviction of tenant farmers to build resorts and golf courses) and cultural (westernizing the attitudes and values of young people, for example). It is important for tourism to be responsible socially, culturally and ecologically.

Concern about the problems caused by tourism has led to new types of tourism: responsible tourism, ethical tourism, ecotourism, and community tourism, among others.

Tourism and the environment

In June 2005, the Millennium Assessment Board reported serious deterioration in over half of all global ecosystems. This is due to various factors, such as population growth and unsustainable development. However, tourism also has serious impacts, such as the construction of resorts, airports and highways, excessive use of water, electricity and other resources, waste outputs such as sewage and garbage (PET bottles, camera batteries, etc) and, worst of all, the impact of airplane emissions on global warming. Ecotourism evolved as a response to these problems. Ecotourists travel in small groups, with minimal environmental impact, they 'take nothing but photos, leave nothing but footprints', and they are expected to offset airplane emissions by making carbon offset contributions. In order to attract ecotourists, local communities will protect and restore their environments (coral reefs and rainforests, for example).

Ecotourism in Ecuador, Peru & Bolivia

Ecotourists have a great interest in countries with high biodiversity, and the countries of South & Central America are outstanding in that regard. Costa Rica is the most successful (ecotourism is its biggest source of income) but Ecuador, Peru and Bolivia also have much to offer, including islands, coasts, cloud forests, rainforests, high mountain ranges and peaks, and high altitude desert (the parano of Ecuador and altiplano of Bolivia). Tiny Ecuador, for example, has 18,250 species of flowering plants and 640 species of birds, not to mention the unique species living on Galapagos.

Tourism and the community

As already mentioned, tourism can cause many problems for a community: environmental, socio-cultural and economic. It is important to maximise the benefits and minimize the harmful impacts. These are the twin goals of Community-Based Tourism. The most important principle of CBT is informed consent: communities have the right to be informed about the potential impacts and to be left alone if they reject tourism. CBT takes various forms: (1) a responsible tour operator maximizes benefits and minimizes impacts (2) there is consultation & collaboration between operator & community (3) the community owns or manages the entire tourism project.

Ecuador

Of the 3 countries reported on in this study, Ecuador has seen the greatest development in CBT. It has over 80 projects, of which half are in the Amazon region. But very few earn a profit. There is too much competition (with other countries in the region such as Costa Rica, and with other projects in Ecuador) and there are not enough ecotourists; the tourist season is short (June to September); and tourism can be devastated by unexpected events (oil leaks in the rainforest, political crises, terrorism incidents, a sharp increase in plane fares, and so on). During this 3-year project, I researched 5 CBT operations in Ecuador: Yachana, Runa Tupari (not included in this report), Maquipucuna, Santa Lucia and Yunguilla.

Yachana

The FUNEDESIN Foundation was founded by an American, Douglas McMeekin, to buy and preserve rainforest around Mondaña Village, on the Upper Napo River. Funding was provided by Rainforest Concern and other donors. FUNEDESIN bought 1730 hectares, of which 80% is primary rainforest. Under McMeekin's leadership, they then established the following projects.

Ecotourism

Yachana Lodge opened just outside Mondaña Village in 1995, providing accommodation for 55 visitors. The cooks, guides, cleaners, gardeners and other employees were hired from Amazon communities and trained by FUNEDESIN. The lodge achieved a relatively high occupancy rate (47%) and a cumulative income of \$4.6 million, nearly all of which was spent in the local community. (The biggest loss was the \$440 a month paid to an Internet Service Provider.) The lodge offers accommodation and meals, guided rainforest walks, lessons on basket weaving and pottery and visits to the local school, a research station, a traditional healer and a gold panner family.

Yachana High School

FUNEDESIN has funded the construction of 21 primary schools and one high school. This (Yachana Collegio Technico) has about 200 students from all over the Amazon region. They attend in two groups, alternating every 28 days. (This allows twice as many to attend, and enables students to help out on their family farms – but some spend a lot of time commuting!) The curriculum includes conservation, ecotourism management and computer skills. The students are being trained to run Yachana Lodge. Much of the food is grown on the school farm (papaya, passion fruit, bananas, yuca, taro, cacao, tomatoes, leafy vegetables) or bought locally.

Research

Yachana has an ecological research station with up to 20 researchers and students from Global Vision International, who also pay for accommodation.

Agricultural Program

This program helps approximately 5000 farming families to introduce more sustainable methods instead of clearing rainforest areas around their farms in order to increase their incomes.

Yachana Gourmet

One product from the agricultural program is cacao. Yachana buys it and produces chocolate for fair trade export.

Healthcare

FUNEDESIN founded the Mondaña Medical Clinic, which now provides healthcare to over 8000 people in 25 communities, using support workers with radios and a tele-medicine link to a hospital in Quito.

Microfinance

FUNEDESIN set up 17 village banks, providing over 1200 small loans to farming families.

Conservation

FUNEDESIN preserved around 2000 hectares of rainforest that had been scheduled to be cleared for farming. Yachana Lodge is a sustainable tourism business (recycling waste, using solar energy and energy-efficient devices such as LEDs, for example). The high school curriculum includes environmental studies and ecotourism management.

From the above, we can see that Yachana has been a great success in terms of both conservation

and poverty alleviation. Its founder has now gone a step further by putting the high school in charge of the ecolodge, a move that will reveal the extent to which his approach to capacity-building has succeeded.

Maquipucuna, Santa Lucia and Yunguilla

These CBE projects are located in the north east of Quito in the Choco Andean Corridor, a region considered to be one of the five most biodiverse places on the planet. When the owner of a large tract of cloud forest went bankrupt, the Nature Conservancy created an NPO named the Maquipucuna Foundation, bought the land and established a research center. Their research focuses on biological assets (in particular birds, epiphytes and orchids), agro-forestry (cultivating shade-grown coffee, for example) and forest rehabilitation (replanting parts of the forest that had been cleared for pasture and sugar plantations). To help pay the bills and promote conservation, they opened an ecolodge, which now has 38% occupancy rates. The lodge gets its electricity from the national grid, there being no more sustainable alternatives in the cloud forest, but in other ways its management is ecologically sustainable. In addition to income from the ecolodge, Maquipucuna sells fairtrade shade-grown coffee, orchids and carbon offsets. Profits are used to purchase additional degraded land for reforestation. Maquipucuna also provides technical help to other cloudforest CBEs nearby, Santa Lucia and Yunguilla.

Santa Lucia is located in the hills above Maquipucuna and belongs to 12 campesino families who, thanks to land reform in the 1970s, gained ownership of 830 hectares that their families had farmed as tenants for generations. In 1976 they formed a cooperative and produced beef, sugar, naranjilla and blackberries. It was unprofitable, and in 1988 the forest came under legal protection, meaning farming was no longer permitted. At the suggestion of a Peace Corps volunteer, the owners decided to open an ecolodge. It was funded by the IUCN; volunteers from Quest Overseas made trails and began reforestation; and Rainforest Concern funded salaries and training programs for staff. The ecolodge opened in 1999 with 25 beds, and offered tours to waterfalls, a place where Cock of the Rock mating rituals could be seen, a Pre-Inca Trail, a sugar plantation, a reforestation project, and an agroforestry project with shade-grown bananas & coffee.

Yunguilla is located at the end of a road that leads to Quito, and a day's walk from Santa Lucia in the other direction. The 50 campesino families living there used to make charcoal and alcohol and raise cattle. Faced with a low income and increasingly degraded environment, they asked Maquipucuna for advice. The response was to try ecotourism. With a grant from UNDP's Small Grants Program and technical help and training from Maquipucuna and Rainforest Concern, they

built a community lodge with 8 beds and small factories producing cheese and jam. The lodge attracted few visitors, so they offered rooms in their own homes. The homestays are included in the Santa Lucia packages and on one tour offered by Runa Tupari, a very successful CBT operation in Otavalo. The people of Yunguilla are not well-off, and even one tourist staying one night can make a big difference. However, Yunguilla has little to offer tourists other than the delightful trek through the cloudforest to Santa Lucia.

Peru

Like Ecuador, Peru has great appeal to ecotourists due to its very high biodiversity, especially as regards butterflies and birds. It also has 10 World Heritage sites including Macchu Picchu; and the islands of Lake Titicaca attract many visitors too. Peru's tourism industry suffered serious damage during its ultimately successful war against two indigenous guerrilla groups. The industry has since recovered and is growing stronger each year. In 2006 it attracted one and a half million tourists. An early example of CBT was established on Amantani Island in Titicaca, where the local community began offering homestays on a rotation basis, negotiating directly with travel agencies in nearby Puno. However, Peru lags behind Ecuador in promoting its 'turismo vivencial'. The National Strategic Plan for Tourism through 2015 focuses on environmental, economic, social and cultural sustainability.

Yachaqui Wayi, Vicos, Humacchuco and Inka Naani

In 2001, the Mountain Institute, based in Washington, helped set up a CBT in the community of Vicos, at the foot of the Cordillera Blanca mountain range that includes Huascarán, Peru's highest mountain. The project includes 10 families, each providing homestays, and all profits have to be returned to the community. In 2003, the MI helped set up another CBT in Humacchuco, not far from Vicos. In this project there are 5 families offering homestays, and each must return a portion of their earnings to the community. Marketing for both Vicos and Humacchuco was provided by Crooked Trails, an American responsible tour operator. However, in 2005, the MI established an indigenous travel agency named Yachaqui Wayi (meaning house of knowledge) in Huaraz, where most foreign visitors to the Cordillera Blanca are based, and now the homestay program is open to tour operators and independent travelers worldwide. There is a third homestay project in Huaripampa.

In 2003 the MI and Crooked Trails introduced an 80-km trek along an old Inca route known as the Inka Naani. The journey takes from 4 to 9 days. Trekkers stay in tents, but meals are provided by local communities, and profits are distributed to the communities on the route. There are no phones,

nor even radio contact, so arrangements are made in advance by a representative of Yachaqui Wayi who actually walks to each village and back to the road.

The road to Vicos ends at the Plaza de Armas (main square) and visitors have to walk for about an hour to their lodges. The facilities are very basic, and the water is not safe to drink. Each of the 10 families hosting visitors in Vicos runs a farm and some other business. For example, Manual, my host, is also the community baker. His wife produces handicrafts, as do most of the other families. Pedro, from the same community, guides tourists to local lakes and accessible peaks.

The 5 lodges in Humacchuco are more comfortable than those of Vicos, and the families appear to be wealthier. The community is right beside the main road to the Llanganuco lakes and the entrance to Huascarán National Park, so it is very accessible. While I was there, a group of 18 Spanish tourists arrived in a tour bus. Maximum capacity is 24, but additional visitors can be accommodated in bungalows belonging to another organization. My host, Jaime, is a farmer, a musician and a mountain porter.

Bolivia

Bolivia is one of the poorest nations in S. America, but has great natural resources. Its 22 national parks occupy 16% of the total land area ranging from 500m to 6500m and including rain forest, cloud forest, wetland (Pantanal), high plateau (Altiplano), salt desert (Salar de Uyuni), the high Andes and Lake Titicaca. Moreover, 66% of the Bolivian people are indigenous, with a rich and diverse culture. Potentially the country could attract 12 million tourists per year, according to the Inter-American Development Bank, but now it only has around 500,000, and most only include Bolivia as an add-on to a tour of Peru. Bolivia is not well-known to international tourists, has poor infrastructure, and suffers political instability. NGOs concerned with environment and development want to promote tourism. The government agrees, and is eager to fund CBEs. But most existing CBEs are operating at a loss, and many have been abandoned. The two most successful are Chalalán and Tomarapi.

Chalalán

A small community named San Jose de Uchupiamonas in Rurrenabaque State applied to the Inter-American Development Bank for funding to build an ecolodge to be named Chalalán, with help from Conservation International. Their application was approved, and the project began. The community built the lodge and supplied the materials; IDB financed the training; and CI hired consultants. 20

community members were given 6 months training in accounting, lodge management, cooking, natural history, sales, and so on. In 1995 Madidi, a vast forest adjacent to Chalalán with an area of over one point two seven million hectares and very high biodiversity, became a national park. Thanks to TV documentaries and two issues of National Geographic, it received a lot of attention. Chalalán was the nearest tourist lodge. It opened in 1998 and was marketed by a tour agency based in La Paz. By 2002 it was making a profit, and in 2006 it had 1136 overnight guests.

Chalalán is generally regarded as an ecotourism success story. In 2006 National Geographic ranked it among the world's top 20 destinations for ecotourists. It was the first business in Bolivia to be owned and run by indigenous people. It brought direct benefits to 74 poor families (as shareholders & employees) and indirect benefits of around \$100,000 to the state of Rurrenabaque.

Tomarapi

This ecolodge is located on the altiplano 5 hours drive from La Paz at an altitude of over 4000m. The only attractions are the altiplano itself – a dry wilderness, with wild alpaca and vicuna – and the snow capped mountains including Sajama, center of the national park. Visitors tend to stay only one night. Yet in 2006 the average occupancy rate was 60%, there were 900 visitors and they spent a total of \$30,000. Tomarapi was planned and built by 2 German development agencies, KfW and GTZ, with support from the National Park Service. There were 3 key criteria: cultural integrity, regional development, and environmental protection.

To preserve cultural integrity, the lodge was built 3km from the nearest community, Caripe. Tomarapi's contribution to regional development lies in the fact that 26 of the 41 local families decided to become employees and shareholders, and income from tourism now exceeds all other sources. The staff were trained by a travel agency in La Paz and are rotated every two months to ensure that everyone can earn an income. As for environmental protection, all electricity comes from solar energy (although heat for showers and cooking is provided by propane gas), and garbage is recycled. There are plans to link Tomarapi to a new tourism circuit attracting tourists from nearby Chile.

Conclusions

Community-Based Ecotourism has great potential for alleviating poverty and protecting endangered ecosystems. However, there are a number of risks.

1. There are too many CBEs in too many countries competing for a small market. New CBEs

should not be developed unless market research shows that they are economically feasible.

2. There is also the risk of management failures: every CBE project must incorporate sufficient capacity-building and accountable management.
3. The failure rate of new CBEs is high. Local communities should be made aware of the risks, and regard tourism as a potential supplement to their income from other sources, rather than their main source of income.
4. NGOs and funding organizations tend to leave as soon as management is transferred to local communities. Consultants should remain to provide guidance and advice.
5. The UNWTO continues to forecast 6% growth in tourism. But airlines are making losses, fuel prices and wages are rising, planes are aging, passengers are frustrated by delays, poor service, cancelled flights and heavy-handed security ... Unexpected events like an epidemic of bird flu or terrorist attacks could lead to a major recession in the industry.

We tend to think any tourism operation should be profitable. But in the case of a CBE, it is not necessary to make a profit.

1. Payments made to employees and to local farmers are not costs but income for the local community.
2. In subsidizing a CBE, we also subsidize sustainable development. This is more efficient than many ODA projects.
3. CBEs such as Yachana often serve as a focus for other initiatives such as education, health and agricultural support.
4. Unlike many approaches to conservation (eg establishing national parks and evicting farmers) CBEs are accepted by local communities because they benefit from them. Before long, the economic value of rainforests, cloud forests and other threatened environments will be accounted for (they absorb carbon, purify water, etc). Until then we have to use every tool we have to save them.

Community-Based Ecotourism in Ecuador, Peru & Bolivia

Symposium, Ritsumeikan University, 1st Nov 2008

David Peaty, Ritsumeikan University

**Rural Producers Organizations:
A central (network) position
in Community Based Tourism development**



Geert van Weert

Abstract

To develop successful Community Based Tourism, Rural Producers Organizations (RPO's) are important stakeholders in the tourism value chain. The rural tourism network model is an adequate strategy for RPO's to accomplish this role with relation to rural development. Agriterra (a Dutch Agri Agency for Rural Development) started a network in the Netherlands to initiate the (organizational) strengthening of RPO's in order to execute Community Based Tourism programs in cooperation with:

- Tour operators
- Development agencies and the Dutch Government
- Agriculture organizations
- Knowledge institutes (universities)

This external support is very necessary to prepare and support the RPO's for their important role in rural development, because of their lack of knowledge and experience (in tourism).

The UNORCAC/ Runa Tupari strategy to develop rural tourism within a network has proved successful. The development 'mechanism' is based on three components:

- The organizational strengthening of the UNORCAC;
- The growing networking capabilities of the communities and lodge owners;
- Increasing self esteem of the participants and the people surrounding them.

The business-like approach is recommended to achieve a sustainable rural tourism program.

A strong and divers network of stakeholders greatly increases the chance of a successful development of rural tourism.

Key Words: Community based tourism; Rural Producers Organizations, Rural development, organizational and network strengthening

Agriterra

Agriterra is an agri-agency, which means a development agency supporting the organized agriculture in developing countries: farmer organizations, producer organizations, cooperatives and rural women organizations.

Tourism program

Agriterra is exploring and stimulating rural non-farm sectors, which are increasingly important in the South. Within rural tourism development the role of producers' organizations and cooperatives has yet to be recognized, but it's encouraging to see that in the last decade several rural tourism initiatives have been started-up and farmer-led successful tourism companies have been set up in various countries. These experiences demonstrate that farmers organization have an important role to play in tourism development in rural areas, both regarding destination development as well as creating linkages between agriculture and tourism.

Rural non-farm economy

Nowadays, livelihood diversification in rural areas is an important issue. Not surprisingly, since additional to agriculture the rural non-farm economy is gaining importance. Rural tourism, regional products, arts and crafts, nature conservation and “green care” have a strong potential to enhance employment and income generation in rural areas in most developing countries.

Rural livelihoods are no longer considered as being a synonym for farming activates. Instead, it has been acknowledged that people in rural areas of developing countries pursue multiple strategies to make living (Forstner, 2004). Agritourism is often regarded as a part of rural tourism, when tourism activities and accommodations are additional of agricultural activities of a farmer.

Recent surveys suggest that non-farmer sources account for 40-45% of average rural household income in Sub-Saharan Africa and Latin America, and 30-40% in South Asia, with the majority coming from local rural sources rather than urban migration (Ashley and Maxwell, 2001). Rural tourism provides examples of the potential of the rural non-farm economy and of how to increase benefits to the poor (Ashley and Maxwell, 2001). In Southern Africa, Uganda, Nepal, Ecuador and St. Lucia, pro-poor tourism initiatives were able to increase the income of the poor, to strengthen community institutional capacity, protect the environment and to create new commercial and political partnerships involving the poor (Ashley et al, 2001a).

Unless the poor are organized they will remain politically powerless and economically disadvantaged. One of the keys to successful fight against hunger is therefore having well-organized partners to work with (IFAP, 2004).

Rural Tourism

Worldwide tourism is a growing industry and there lies a huge potential for producers organization to obtaining a significant piece of the pie through enhancement of rural tourism and through providing sound services on tourism development to their members. Tour operators are getting more and more involved with processes of corporate social responsibility and at the same time their clients have differentiated their wishes. Consumers search for more profound and meaningful experiences, expressing their taste, identity and lifestyles (Ateljevic and Doorne, 2000). In addition to visiting highlights, contact with local people and the opportunity to experience daily life activities have become important features for an unforgettable trip.

More and more rural tourism is conceived and utilized as an instrument to enhance the rural non-farm economy and to increase benefits to the poor. Within rural tourism development the role of producers' organizations and cooperatives has yet to be recognized, but it's encouraging to see that in the last decade several rural tourism initiatives have been started-up and farmers owned successful tourism companies have been set up in countries like Ecuador, Brazil, Tanzania, Vietnam and Madagascar. These experiences demonstrate that farmers organizations have an important role to play in tourism development in rural areas.

Rural Producers Organizations (RPO's) are often linked to the concept of social capital – norms and networks that enable people to act collectively (Woolcock and Narayan, 2000). RPO's create dimensions of social capital in the form of networks and organizations, which play a critical role in helping localities to renegotiate relationships with the market, state and other civil society actors (Bebbington, 1997). Some researchers studied the relation between social capital and development and argue that those communities endowed with a stock of social networks and civic association will be in a stronger position to confront poverty and vulnerability and take advantage of opportunities (Bebbington, 1997; Woolcock and Narayan, 2000). The social capital inherent in indigenous organizations in both their traditional and modern forms, allowed forms of collective action and economies of scale that one single actor alone would have been unable to do anything about. Involvement in organizations and networks of RPO's often is seen as the vehicle through which localities have been able to access the resources held by other actors and institutions and can strengthen and empower individual farm families in accessing and negotiating with those non-local actors, institutions and organizations that have significant impacts on possibilities of local intensification (Bebbington, 1997). Availability of social infrastructure or organizational software is a favorable condition to make more productive physical hardware (Uphoff and Wijayaratna, 2000).

Farmer's organizations encounter the following obstacles to get involved as stakeholder in the tourism value chain:

- Inability to strategic linking with the tourism sector;
- Inability of cooperatives in time and resources to extend their areas of operations or activities in the field of tourism;
- Unawareness about tourism and the possibilities of linking agriculture with tourism;
- Lack of experience, knowledge and documentation of successful models of farmers-led tourism in the region.

Because of their lack of knowledge and experience (in tourism) it is clear that external support is very necessary to prepare and support de RPO's for their important role in rural development.

Concept and approach

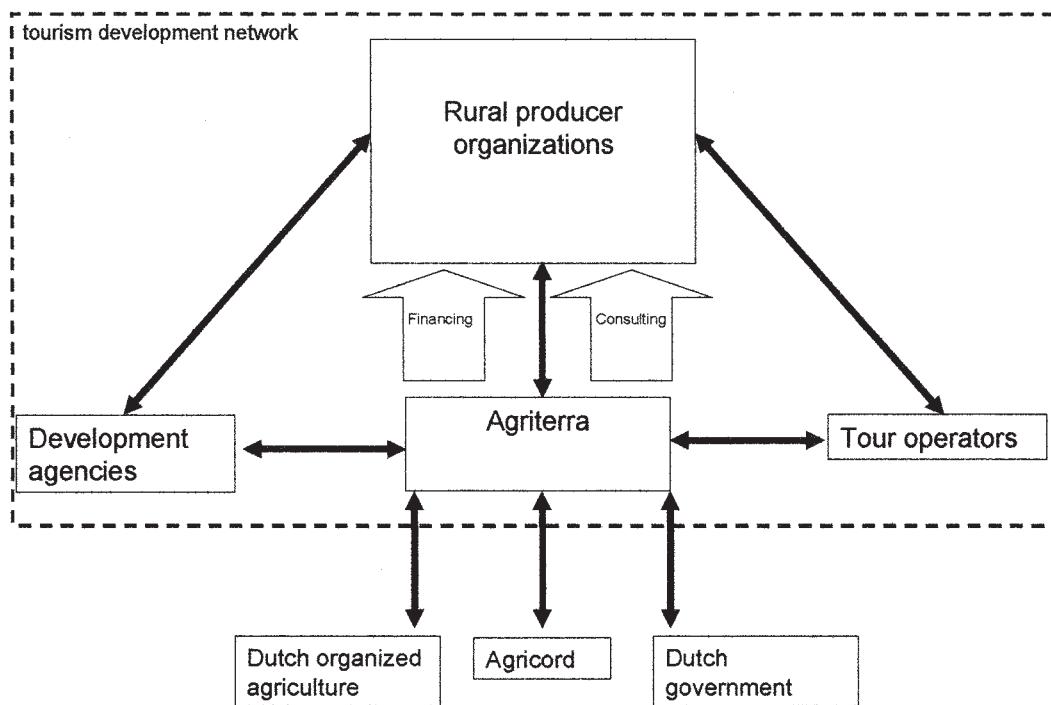
Rural tourism means leisure activities carried out in rural areas. Tourism products developed by RPOs aim to give visitors personal contact with, or a taste of, the physical and human environment of the countryside and, as far as possible, allow them to participate in activities, traditions and lifestyles of the rural people. Community Based Tourism as a part of rural tourism has its own focus based on the following principles:

- *Improve quality of life*: employment and income for local people.
 - *Sustainability*: use local products and goods in order to bring economic benefits to the local community.
 - *Community ownership*: recognize, support and promote community ownership of tourism and involve farmers from the start in decision-making and the tourism development process.
 - *Sharing of benefits*: distribute benefits fairly among community members and install a community development fund which directs a fixed percentage of income to community projects.
- Cultural preservation*: preserve the unique character and culture of the local areas and promote community pride.

Rural tourism Network

An adequate strategy for RPO's to accomplish the important role with relation to rural development is: The rural tourism network model.

To integrate the most important stake holder Agriterra has developed the following network model: (Van Rij, Middelbeek 2007)



The model forms the starting point of the rural tourism program of Agriterra and its focus on RPO's and a business-like approach. The business-like approach is expressed in various aspects of the tourism program:

- Including market partners from the start: joint product development and site-identification with tour operators.
- Strong focus on creating market access and marketing (active matchmaking).
- Focus on business planning through the business planning intervention phase.
- Finance structures: farmers involved invest themselves, shareholder structures and involvement of credit agencies/banks.
- Tourism ventures' status and operations: venture is registered, preferably as a company.

The action plan will be executed in cooperation with all actors involved and takes into account their needs, wishes, interests and problems. Actor groups to be involved are:

1. Rural producer organizations: Although a diverse group in structure, size, services, work level (regional, national) and geographic focus, their needs, wishes and problems regarding tourism development are likely to be the comparable. The majority is not active in tourism yet.
2. Tour operators and agencies: When it comes to adaptation of the rural tourism product to consumer wishes and trends tour operators and agencies are valuable knowledge sources. Tour operators and agencies can also express their needs and wishes regarding product development.

3. Development agencies: other development agencies have – based on their strategies, objectives, interests and interventions – their experiences with tourism development and could be complementary stakeholders in the rural tourism network.
4. Dutch organized agriculture: this group includes the Regional Agricultural and Horticultural Organizations, the Dutch Rural Women's Organizations and the Dutch Young Farmers Organization.
5. Agricord knowledge institutes network: Considering the important role research and students play within the tourism program and the work that needs to be done – product development, exploration of other concepts, studying possibilities if involving credit agencies, etc. – knowledge institutes are valuable actors in the rural tourism network. Strengthening bonds, in specific, with WUR (Wageningen University and Research Centre) and NHTV (Breda University of Applied Sciences) could be interesting for both. Besides the exchange of students, the alliance with WUR and NHTV could be placed in a broader context of knowledge management, advisory services and/or joint product development.

The main objectives of this tourism development network are:

- To develop sustainable forms of tourism in rural areas with farmer organizations, according professional business practices by farmers' organization in the South.
- To stimulate farmer organization to become meaningful actors in rural tourism development and enhance RPO's capacity in tourism entrepreneurship.
- To develop a sound and innovative advisory practice providing a supportive set of tools, instruments and resources (experts, network, etc) to diversify agriculture and unfold a rural non-farm economy.

Beneath these goals several underlying more specific outputs and objectives are appointed:

- Facilitate, support and monitor rural tourism ventures initiated by their members.
- Integrate the theme rural tourism in their general rural development strategies.
- Develop a modest body of knowledge and expertise on rural tourism and appoint someone responsible within their organization for maintaining a strong linkage between the local tourism initiative and the RPO.

Besides the members of the RPO also the RPO itself will have substantial benefits from getting involved with rural tourism (financial, expertise, training, extra service for members).

UNORCAC: Rural development with an intercultural identity

Introduction

Cotacachi's Union Peasant and Indigenous Organizations (UNORCAC) is an intercultural organization that represents 44 mostly indigenous rural communities (3.200 families). The objective of the organization is to improve living conditions of its members through development projects and programs such as agro-ecological production, reforestation, environmental conservancy, legal assessment, indigenous healthcare, bilingual education, and rural tourism.

UNORCAC (founded in 1977) expects to contribute to the construction of a more fair and egalitarian intercultural society, reducing poverty levels, empowering people for self-management, expanding the democratic participation of the communities and strengthening their social organization.

The rural indigenous people of Cotacachi (the working area of UNORCAC) face a deprived social and economic situation. Indigenous people encounter racism and discrimination, and in the rural area 80 % of the population lives in poverty and 40 % in extreme poverty. This extreme poverty in combination with poor education (30% illiteracy, 0,8 % of the youngsters enters university) and low employment possibilities contributes to a low self esteem of the farmers and a suspicious attitude towards institutions and society in general.

On the other hand there are favourable characteristics to develop rural tourism. People are hospitable and friendly, their rural lifestyle is traditional and attractive (costumes, agriculture, traditional handicraft and healing). Furthermore the landscape and biodiversity are impressive and three important tourist attractions are close by;

- Otavalo market (200.000 foreign visitors annually)
- Cuicocha lake and the national park Cotacachi Cayapas
- Leather village Cotacachi

In 1999, with the support of two Dutch NGO's (Agriterra and CMC) UNORCAC (together with 4 of its indigenous communities), founded the community based tour operator Runa Tupari Native Travel, (in Quichua, "meeting the Indigenous people"). UNORCAC is the main share holder representing 40 communities. The four communities which participate directly in the tourism program are shareholders of the community based tour operator.

Runa Tuparies activities are carried out by three interrelated groups;

- The host families are local indigenous people without formal education in tourism. They manage the core business of Runa Tupari: overnight stays at rural lodges, where tourists get the opportunity to share the daily life of farmers and visit the many natural and cultural attractions of the area.
- A professional staff in charge of all the front and back office related tasks: marketing and sales, planning and administration, accounting and organization (receiving tourists and transport, paying lodge owners and local guides etc.)

The share holders, representatives of the UNORCAC (president) and the four participating communities (presidents). They are the decision makers who supervise and guide the community based tour operator.

Concept

The heart of the concept is the ‘convivencia’; the possibility for tourists to share daily life of the indigenous farmers. Tourists are invited to participate in daily activities (gardening, cooking and farming) and always share the meals with the host family in their kitchen. The idea is to encourage an intercultural exchange between the visitors and host family.

So far 15 rustic lodges have been built adjacent to the houses of each of the participating host families, financed with a combination of grant funds and a personal loan. Each lodge can house two or three visitors and is equipped with a fireplace and a private bathroom with hot water. A network of 15 micro enterprises has been created, which provides services to the community based tour operator Runa Tupari. An intense training program for lodge owners and local guides made it possible to start with a team of local farmers.

Organization and implementation

The main stakeholder of the Runa Tupari tourism program is UNORCAC and its grass roots organizations. In coordination between UNORCAC and a Dutch consultant the tourism program was designed and planned. The UNORCAC discussed the design with its member’s organizations and communities, playing a leading role in the selection and implementation process. The local authorities of the selected communities coordinated a general meeting with the community members and participated in the planning process. The final step was the selection of families who showed interest. The participation of UNORCAC guaranteed an implementation process, respecting local culture and customs. Nevertheless was it difficult to find participants in the first two years, because

the families conceived it a big risk to join the project: they had to invest \$ 1.500 in a new and unknown activity, without any guarantee that the tourism project would be profitable.

Rural Tourism Network

The rural tourism network started in cooperation between UNORCAC, CMC and Agriterra. First Agriterra financed a feasibility study, executed in coordination with an NGO (PUM) and two Universities (WUR and NHTV), which resulted in a project proposal, which was financially supported by Agriterra for three years. Additionally Runa Tupari received technical support of another Dutch NGO: CMC (3 years). The training of lodge owners and guides was executed by the University of Ibarra (Ecuador) and marketing and sales were supported by CBI (Centre to stimulate import from developing Countries), tour operators and students from several universities.

After two years several other stakeholders joined the network extending activities or supporting the existing program.

Stakeholders in this extended network are:

- USAID: biodiversity gardens (USAID)
 - Ministry of Ecuador: exchange Galapagos and promotion
 - Ecuadorian NGO Tierra Viva: construction of 3 lodges
 - Italian NGO Focisiv: Staff (Marketing and sales)
 - Inbound tour operators: marketing and sales
 - Italian NGO UCODEP: training
- NGO Rainforest Alliance: promotion

Development mechanism

Within rural tourism development the role of producers' organizations and cooperatives has yet to be recognized, but it's encouraging to see that in the last decade several rural tourism initiatives have been started-up and farmers owned successful tourism companies have been set up in countries like Ecuador, Brazil, Tanzania, Vietnam and Madagascar. These experiences demonstrate that farmers organization have an important role to play in tourism development in rural areas.

As stated above there is a knowledge and experience gap within the RPO's to fulfill this role. The external support to prepare and support the UNORCAC included:

- Organizational strengthening of the UNORCAC and its communities
- Strengthening of networking capabilities of the partners
- Increasing self esteem of the participants and their environment

Strengthening the identity and self organizing abilities of RPO's and its members stimulates an integrated and sustainable development. The Runa Tupari community based tourism program has been a pilot project and the experiences and knowledge were used in other areas and sectors. New economic projects that have been started in cooperation with UNORCAC are:

- The saving and credit cooperation - Santa Anita
- The bee keepers association - Asoproac
- The processing of dried fruits and chili peppers - Sumak Mikuy
- The processing of medicinal herbs and herbal tea - Sumak Jambina

UNORCAC is planning to start its own marketing and sales department in order to stimulate the commercialization of the products, increase the profitability and sustainability of the micro enterprises and to create more employment in the rural area of Cotacachi.

Impacts

Unorcac

- UNORCAC created a successful tourism company which led to a growing confidence of donors and member organizations and generated new economic projects.
- Other NGO's participated in the Runa Tupari/UNORCAC partnership with integrated projects; biodiversity, handicraft, education and gardens.
- Runa Tupari's example is followed by other successful economic and social new initiatives (bee keeping, medicinal herbs, saving and credit cooperation).
- There are plans to develop an own UNORCAC brand and to start a marketing and sales department.
- There is a growing interest of communities to participate in economic development.
- UNORCAC gained experience and knowledge in creating and supervising economic activities and organizations.

Communities

- The communities are share holders and gain experience in supervising a company.
- Communities get involved in new (economic) initiatives, traditional music and handicraft groups are connected to the tourism program.
- Lodge owners stimulate new initiatives and involve other community members (dance groups and volunteer programs).
- The community is in charge of a development fund from tourism.

- Conflict between business like approach and the community culture and structure, the ‘best’ not the poorest families were selected.
- Increasing income differences between families.
- Higher interest to participate in new economic initiatives.
- High participation of lodge owners in the local council.
- Revaluation of the culture and traditions.

Families

- Lodge owners (women) are earning and managing their income.
- Tourists open up the women’s world and show respect for their work, (cooking, farming), their knowledge (gardening, medicinal plants) and culture, which leads to a growing self esteem.
- Increasing family income with an average \$ 120 per month.
- A growing social cohesion between lodge owners (women).
- The training and side programs have improved the family diet and their living circumstances.
- The families wish to expand their business (more guests).
- The successfulness of the project leads to women empowerment.

Lodge owners would like to increase their influence in the management and politics of Runa Tupari.

Conclusions

UNORCAC

The Runa Tupari case shows that RPO’s are able to be the linking pin between rural actors and (developing) organizations in the rural tourism network. Strengthening organizations like UNORCAC stimulates a sustainable development because of their long term presence in the area. The multi disciplinary approach guarantees a positive impact on the different working areas.

Executing successful programs had a positive influence on the image of the UNORCAC and increased the willingness of donor organizations to participate in their development networks. In the case of Runa Tupari, donor organizations were willing to contribute to a further development of the project and integrated tourism in their project proposals.

Part of the tourism project was a pilot to lay out ecological gardens next to the lodges. Nowadays over 300 families are practicing ecological gardening and a demonstration garden has been laid out,

to be used for environmental education and as a tourist attraction. This is an example of successfull integration between tourism and ecological farming.

UNORCAC has played a crucial role in supervising the social goals of the network of lodge owners. The lodge owners wished to extend their activities and receive more tourists at a time, but UNORCAC and Runa Tupari insisted to maintain the limit of three tourists per lodge and extend the project, involving more families and communities.

Nevertheless UNORCAC sometimes gets in a delicate position because of the conflicting interests of the different stakeholders.

The community

Respecting the community structure and culture contributed to a broad acceptance of the tourism project in the community. The active role of the local authorities in planning and implementation of the project and the existence of a community development fund are contributing to the community structure of decision making.

On the other hand the authorities were not involved in the selection process of the families. Main criteria were the potential and the perceived service quality of the family and their creditability. In at least one case the selection caused tension within the community because of one of the interested families did not agree with the criteria. In their opinion a “well off” family should not have been selected. The families and the community authorities solved this problem.

The families who are participating in many cases already played a leading role in their communities being a member of the local council. Most of the families continued or extended this role. At the moment 2 of the lodge owners are president of their community, one of them being a woman. This way they are able to use their knowledge and skills for the benefit of the community. They also play an important role as peers, an example of successful entrepreneurship within the community.

Family

Getting in touch with tourists broadens the horizon of the host families and makes them aware of their capabilities and opportunities. Being successful entrepreneurs, meeting tourists and being able to organize the home stay program, receiving compliments about the way they run the lodge and being part of a network with an international reputation makes them proud and stimulates looking for new ways to find solutions for their problems.

Runa Tupari

The professional staff of Runa Tupari is responsible for the front and back office activities and forms the bridge between clients (tourists and tour operators) and partners (UNORCAC and its donors, the lodge owners, the native guides and the communities). Runa Tupari needs to secure the (economic) sustainability of the company within the social and political boundaries of their partners.

A business-like approach is recommended to achieve a sustainable rural tourism program. The combination of a strong concept, an authentic core product and a professional staff, are contributing to the success of Runa Tupari.

The network of lodge owners

The lodge owners took an enormous risk to participate in the program without any income guarantees. After a difficult start in the first two years the flow of tourists reached an average of 15 nights a month (\$ 120 income) in 2003. The growing flow of tourists justified the expansion of the capacity to another village and more families. Nevertheless some lodge owners wished to receive more than 3 tourists in their lodge. This resulted in the withdrawal of one lodge owner, who started his own private rural hostel with 20 beds, using the community based image and competing with Runa Tupari. This forms a serious threat for the lodge owners' network.

General conclusion

The UNORCAC/Agriterra strategy to develop rural tourism within a network has proved successful. The philosophy of empowering rural producer's organizations, local councils and families resulted in sustainable project, a growing number of initiatives related to the tourism program and will accelerate further sustainable rural development in the future.

A key factor in the Runa Tupari case was the authentic core product in combination with a business-approach of the tour operator which was able to supply a steady flow of tourist and run the project in a professional and transparent way. A strong and diverse network of stakeholders increases the chance of a successful development of rural tourism.

“The Stranger, the Native and the Land” in Northern Canada: Sustaining a Way of Life

Claudia Notzke

Abstract

Aboriginal/Indigenous cultural tourism always involves a cultural encounter between “the Stranger” and “the Native.” Generally speaking, “the Land” is at the very heart of native culture and, in northern Canada in particular, this bond is alive and well. Even in southern Canada, where people no longer depend on the land for survival, their cultural and political identity is still derived from their bond with the land¹.

Not surprisingly, the challenges and issues faced by aboriginal people involved in the industry in Canada are vastly different depending on whether they live in northern communities, where a land-based way of life is still prevalent, or whether they are residents of southern reserves.

This presentation highlights research findings primarily from Canada’s western Arctic region. Fieldwork consisted in participant observation, semi-structured interviews with a large number of stakeholders in the regional tourism industry and a questionnaire survey among tourists.

The operational environment for tourism in this area is characterized by the presence of mixed local community economies and a co-management framework for lands and resources. In the North, aboriginal tourism is a resource-based industry, traditionally in the form of big game hunting, and in a more modern context, evolving into ecotourism and cultural or ethnic tourism, where the traveller's experience combines natural and cultural elements. Some indigenous people are exploring innovative ways to harness tourism to support the traditional elements of their land-based economy, rather than being consumed by the industry. The "authenticity" of this tourism experience represents a major asset as well as a significant management challenge.

Keywords: Indigenous Tourism; Canadian Arctic; Mixed Economies, Co-Management.

Introduction

¹ Consequently I chose the title of a 1994 CNATA (Canadian National Aboriginal Tourism Association) video, *The Stranger, the Native and the Land* as the title for my book on Indigenous Tourism (Concord ON: Captus Press, 2006). Barry Parker, former president of CNATA, graciously agreed to my use of this title.

Aboriginal/Indigenous cultural tourism always involves a cultural encounter between “the Stranger” and “the Native.” Generally speaking, “the Land” is at the very heart of native culture and, in northern Canada in particular, this bond is alive and well. Even in southern Canada, where people no longer depend on the land for survival, their cultural and political identity is still derived from their bond with the land. Not surprisingly, the challenges and issues faced by aboriginal people involved in the industry in Canada are vastly different depending on whether they live in northern communities, where a land-based way of life is still prevalent, or whether they are residents of southern reserves. This is true for the context of tourism development, i.e. its operational environment, as well as for the contents of tourism products. The operational environment for tourism in this area is characterized by the presence of mixed local community economies and a co-management framework for lands and resources. In the North, aboriginal tourism is a resource-based industry, traditionally in the form of big game hunting, and in a more modern context, evolving into ecotourism and cultural or ethnic tourism, where the traveller's experience combines natural and cultural elements. Many indigenous individuals and communities are striving to use tourism to support their land-based economy and lifestyle, and provide experiences to visitors which allow them to share this lifestyle for a brief time.

Northern Mixed Economies

A basic knowledge of how northern communities and economies function and a thorough understanding of the nature of socio-economic change are indispensable for understanding the forces that shape tourism in the North, and for assessing the impact of tourism. Peter Douglas Elias has tackled the complex task of constructing a detailed model of how northern communities work, in particular, northern economies. His work is based on decades of personal experience as well as on the collective knowledge contained in the primary literature, i.e. empirical research data, collected by 133 authors in 74 communities representing 30 identified cultural populations in Canada, Alaska and Greenland (Elias 1995:4).

One important objective of this exercise was to offer planners and decision-makers a tool to help them determine where development initiatives may have beneficial or harmful effects, and how scarce development resources may be applied in an optimum manner. Some of the more salient findings with relevance for tourism are presented here.

Northern communities are small, seldom numbering more than several hundred inhabitants. Their populations are predominantly aboriginal as well as young and fast growing. By national

standards they possess very modest physical infrastructures. They are geographically remote from non-aboriginal population centres; and they are located in relatively pristine natural environments. These communities feature "mixed economies" in which incomes are derived from a mix of domestic production, wage labour, transfers, and enterprise. Due to the high cost of living in the North, life would be problematic in many villages without income from domestic production--hunting, fishing, trapping, and gathering.

Although domestic production makes a very significant contribution to the local economy, little of that contribution is in the form of cash. Because all needs cannot be satisfied through domestic production, it would be equally difficult to continue life in Northern villages without cash. Cash incomes are earned through sale of labour and commodities, and enterprise. Of these, wage labour is most important, but rarely are there enough jobs for all people who want employment, and employment opportunities usually grow more slowly than the labour force. Because domestic production cannot provide for all needed goods and services, nor can employment, commodities and enterprise yield all needed cash, communities are sustained partially by transfers from the outside. In mixed economies, no one sector takes precedence over any other; the sectors are mutually supportive to the extent that should one sector fail, the entire economy would be in jeopardy (Elias 1995:8).

In northern mixed economies, households are the basic units of production, distribution and consumption. They tend to be multi-generational, comprising members of extended families, although related individuals are likely to dwell in several households. Northern community economies are structured by kin relations between members of different households. In any particular community, there may be considerable variation in how individual households are involved in each sector of the mixed economy. Furthermore, the extent of a household's involvement in a particular sector changes through time (*ibid.*).

With regard to the important question, how tourism can be made to fit into this picture, one statement in particular needs to be reiterated:

In mixed economies, no one sector is more important than any other; the sectors are mutually supportive to the extent that should one sector fail, the entire economy would be in peril (Elias 1995:8).

For the longest time the universal paradigm of social change has been based on the assumption,

that hunting, trapping and fishing will be replaced by wage-labour and enterprise as the means of making a living, and that this process represents an inevitable and universal step in human progress. This way of thinking -- dubbed the modernization/acculturation model by Elias and Weinstein (1992:5f) -- still is alive and well. On the other hand, findings in aboriginal communities across the North suggest that the combination of different sectors within the mixed economy constitutes a dynamic equilibrium which is as fragile as it is resilient. The subsistence/adaptation model (*ibid.*) postulates that land and resource use is a primary value for aboriginal societies. Culture and social structure are inextricably tied to the natural environment and based on hunting, trapping, fishing and gathering. Critical elements of satisfaction and meaning in life, economic well-being and recreational preferences are all derived from these land-based activities. Ideas of how life should be lived are fundamentally tied to being on the land (*ibid.*). As a result, rather than eagerly forsaking the land for wage labour and enterprise, when given the opportunity, aboriginal northerners have devised flexible systems of managing lands, resources, time and cash, engaging in both casual employment and resource harvesting. The result is the mixed economy.

Within this framework, domestic production continues to be viewed as the most reliable sector of people's economy, and as the main source of cultural satisfaction and social prestige. Rather than detracting from this valuation, cash income adds to it. Cash income from various sources and the level of domestic production go hand in hand. Cash is not only used to supply households with consumer goods and services, but also underwrites the costs of domestic production. When households have cash available, they will spend it on technology and transportation to reach distant harvesting sites more quickly, to enable them to produce more costly prestige resources (beluga, caribou), and to enhance their redistributive status within the community. Modern domestic production requires considerable amounts of cash to meet the costs of necessary equipment and operations. As a result, the level of domestic production a household can achieve depends in large part on the ability of the household to meet these costs. Households and individuals with high incomes are frequently the most productive domestic producers in a community (Elias 1995:11). How tourism can be fitted into such economy, is illustrated by an example from the western Arctic.

Some of the people who are making the richest contribution to a visitor's northern experience are enabled to do so by the fact that they are not full-time tourism professionals, but are firmly rooted in a way of life that ties them to the land. The tourism part of their mixed economy provides the cash to supply households with consumer goods, and underwrites the cost of their domestic production. The local operators for *Arctic Nature Tours* in Tuktoyaktuk a married couple, are an excellent

example, of how this can be accomplished.

These tourist outfitters combine a land-based way of life with tourism and pursue both, ecotourism and guiding and outfitting sport hunters. The husband has been involved in tourism for approximately nine years. During the summer of 1995 he was completing his certification process as a whitewater rafting guide. The couple are in the process of setting up their own tourism company, *Ookpik Tours and Adventures*, which is to combine adventure and ecotourism with big game hunt outfitting and guiding (Table 1). Presently all their non-sport hunting tourism is booked through *Arctic Nature Tours* in Inuvik; sport hunting clients are allocated by *Beaufort Outfitting and Guiding Services*, a community corporation. As the wife points out, in this manner they are able to spend almost ten months out on the land. The couple come across as genuinely enjoying what they are doing, and tourists respond to this attitude. They also report considerable interest in land-based tourism on the part of younger people, whenever they are looking for employees (Interview with the operators in July 1995) (Notzke 1999:68).

Table 1 Seasonal Cycle of Community Residents Combining a Land-Based Way of Life with Tourism Activities (Source: Notzke 1999:69)

Date	Activity
September:	sport hunt for caribou, fishing for subsistence and dogs
Late October - December:	trapping Christmas break
January - February:	trapping, preparation for polar bear hunt
March - April:	sport hunt for polar bear, muskox and barren ground grizzly
May:	traditional spring hunt for geese (subsistence only) and icefishing. The operators plan to attract "spring tourists" for the Beluga Jamboree (a spring festival) with dog team rides and visits to the pingos (local landforms).
June:	Tourists start arriving.
June 20 - July 23 (appr.):	river rafting trips;
June - August:	whaling, community tours for visitors.

The importance of cash in northern economies is likely to increase in the future. For this reason, most households, whether or not they are currently dedicated domestic producers, will welcome any

initiative that increases access to cash. Despite this urgency, it is hardly surprising that there is much individual determination and collective political will to safeguard domestic production and its resources from trespass and competition of cash-producing activities, be they resource-based or not. This is achieved by the process of co-management of natural resources, which creates an operational environment with this priority in mind.

Co-Management Regimes

"Co-management" broadly refers to the sharing of power and responsibility between government and local resource users. This is achieved by various levels of integration of local and state level management systems. Co-management ranges from the mere tokenism of local participation in government research to local communities that retain substantial self-management power. Co-management regimes may concentrate on a particular species or include all renewable resources of an area. As a rule, co-management schemes result in the establishment of co-management institutions such as boards or committees with government and user-group membership.

Co-management regimes by native and non-native parties for renewable resources are being established in all parts of Canada (and increasingly in countries all over the world) under different circumstances and for different purposes (Notzke 1993; 1995b). One of the most important vehicles for the establishment of co-management regimes is the settlement of comprehensive claims. Claim settlements usually involve exclusive or preferential harvesting rights for aboriginal people on Crown lands within their claimed territory and involvement by aboriginal people in the management of resources. The latter is accomplished by schemes that allocate control of resources among competing interests and facilitate the merging of local environmental and western scientific knowledge. The Inuvialuit Final Agreement provides an example of the functioning of such regime in relation to tourism.

The 1984 Western Arctic (Inuvialuit) Final Agreement created a complex co-management scheme, encompassing all aspects of natural resource management, environmental impact assessment and review, and the establishment of new national parks (Notzke 1995a). This agreement constitutes the settlement of the Inuvialuit comprehensive claim, based on traditional use and occupancy, to lands in the western Arctic. More than 3,500 Inuvialuit were represented under the Inuvialuit Final Agreement; they are the majority residents of the western Arctic and live in the six Inuvialuit communities of Inuvik, Aklavik, Tuktoyaktuk, Paulatuk, Sachs Harbour, and Holman (see Figure 1). In settlement of their comprehensive claim, the Inuvialuit Final Agreement granted to the Inuvialuit

specific rights, including title to lands in fee simple, \$ 31.3 million (US) in cash, and rights related to participation in resource development, renewable resource harvesting, and management of renewable and non-renewable resources.

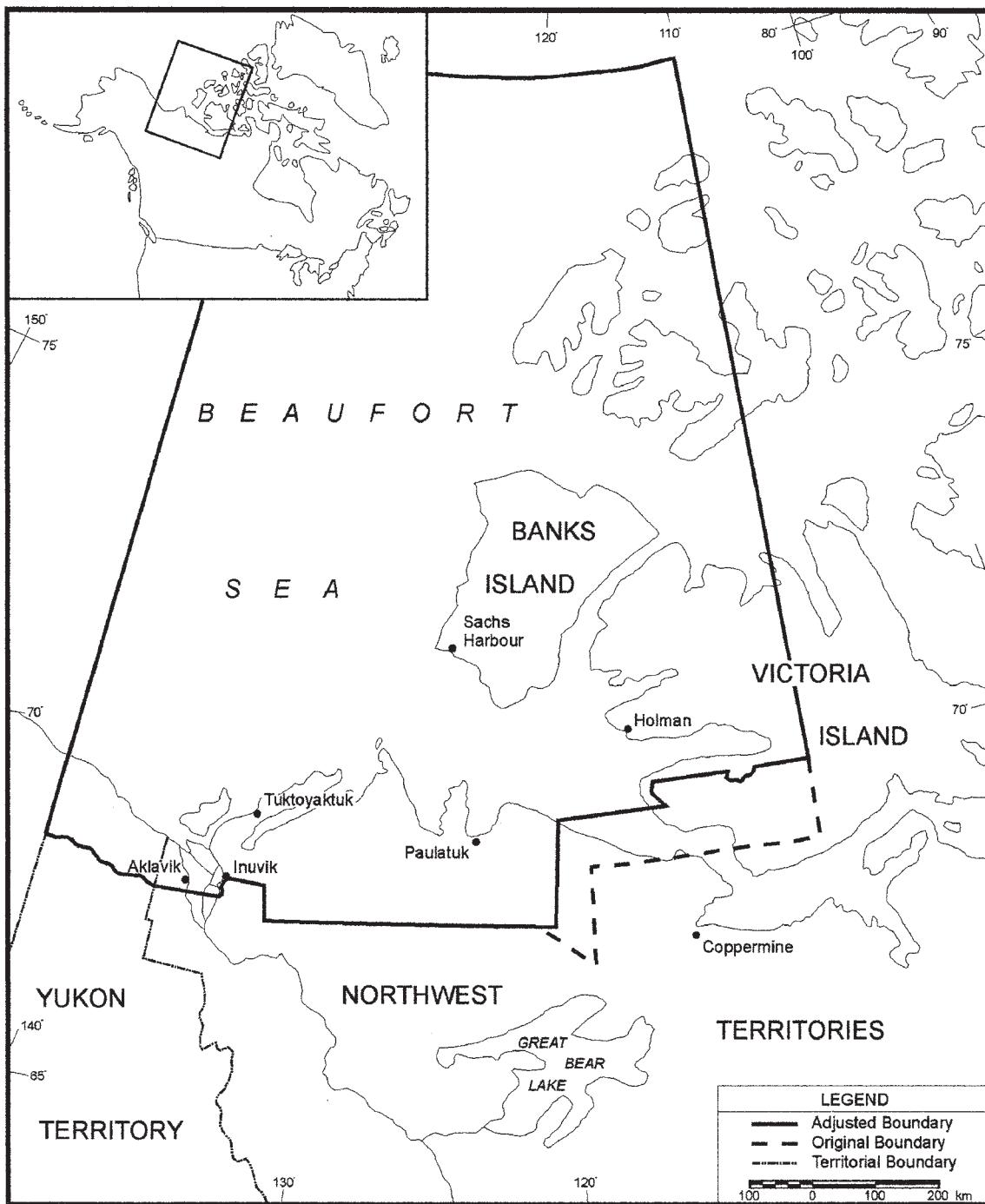


Figure 1. The Inuvialuit Settlement Region

The goals of the Inuvialuit with regard to their comprehensive claim settlement, spelled out in Section 1 of the Inuvialuit Final Agreement, are to preserve Inuvialuit cultural identity and values within a changing northern society; to enable Inuvialuit to be equal and meaningful participants in the northern and national economy and society; and to protect and preserve the Arctic wildlife, environment and biological productivity (Government of Canada 1984:1). These goals can be summarized as being related to cultural identity, integration and conservation (Doubleday 1989:211). They may also be interpreted as containing a dual mandate: development as well as conservation. This apparent dichotomy is mirrored in the two principal management structures created by the agreement, the Inuvialuit Game Council and the Inuvialuit Regional Corporation. It is being addressed by five co-management institutions, the so-called Renewable Resources Committees (Notzke 1995a:38). The resultant regime strives to provide for a regulatory environment that makes allowance for both traditional and innovative modes of resource utilization. It is a complex regime for any industry, including tourism, to operate in. It endeavours to do justice to Inuvialuit society and economy, and to the nature of socio-economic change and continuity, as the Inuvialuit perceive it. Aboriginal tourism products in this region include guided community tours, visits to fishing and hunting camps, homestay programs, fishing lodges, outfitting for big game hunting, and arts and crafts sales. Many of the non-consumptive visitor activities combine an experience of the Arctic or Subarctic ecosystem with varying degrees of cultural immersion. This reflects the growth of ecotourism in the region.

In land claims settlement regions, not only government regulations must be satisfied, when it comes to licensing and operation of tourism enterprises. In the case of the western Arctic there are also numerous Inuvialuit and Gwich'in (neighbouring claim region) boards, committees and community organizations, which must be accommodated. These institutions are creations of the claims process and the operational expressions of the resultant co-management regime. For the Inuvialuit and Gwich'in such management environment can be empowering and constraining at the same time.

The Regional Tourism Manager for Economic Development & Tourism, Government of the Northwest Territories (NWT), felt in the mid-1990s that the licence application and consultation process had become a major roadblock for many prospective tourism entrepreneurs or outfitters (Notzke 1999:65). The Inuvialuit, with the maturing of their management regime after a decade of claim settlement implementation, had come to adopt a slightly more relaxed attitude and sought to streamline some of their procedures. The Gwich'in, on the other hand, were just in the process of establishing their management regime, and, understandably, were exercising their management and

decision-making power more assiduously. While big game hunting, and guiding and outfitting activities associated with it, fall under the authority of the Government of the NWT Renewable Resources Department, other sub-sectors of the tourism industry are the jurisdictional responsibility of the Department of Economic Development & Tourism (and, where applicable, Parks Canada). The most important piece of legislation in this context is the *Travel and Tourism Act*, with its Regulations for Outfitters and Tourist Establishments. A need to revise this allegedly outdated piece of legislation is often expressed by the industry, but, to date, no action has been undertaken.

The Inuvik office of Economic Development & Tourism provides prospective applicants for a Tourist Outfitter's licence with an information package on the application process. Part of the package is a licensing check-list of authorities that need to be consulted. They include, at the consultation process level, such institutions as Town, Hamlet or Settlement Council, Gwich'in Tribal Council, Renewable Resource Council (Gwich'in Land), Inuvialuit Land Administration, Hunters' and Trappers' Committee (Inuvialuit Land), Community Corporations, Environmental Impact Screening Committee, Band Council, and Metis Association. Government agencies on the check list include the Department of Fisheries and Oceans, the Canadian Coast Guard (for proposed operation on coastal and inland waters), the Department of Renewable Resources, and the Canadian Wildlife Service in Yellowknife (for permits to enter migratory bird sanctuaries). Still other licensing requirements cover registration with Corporate Registries and the Department of Justice, registration with Workers' Compensation Board of the NWT as well as Public Liability Insurance.

The first part of the list largely contains institutions created by the claim process. Most outfitters will be concerned either with the Inuvialuit Settlement Region or with neighbouring Gwich'in lands, but there are land use overlaps, and some operators may want to travel in both areas. Tourism proposals -- be it river travel, dogsledding, a camp or lodge -- within the Inuvialuit Settlement Region, including national and territorial parks, are all considered "developments" by the Environmental Impact Screening Committee (one of the five Inuvialuit Renewable Resource Committees). A tourism proposal will therefore be screened by the committee to determine any potential environmental impact the proposed activity may have. Since the screening process involves consultation with local community organizations, it takes several weeks or even months. Upon completion it is referred to the licensing agencies (Economic Development & Tourism or Renewable Resources) for their approval, or sent for further environmental review and public hearings. Depending upon the complexity of the proposal, the latter process may again take several months. New applications must be submitted by licence holders, if there is even a slight change in their operations, such as a new stopping point on the river or a new campsite. Until recently, even

established tour operators with a track record in Ivvavik National Park needed to go through the approval process on an annual basis, in order to run their Firth River rafting trips, which has caused them serious problems. Only lately has this procedure been replaced by a multi-year approval process.

For aspiring Inuvialuit entrepreneurs in the tourism sector the application and approval process in individual cases may take in excess of one year, and a positive outcome is by no means guaranteed. Inuvialuit, who have worked "on the inside" of the system, do not perceive the process as excessively onerous but concede that an "in-house educational process" may be useful (Interview with Richard Binder, Inuvialuit Joint Secretariat, Inuvik, July 1995). Candidates who are less familiar with the requirements, may be deterred by the multiplicity of agencies, but also by the possibility of being turned down by their own communities. A problem that local aboriginal people find hard to deal with, is the "personal nature" of their denial or approval within their community or claim area. It contrasts with the anonymous nature of government dealings and is much harder to accept and to cope with. A negative experience with non-native or external tourism operators may prompt a community to deny an opportunity to one of their own (Interview with Floyd Roland, Chairman of the Inuvik Hunters' and Trappers' Committee, Inuvik, July 21, 1995). Furthermore, politics enter into the decision-making process.

On the other hand, it must be acknowledged, that community decision-makers may be faced with very difficult choices. One of the most sensitive issues concerns the admission of visitors into hunting and whaling camps. Many Inuvialuit individuals firmly believe in the educational potential of "cultural immersion" tourism, in educating visitors about the realities of a land-based way of life. But in the wake of the 1980s' demise of the sealing industry and the trapping controversy, the communities were also extremely concerned about the "Greenpeace syndrome" and were reluctant to make harvesting activities publicly accessible. This caution still lingers.

Most of the measures to regulate and control tourism (and other activities) are designed to protect the natural resource base of the Inuvialuit Settlement Region and the integrity of Inuvialuit harvesting activities. It is the Inuvialuit vision, that what the land provides, will always remain central to Inuvialuit life, modern economic aspirations notwithstanding. For this reason it is very important to examine the relationship between the Inuvialuit land-based economy and the tourism industry. For the Inuvialuit the challenge of embracing tourism is twofold: to protect the integrity of their land-based economy and way of life from trespass and interference of the tourism industry; and to engage in tourism industry activities in a way which enables tourism to fit into, nurture and

benefit community mixed economies to an optimum degree. The latter can be accomplished by optimizing the integration of tourism-related activities into the mixed economy of households and communities (see Table 1).

The Inuvialuit have responded to the first challenge in a constructive way by their development of Tourism Guidelines for beluga-related tourism activities. Considering the devastating impact the animal rights movement has had on northern aboriginal peoples' lives and economies (Notzke 1994:127ff), the Inuvialuit are justified in being extremely wary of granting the public access to harvesting activities. During the summer tourist season whaling is *the* harvesting activity, and consequently the communities' greatest concern. The Tourism Guidelines are designed to prevent physical interference with whaling as well as misrepresentation of the activity. The Beaufort Sea Beluga Management Plan of 1991 points out that whale hunting and tourism are not necessarily compatible activities (Fisheries Joint Management Committee 1991:16); any encounter between the two requires sensitive management. The Guidelines provide the Hunters' and Trappers' Committees of the harvesting communities (mostly Inuvik, Aklavik and Tuktoyaktuk) with the authority to strictly control access and other activities in the harvesting zones, camps and vicinity thereof, and they clearly stipulate that subsistence hunting takes priority over tourism activities.

The Hunters' and Trappers' Committees designate areas that may be used for the purpose of whale watching within the Inuvialuit Settlement Region, but retain the right to impose every kind of limitations on these activities. As a condition for their licence, tour operators visiting camps need written agreements with the Hunters' and Trappers' Committees and camp owners in question. No one is allowed to take photographs or video footage of harvesting or related activities without the explicit written consent of the relevant Hunters' and Trapper' Committee(s), the camp owner and hunters involved in the hunt, or the Inuvialuit Game Council. Media involvement is even more strictly controlled. These are only some of the provisions that pertain to harvesters' concerns in particular. Other provisions address marine mammal harassment, artefact removal, garbage disposal and aircraft restrictions.

How effective are these Guidelines? In the late 1990s Dressler (1999:109) found that their efficacy was questioned by many. Charter aircraft were still flying over the whaling camps. They were even known to tilt and circle back to allow tourists to take photos of hunters out on the water. Different problems were caused by independent tourists passing by or arriving at coastal or inland whaling camps, or in other hunting territory, by way of charter plane or kayak. This clearly showed that the Tourism Guidelines' requirement of a community consultation process was not adhered to.

However, the issue was fairly complex. Many tour operators and visitors felt that the Mackenzie River system and Beaufort Sea were public domain, and that they should thus be treated as common property. There was potential for conflict between the public right to pursue leisure activities and the Inuvialuit right to engage in their traditional lifestyle (*Ibid.*:110). The intrusive "tourist gaze" was also objected to in communities, particularly in Tuktoyuktuk, where visitors often encroached on residents processing whales, to take photos and ask questions. The popular "Tuk Town Tour" attracted over 2,000 visitors annually (*ibid.*:133). As a result many residents felt "on display", while tourism benefits were only enjoyed by those directly involved in the industry. The introduction of mini-vans has improved the manageability of tour groups, but independent travellers are more difficult to control.

Land claims regimes are the operationalized form of aboriginal rights and as such enjoy legal and constitutional protection. Their successful implementation requires constant review and adaptive management practices. They empower in some ways and constrain in others. But they do equip aboriginal people with the means to direct socio-economic change as they see fit, and they do improve the prospects for aboriginal communities of protecting their renewable resource base and the way of life it has nurtured for countless generations. It is increasingly recognized, that the right kind of tourism just may be able to assist in both, but its management is likely to remain challenging. Much will depend on the attraction of the "right" kind of tourists.

The Visitor's Perspective

In the summer of 1995 the author conducted a questionnaire survey among tourists in Inuvik (see Figure 1), to gain an impression of their "aboriginal tourism experience". Seventy completed questionnaires were collected. The sample bore much resemblance to visitor characteristics reported by other studies conducted by or on behalf of the Government of the

Northwest Territories (Government of the NWT 1995; Bufo Incorporated 1992a&b. Most travellers appeared to be well off and well educated. The majority, over 60 percent, were Canadians; almost 25 percent Americans, and 15 percent came from other countries, such as Australia, Germany, Mexico, Japan and Poland.

The majority of the travellers had visited the Canadian North before, but only 11 percent knew Inuvik from a previous visit. The largest percentage, 44 percent, identified their travel as "autotouring" (although 56 percent had arrived in Inuvik by vehicle); 27 percent had come for

"outdoor adventure"; 25 percent were visiting family, friends, or their travel was partly work-related; and 4 percent wanted to go fishing. Most of the visitors, 79 percent, were travelling independently. Except for those who were visiting friends or family, most travellers spent very little time in Inuvik, most commonly between one and four days.

Statistics sometimes fail to do justice to the variety of the human element amongst travellers. There was

-the "stay at home Mom" from Alberta;
-the physical therapist from California, leading a Sierra Club trip;
-the college student from Calgary visiting her Inuvialuk boyfriend;
-two retired teachers from Virginia and New York State, having the time of their life;
-the professor from Poland;
-the German writer, driving his red van from Alaska to Tierra del Fuego;
-another professor from Japan, and
-the graduate student from Illinois, who was "loathe" to identify himself as a "tourist".

What united all these people, was their great interest in aboriginal northerners and their lifestyle. Seventy-one percent of the respondents claimed to be very interested in native people, 28 percent were interested, and only one respondent said that he was not particularly interested. For 16 percent of the travellers an encounter with northern native people constituted the most important part of their trip. Asked, what they were particularly interested in regarding aboriginal people, by far the largest percentage, 77 percent, named people's everyday life; arts and crafts were mentioned by 69 percent; traditional land-based activities by 50 percent; learning from native people about the environment by 47 percent, and country food by 44 percent (people were encouraged to name multiple items).

Almost all of the travellers reported encounters with aboriginal people (94 percent), many of them informal in nature or privately arranged, but the majority of visitors took advantage of the two Inuvik tour companies. People reported a high degree of satisfaction with the tourism product. Asked about the highlight of their experience, 54 percent considered it to be their "personal encounter with native people"; the next frequent response with 29 percent referred to their "native guide's performance", and 20 percent particularly enjoyed the country food.

The strong emphasis placed by visitors on their personal encounter with aboriginal people and on their native guide's ability to communicate his/her culture to the traveller, is extremely important. It

corresponds closely with the response given by most tourists, when asked, what they were particularly interested in: Seventy-seven percent wanted to find out more about people's everyday life. Learning about people's daily lives from the people themselves seems to constitute an important measure of the quality of a visitor's aboriginal tourism experience. This sounds very simple, but is anything but simple. Putting on a paid performance for a visiting public is much easier than sharing one's life in a genuine manner. Many (though not all) tourists in the western Arctic may be given credit to be able to tell the difference. Among those, who (in the questionnaire) claim to have enjoyed themselves "very much", there actually is a wide spectrum of satisfaction, illustrating once again the importance of personalities and individuals at this stage of tourism development in the region. Depending on their community guide, people may proclaim that they had "the experience of a lifetime", or that "it was nice." Taking into account the importance of "word of mouth" advertising, this is not to be taken lightly. The following is just one example of a comment.

I enjoyed spending time with Maureen and James in their home, partaking of "lunch" with them. They shared their food, lifestyle and culture with us. We learnt about the wonderful way they live on the land, preserving food, making clothing and yet live in town.

Having established that people report a high degree of satisfaction with their aboriginal tourism experience, it is equally important to investigate potential areas of complaint. Among the 70 respondents, 14 put forward complaints or suggestions for improvement. Six of those concern the two tour operators in Inuvik. Among the points raised were false advertising, inefficiency, disorganization and poor salesmanship

Both tour companies in Inuvik have advertising that misrepresents them. Although many tours are listed for both companies, they in fact only have 4 or 5 readily available when you arrive -- and then you never know till the last minute if it will leave. If they had better management they could prosper. The bookers are very "unsalesmanlike" and don't seem really informed or to care about booking more than one trip per person. These tours should be set up to rotate days so people could do 3 or 4 trips. They do too many to same site -- dumb.

Comments like this reflect two things:

a) a very real sense of frustration on the part of many tourists with what they perceive as the difference between myth and reality of advertising. Considering that the majority of visitors are in Inuvik for less than four days, it must be acknowledged that only a handful of the tours are available on a daily basis (or every other day), and that many tours are conducted only occasionally or every other season, unless an individual or couple is prepared to pay a group charter price (which is unrealistic). This differentiation is not reflected in the advertising of either tour company.

b) a lack of education of the visitors about the conditions, that northern tour operators have to contend with. Most northern visitors come to their destination for an authentic northern experience. It will not do them any harm to experience first hand the factors that control northern tourism: the weather, indigenous northern culture, and the role of tourism within northern land-based economies. Travellers must be made to understand, that in the North these factors do not just exist on paper (in fine print...), but are very real indeed. This, in itself, may be turned into a "tourism experience". Honesty is at a premium.

The issue of educating the traveller appears to be a recurrent theme. Some of the most motivated and successful aboriginal tourism product providers are driven by a desire to educate visitors about the realities of northern land-based economies. Educating the tourist is also part and parcel of honest advertising. It is encouraging to note, that this lesson is not lost on northern travellers. Seventy percent of questionnaire respondents replied to the question "Did this experience teach you anything about aboriginal people?" by sharing some of their lessons. These lessons covered many different topics, such as the role of hunting and whaling in northern people's lives, political and social issues, human nature and social norms. The expressed opinions reflected a wide spectrum of experiences and perceptions. For the most part they did not appear reflective of stereotypes or pre-conceived ideas. The same is true for a variety of other comments volunteered by 47 percent of survey respondents. To the degree that northern aboriginal hosts are interested in getting their point across to southern or foreign guests, by and large, they are meeting with a receptive audience.

Conclusion and Outlook

Tourism in northern Canada confronts all stakeholders with enormous challenges. Some of the most important challenges facing the Inuvialuit and other northern native peoples relate to aboriginal people's land-based way of life, to questions of how this way of life can be protected from tourism, and how tourism can be shaped to fit into this way of life. Both of these challenges have been successfully tackled by the Inuvialuit, even though difficulties are still being encountered. Their

approach represents an interesting example of how the provisions of their claim settlement agreement are employed to provide an operational environment for the tourism industry, which bears Inuvialuit priorities of renewable resource harvesting in mind. While the claims regime has proven to be both empowering and constraining, aboriginal people have gained ownership in the process, and it is largely up to them to direct the process to their optimum advantage.

Local outfitters capitalize on elements of seasonality and flexibility in both the tourism industry and their mixed economy to combine the two. These strategies and tactics offer promising options for application and investigation in other parts of the Arctic. Nevertheless, a more widespread recognition on the part of community leadership and the public, that tourism (if properly controlled and realistically assessed) can really benefit communities, and a more sophisticated understanding of how these benefits can occur, are slow in emerging. The overall impact of tourism on host communities appears to be limited and generally benign, but more research is needed to gauge community perception and reaction. It would also help to determine the feasibility of trying to improve the linkages of the tourism industry to local supplies and services to further reduce leakage of tourism dollars, and it would assist in assessing tourism information and education needs at the community level.

Most people currently involved in the tourism industry in the western Arctic look to the future with confidence, but also with some uncertainty. Northern aboriginal communities and ecotourism are both in state of rapid evolution, and their interface is a complicated one. Furthermore, both are operating in a highly fragile and unpredictable ecosystem, which is being further stressed by climate change. The future of tourism in this region, as visitors now encounter it, is inexorably bound to the evolution of northern local economies. In this evolution tourism has the potential for acting as an agent of change as well as an agent of preservation. The "authenticity" and "real life character" of the current tourism experience sometimes also makes it very difficult to manage. It is well-nigh impossible to predict, where the next generation is headed. As Darielle Talarico, Business Manager of Arctic Nature Tours, mused in the 1990s, more tourists and more "professionalism" will make the industry easier to manage, but what will be lost in the process? (Interview in Inuvik, July 29, 1995) For the time being, it seems important to educate tourists about their role in northern aboriginal people's lives, and to show them, that their role is appreciated. They must be made to understand, that, for however fleeting a moment, they are not just witnessing, but participating in a lifestyle, that deserves to live on, for the people's sake, and for the land's sake.

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島社会におけるエコツーリズム——西表島上原地区を事例として——

古村 学

要約

本発表では、沖縄県八重山諸島西表島を事例として、エコツーリズムにたいする島民の対応とその意味を、自然保護とのかかわりおよび日常生活から、明らかにすることを目的にしている。

西表島は、日本におけるエコツーリズムの先進地域であり、成功地として知られている。成功の背景には、イリオモテヤマネコをはじめとした貴重な生態系の存在がある。

しかし、島民たちは、現在のカヌー・ツアーを中心としたエコツーリズムにたいして、エコツーリズムという名前を利用しているだけで、じっさいには自然を破壊していると反感をいだくことが多いが、それ以上に距離感を感じている。この距離感は、西表の伝統や文化、それと結びつく自然をもとにしたエコツーリズムというもう一つのエコツーリズムの活動に対しても示されている。

この背景には、自然保護という「正義」によって、島民の主体性が奪われてきた歴史があることを指摘する。自然保護もエコツーリズムにも、近代西欧を起源とした生態学の「知」があり、それは島民の生活とは、別の世界の出来事のように「距離感」があるものなのである。西表の伝統や文化も同様に、かならずしも島民の生活の連續性の中にあるわけではなく、民俗学の「知」としてあり、そこに「距離感」を島民は感じているのである。

キーワード：西表、エコツーリズム、自然保護、カヌー・ツアー

1 はじめに

「自然環境の保護」という題目だけみれば、それを否定することは難しいだろう。現在では、自然保護への巨大な潮流は、人権の保護とも並んで、人びとが疑うことのできない無条件の「正しさ」を備えているように思われる。現代社会においては、どのような立場からであれ、自然保護の動きにたいしてやみくもに反対することは難しい。

このような認識は、実際にはさほど古いものではない。自然環境の保護と開発は、近代的な開発思想のなかでは対立概念ととらえられてきたともいえる。しかし、現代においては、たとえ生存や発展のための開発が必要であると主張したとしても、そこには一時的に環境保護より開発が「優先」されるべき事情があるという含みがあるのであり、それは環境保護自体の否定ではありえない。開発の主張にも、ある程度の開発が達成されたならば、環境保護へと向うことが前提とされる。

「持続可能な開発」は、この環境保護と開発を両立するために、1980年代後半に生まれた概念である。発展のために開発を行うにしても、環境に配慮しながら行う。バイオ燃料、太陽光や風力による発電などがこれにあたる。ここで使われるエネルギーは大規模な実用化や経済効率等の問題は多々あるが、資源としては再生可能なものである。この「持続可能な開発」は、いまやグローバルな規模で無視できない潮流となっているといえよう。もちろん日本の政策においても重視されてきている。

この「持続可能な発展」を観光に適用したのが「持続可能な観光開発」である。具体的には、エコツーリズムやエスニック・ツーリズム、グリーン・ツーリズムなどがそれにあたる。これらの観光形態は、地域環境や地域社会を無視した開発を行ってきたそれ以前のマス・ツーリズムへの批判から生まれたものであり、研究者だけでなく、行政からも、現在もっとも注目されている観光のあり方である。そこでは、既存のマス・ツーリズムの弊害を乗り越えるために、地域における環境への配慮だけではなく、地域社会への貢献、地域の主体性（自立性、自律性）もまた強調されている。その主眼は、観光の現場である地域社会の重視に置かれていると考えられる。

これまでの日本のエコツーリズム研究においては、たとえば観光開発の成功の要因の分析や、逆に観光による弊害をとらえるものなど、多方面からの分析が行われているともいえるが、それらは地域社会の研究であっても、かならずしもそこから地域社会の姿が見えてこないように思われる。なぜなら観光開発を主軸にとらえた研究では、観光開発に中心的にかかわる人を切り取り、一面的に地域社会を規定していると考えられるからである。そこで、本発表では、この「持続可能な観光開発」のなかで、自然保護とのかかわりがもっとも強く現れているエコツーリズムについて、沖縄県の西表島を事例として現状を報告してみたい¹。西表島は、日本におけるエコツーリズムのもっとも先進的な地域、もっとも有名な地域のひとつである。それだけに、エコツーリズムによる西表社会への影響がその効果の面でも問題性の面でももっとも典型的に現れている地域であるといえよう。また西表島において活発に推進してきた自然保護活動の動きそのものと、島民たちの生活感覚やエコツーリズムにたいする態度との関連を考えるにも恰好の事例となる。そこで、本稿では、自然保護とエコツーリズムのかかわり、とくにそれらを地域住民の生活、自然観の中に置き直してみることを分析の中心におきたい。

¹ 本報告のための調査は、大阪大学人間科学研究院学生フィールドワーク支援基金からの助成をえて2006年2月1日より14日まで、また科学研究費保持基金基盤研究(A)（課題番号：18251005）「社会的弱者の自立と観光のグローバライゼーションに関する地域比較研究」(研究代表：江口信清)の研究協力者として2008年9月12日から19日まで行った。

2 西表島のツーリズムとエコツーリズムの現状

2-1 西表島の概況

西表島は、イリオモテヤマネコをはじめとして日本列島のなかでは独自の生態系をもつた島であり、その独自性ゆえに「東洋のガラパゴス」とも呼ばれている。この独自の生態系ゆえに、多くの生態学的研究が行われており、また、活発な自然保護活動も行われてきた。

場所は、東経 25 度、北緯 123 度、日本列島の南西の端に位置する。気候は熱帯・亜熱帯であり、面積の 90%が森林に覆われている。面積は、289.27 平方キロメートルと、日本の離島（離島とは、離島振興法にもとづき、北海道、本州、四国、九州、沖縄本島以外の島とする。）では佐渡島、対馬について大きい。行政区画としては竹富町に属する。竹富町は西表島のほか、赤瓦の家並で有名な竹富島、NHK の朝の連続小説「ちゅらさん」の舞台となったことで知られる小浜島、水牛車で渡る由布島、日本最南端の波照間島など、それぞれ特徴的な 10 の有人島と 6 の無人島で構成されている（沖縄県八重山支庁総務・観光振興課 2007）。一方、竹富町の役場など公的機関は隣の石垣市（石垣島）に置かれており、また竹富町の島々に渡るには、石垣島の空港や港を経由しなければならないなど、竹富町の島々は石垣市にたいしてある種従属的な関係性をもっているという現状がある。竹富町の中心は石垣島にあるともいえるのである。

西表島の人口は、2,316 人、高齢化率 16.9%、若年率 16% である。ちなみに、竹富町全体の人口は 4,192 人、高齢化率 21.0%、若年率 15.5% であるが、町内で二番目に多い小浜島でも人口 652 人であるなど、ほかの島々に比べれば西表島の人口はぬきんでている（沖縄県八重山支庁総務・観光振興課 2007）。また西表島の人口構成は、「僻地」にありながら、現在、過疎高齢化へ向かっていない点が特徴的である。竹富町全体では、日本におけるほかの多くの離島の現状と同様、昭和 25 年の 9,908 人をピークに減少しつづけ、昭和 55 年には 3,376 人まで落ち込んでいる。その後、横ばいを続けていた人口が持ち直していくのは、平成 12 年から平成 17 年にかけて、この間の人口の増加率は 18.1% と大幅な増加をみた（沖縄県八重山支庁総務・観光振興課 2007）。この要因は、多くの内地の若者の移住があつたためである。この点については、観光との関係で後にあらためてとりあげたい。

産業は農業を中心であったが、近年は観光業を中心とした三次産業の伸張が著しい。現在では、第一次産業が 17.1%、うち農業従事者が 15.2%。第三次産業は 72.8%、そのうち飲食店、宿泊業 22.1%、サービス業（ほかに分類されないもの）18.1% となっている（沖縄県八重山支庁総務・観光振興課 2007）。観光産業従事者の詳細な数値は、統計データから直接見えるわけではないが、その割合はかなり高いと考えられる。

2－2 観光の概況、西表島における観光の重要性

西表島の観光についてまずデータから見ていく。昭和 50 年代初頭に 4 万人程度であった観光客数は着実に伸び続けている。とくに平成になってからは急激に伸張し、平成元年には 11 万人、その後平成 19 年には 40 万人を越える（竹富町役場）。この数字は、島の人口の 170 倍もの観光客が訪れているということを意味する。また日本の離島全体で見れば、2004 年度（平成 16 年度）のデータによると、西表島の観光客数は全国の離島のなかで 5 番目に多い数字となる（離島統計年報）²。総じていえば、石垣島やその他の島々を含めて、この八重山諸島への観光は好調であるといえる。

それでは、西表島ではどのような観光が行われているのか、ここでは、その典型的なルートを実際のツアーにそって紹介してみよう。

朝、石垣島のホテルを出て、離島桟橋へ向かう。石垣港から西表へ船で移動、40 分ほどで西表に到着。西表島内の移動は基本的に大型バスが使われる。裏内川を遊覧船で移動。船着場到着後、マリウド・カンピレーの滝まで往復 3 時間かけてハイキング。ハイキングのための道は、歩きやすいよう橋がかけられ、階段が作られている。ふたたび、遊覧船で海岸まで戻り、昼食。星砂の浜でひと泳ぎ。その後、由布島まで牛車にゆられて渡る。夕方には、石垣島のホテルへ戻る（パンフレットのツアー案内より）。コースによっては、西表島・由布島・小浜島・竹富島の四つの島を一日で回るツアーもある。このばあい西表島には、数時間しか滞在しないことになる。

このように、西表島には、年間 40 万人と多くの観光客が訪れているが、その多くは、通過型マス・ツーリズムの客であると考えられる。西表島宿泊者数についての詳細なデータは発表されていないが、全体の 9 割ほどが団体客であり、8 割ほどが日帰り観光客だとされている（竹富町 2002, p.22）。また、マス・ツアーの多くは、石垣などの島外の業者によるものであることも指摘されている。こうした傾向は、多くの観光客を集めているものの、島外の旅行会社が企画した通過型の団体旅行が中心であり、観光による収入が少ないというマス・ツーリズムの弊害として指摘されているものであり、新たな観光形態としてのエコツーリズムの展開で知られる西表島でもこうした構造を抜け出しているわけではないということが見てとれよう。

一方で、西表への日帰り観光客を送り出している石垣島には、現在 77 万人の観光客が訪れており、公表されている統計データ上は同数の観光客が宿泊している。石垣島は観光

² 最新の離島統計年報のデータは、2004 年（平成 16 年）のものであるため、これを利用した。また、最大の観光客数を集めているのは香川県の塩飽諸島与島の 257 万人であるが、これは瀬戸大橋のパーキングエリアがあるため、立ち寄り客が非常に多いためである。与島を除けば、西表島と同じ沖縄県八重山群島の石垣島の 72 万人がもっとも多く、ついで新潟県佐渡島の 65 万人と続く。また、西表島と同じ竹富町が 6 位である。

客数、宿泊者数とともに、沖縄では本島について多く、日本の「離島」のなかでは最大である。石垣島への観光客は平成元年の 30 万人から順調に伸び続け、平成 18 年には 77 万人へと倍増している。この背景には全体としての沖縄ブームという状況も存在するが、近年の西表島や竹富島などの離島人気も大きく影響を与えていると考えられる。

上述のように、西表島観光は、ある意味で石垣島に従属的な構造となっているのだが、しかしそうした状況を踏まえた上で、西表島にとってはその産業構造からみても、観光の経済的重要性は比較的大きいという点も注意が必要である。経済学者の富川によれば、西表の収入全体の 13%が観光によるもの、就業者の 13%が観光に関与しているとしており、これが「観光立県の沖縄県全体」とほぼ同率であることから、西表島における観光産業の重要性を指摘している。また、竹富町の一人あたりの収入が、1985 年の 148 万円（県全体で 18 位）から 1999 年には 247 万円（8 位）に上昇したとし、その要因として観光化による収入の増加を指摘している（富川 2003）。この傾向は現在も継続しており、観光の産業としての重要性はより拡大していると考えられる。

2-3 西表島のエコツーリズム

観光産業の構造としてはマス・ツーリズム型が多いとはいえ、西表島の観光を代表するものはエコツアーである。先にもみたように、実際に団体ツアーで西表島を訪れるさいにも、西表の自然体系を満喫できるエコツアーを組みこんだ形態が準備されている。そのエコツアーの代表的なものとしてあげられるのが、カヌー・ツアーである。西表島のエコツアーとしては、ほかにも 10 時間以上かけ島を横断する横断ツアーなどのトレッキングだけのツアー、生態観測を行うナイト・ツアーなどもあるが、現時点では取り扱う業者も少なく、一般的ではない。ポピュラーなのは、カヌー・ツアーとトレッキング・ツアーがセットになったものである。なかでももっとも人気が高い「ピナイサーラの滝」へのツアーについて、以下、実際のツアーの状況を再現してみよう。

朝、ホテルもしくは港に迎えのワゴン車が来る。そのまま、マーレ川のカヌー乗り場近くの駐車場へと車で向かう。あたりにはすでにいくつかのワゴン車が止まっている。ライフジャケットを着て、カヌーをこぐためのパドルを渡され、川岸へと向かう。途中、ガイドからカヌーの講習を受ける。ガイドが川岸のカヌー置き場からカヌーを川へと運び、カヌーに乗り込む。

このカヌー置き場は、カヌー組合に参加している業者だけが利用可能である。また、ピナイサーラの滝では、ガイドひとりにつき客は 7 人まで、ガイドは一日に 2 回までと、カヌー組合による自主ルールによって規制がなされている。過度に利用され、破壊が進まないようにするためである。

カヌーに乗って、マンガロープ林の中の川を上っていく。途中、ガイドによって、マン

グローブ林や周囲の動植物の説明などが行われる。川上のカヌーつき場に上陸後、ピナイサーラの滝を目指しトレッキング。トレッキングの道は、基本的に自然のままの状態になっている。サキシマスオウの木など動植物にかんする説明がガイドによってなされる。

ピナイサーラに到着。ピナイサーラは沖縄県では、一番落差のある滝であり、その雄大な景色、発せられるマイナス・イオンを楽しむ。トレッキングで火照った体を冷やすため、滝つぼでは泳ぎを楽しむことが出来る。以前は、岩の上から滝つぼに飛び込むことも出来たが、滝つぼの生態系への影響に考慮し、今は禁止されている。ピナイサーラの滝では、昼食をとるツアーが多い。なかには、沖縄そばを食べるところもある。半日ツアーならば、このままもと来たコースを戻る。一日ツアーでは、滝の上までトレッキングで上り、滝の上からの景色を楽しむ。

こうしたツアーが、西表島のエコツアーの実体験としては典型的なものであろう。ここでは、貴重な自然環境を継続的に利用していくためのいくつかの仕組みとともに、実際に観光客が環境を楽しみながら理解し、享受するという典型的なエコツアーカたちがあるといえよう。

西表島のエコツーリズムは、1990 年の環境庁による「国内エコツーリズム推進方策検討調査」によって、知床や屋久島などとともに対象地域に選ばれることに始まる。1994 年には、国内で初のエコツーリズムのガイドブック『西表島エコツーリズム・ガイドブックヤマナ・カーラ・スナ・ピトゥ』が発行され、1996 年には、日本初のエコツーリズム協会「西表島エコツーリズム協会」が発足された。また、1996 年には、カヌー組合が作られ、2002 年には西表島エコツーリズム・センターが建設されている。こうした制度面での展開は、1990 年代後半から始まったカヌーツアー・ブームの盛り上がりとともに、次第に形を整えていったのである。

また、西表島でのエコツーリズムの取り組みは、エコツーリズム協会による 1999 年「地域づくり自治大臣賞」、2000 年「自然環境功労者環境庁長官賞」の受賞、仲間川地区保全利用協定締結業者による 2005 年環境省の「第一回エコツーリズム大賞」の特別賞受賞など、国から高く評価されている。

3 地域住民から見たエコツーリズム

3-1 カヌー・ツアーやエコツーリズムの具体的な観光ツアーや、地域の人びとにどのようにとらえられているのだろうか。本発表では、こうしたエコツーリズムの業者が多い上原地区を中心に聞きとり調査を行っている。

西表島は、大きく分けて西部と東部に分かれる。そして、現在、西部と東部合わせて 14

の集落があるが、琉球王朝時代からつづく伝統的な集落は、西部の祖納、星立、東部の古見の 3 集落しかない。昔はより多くの集落があったが、残りの集落は悪性マラリヤや過疎化のために廃村となってしまった。白浜は大正時代に炭鉱町として出来たが、それ以外は戦後の琉球政府による計画移民や自由開拓移民によって、開かれた集落である。そして、本発表の調査の中心となった上原地区は、近年の移住者がもっとも多い地区である。この上原地区は、沖縄本島、宮古島、竹富町の島々、そして本土からの移民からなり、現在西表でもっとも人口が多く、若者も多い地区である³。この多様な出身から、西表島では「合衆国」と呼ばれることがある。

エコツーリズムについて島民に話を聞くと、「あれはエコじやなくて、エゴツーリズムだね」という返事がかえってきた。自然保護とは無関係にあるいは自然を破壊しながら、商売のために自然を利用しているというニュアンスが含まれているのである。とくにこうした反応を引き出してしまうのは、カヌー・ツアーである。元々民宿でのカヌーの貸し出しサービスから始まったカヌーでの川上りが、ここ数年のブームを受けて、カヌー組合への参加事業所だけで、急増している。カヌー組合に参加していない事業所もあわせれば、島内では 50 以上の業者が乱立しているという。

またこうしたカヌー・ツアーへの反感は同時に、エコツーリズム自体への嫌悪感や忌避感へとつながりやすい。それはたとえば、とあるカヌー業者の「いまの西表でいえばね、どんな形であれツアーをやれば、私はエコツーリズムですと名のれば、エコツーリズムになるんですよ。あれは、おかしいでしょ」といった表現のなかに示されているだろう。「エコツアー」や「エコツーリズム」という言葉自体が、集客のための記号と化している。こうした発言からは、「エコツーリズム」という語そのものが、本来的な意味での自然環境への配慮という要素以上に、一種の看板、記号として機能しているという現状認識が読み取れる。そうした場では、この看板としての機能を逆手にとって、島外からの移住者が、島に住みつづけるため、島で生活していくために「エコツーリズム」を利用していくという事態が容易に起こりうる。

カヌー・ツアーへの参入は容易であるという点がこの傾向に拍車をかけているとも考えられよう。西表のカヌーは、海へ出ない限り難しい技術は必要とされず、動力船などに比べると設備投資費は少なく、維持費も安い。極端なばあい、カヌーと備品、送迎のためのワゴン車、携帯電話を用意し、インターネットでのホーム・ページを開設すればはじめることが出来る。島に住み続けるための手段として、内地出身者がエコツアーのガイドになることも少なくない。

こうした傾向にたいして、エコツーリズム関係者からも批判が出ているが、エコツーリズム関連の研究においても、カヌー・ツアーをとおした西表島のエコツーリズム批判が行

³ 竹富町史編集委員会 2003 などを参考。

われている。以下、こうした研究からその論点を取りあげておこう。

3－2 西表島におけるエコツーリズムの批判的研究

生態学者である奥田は、カヌー・ツアーやによるヒナイ川のオーバー・ユースにより、「希少種の絶滅可能性の増大を含めた自然環境の破壊」の可能性が高いと指摘する。そして、現行のカヌー組合による自主規制の効果では、自然破壊をとめることが出来ないとしている。その理由として、カヌー組合に存在しない業者が存在していること、自主規制に違反してもペナルティが弱いこと、さらに、現在の利用制限には科学的な根拠はなく、制限が弱いことなどがあげられる（奥田 2007）。

奥田の指摘は、生態学的な視点からのカヌー・ツアーやの現状にたいする批判であるが、この要因として、彼はさらに西表島への移住者、ニューカマーの問題をあげている。西表島におけるカヌー・ツアーやの大半は、「『自然への憧れ』を抱いた外部出身者が憧れの地域で暮らす手段を提供しているに過ぎない」ものであり、地域振興には役立っていないという（奥田 2007: 85）。

こうした島へのニューカマーの問題は、離島のエコツーリズムを分析するさいに重要な論点となっている。すでに見たように、西表島では、「南の島」にあこがれた本土の人々が移住を望むケースが多く、とくにエコツーリズムの盛況以降、移住者の増加は著しい。カヌー・ガイドを必要とするエコツーリズムは、ニューカマーが西表で暮らしていくための手段のひとつとなっているのである。このようなニューカマーの状況は、西表島のエコツーリズムの実態と切り離せない側面をもつ。

環境社会学者の松村は、ニューカマー主導によるエコツーリズムという観点から、西表島の状況を分析し、「（エコツーリズム）協会に加盟している観光関連業者の多くは島外出身者によるものであり、エコツアーやのガイド役もほとんど島外出身者で」あり、島外出身者主導による西表島のエコツーリズムは、「島人（島出身者）の雇用を創設しないエコツーリズム」であると述べる（松村 2004: 90）。島出身者がエコツーリズムに関与していない理由について、彼はカヌー・ツアーやに関連した自然環境への知識と技術のあり方を問題とする。彼によれば、カヌー・ツアーやのガイドに求められるのは、西表島の自然を観光客たちに見せるための「眺めるための知識・技能」であり、それは島出身者のもっている伝統的な生活の中でつかわってきた自然に「かかわるための知識・技能」とは異なるというのだ。自然を見せること、体験することを中心とした現状でのカヌー・ツアーやは、「眺める」ことに重点が置かれ、「関わるための知識・技能」がいかされることとは少ない。また島出身者たちは島の自然への関与が深いゆえに、島外出身者のもつ「西表島の自然を相対化する視点」をもちえないでいるという点もこうした事業への参与を阻んでいる要因としてとらえられている（松村 2004: 91-92）。

こうした分析は、西表島におけるエコツーリズムの実践において、確かにガイドという仕事の創成はあるが、実質的には移住者によって行われており、またそうした取り組みが自然保護にも雇用を中心とした地域振興にもさほど貢献していないという一面をとらえている。また、エコツーリズムに必要とされているのはニューカマーがもつような「知識・技能」もしくは「視点」であり、島出身者は、そのような「知識・技能」や「視点」を獲得することはむずかしいために、エコツーリズムに参入できないという松村の分析は、一見すると理解しやすいもののようにも思える。

たとえば、こうしたニューカマーと島出身者の対立軸の設定は、自然保護の文脈やエコツーリズムやヘリテージツーリズムなどの自然・文化保護を志向する観光の文脈において、しばしば報告される分析軸である⁴。新たに移住した外来者は地域の自然や伝統をその地域の価値の源泉として意識することが多く、その価値自体を利用しようとする。一方もとからの住民にとって自然保護と相反する開発が重要な発展戦略として意識され、対立が生じるという構図である。またこうした視点から、西表島のエコツーリズムやカヌー・ツアーハウスへの反感を説明することも可能であろう。

このような分析枠組みの設定は、確かにエコツーリズムをめぐる住民間の関係性的一面を取り出しているともいえよう。しかし、こうした分析は島への新たな流入者の存在のもつ可能性を制限してしまいかねない。さらにいえば、従来的な二項対立図式は、島の住民関係を単純化し、島の生活のリアルな変容プロセスをとらえきれていないのではないだろうか。こうした点からここで注目してみたいのは、西表島の人々が示すエコツーリズムへの一種の曖昧で複雑な「距離感」である。エコツーリズムにたいする島の人びとの態度とは、単純な肯定、否定に還元できない曖昧な領域のなかに、その現実があるように思われるからである。以下この点について見ていただきたい。

3-3 エコツーリズムに対する距離感

エコツーリズムを主題としてインタビューを行うと、カヌー・ツアーハウスを中心としたその活動に反発が表明されることが多いが、そのことは、島の人びとのあいだでエコツーリズムがどのように話題になっているかということと少し位相を異にしている。さきほどのエコツーリズムの問題を指摘したカヌー・ガイドは、「みんな地域の人は、エコツーリズムにたいして、いいように思ってないか……、何もわかつてないよね。関心がない」という。3-1のエコツーリズムへの反感は、冒頭の言葉をのぞき、数人のカヌー・ガイドなどのエコツーリズム関係者からの聞き取りをもとにしたものだ。多くのエコツーリズムに關係ない人にとってみれば、意識して、考えるほどのことでもないのだ。ある人からは「(日

⁴ たとえば鬼頭 1999、塩路 2003 など。

（常にエコツーリズムについて話すことは）しないよ、あんたがこうやって聞くから、話してるんだよ」という返事がかえってきた。

カヌー・ツアーカーの現状についても、道路から川を見て、たくさんカヌーがあるな、たくさんきているなという程度であり、「内地から研究者やカヌーの人が来ているのは知ってるけど、よくわからない」という感覚が典型的なものであろう。島民の日常的な生活からは、どことなく「距離感」があるものとして感じられているといえよう。

こうした距離感は、西表島のエコツーリズム協会の活動にたいしても同様である。発足してからすでに 12 年が経過し、協会の建物「エコツーリズム・センター」が建てられてから 6 年たつにもかかわらず、島民のあいだに浸透しているとはいがたい。「なにをしているのかわからない」、あるいはそういう施設の存在自体を知らない人も少なくない。この点は多くの研究者も指摘している点であり、協会の関係者も気にしているところである。

西表のエコツーリズム協会の活動は、島の文化や伝統の保護と育成を課題とした取り組みであり、それは必ずしもカヌー・ツアーやイコールではない。本来の活動の発端は、外部資本によるリゾート開発にたいする危機感から、石垣金星氏を中心としてリゾート開発の中止を求め、500 年以上前から続く島の文化や伝統、それと結びついた自然を守ろうという趣旨にあった。ここで言われている「自然」とは、現在のエコツーリズム・ブームのなかで取りあげられる「原始の自然」といったものではなく、農耕文化を取りまく人びと生活と関わる自然である。

こうした活動のなかでは、観光という発想も、現在行われているカヌー・ツアーやエコツーリズムという発想も当初は存在していなかった。それが、自然体験型のエコツーリズムへと変化していった契機は、1990 年代初頭の環境庁による「国内エコツーリズム推進方策検討調査」の対象地域に選ばれたことにある。その後、国や県によってエコツーリズムが推し進められ、またカヌー・ブームに押される形で、西表島のエコツーリズムはカヌー・ツアーやとらえられるほどに、カヌー・ツアーバイ傍倒になってしまった。

このような西表島におけるエコツーリズム活動の展開の経緯から見れば、現在西表のエコツーリズムは、ふたつの方向性に分化しているといえるだろう。ひとつは前述のようなカヌー・ツアーや、もうひとつは石垣氏やエコツーリズム協会を中心とした文化や伝統、自然の維持保護を中心とした活動である。現実と理念といつてもいいかもしれない。この第二の方向性においては、西表島に古来から伝わる織物技術の保存や、あるいは祖納や星立などの古くからある集落の伝統行事や農法を守り育成することが活動の中心である。こうした取り組みは、伝統的な西表の生活を保存することを目指すものであり、まちづくりの活動へと繋がる側面があるとしても、必ずしも観光に直結するものではないといえよ

う。これまで西表島のエコツーリズム研究のなかで成功例として紹介され⁵、地域社会学者である鳥越によって日本型エコツーリズムとして評価されてきたのもこうした取り組みである（鳥越 2004）。

西表島のエコツーリズムをこうした二つの方向性をもったものとして見れば、それぞれの特徴をより明確に取り出しておくことができる。一方のカヌー・ツアーに代表される観光への取り組みは、近代西洋を起源とする自然体験、自然観察型のエコツーリズムである。エコツアーという活動の根本には、近代西洋の生態学的な「知」としての自然観がある。こうしたエコツーリズムを支える基盤としては、現在の実態がどうであれ、西表島の自然保護運動の流れが一定程度作用していると考えられる。そして、この貴重な生態系の保護という運動は、住民と無関係に存在する「自然」が前提されている。

もう一方の伝統文化保全の取り組みは、島に古来から存在してきた「生活」に根ざした文化・伝統（およびそれを取りまく自然）を基礎とすることが主張されているものだ。それはちょうど松村のいう「関わるための知識・技能」にもとづくエコツーリズムとも呼べるものである。

この地域社会の伝統、文化、それと結びついた自然を、観光によって守り育成していくという方向性は、日本型エコツーリズムのひとつの理想像として考えられるかもしれない。しかし、現実の住民の対応としては、カヌー・ツアーと同様に、「金もうけに利用している」、「なにをやっているかわからない」、「知らない」といったある種否定的な反応や無関心な態度が表されている。このように西表島のエコツーリズム活動にたいする評価が錯綜し、また島民自身にとっても曖昧な距離感をともなった感覚のなかで意識されているのは、西表島においてはエコツーリズム活動が一つの言葉と制度のもとで分岐し、異なる方向性をとってしまっているという活動経緯の錯綜性に、その理由があるともいえる。しかしこうした住民の無関心の背景には、もう少し根本的な問題があるようにも思われる。

住民がこうしたエコツーリズムに距離感を感じているのは、「関わるための知識・技能」にもとづくエコツーリズムが基盤としている「伝統文化」そのものがすでに継承されていない、あるいは広い範囲で共有されるものとなっていないことに理由があるのではないかだろうか。西表島は、1972 年に本土復帰し、それと同時に約 35%が国立公園に指定された。そのことによって、「生活」の中における自然とのかかわりが制限されてしまっている。また、近代化によるライフ・スタイルの変化によって、それまでの伝統的な自然とのかかわりは変化していった。たしかに、祖内や星立てといった古い集落では、祭などの伝統的な行事は維持されているが、伝統的な自然とのかかわりは農業などの生業に限られていったのである。しかし、それ以上に、西表は「移民の島」であるということが、この伝統的なかかわりの継承に歯止めをかけている。先にも触れたが、特定の集落に西表島の

⁵ たとえば海津・真板 2001、海津 2005 など。

数百年の伝統を探ることは可能であっても、現在の西表島を構成している多くの集落は相互に孤立的に、近代になってつくられてきたという状況がある。さらに、現在の島の若者層を支える人口もまた、他の地域からの移住者の存在を抜きには考えがたい。

4 おわりに

西表では、ヤマネコ保護を中心とした近代西欧を起源とする生態学的な自然保護がシマを覆ってきた。返還直後からヤマネコの生存か人間の生存かを争った「ヤマネコ論争」、北岸道路建設への反対、東部の土地改良事業への反対、最近では大規模リゾートホテル「ニラカナイ」建設への反対活動である。これらの自然保護運動の実質的主体は、ごく少数の島内に住む自然保護活動家と島外の研究者によって担われており、大多数の島民にとっては、生活改善のための開発を制限されるものとなる場合もあった。とくに、生活に直結した道路や土地改良といった開発への反対は、島民の生活を脅かすものと見なされ、自然保護活動への反感が島内の意識として作られていったのである。西表での自然保護活動においては、生態学にもとづいた自然保護の「正義」によって、島民の主体性が奪取されたともいえるのではないだろうか。

現在では、西表島の開発はある程度達成され、生活レベルが向上し、不便さも緩和されている。そのこともあって、開発よりも自然保護に重点を置く（あるいは自然保護を視野に入れた開発）というグローバルな潮流も受け入れやすくなっている。その意味では、現在の西表における自然保護活動は、かならずしも生活を脅かすものではなくなってきている。しかしながら、こうした活動の主体から、島民自身が排除されている現状には変わりがない。自分たちとはかかわりのないところで自然保護活動がすすめられている。自分たちのものであるはずの島が、自然保護という「正義」の旗印のもとに、自然活動家や研究者によって占有されているという状況である。このような状況から、自然保護を掲げた活動への島民たちのある種の「距離感」が生まれている。自分たちとは「関係がない」という言葉で表現される、漠然とした曖昧な「距離感」である。

この自然保護の正当性によって島民から自然が奪取されている状況と、そのことへの「距離感」は、カヌー・ツアーセンターを中心としたエコツーリズムにたいしても同様にある。すでに見たように、カヌー・ツアーセンターに対しては、「エコツーリズム」という記号自体を利用して島の自然を破壊し自己利益としていることへの反感が存在している。しかし、より根底にあるのは、こうしたツーリズムのなかで消費される「自然」もまた、貴重種の保護を前提とした自然保護運動が準拠する自然観と同一であり、こうした認識に寄りかかるによって、住民の生活から乖離したところで、エコツーリズムが進められているという感覚ではないだろうか。こうしたエコツーリズムの正当性が、ことに内地の人びとによって提

示されていることで、島民自身から自分たちの島の自然が奪われているという構図をつくりあげてしまう。こうして、近代欧米を出自とする生態学的な「知」の体系に基づき自然保護も、それに立脚したエコツーリズムも、島の住民の生活に直接関係性を帯びたものとしてではなく、どこか別の世界のもののような「距離感」のあるものとして意識されるのである。

これにたいして、西表の伝統と文化、それにかかわる自然を基礎としたエコツーリズムへの志向性は、西洋的な自然保護活動のあり方やエコツーリズムにたいして、それを乗り越えるもうひとつの選択肢となりうるものであった。しかし、こうした方向性にたいしても、すでに見たように制度的な自然との接触の制限、ライフスタイルの変化、さらに多くの移住者によって成り立つ「移民の島」であるという西表島の現在の状況のなかでは、これらの伝統文化を自分たち自身のものとして実感できることは少なくなっている。祖内や星立といった伝統文化がいまだ祭などの行事として存続している古い地区ではまだしも、新たに作られた上原地区では、この伝統文化はあたかも別の島の出来事のように疎遠なものである。ここにももう一つの「距離感」が現れてくる。

さらに、本来、生活に根づいた伝統文化として取り出されてきたものが、時代の流れのなか、生活の変容のなかで、次第に民俗学的な「知」へと回収されているということも指摘できる。とくに、こうした伝統文化の担い手である当事者以外の人びと、新しい移住者たちやライフスタイルそのものが異なるような若者にとっては、そのようになる可能性があるだろう。民俗学的な保存のための祭になっているという側面があるのだ。伝統文化にもとづいたエコツーリズムは、民俗学的な「知」を根拠とすることにより、かならずしも現在の実質的な「生活」を基盤とするものにはなりえていない。こうした伝統・文化・自然へのアプローチもまた、自然保護同様、多くの住民にとっては、みずからの主体的関与の可能性を奪われた状況にあるといえよう。

西表島においては、長い自然保護活動の歴史あり、多くのエコツーリズムの試みが行われてきている。その意味では、エコツーリズムの抱える多様な問題があらわれている。このような問題を乗りこえ、島民の主体性（自立性・自律性）を取り戻していくためには、生態学の「知」や民俗学の「知」にもとづいた正当性のあり方だけではなく、現在の「生活」のなかでの自然環境とのかかわりにもとづいたエコツーリズムの構築への努力こそが、必要なのではないだろうか。

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「マレーシアにおける貧困問題の地域的・民族集団的多様性に関する研究」と
社会的弱者およびツーリズム

Malaysia Research Project of “A Study on Regional and Ethnic Diversities of Poverty Problems in Malaysia” and the Socially Deprived and Tourism

藤巻正己 (Fujimaki, Masami)

Abstract

Malaysia research project of “A Study on Regional and Ethnic Diversities of Poverty Problems in Malaysia” led by this speaker was initiated with a three year target date to investigate into the actual conditions and mechanism of poverty in Malaysia. Outline of our project is as follows.

(1) Objectives, Viewpoints and Research Frameworks (Fig.1)

a) Comparative study regarding regional and ethnic diversities in poverty:

In Malaysia, diversified situations of poverty in terms of region and ethnicity have been observed throughout the country: the urban squatter societies consisting of Chinese, Malay, Indian and foreign-workers, “new villages” in Chinese-concentrated areas once built as a measure against dissident guerrillas, rubber or oil palm plantation areas where Malay and Indian farmers and foreign workers are employed, fishing villages, the Orang Asli society in the Malay Peninsular, the Iban (the indigenous people in Sarawak) society, etc. This study is marked by the following points: making a comparative study of various poverty areas, separated out the development process of poverty situations generated in each region, trying to clarify those structural factors, and then finally making an attempt to give a comprehensive and topographical description of Malaysia on the theme of poverty issues.

b) Combining an “on-the-ground” approach and a “bird’s eye-view” approach”:

A “bird’s eye-view” approach of “where, how and why” poverty situations are distributed was lacking in traditional poverty studies based on an elaborate on-the-ground approach. Therefore, by linking fieldwork and the fruits of GIS analysis of the socio-economic map, this study takes the approach of clearly articulating geographical poverty distribution and examining each factor and background in target areas.

c) Policy recommendations for poverty alleviation from a welfare geography perspective:

In order to alleviate poverty conditions, it is important not only to raise the income level but also to explore how basic human needs can be substantially satisfied. It is essential to have measures to realize poverty alleviation (these could be a little roundabout, but practical) through the improvement of the supply of and the accessibility to social resources and services such as proper

housing, water supply, electricity, good access to arterial roads, healthcare facilities, schools, etc. This study characteristically attempts to present policy recommendations for poverty alleviation based on the research findings of (1) and (2) from the perspective of welfare geography: what kinds of basic human needs are lacking in target poverty areas and society, and how appropriate and fair geographical distribution should be realized.

Malaysian government's poverty eradication efforts target the hard-core poor whose monthly income is less than RM230 (approx. 6,000 yen) in Peninsula Malaysia, RM272 in Sabah and RM317 in Sarawak. These poor are concentrated in the following groups: paddy farmers, estate workers, owners of small scale rubber farms, owners of small scale coconut farms, shifting cultivators in Sabah, sago producers in Sarawak, fishermen, the Orang Asli, Chinese in 'New Villages' and the urban poor including squatters or former squatters who have resettled in low-cost, high-rise flats or are temporarily living in public wooden row houses. Besides foreign laborers estimated at two million and more, mainly from Indonesia, Bangladesh and other Asian countries, should not be overlooked. In our research project some groups and areas among the above have so far been investigated through detailed fieldworks (Tab. 1 and Fig. 2).

Our Malaysian research project doesn't directly deal with tourism itself. Tourism and the 'poverty', however, are mutually and closely related. Because the expansion of tourism has inevitably accompanied developments and mega-projects such as construction of airports as well as highways, theme parks and many kinds of facilities attracting tourists in not only urban areas but also mountainous and coastal areas. These areas often include marginalized "poor area" or areas which the poor live in. Since 1990s Malaysia government has prompted the development of tourism sector as the second acquisition of foreign exchange after manufacturing sector. Various types of 'tourism spaces', as a result, have been produced and expanded at national wide and a lot of contestations over lands where 'tourism spaces' were produced occurred among inhabitants in developmental areas, developers and governments. Although governments have facilitated 'pro-poor tourism' projects in the cause of alleviating poverty in the poor areas, in many cases the 'forgotten areas' and 'forgotten people' left from main stream of economic growth have been forced to expose themselves to waves of tourism and to ironically [re]face their condition of 'poverty' in main stream society.

Many case studies of our research projects naturally had unavoidably to take interest in relationship between poverty and tourism occurred in their research fields (Fig.3). Studies by Prof. Eguchi, Prof. Tawa, Dr. Soda and Prof. Fujimaki are good examples (Tab.1 and Fig.2). Thus our Malaysia research project could have a chance to be set up a particular session under the name of "Tourism in Malaysia" in this symposium.

1. 「貧困問題」をめぐる「共時的」な「双子」研究プロジェクト

江口信清教授（立命館大学・文学部）が研究代表を務める「社会的弱者の自立と観光のグローバライゼーションに関する地域間比較研究」プロジェクトと、藤巻が研究代表を務めるマレーシア研究プロジェクト「マレーシアにおける貧困問題の地域的・民族集団的多様性に関する研究」とは、さまざまな意味において「双子」の関係にあるといえる。

第一に、研究課題が類似していることである。すなわち、両研究ともに「貧困」をテーマにしており、貧困地域における貧困の実態・メカニズム背景を探求し、そこに暮らす住民（社会的弱者）が開発プロジェクトとのかかわり／せめぎあいの中で、どのように貧困状況から自立的に脱却しようとしているのか／できないのかについて、さまざまな地域や民族集団を研究対象に言及しようとしてきた。

第二に、双方の研究実施期間がともに2006年4月から2009年3月の3年間であること、また江口教授と藤巻とが、それぞれ代表者となっている研究プロジェクトの分担者として互いにかかわってきた。つまり私たちの研究プロジェクトは、実に「共時的」であるとともに「相互補完的」であることを強調しておきたい。しかし、このことは「偶然性」を意味するものではない。兩人はともに過去10年余り、同じ研究グループにおいて世界各地の「貧困」問題について、文化人類学や地理学、社会学などの立場から探求してきたという前史を共有しているからである。さらに、私たちがそれぞれ文部科学省に申請した「貧困」あるいは「社会的弱者」をめぐる研究テーマが同時に採択されたことは、21世紀の地球社会において今なお、いな、ますます重要な意義をはらんでいることをも物語っている。

2. マレーシア研究プロジェクトの概要

さて、以下に、「マレーシアにおける貧困問題の地域的・民族集団的多様性に関する研究」と題する研究プロジェクトについて簡単に紹介してみたい。

（1）研究の目的・視点・枠組み

①地域的／民族集団的貧困状況の多様性に関する比較研究

多民族国家マレーシアには、都市部での華人系・マレー系・インド系および外国人労働者系のスクオッター（不法占拠者）社会、かつて反政府ゲリラ対策として建設された華人居住地区の「新村」、マレー系農民・インド系農業労働者・外国人労働者が就労するゴム・油やしのプランテーション地域、そして漁村地域、さらにマレー半島の先着・先住民であるオランアスリの社会、16世紀にマラッカを占領したポルトガル人の子孫が集住するコミュニティ、ボルネオ島サラワクの先住民のイバン人社会などといったように、地域的・民族集団的に多様な貧困状況が各地で確認されてきた。

本研究では、こうしたさまざまな貧困問題地区の比較研究を試み、各地区的貧困状況の生成過程を析出し、それらの構造的要因を明らかにしようとする点、さらにそれらをふまえて「貧困問題」を主題としたマレーシアの総合的・地誌的記述を試みる点に特色がある。

②虫瞰的アプローチと俯瞰的アプローチの接合

従来の精緻な虫瞰的アプローチにもとづく貧困研究は、貧困状況が「どこで、どのように、なぜ」分布しているのかという「俯瞰する」視点が弱かった。そこで本研究では、問題地区におけるフィールドワークと GIS（地理情報システム）による社会経済地図分析の成果とをリンクさせ、同地域における貧困状況の地理的分布とその要因・背景について検討を加えるというアプローチの方法に特色がある。

③福祉地理学的立場からの貧困状況緩和のための政策提言

貧困状況緩和のためには、単なる所得水準の向上だけではなく、実質的に人間としての基本的欲求をどのように充足させるべきかという視点からの探求が重要である。たとえば、生活のために最低限必要な健康的な生活を送るのに適切な住居・上水道・電気の供給、幹線道路へのアクセス、保健医療施設・学校など、社会的諸資源・サービスの供給およびそれらに対するアクセシビリティの改善により、（迂回的かもしれないが、しかし実質的に）貧困状況を緩和していくという観点からの方策が必要である。そのためには、問題地区・社会においてどのような人間としての基本的欲求が欠如あるいは不足しているのか、またそれらの適正な地理的配置はどのようになされるべきか、という福祉地理学的観点から、上記 1) と 2) の研究成果をふまえ、貧困状況緩和のための政策提言を試みようとする点に本研究の特色がある。

（2）研究のプロセス

以上の研究目的・視点・研究枠組みにもとづいて遂行された 3 年間の研究のプロセスを示したのが、図 1 である。しかし結果的に、構想倒れあるいは「絵にかいた餅」となってしまった部分がある。とくに、上記の研究課題のうち③については、研究地域に関する基礎的データの入手が困難であったため、十分な成果をあげることはできないことが予測される。

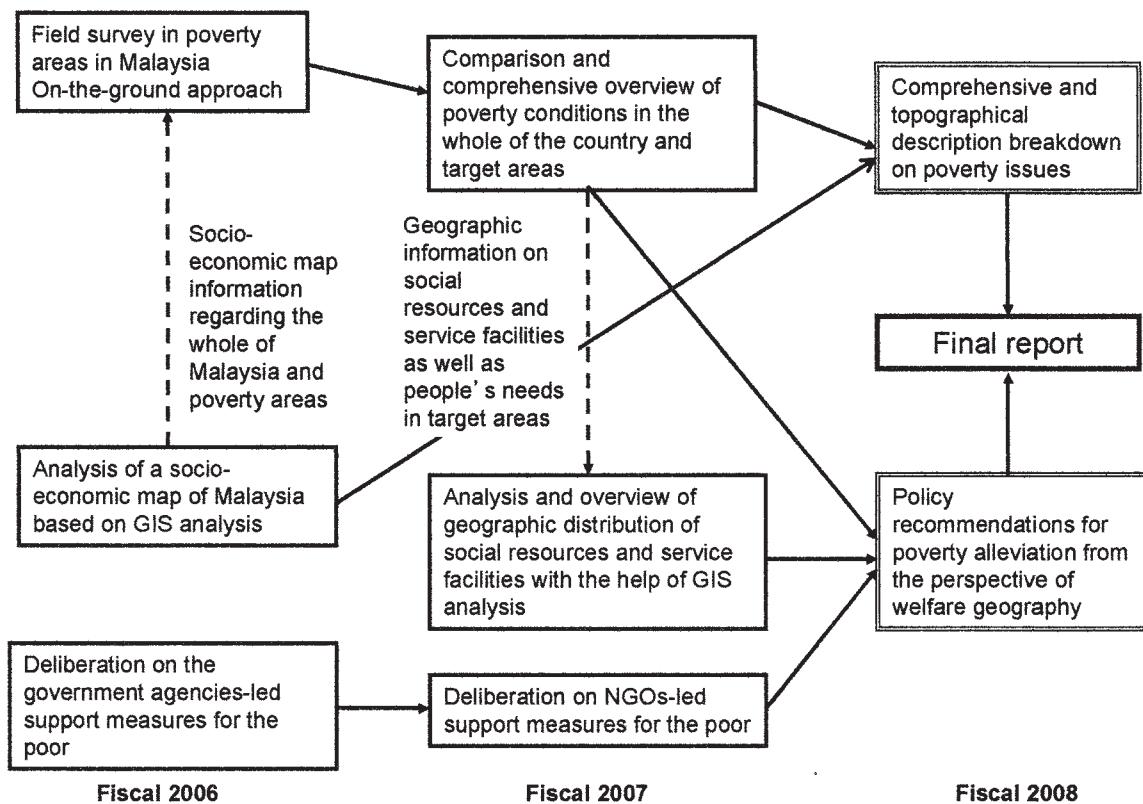


Fig.1: Conceptual figure of research process

図1 マレーシア研究の全体構想概念図

(3) 研究メンバーと研究対象地域／民族集団

表1は、マレーシア研究プロジェクトのメンバーとカウンターパートの研究対象地域／民族集団および研究課題を示したものである。また図2は、研究対象地区の位置を図示している。多民族国家マレーシアでは、三大種族の中で華人が最も所得水準が高く、次いでインド系、マレー系の順となっていることが報告されることが多いが、これらに加えてオランアスリやイバン人などの先住民族やポルトガル人など、三大種族以外のエスニックマイノリティや周辺的コミュニティの貧困問題はより深刻であることが想定される。

また、マレーシア政府によれば、貧困撲滅の対象となっている極貧層（the hard-core poor）は以下のグループに集中しているとみなされている。

稻作農民、農業労働者、農園労働者、零細ゴム自営農、ココナツ自営農、焼畑農民（サバ）、サゴやし栽培者（サラワク）、漁民、「新村」住民、オランアスリ、スクオッターなどの都市貧民

しかし、マレーシアにおいて 200 万人を超える外国人労働者の存在も看過できない。なぜならば、低賃金かつ劣悪な生活環境の中での暮らしを余儀なくされている事例が数多く報告されているからである。

本研究プロジェクトではこれらのすべてについて調査を遂行してはいないが、上記の表や図でも明らかのように、可能な限り貧困問題が表出しているさまざまな地域・民族集団を対象にしてフィールド調査をおこなってきた。

Tab 1: Research Areas and Ethnic Groups/ Subjects

表 1 研究メンバーと研究対象地域／民族集団・研究課題

Name	Research Areas, Ethnic Groups and Subjects
Fujimaki Masami (Ritsumeikan Univ.)	Squatter settlements, Orang Asli villages and foreign workers' quarters in the Kuala Lumpur Metropolitan area and Orang Asli villages in Cameron Highlands, Pahang
Eguchi Nobukiyo (Ritsumeikan Univ.)	Portuguese village nearby Melaka
Ikuta Masato (Ritsumeikan Univ.)	Policies for eradication of poverty by Federal and Sates governments
Hirato Mikio (Takusyoku Univ.)	Quarters of Indonesian estate workers in Jengka, Pahang
Yamashita Harumi (Tsukuba Univ.)	Chinese communities including 'New Villages in the Kuala Lumpur Metropolitan area
Tawa Masataka (Kwansei Univ.)	Fishery village nearby Pekan, Pahang
Soda Ryoji (Hokkaido Univ.)	Iban communities in the Bintul River Basin, Sarawak
Norizan Bin Md Nor (Universiti Sains Malaysia)	Orang Asli villages in Cameron Highlands, Pahang
Ruslan Bin Rainis (Universiti Sains Malaysia)	Construction of socio-economic maps on Peninsular Malaysia by GIS
Tarmiji Bin Masron (Universiti Sains Malaysia)	Construction of socio-economic maps on Sarawak by GIS, Orang Asli villages in Cameron Highlands, Pahang

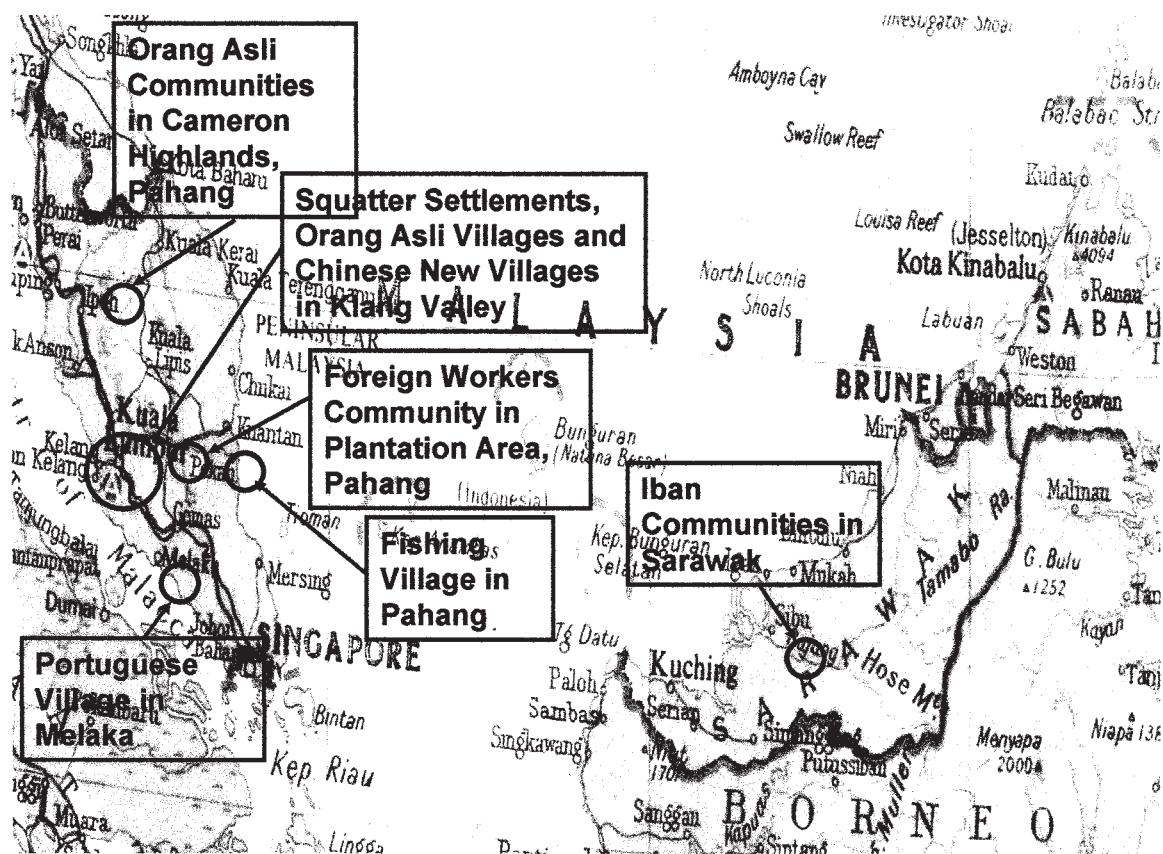


Fig 2: Overview map of investigation areas

図2 調査地の位置概観図

(3) マレーシア人研究者招聘講演会

① 2006年12月1日（立命館大学）

The Economic and Socio-Cultural Impacts of Ecotourism on the Minority People in Cameron Highlands, Pahang, Malaysia Norizan Bin Md Nor (Universiti Sains Malaysia)

② 2007年1月27日（立命館大学）

The Changing of Distribution of Population and Socio-Economic Condition in East Malaysia, Sarawak Tarmiji Bin Masron (Universiti Sains Malaysia)

The Changing Spatial Pattern of Population Concentration and Ethnic Diversity in Peninsular Malaysia since 1980s Rusulan Bin Rainis (Universiti Sains Malaysia)

③ 2007年12月2日（立命館大学）

　　パハン州ジュンカ地区の外国人労働者について ······ 平戸幹夫（拓殖大学）

Fifty Years On: Whither the New Villages in Malaysia?

　　··· Voon Phin Keong (Director of Centre for Malaysian Chinese Studies)

3. マレーシア研究プロジェクトと「社会的弱者の自立とツーリズム」

マレーシア研究プロジェクトでは、ツーリズムそのものを対象としてはいない。しかし、製造業部門に次いで外貨獲得現として、マレーシアでは1990年代以降、国をあげて推進されるようになったツーリズムに伴う開発は、しばしば「貧困地域」あるいは貧困層が集住する地域において展開された。たとえば、高速道路やホテル、テーマパーク、ダムなどの建設が全国各地で行われ、都市部のみならず山地部や沿岸部においても「ツーリズム空間」は急速かつ広域にわたり拡大した。また、これまで主流社会から「忘れられてきた地区」や「忘れられてきた人々」が、ツーリズムの波にさらされ、「貧困問題に直面」するようになるという皮肉な問題が各地で生起するようになった。また、政府は「貧困克服のためのツーリズム」の美名のもとで、職業機会や現金収入を得る機会が少なかった地域において観光開発を推進するようになった。

以上のことからも明らかなように、私たちのマレーシア研究プロジェクトにおけるいくつかのケーススタディにおいても、必然的に貧困問題とツーリズムとのかかわりをめぐる問題に向かい合うこととなった（図3）。たとえば、マラッカにおけるポルトガル人村（江口信清）、パハン州の漁村研究（田和正孝）、サラワクのイバン人社会（祖田亮次）、そしてクアラルンプル大都市地域およびキャメロンハイランドに暮らすオランアスリ社会（藤巻正己）に関する研究である。

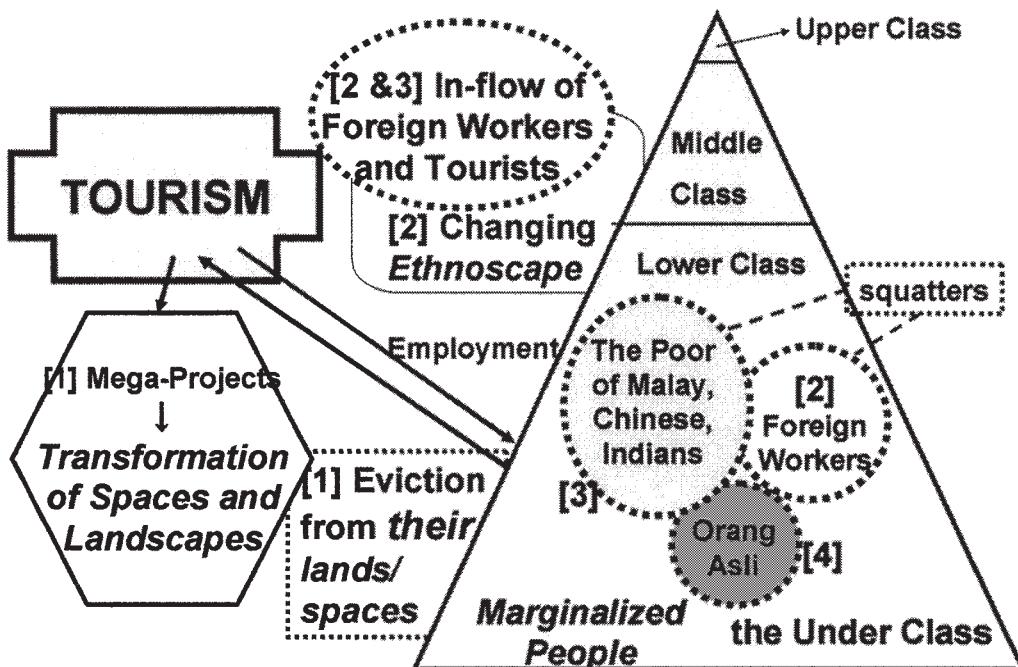


Fig.3: Conceptual figure of research fields on the expansion of tourism, 'the socially deprived' and the relations between both

図3 ツーリズムの展開と社会的弱者に関する研究領域の概念図

こうして、江口教授が主宰するこのシンポジウムにおいては、私が研究代表者を務めるマレーシア研究プロジェクトにかかわるセッションを設けてもらう機会が得られた。研究報告者は3名である。一人目は、マレーシア研究プロジェクトのカウンターパートのNorizan Bin Md Nor博士である。ノリザン博士はペナンに所在するマレーシア科学大学人文学部地理学教室（Geography Section, School of Humanities, Universiti Sains Malaysia）に所属し、昨年まで学部長という重職を6年余りつとめるかたわら、マレーシアのツーリズム研究を進めてこられた。今回はパハン州の高原リゾートであるキャメロンハイランドにおけるツーリズムの展開に、同地域の先住民族であるとともにマレーシアにおける社会的弱者ともいえるオランアスリ（Orang Asli）がどのように対応しているのかについての報告がなされる。

二人目は、田和正孝教授（関西学院大学・文学部）である。田和教授は、パハン州など半島部マレーシア各地の漁村で長年フィールドワークを遂行してきたが、このセッションではマレー系あるいは華人系の漁村における貧困問題の表出状況と、地域振興のための一手段として導入された観光プログラムの現在について言及する。

三人目の報告者は、このシンポジウムの主宰者である江口信清教授である。江口教授は、

マラッカ郊外のポルトガル人村の成り立ちと住民の生存戦略としてのツーリズムのありようについて言及することになっている。

また、このセッションの座長をつとめる生田真人教授（立命館大学・文学部）は、貧困問題に対するマレーシア政府の政策的取り組みの系譜と問題点について研究を進めている。

最後に、私自身のマレーシア研究プロジェクトにおける役割について簡単に紹介させてもらいたい。私の研究課題は、クアラルンプル大都市地域（クランバレー）におけるスクオッター、オランアスリ、外国人労働者の貧困問題の表出状況について探求することにある。しかし、昨年度から私の関心は、キャメロンハイランドの「オランアスリ・ツーリズム」にかかわる問題に移っている。すなわち、オランアスリが自ら、主体的に「彼らの生存戦略」実現のために、どのようにツーリズムに参加しているかに関心を払うようになった。しかし、「キャメロンハイランドにおけるツーリズムとオランアスリ」をめぐる問題については、このテーマの研究の先駆者であるノリザン博士の報告に委ねたい。

ECOTOURISM DEVELOPMENT IN CAMERON HIGHLANDS, PAHANG, MALAYSIA : PARTICIPATION AND IMPACT ON THE ORANG ASLI

Norizan Md Nor

Abstracts

This article discusses the ecotourism development in Cameron Highlands, Malaysia focuses on the participation and impact on the Orang Asli community. Research employing a questionnaire survey, interview and field observation was conducted, focusing on how they have benefited by ecotourism and their perceptions towards the tourists and tourism activities. Findings indicate that ecotourism development in Cameron Highlands has both positive and negative economic and socio-cultural impacts. Some of the positive impacts include income generation and employment opportunities, infrastructure development and the improvement of social services, telecommunication and access to electricity. However, the real economic impact is rather small and most of the Orang Asli are at the margin of ecotourism development. As a social group, they are delighted with the arrival of tourists but at the same time they perceived that they gain little from them. Another negative impact involves the degradation of forests and polluted rivers which has affected the well being of Orang Asli. This article suggest that even though the ecotourism development has been taking place quite sometime in Cameron highlands but the involvement and the participation of local indigenous community has been marginal and the impacts on them rather not up to the expectation.

Keywords : Orang Asli, ecotourism, minority development, Cameron Highlands

Introduction

After a decade of sustained growth in volume and visibility, tourism is one of the leading global industries (11 per cent of global GDP) and constitute one of the major migratory movements in modern society - about 700 million international travelers in 2001 (UNEP 2002a) and 760 million in 2004 (New Straits Times 23.6.2005). This has produced significant impacts on resource consumption, pollution and economic and social systems. This article will discuss the participation and impact of ecotourism development in Cameron Highlands, Malaysia, on the lives of the local communities, the *Orang Asli* living in this area. The economic and socio-cultural impacts described here are the effects on host communities of direct and indirect relation with tourists, and of interaction with the tourism industry. The impact arises when tourism brings about changes in the livelihood of the local people, such as changes in economic activities, value systems, behaviour and collective traditional lifestyles. While tourism can generate positive impacts as it can create local jobs and generate income, it may

also threatens indigenous identity (see for example UNEP 2002b; Upchurch and Teivane 2000; Mbaiwa 2004).

Tourism development in Malaysia

From an economic point of view, in Malaysia, tourism is the second most important sector following manufacturing. In 2005, tourism contributed RM31.0 billion with an increased at an average annual growth rate of 12.4 percent, from RM17.3 billion in 2000 to the national economy through foreign exchange and taxes (Ninth Malaysia Plan, 2006), and recorded a total number of 16.4 million tourists compared to 10.2 million in 2000 (Economic Planning Unit and Ministry of Tourism Malaysia 2006). The increase in the total number of tourists arriving in Malaysia has contributed to an increase in income, for example from RM17.3 billion in 2000 to RM26.9 billion in 2002 (Suriati and Morshidi 2004:16) and increase steadily to RM31.0 billion in 2005 (Ninth Malaysia Plan, 2006). This meets the vision of the Ministry of Tourism Malaysia, which is to direct Malaysia to be a dominant country in tourism, and that tourism will be the main sector in contributing to socio-economic development in this country (Ministry of Tourism Malaysia 2005b).

Ecotourism industry which is based on both natural and cultural attraction is becoming important since the demand for exotic vacations has expanded to include visits to indigenous and minority ethnic groups in remote locations around the world (IDRC 1996). In many places, indigenous peoples have maintained local traditions and developed sophisticated practices for the sustainable exploitation of their environment. However, these groups are particularly vulnerable to the negative impact of tourism. In the search for untouched and authentic tourists' destinations, many places once considered 'off the beaten track' have become overpopulated with visitors, accelerating the pace of social and environmental degradation (IRDC 1996).

Malaysia has set up a National Ecotourism Plan in order to promote ecotourism which will boost the country's economy and at the same time will preserve natural heritage. With the objective to lead Malaysia as a destination for international ecotourism, this plan draws attention on the need to establish and manage ecotourism areas. The identified initiatives, among others, includes enhancement of ecotourism coverage area, providing management and development plan for these areas and building up the financial know-how to support ecotourism (Ministry of Tourism Malaysia 2005c). The plan identifies potential sites for ecotourism which include, among others, national parks, forest reserve, rivers, waterfalls, lakes and mountain sides, in which, most of these are the characteristics of the Cameron Highlands area.

Research setting and methodology

Cameron Highlands, situated in the midland of Peninsular Malaysia, is about 1,829 metres above sea level. First discovered in 1885 by a British surveyor William Cameron, the fame of Cameron Highlands grew during the colonial era when British Planters realised the potential of its fertile mountain slopes for growing tea. Since then Cameron Highlands, with its cool temperate surroundings has developed into a popular hilltop holiday spot for both locals and visitors alike (www.cameron.com.my, 2003). As the popular tourists' destination for more than a decade, Cameron Highlands has many places of interest such as a number of tea estates, vegetable farms, strawberry farms, flower nurseries, Gunung Brinchang, jungle walks, waterfalls, and some old buildings left by the British. Most of these are situated surrounding Ringlet, Tanah Rata and Brinchang, three main settlements (towns) in Cameron Highlands. These towns are populated by mainly the Chinese business operators, and the Malays and Indians officials and service workers. The *Orang Asli*, on the other hand, are the inhabitants of the aborigines' villages situated a few kilometers away from these towns.

Socio-economic and demographic background of the *Orang Asli* in Malaysia

Orang Asli is a general term used for any indigenous groups that are found in Peninsular Malaysia. They are the minority indigenous groups in Peninsular Malaysia. They are divided into three main tribal groups namely the *Negritos*, *Senois* and *Proto-Malays* with a number of sub-groups. The *Orang Asli* is further divided into 18 sub-ethnic groups according to their different languages and customs (Table 1). The *Negritos* are usually found in the northern region of the peninsula, the *Senois* in the central region, and the *Proto-Malays* in the southern region. In 2000, the *Orang Asli* comprise only 0.5% of the total population of Malaysia. Their population is approximately 148,000. The largest groups are the *Senois*, constituting about 54% of the total *Orang Asli* population. The *Proto-Malays* form 43% and the *Negritos* forming about 3%.

The poverty rate among *Orang Asli* is 76.9%. In addition to the high rate, the Statistics Department of Malaysia has classified 35.2% of the population as being "hardcore poor". The majority of *Orang Asli* live in rural areas, while a minority have moved into urban areas. In 1991, the literacy rate for the *Orang Asli* was 43% compared to the national rate of 86% at that time. They have a life expectancy of 53 years (52 years male and 54 for female) a high infant mortality rate is also evident with 51.7% death per 1000 birth (government of Malaysia, 1993).

In term of social and legal status, the government agency entrusted to oversee the affairs of the *Orang Asli* is the Jabatan Hal Ehwal Orang Asli (*Department of Orang Asli Affairs*) popularly known as *JHEOA*. This body is under the Malaysian Ministry of Rural Development, and was first set up in 1954. Among its stated objectives are to eradicate poverty among the *Orang Asli*, improving their health, promoting education, and improving their general livelihood. There is a high incidence poverty among the *Orang Asli*. In 1997, 80% of *Orang Asli* lived below the poverty line. This ratio is extremely high compared with national poverty rate of 8.5% at that time.

Table 1 : *Orang Asli* by Groups and Subgroups

<i>Negrito</i>		<i>Senoi</i>		<i>Proto-Malay</i>	
Subgroups	Total	Subgroups	Total	Subgroups	Total
Bateq	1,519	Che Wong	284	Jakun	21,484
Jahai	1,244	Jahut	2,594	Orang Kanaq	73
Kensiu	254	Mah Meri	3,503	Orang Kuala	3,221
Kintak	150	Semai	34,248	Orang Seletar	1,037
Lanoh	173	Semoq Beri	2,348	Semelai	5,026
Mendriq	167	Temiar	17,706	Temuan	18,560
Total	3,507	Total	60,633	Total	49,401

* Total 113,541 [excluding those living in designated *Orang Asli* Settlements which would amount to about 20,000]

Source : *Department of Orang Asli Affairs (JHEOA)*, 2002

Issues and problems faced by the *Orang Asli*

Many studies has been carried out discussing issues and problems faced by the *Orang Asli*. The close proximity to the town have exposed the community to various development projects carried out by the central government, state government and private companies. Among them are the clearing of lands for rubber and palm oil plantations, setting up pig and cows farms and reserve forest by the Forestry Department (this occurred in 1960's). The majority of these projects have created more harm and negative effects than otherwise. In addition to the shortage of water supply, their areas which are fast becoming smaller and trespassing, and also endure;

1. A decreasing number of forest resources (main economic supply), ritual food sources, knowledge, craft, medicine and so forth.

2. Youth are being influenced by unhealthy social ills ensuing in drop-outs.
3. The *Semai* culture of mediocrity and sharing is replaced with selfishness and materialism - the early bird catches the worm attitude.
4. Traditional village administration is reinstated according to government orders, soliciting a middle-man.
5. Indifference towards the involvement of the role of women and youths in society.
6. The government approach in dealing solely with village headmen, board members, government department employees and men advocates the problems stated above.
7. the fading trust amongst *Semai* villages when they display preference towards outsiders claims
8. The emergence of modern religions such as *Christianity*, *Bahai* and *Islam* is causing discord and disunity among the villagers.

However the current increased of awareness and the participation and involvement of the local community, NGOs and government in the planning process will improve present situation.

Cameron Highlands and the *Orang Asli* population

The district of Cameron Highlands experiences an increase in population over the years. In 2000, the total population of Cameron Highlands is about 35,000 people with the annual growth rate is about 1.8 %. The population is projected to increase to 41,913 people in the year 2020 (Government of Malaysia, 2004). Agricultural land use experiences a rapid increase from 1.7% in 1947, 9.3% in 1982 and 17.8% in 1997 (Table 2) while forest land use decreased from 95% in 1947 to 62% in 1997.

Table 2 : Percentage land use change for various land use categories in Cameron Highlands (%)

Landuse	1947	1966	1974	1982	1990	1997
Forest	95.0	78.0	76.0	73.0	72.0	62.0
Agriculture	1.7	2.4	3.8	9.3	10.2	17.8
Tea & Orchards	2.7	8.9	10.8	9.7	9.5	7.5
Urban/Housing	0.6	10.7	9.4	8.0	8.3	12.7

Source : Cameron Highlands District Office 2005

The *Orang Asli* comprise of roughly 14% of the total population of Cameron Highlands with 2,570 in 1990 and 4,275 in 2001. These *Orang Asli* live in 27 villages with an average of 158 people per village. The largest village is kampong Sungai Ruil, located near Tanah Rata town, with

a population of 896 people while the smallest is Kampong Sungai Pinang with 26 people located about 57 km away from the nearest town. Majority of them, 96 % belong to the sub-ethnic group *Semai* and the remaining were from sub-ethnic *Temiar*. They are living on the state land, in villages located along the major rivers such as Sungai Bertam, Sungai Telom and Sungai Lemoi or their tributaries (Table 3).

By degree of development, 4 (15 %) are developed villages which are located near towns, 6 (22 %) are semi-developed villages and 17 (63 %) are underdeveloped villages situated in the remote areas. The urban villages have more facilities such as telephone booth, kindergarten, civic hall etc. In 2001, 21 % of them are *Muslims*, 8% *Christians* 8 %), 5 % *Bahai* and the majority 66 % remained animists. In term of accessibility, 10 villages (37 %) are accessible by most vehicles, 14 villages (52 %) by 4-wheel drives and 3 villages (11%) by 4-wheel drives, to be followed by foot. The standard of living are low and most of them engaged with subsistence farming, fishing, hunting and gathering of non-timber products except those live near to urban areas

Table 3: Orang Asli Population in Cameron Highlands, 2004

No	Village	Sub-ethnic	Households	Population
1	Sg Ruil	Semai	96	896
2	Sg Ubi	Semai	45	228
3	Paggen	Semai	41	296
4	Sg Kabuk	Semai	25	168
5	Sg Chonhong	Semai	15	105
6	Sg Triang	Semai	27	154
7	Kuala Boh	Semai	71	415
8	Sg Relong	Semai	43	211
9	Leryar	Semai	26	141
10	Menson	Semai	13	106
11	Sg Getam	Semai	39	154
12	Sg Telimau	Semai	39	174
13	Terisu	Semai	40	209
14	Sg Jarik	Semai	25	125
15	Lemoi	Semai	25	137
16	Telimau	Semai	11	53
17	Chenan Cherah	Semai	9	47

18	Renglas	Semai	14	91
19	Rening	Temiar	13	86
20	Cheros	Semai	11	73
21	Susu	Semai	14	51
22	Terakit	Temiar	11	36
23	Sg Loon	Semai	10	95
24	Teji	Semai	13	79
25	Tiat	Semai	8	44
26	Abu	Semai	16	75
27	Sg Pinang	Temiar	8	26
Total		2	708	4,275

Source; JHEOA Office, Cameron Highlands,

The tourism agency of Malaysia has introduced various types of tourism products related to the *Orang Asli* in Cameron Highlands. Currently as shown in Table 4 are some of the activities that could attract tourists in Cameron Highlands.

Table 4: Activities related to *Orang Asli* that could attract tourists in Cameron Highlands

No	Activity	Remark	Potential Village
1	Hill padi cultivation	Understand the process of hill padi cultivation, its relation to the <i>Orang Asli</i> 's socio-cultural way of life and impacts on the environment.	Rening, Telanok, Renglas, Cheros
2	Hunting	Understand how the <i>Orang Asli</i> make use of the traditional forest products in hunting activities such as making traps, the use of blowpipe and identify animal tracks and zones.	Rening and other accessible rempte villages
3	Fishing	Participate in fishing trip and understand better the problem of fish depletion as well as methods of fishing such as <i>bubu</i> (trap), <i>jala</i> (net), root poisoning & hook and line.	Villages located along the Telom, Bertam and Lemoi River
4	Forest vegetable and fruit gathering	Female gather forest vegetables (<i>pucuk</i> or young shoots)such as <i>pucuk ubi</i> , <i>pucuk pisang</i> , <i>pucuk paku</i> , <i>menjelei</i> etc. Harvesting of forest fruits such as <i>petai</i> (parkia	Rural villages

		speciosa), <i>rambutan</i> (<i>nephelium lappaceum</i>) etc.	
5	Rattan harvesting	Participate in rattan manao (<i>calamus manan</i>) harvesting trip.	Teji
6	Gaharu harvesting	Participate in <i>gaharu</i> harvesting trip.	Tiat
7	'Bersewang' cultural and religious activity	a. To ensure 'the deceased goes happily to haven'. b. Hill padi harvesting period (January & February).	All villages
8	The 'bersanding' wedding ceremony	The <i>Orang Asli</i> combines their traditional and Malay wedding cultural practice in the <i>bersanding</i> ceremony where the new couple sits on a stage as 'king & queen' to be admired by others.	All villages
9	Types of houses	a. <i>Rumah Yea</i> temporary built in their farms using forest resources. b. <i>Rumah Ran</i> temporary built on trees used during rattan harvesting, opening new land. c. <i>Rumah Pisang Sesikat</i> built at river bank for fishing, in the farm and the forest. d. Normal wooden/bamboo house. e. Wooden house in <i>Terisu Regroupment Scheme</i> . f. Brick houses (latest).	Remote village
10	Tapioca eating	Observe and enjoy the tapioca food.	All villages
11	Blowpipe demonstration	Observe and learn how to use the blowpipe.	All villages

Socio-economic and demographic background of the respondents

The survey, interview and field observation were done in the towns of Cameron Highlands and also in the aborigines villages nearby, such as Kampung Sungai Ruil, Kampung Sungai Kabuk and Kampung Sungai Tiang. 166 Orang Asli of the *Senoi group* were interviewed, of which 149 were the *Semai* sub-group and 17 were the *Temiar* sub-group. The discussion however will not be made with reference to villages, but to the overall socio-economic conditions and perceptions of the respondents studied.

The 166 *Orang Asli* interviewed were ranged from the age of 15 to 80, but the majority was those of age 20 to 44. Questions were asked regarding their socio-economic and demographic background, followed by their perceptions on how ecotourism have affected their livelihoods. 40.4 per cent of the respondents were males and 59.6 were females. 42.2 per cent have never attended school, 22.3 have primary education and 33.2 per cent have attended secondary school. 2.4 per cent or 4 respondents have attained higher education from a college (one respondent) and universities (3 respondents) (Table 5). There are no significant differences between the genders, in which, the majority of both genders have never attended school. However, most of them are the elder respondents of age 40 and above. On the contrary, younger generations of both genders have the same opportunity to seek education in schools. The high percentage of those without formal education and attained only primary education reveals that the *Orang Asli* living around Cameron Highlands form a lower educated group when compared with other major communities in Malaysia, such as the Malays, the Chinese and Indians. Because of this, previous researches on *Orang Asli* often conclude that *Orang Asli* are placed at the margin of development and are often excluded from the mainstream of the socio-economic development (see for example Clammer 1987; Nicholas 1993, 2000).

Table 5: Levels of education according to gender

Levels of education	Male		Female		Total	
	Count	%	Count	%	Count	%
Never attending school	26	38.8	44	44.4	70	42.2
Primary education	19	28.4	18	18.2	37	22.3
Lower secondary education	9	13.4	19	19.2	28	16.9
Upper secondary education	11	16.4	16	16.2	27	16.3
College, polytechnic and university	2	3.0	2	2.0	4	2.4
Total	67	100.0	99	100.0	166	100.0

The *Orang Asli* interviewed are engaged in various types of occupation. The majority of them are production workers and labourers, farmers and also as service workers (Table 6). There is no significant difference between the type of jobs employed by the males and the females, except that the females are prominent in high ranking jobs as professional and managerial workers when compared to men.

Table 6: Occupation of Orang Asli according to gender*

Occupation category	Male	Female		Total	
		No.	%	No.	%
Professional and technical workers	-	1	2.0	1	0.9
Administration and managerial workers	2	3.4	4	8.2	6
Clerical workers	6	10.4	-	-	6
Sales workers	2	3.4	5	10.3	7
Service workers	11	19.0	13	26.5	24
Agricultural, forestry workers, and hunters	16	27.6	11	22.4	27
Production workers and labourers	21	36.2	15	30.6	36
Total	58	100.0	49	100.0	107
					100.0

*This table excludes those claimed as not occupied in any economic activities, which were housewives, students and the elderly.

The majority of them (71 per cent) are salaried workers in the government offices, hotels and resorts, and also in shops and stalls. Most of them are occupied in low ranking jobs such as maintenance workers and cleaners in the offices, hotels and resorts. Others are caddy in the golf resorts, waiters in the restaurants, sales assistants in the shops and also a cook in a hotel. Some of the respondents are working with the government offices as clerk assistants and drivers. Only a few, higher educated respondents have managed to work in the higher ranking jobs such as officers in the community development offices (3 respondents), and also as a female teacher and a male tourist guide.

Only 29 per cent of the Orang Asli interviewed are self-employed. They are farmers (26 respondents), hunters and gatherers (2 respondents) and business operators (3 respondents).

These findings reveals that ecotourism development in Cameron Highlands have an impact in both economic and socio-cultural aspects of the life of *Orang Asli*. Once known as the hunters and gatherers of Malaysia and very much dependent on the land, rivers and forest as their sources of livelihood, they have now become incorporated into the global economy and have diversified economic activities in sectors other than agriculture. This is similar to other findings elsewhere which shows that tourism development has positive economic impacts on the local people because it generates income and employment opportunities from the infrastructure development such as tarred roads, hotels, lodges and resorts (see for example Suriati and Morshidi 2004, UNEP 2002c, Mbaiwa

2003; Upchurch and Teivane, 2000). Where ecotourism offers a viable economic alternative, tourism opportunities have induced people like the *Orang Asli* to abandon cultivated land, allowing forests to regenerate. This has become one of the reasons that turned conservationists to ecotourism in order to provide local economic benefits while maintaining ecosystem integrity (see Stem, Lassoie and Lee et al, 2003).

The extent to which the *Orang Asli* are able to reap the economic benefit of the ecotourism in Cameron Highlands will be investigated further by looking at their income gained from their employment. Table 7 indicates the monthly income of 107 employed respondents.

Table 7: Distribution of income according to gender

Monthly income	Male		Female		Total	
	Count	%	Count	%	Count	%
RM300 and below	19	32.8	16	32.7	35	32.7
RM301- RM600	20	34.5	29	59.2	49	45.8
RM601-RM900	13	22.4	2	4.1	15	14.1
RM901-RM1200	6	10.3	1	2.0	7	6.5
RM1201 and above	-	-	1	2.0	1	0.9
Total	58	100.0	49	100.0	107	100.0

The majority of the working respondents studied can be categorised as low-income earners. More than 70 per cent of them earn RM600 per month and below. Almost a third of them earn RM300 and below, and these are mainly self-employed farmers and low-paid labourers. Only very few, that is 6.5 per cent earn an income of RM901-RM1200. They are mainly clerks and officers in the government offices, drivers and sales operators. Only one respondent earns more than RM1200, that is the female school teacher who earns RM2500 per month. There is no significant difference between the men and women's income except in the category of RM301-RM600, in which many women than men have an income in this category whereas many men have an income in the upper category (RM601-RM900).

Most of those who are employed in jobs directly related to tourism (maintenance workers in the hotels, caddy in golf resorts, waiters and sales assistants), earn between RM301 to RM600 per month. Only a few, such as a cook, a tourist guide earn between RM601-RM900. Only one respondent, who gathers forest produce and sells them to tourists claimed that he earns to more than RM1000 per month. This shows that ecotourism create jobs and generate income to the *Orang Asli* living in this

area, and those working in non-agricultural sectors and directly related to tourism earn better than those working in agricultural sector as self-employed farmers.

This findings supports the similar study on the impact of tourism to local people such as by Suriati (2004) and Ashley and Roe (2002) and others mentioned above, in which, ecotourism offers a wide range of jobs to many lower educated, poor local people. Even though the income is still rather low, what little they obtain is important to the livelihood of the local people, especially at a time when ready money is becoming increasingly important to pay for necessities such as food, services and education. If we take this into account, it is easier to understand why the majority of Orang Asli view ecotourism in a positive light at the area studied, as will be discussed below.

Orang Asli's perceptions on economic and socio-cultural impact of ecotourism

The economic and socio-cultural impacts of ecotourism discussed here are from the view of the host communities, the Orang Asli. They gave their opinion on effects of direct and indirect relations with tourists, and of interaction with tourism industry. Host communities are often the weaker party in interactions with their guests and service providers, leveraging any influence they might have (UNEP 2002b). These influences are not always apparent, as they are difficult to measure, highly depending on value judgments and are often indirect or hard to identify.

The respondents were asked on how they feel with the influx of tourist to Cameron Highlands and to their villages. Of the 166 respondents interviewed, 85.5 per cent (142 respondents) said that they are happy and excited with the inflow of tourists to Cameron Highlands whereas the rest (14.5 per cent or 24 respondents) are feeling irritated and disturbed. The percentage of women who gave negative gestures and are uncomfortable with the arrival of tourists is a little higher than that of the men. Table 8 summarises positive reasons and Table 9 demonstrates negative reasons behind their answers and gestures.

Table 8: The reasons for feeling happy and excited with the arrival of tourists

Reasons	Male		Female		Total	
	Count	%	Count	%	Count	%
The coming of tourists has increased the family income	10	16.9	8	9.6	18	12.7
We gain new experience, they gave us presents and we feel happy to know them	25	42.4	48	57.8	73	51.4
The village become more developed and cheerful	21	35.6	24	28.9	45	31.7
No comment	3	5.1	3	3.7	6	4.2
Total	59	100.0	83	100.0	142	100.0

Table 9: The reasons for feeling disturbed and uncomfortable with the arrival of tourists

Reasons	Male		Female		Total	
	Count	%	Count	%	Count	%
I don't like tourists, they are impolite; They are ignorant and rude; I feel disturbed and irritated for they just come to take a quick snapshot and gone	5	62.5	13	81.2	18	75.0
I am shy and worried because our houses/ villages are poor/improper	1	12.5	3	18.8	4	16.7
No comment	2	25.0			2	8.3
Total	8	100.0	16	100.0	24	100.0

These grievances and irritation due to tourists' behaviour have been reported by other research on the perceptions of host communities (see Ransom 2005; UNEP 2002d; Suriati 2004). The respondents were concerned that the tourists' photographs would not portray their village in the most favourable light. Similarly there were complaints that the inappropriate attire of the visitors shows a lack of respect for the elders. Such irritation can lead to social stress among the local communities.

Involvement in tourism industry

Even though many respondents claimed that they are pleased with the inflow of tourists to Cameron Highlands, the number of those who perceived themselves as involved in tourism industry is small. Only 22 per cent (36 respondents, 18 men and 18 women) perceived that they have direct involvement with the tourism industry and with the tourists, particularly those who work as tourist guides, workers in the hotels and lodgings, assistant sales in shops and as caddy in golf resorts (Table 10).

Table 10: Involvement of Orang Asli of Kg Sungai Ruil in Tourism in Cameron Highlands, 2004

Items	Number of Males	Number of Female	Total
Selected major hotels:			
a. Merlin Inn	5	5	10
b. Strawberry Park	4	-	4
c. Heritage Hotel	6	12	18
d. Equatorial	14	11	25*
Subtotal (i)	29	28	27
Caddy at Merlin Inn Golf Course:**			
a. 15 years +	45	-	45
b. Below 15 years	25	-	25
Subtotal (ii)	70	-	70
Tour guide (subtotal (iii))	4	-	4
Total	103	28	131

* more than half of these workers are from Tapah

** mostly part-time basis

Attending courses related to tourism is another way of making the respondents feel that they have contribute to the tourism industry. Half of the respondents (54 per cent or 91 respondents) claimed that they have attended some short courses related to tourism activities sponsored by the local authorities such as the Department of Orang Asli Affairs and the Department of Tourism. What encourage them to attend the courses is very much social in reasons. Many respondents said that they are interested to know the tourists and to attain knowledge from them. Respondents who are the community leaders and those who work as officials in the government departments, for example, are

often asked to attend such courses. It is related to their work, in which the community leaders are responsible in helping their people to enhance their knowledge and therefore enabling them to participate actively in tourism-related activities.

The purpose of such courses, among others, is to teach the Orang Asli ways to provide accommodation to tourists, therefore they will have the opportunity to increase their income. The tourists may choose to stay with the Orang Asli through a homestay programme. Those interested in joining the programme would have to register with the tourism department. The condition of their house would then be assessed by the department to evaluate their suitability as places of accommodation for visitors and tourists (Suriati and Morshidi 2004:111). Therefore those who join the homestay programmes would also have to upgrade the condition of their houses.

Table 10 shows that 55 per cent of the respondents (92 persons) have entered the programme, which proves the positive attitude of the respondents towards the tourists. Surprisingly, their main reason for joining the programme is for social purposes, such as to make friends with the tourists, and to get experience from them (reasons cited by 93 per cent of the respondents involved in the programme). The economic purpose (to increase the income and to get aid from the government) has become the reasons for only a few of them (7 per cent). This reveals that the Orang Asli is very attracted to tourists in the social way and they realise that they will not gain much, economically, from them.

Of the other 29 per cent (48 respondents) who do not become a member of the homestay programme, 56 per cent said that they are reluctant to participate because they do not want to be disturbed by the tourists. For many of them, the tourists will just create problems to them. Some indicated that they have social constraints, including language and cultural barriers, which made them not interested in establishing relationship with tourists. 44 per cent thought that their house is in poor condition, have no rooms and have lack of facilities, thus it is not suitable for the homestay programme. Interestingly this finding supports the earlier discussion in that they do not like tourists because they feel that tourists are ignorant and their visit interrupt their daily activities.

The rest of the respondents (16 per cent of the 166 respondents) cannot give comment on this matter because they do not know about the homestay programme and are not sure whether their houses are in the programme. These 16 per cent represent the younger and elderly respondents.

Table 11: The reasons for joining/not joining the homestay programme

Reasons	Male (Count)	Female (Count)	Total(Count)
Reasons for joining the homestay programme			
1. To get to know tourists/to attain knowledge from them	34	52	86
2. To increase an income/to get aid from the government	4	2	6
Total	38	54	92
Reasons for not joining the homestay programme			
1. I don't like tourists/ they disturb our daily activities/ they are impolite/ I cannot speak their language/ Our culture is different	11	16	27
2. My house is in poor condition/ there is no room/no facilities	5	16	21
Total	16	32	48

Perception on the benefits of the tourism industry

35 per cent of the respondents indicated that the influx of tourists and tourism-related activities in Cameron Highlands has benefited them because they have the opportunity to establish relationship with the tourists and to learn about the outside culture. More new jobs are created for women whereas their receptiveness usually lead to economic and social exploitation (Ritcher 1994)

56 per cent of the 166 respondents said that the clearing of forests for tourism activities do not give any positive economic or social benefit to them. Comments on physical degradation are often heard. The Orang Asli said that the rivers are polluted with high level of soil residue, which made it unsuitable for every day use. They are worried and feel threatened with the recurring incidents of landslides due to the clearing of forests in Cameron

Due to the forestation, they have now a very limited area to go hunting and gathering food. The Conservation Act which aims to conserve the forest has also given another impact on the economic and well being of the Orang Asli. While it secures valuable flora and fauna in the forests, it has affected the source of livelihood of Orang Asli. This led to resource use conflicts, that is competition

between tourism and Orang Asli for the use of primary resources (see also Stem, Lassoie and Lee 2003; Riemer 2004). As hunting and gathering some forest produce is now prohibited, many of the *Orang Asli* have given up their traditional occupation and seek for other-salaried jobs around the towns of Cameron Highlands.

The rest 44 per cent saw positive consequences of the clearance of forest for tourism development purposes. They believed that the development of hotels and shop lots will create more jobs for them. They also believed that the local economy will be enhanced by these activities.

Once known to be a talented hunter and gatherer, many of the *Orang Asli* today has lost their traditional skill. Even though 65 per cent of the respondents claimed that they are skilled in forest tracking, but the majority of them have no skill in hunting, gathering forest produce and finding food in the forest (more than 60 per cent). The majority of them have also admitted that they have no ability or talent to live in the forests similar to their grandparents or ancestors. Thus ecotourism development led to the irreversible socio-economic and cultural change in the livelihoods of the local communities such as the *Orang Asli*.

Conclusions

This study offers insights on the economic and socio-cultural impacts and the residents' participation and attitudes towards ecotourism. Ecotourism has a dramatic impact at the local level, as some traditional cultures and economies are being modified to an extent that they are effectively destroyed. A number of perceived positive and negative impacts of the development are reported and these appeared to be related to levels of community attachment. Although respondents are generally supportive, there is a sound opposition from the community. Therefore, it could be inappropriate to conclude that the respondents would be 'euphoric' about the development. On the other hand, views on tourism development are partly gender based. It appeared that women are generally more opposed to the development on the grounds of perceived negative impact. Paradoxically, women highlighted positive social impacts including the ability to attain knowledge from the tourists and the development in greater extent than the men. Further research into gender variations in relation to such development should have priority, particularly as any findings should assist in the tourism planning process.

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マレー半島の漁村におけるツーリズムの課題
Problems for Tourism in Fishing Villages of Malay Peninsula

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Abstract

In recent years there has been considerable concern about the introduction of tourism to the rural area in Malaysia to sustain the socioeconomic well-being of the people. The tourism, however, does not always give good effect there. The aim of this presentation is to discuss tourism in fishing villages of Malay Peninsula. Firstly I categorize the fishing villages of Malaysia from the standpoint of historical process of formation. Secondly I analyze the description of fishing village on the tourist brochures. Lastly I discuss the case of introduction of tourism in a Chinese fishing village in Johore State.

はじめに

報告者は、1991年以来、マレー半島の小規模漁村における漁場利用（田和,1992）と水産物の利用（田和,1995；田和,1999）について調査研究を進めてきた。その手法は、参与観察による生態学的なパースペクティヴによる時間・空間利用の分析や聞き取りによる生業経済や生活様式の把握であった。今回の主要なテーマである「ツーリズムを通じて貧困の問題や住民の自立を問うこと」については、これを課題として調査研究を行ってきたわけではない。したがって、シンポジウムに参加するに適当な話題提供者とはいえないが、これまで巡ってきた数々の小規模漁村での経験を定性的に語ることによって、漁村におけるツーリズムに対してその課題と展望をわずかながらでも提示できれば幸いである。

本日の発表内容としては、まず、①バックグラウンドとしてマレー半島の漁村成立の歴史を位置づけ、②半島マレーシア水産業の動向を簡単におさえ、③小規模漁村とツーリズムについてメディア（観光パンフレット等）でのとらえ方を明らかにした後、実際のフィールドワークで得たデータと比較考察し、最後に、④華人漁村におけるツーリズムについて事例を紹介する。

1. マレー半島の小規模漁村の成立

マレー半島はおよそ 1,850km にわたる長い海岸線をもつ。沿岸から 80~160km の範囲には大陸棚が発達している。漁業地域は、南シナ海（南中国海）に面する東海岸側と、マラッカ海峡に面する西海岸側とに大きく分けることができる。これら 2 つの地域の漁業環境は著しく異なっている。東海岸は、一部の岩石性の海岸を除くと、出入りの少ない単調な砂浜の連続である。港湾には不向きなところが多く、漁船は集落の前の海岸に引き揚げられたり、流入河川の河口部に係留されたりしている。4 月から 10 月にかけての南西モンスーンの時期が盛漁期にあたる。半島中央部の脊稜山地がこの季節風を遮るかっこうとなり、海は穏やかになるからである。しかし 11 月から翌年の 2、3 月にかけては北東モンスーンの影響をまともにうけ、風波が激しく一部の漁業種類については全く操業に適さない。

一方、西海岸は遠浅の砂泥海域が続く。最近は貧弱になってはきたものの、各所にマングローブ湿地が展開する。河口部や沿岸湿地にそって、漁船の係留に適した港湾も多くみられる。東海岸とは反対に、10 月から翌年の 4 月にかけての北東モンスーンの時期が、主要な漁期である。ただし、南西モンスーンの時期でも、マラッカ海峡内では西に位置するスマトラ島が季節風を遮るので、操業に特に支障をきたすことはない。東海岸とは異なり周年操業が可能である。

ところで、東南アジアの漁村成立を、漁業をいう民族と人びとの移動に注目して分類した場合、報告者は以下のような 7 つのカテゴリーを考えるにいたった。

- ①船上生活者が、沿岸のマングローブ地帯や隆起サンゴ礁島に定着することによって形成された漁村・漁業地域
- ②中国南部からこの地に流入した中国系移民によって形成された漁村・漁業地域
- ③各国の主たる民族および宗教上のマジョリティに疎外、排斥されたマイノリティによって辺境に形成された漁村・漁業地域
- ④国内外の移住政策によって形成された漁村・漁業地域
- ⑤土地を所有しない人びとが漁業へ就労したことによって大都市周辺に成立した漁村・漁業地域
- ⑥土地なし農民や零細農民が農業や農村から排除されたのち、手っ取り早く収入を得る方法として漁業に従事することによって成立した漁村・漁業地域
- ⑦内戦状態や政情不安によって、従前の村から避難した人びとが形成した漁村・漁業地域

マレー半島の場合、何世代にもわたって定着し続けてきたマレー系の人びとが形成した、いわゆる伝統的な漁村・漁業地域がその基盤にあることはいうまでもない。その上に、上記の②にみられる中国系住民が居住する漁村が形成された。わずかながら、①にある船上生活者（Sea Nomads）の定着や、1970 年代以降にみられた、ベトナム系難民やカンボジア系難民の受け入れとその後の漁業への参入によって形成された、⑦にみられるような諸

漁村を加えれば、マレー半島の漁村をほぼ語りつくすことができよう。

マレー人漁村と華人漁村とは、これまできわめて対照的にとらえられてきた。マレー半島の東西両海岸の漁業を漁業社会および漁業経済に注目してあらためて考察してみると、以下のような相違点が浮かびあがる。すなわち、東海岸側にはマレー系漁業者が居住する伝統的漁村社会が多く、漁業生産は西海岸に比べて少ない。西海岸は華人系漁村が中心で、商業的な漁業経済が特徴である。19世紀、西海岸を中心におこなわれたイギリスの植民地開発によって、多数の華人系、インド系移民労働者がスズ鉱山やゴムプランテーションに流入した。これにともなって周辺部では都市の成長が始まり、都市住民の重要な動物性蛋白源として、水産物の需要が高まった。このことは、専業漁民として、マレー人以上に華人移民を商業的漁業に参入させる結果となった。漁業の発展は、都市地域に近い西海岸に集中し、東海岸の漁業は流通システム、市場システムが整っていなかったために停滞を余儀なくされた。20世紀になると西海岸を中心に近代的な道路網、鉄道網が確立し、氷冷システムによる鮮魚輸送の長距離化がはかられ、とくに華人が市場や流通の過程をますます掌握するようになった。それのみならず、西海岸の各漁村には華人系魚商人が配置され、華人資本によって漁業生産もさらに増大したのである。

2. 半島マレーシアの漁業概況

1990年代から2000年代初頭にかけてのマレーシア全体の海面漁業生産は、100万トンから増加傾向にあり130万トン近くに至っている（第1図）。半島マレーシアの生産量が占める比率は、このうちの70～75%である。近年は90万トン前後で推移している。2002年の統計から、漁業種類別の漁獲量をみると、近代的漁業のカテゴリーにはいる2つの漁業種類、すなわち底曳網およびまき網による漁業生産量が、それぞれ約50万トン、23.5万トン、合計73.5万トンと半島全生産量の80%以上を占めている。残りの約20%は、伝統的漁業に分類される刺網類、敷網類、漁柵、袋網、釣りなどによるものである。就業者数は、底曳網が14,939人、まき網が12,225人となっており、半島全体の就業者数51,772人のうちの52%を占めている。その多くは、資本家あるいは船主層に雇われた漁業労働者である。残り48%は沿岸での小規模漁業従事者である。そのことから考えると、漁業経済構造の二重性は顕著であるといえるだろう。

漁業者の地域別民族別数を示したものが第1表であるが、これをみれば、東海岸はマレー人漁業者が卓越し、西海岸には華人漁業者が多いという基本的構造は現在も変わっていない。すなわち、マレー系（ブミブトラ）漁業者は、東海岸ではケランタン、トレングヌ、パハンの各州、そしてジョホール州東海岸側、西海岸側では北部のプルリス、ケダー、ペラー3州とジョホール州西海岸側に多い。華人漁業者の分布地域は、これとは全く反対で、東海岸の北部一帯ではほとんど見られず、西海岸ではペラー、セランゴール、ペナン、ジ

ヨホールの各州に偏っている。

3. メディアにみる小規模漁村のツーリズム

(1) パンフレット類における小規模漁村・漁業の記述

マレー半島の小規模漁村は、メディアの中でどのように認識され、ツーリストに対して何を発信してきたのであろうか。ここでは、各地のツーリストインフォメーションセンターにおいてツーリストに無料で配布される各州を紹介する観光パンフレット（一部ガイドブックを含む）での取り上げられ方と記述内容に注目し、さらに報告者のフィールドワークによる考察も加えて、そのことについて考えてみたい。パンフレット類のほとんどは、マレーシア政府観光局（文化・芸術・観光省：後に観光省として独立）によって発行されたものである。したがって、そこにある情報は、観光局が州を代表すると考える自然資源および文化資源を提示しているはずである。

第2表は、報告者が収集した、英語表記および日本語表記の観光パンフレットの内容をまとめたものである。

ここでは、漁村・漁業について比較的説明の多い、東海岸のクランタン、トレングヌ、パンの3州および西海岸セランゴール州の表記について詳しく見てみよう。

クランタン クランタン州では、漁村は観光の重要なキーワードとなっている。パンフレットの中には「漁村（Fishing Village）」を小見出しにして説明しているものもある。Kelantan(1998発行)は、「マレー半島東海岸の心を形づくる、数多くある漁村のひとつも訪ねることなくして、ケランタンを訪ねたとはいえない」と述べ、諸漁村のうち最もよく知られているのは、州都コタバルから 14km の距離にあるサバク海岸にある漁村であるという。午後遅くに漁から戻る漁業者に出会い、漁獲物が積まれた色鮮やかな漁船を見逃さないようにと説明が続く。そして、海岸で漁獲物をめぐって漁業者と魚商人との間で繰り広げられる水揚風景のにぎやかさと興味深さも指摘されている。

報告者の調査によると、1998年当時のサバクの集落近くの砂浜海岸は、海岸流の影響で改廃が著しく、多くの漁船が、集落からかなり離れたマングローブ湿地を開削して造られた新しい船溜りを利用していた。漬け柴（ウンジャン）を使用するプカ・タンクルと呼ばれる四つ張り網が 10 統操業していた。荒天となる雨季を除く 3 月から 10 までの期間、アジ類やニベ類など群れをなす魚を漁獲した。操業形態は、4 隻の漁船が大型の敷網の四方をそれぞれ引き揚げるもので、漬け柴を操作する漁船 1 隻を加えた 5 隻で 1 統をなした。漁船は、パンフレットの記述にあるように、伝統的でかつ色彩の鮮やかなものである。多数の漁船が舫う船溜りはサバクにおいて他ではなく、ツーリストに注目される大きな文化資源といえよう。しかし、ツーリストが漁業活動を実際に見るには時間的制約が極めて大きいことを指摘しておきたい。漁船団の帰港時刻が限られているし、水揚げ物を漁業者と

地元の女性の魚商人とでやり取りする光景は現在も見られるが、集荷が終わると漁獲物はすぐに自動車に積み込まれ、コタバルの市場へと運ばれてゆくからである。

トレンガヌ トレンガヌ州でも、漁業は古くから主産業のひとつである。200km以上におよぶ長い海岸沿いに特徴的な多数の小漁村が立地している。Terengganu(2006年発行)は、「観光客は河口あたりで漁業活動を目の当たりにする」と説明する。しかし、パンフレットやガイドブックで扱われるのは、ドゥヨン島、マラン、スプランタッキールの3つの漁村が中心である。トレンガヌ川河口にある砂洲島ドゥヨンはトレンガヌ州でもっとも有名な造船業の島として、必ずといってよいほど取り上げられている。Terengganu(1999年発行)はマランを、ココヤシが風にそよぎ、心地よい空気、美しいラグーン、トロール漁船がツーリストを迎えてくれる「絵のような美しい漁村」と形容している。スプランタッキール漁村は、トレンガヌ川をはさんで州都クアラトレンガヌと向かい合う小漁村である。塩干魚とすり身(ケロポック・レコー)加工の在村型製造業で名高かった。そのことはTerengganu(2006年発行)にも記載されているが、1998年の現地調査によると、かつて20数軒を数えた塩干魚加工場もすでに3軒、すり身加工場は2軒営業しているにすぎなかった。原料魚の漁獲が地元において減少したことが閉業の最大の理由であった。2007年の調査では、塩干魚加工場は2軒、すり身加工場は1軒となっていた。塩干魚のふるさとと言われ続けてきたことや経済の変化、文化資源の減少について、紹介文の修正が必要である。

パハン パハン州の説明で漁村が登場するのは、州都クアンタンの北方10数kmに位置するブッサラーのみである。Kuantan(1990年代発行)には、ブッサラーが「一風代わった漁村」として掲げられている。それは、砂浜に戻ってきた漁船から漁獲物を運搬する時に水牛車が使用されることからである。また、ブッサラーは塩干魚製造でも有名であるが、1998年当時、経営は華人による4軒にすぎなかった。

報告者のこれまでの調査によると、パハン州では、パハン川河口のクアラパハンやブバ一川河口のネナシのほうが、漁村景観、漁業景観のいずれにおいてもマレー漁村の特徴をより多く備えているといえる。しかし、それらがパンフレット類において取り上げられることはない。

セランゴール Selangor Darul Ehsan(1997発行)には、クアラルンプルの外港クランの沖合に浮かぶケタム島が取り上げられる。この島が「カニ島」と訳せることや木を組んだ道が連なるユニークな杭上集落からなることが述べられ、そこでは、ボートツアーや漁(fishing trip)、バードウォッチングを楽しめること、ホームステイが可能であることが説明されている。

ケタム島は、5000人以上が居住する華人漁村である。この島は、「都市近郊型漁村」と位置づけられる。マレー半島最大の観光漁村のひとつといえるであろう。しかし、観光客のほとんどは、海鮮料理を楽しみに来島する「短時間滞在型」である。都市に在住する華人

が休日を利用してハイキングにやってくるようなツーリズムの形態が中心である。島の桟橋で高速艇から降りた観光客たちの行動範囲は、桟橋に近い中華海鮮レストランと島の中心商店街にほとんど限られている。上述のようないわゆるエコツーリズムを体験する装置は完備していない。パンフレットの記述は誤解を生むことを指摘しておきたい。

(2) ルーラルツーリズムとしての漁村の位置

近年、ルーラルツーリズムという言葉をよく耳にする。ルーラルツーリズムとは、いわゆる「農漁村的な田舎風の暮らしぶり」を消費するツーリズムであり、食べ物や飲み物といった商品や宿泊所はもとより、様々なインフラ、自然資源や文化資源に依存しながら構築されるものである。マレーシアの漁村では、現在、このようなツーリズムが、漁業開発公社 (LKIM: Lembaga Kemajuan Ikan Malaysia, Fisheries Development Authority of Malaysia) やツーリスト発展協会 (TDC: Tourist Development Cooperation) によって、各地で徐々に進められている。ツーリストが地域の漁業コミュニティーに親しむことができるようなエコツーリズムなども推進されている。

たとえば、ツーリストが直接、漁家のいえにホームステイし、漁業者の生活（いわゆるカンポンライフ）に触れることができたり、漁業活動を体験したりするような場の設定が考えられる。現地の文化や生活を知るには、実際に漁村に住んで交流を持つことがもっともその近道であることに異存はないであろう。

第2図は、LKIMが漁村ツーリズムを進めている地域を示したものである。ここでは、ホームステイ先として、ケダー州の1漁村、ペナン州の2漁村、計3漁村が掲載されているにすぎない。他はいずれもシャレーを有する小規模な宿泊地が設けられているところである。東海岸にあっては、トレングヌ州北部のブルヘンティアンの1カ所にとどまっている。

このようなルーラルツーリズムが立ち上ることは、地域の側にツーリズムに関係するさまざまな収入を生み出す方法と考えられ、期待もされる (Yahaya, 1994)。しかし、漁村の側にほとんど雇用機会がなかったり、公的な援助が行われなかつたりすれば、地域が生み出す漁業ツーリズムは、都市の様々な観光地やビーチリゾートに実際には全く対抗できない。

パハン州も近年、オルタナティヴな宿泊としてのホームステイ型ツーリズムに力を注いでいる。自然資源のキーワードは、「島と海岸」および「山地」である。その中でホームステイが取り入れられているのは、熱帯林地帯にある渓谷域など山地を中心とする。島と海岸としては、北部のチェラティン、南シナ海のティオマン島などがある。これらは国内でも第一級のビーチリゾートとして施設が充実している。その中に小漁村が点在しているが、それらの漁村におけるツーリズム施設の充実も、ビーチリゾートには対抗できず、手つかずのままで現在にいたっている。

4. 漁村と観光—ジョホール州の華人漁村パリジャワ

ここでは、1991年から1998年にかけて継続的に調査したジョホール州の華人漁村パリジャワにおけるツーリズムについて考えてみよう。

パリジャワは、マラッカ海峡に面した、ジョホール州北西部、中心都市ムアーの南10数kmに位置する町である。漁港はショップハウスが並ぶ町の中心から約1km西にある。沿岸はかつて湿地帯であり、百数十年前にはマレー人の家屋がわずかに点在するにすぎなかった。そこに潮州人、福建人など華人がマレー半島各地から流入し、マングローブを伐開し、漁港を徐々に形成していった。加えて媽祖廟など宗教施設も設けられた。華人たちは、華語で海口、マレー語でパンタイとよばれる漁港周辺を「パリジャワ発祥の地」ととらえている。

漁港は、住宅地の間を流れる小河川パリジャワ川の河口部を開削して造られたものである。付近には砂泥干潟とマングローブ湿地が残り、その間の細い瀬すじがマラッカ海峡へ続く漁船の出入り口となっている。1950年代後半生まれの世代によれば、彼らが子供の頃、漁港周辺には砂が混じる海岸が広がっていた。子供のころ、この海岸でボールを蹴って遊んだという。しかし1969年、河口部分に高潮から周辺の農地と宅地を守るために水門が設けられた。農地からの排水路としての機能をあわせもつパリジャワ川の泥土が多く含まれた水は、この水門を開いて一気に海へ放水された。このような水位調節法によって海岸部には砂泥が堆積し、泥干潟を発達させる結果となつたといわれている。

主要な漁業種類は、伝統的な漁業種類に含まれるかご、ケーロン（漁柵）、浮刺網（流網）である。操業域は地先の浅海域およびジョホール州北部一帯の沖合であった。

1997年の漁業者数は、パリジャワが含まれるムアー漁業地区全体で930人を数えた。このうちマレー人が592人(63.7%)、華人が338人(36.3%)であった。パリジャワの漁業者数は約300名を数え、その80パーセント以上が華人漁業者であった。漁獲高はムアー漁業地区全体のおよそ60パーセントをしめ、年間約1,100トン、金額にして657万リンギット(約2億円)に達した。漁獲物は地域内で消費されるほか、ジョホール州内の内陸諸地域へと運ばれた。エビ類やマナガツオ、フエダイなど、高級魚の一部はクアラルンプルのほかジョホールバルを経てシンガポールへも出荷されていた。

漁港周辺には海鮮料理を売りものにした中華料理店が数軒営業していた。パリジャワは鮮度のよい魚を提供する場所としても名前が通っており、週末や休日には海岸べりで食事を楽しもうとする多くの客が集まつた。また、近隣の漁村パリウナには信仰を集める廟があり、1990年代前半にはシンガポールからも観光バスを仕立てて参拝者が訪れた。このような参拝者が、パリジャワで海鮮料理を楽しむ光景も見られた。

ここに2枚の「パリジャワ海口」の地図を用意した。1枚は1991年当時のもの、もう1

枚は1998年のもので、1998年の地図は1991年の地図をベースとしてその上に変化の状況を描き加えたものである。両図を参考にしながら、海口の変化について見てみよう。

景観的にもっとも変化したのは、レクリエーション客を目あてに造られた施設の増加であった。集落後方の湿地林は50m四方の広さがあり、1991年当時には、一部はごみ捨て場と化していた。それが、1994年にはジョホール州政府の援助によって伐採・整地がすすめられ、そこに大型の集合型店舗施設が完成した。そのなかで3軒の海鮮料理店が営業を開始した。集落の対岸にあたる場所には、1991年当時、放棄された古い養魚池が4面あった。1996年、このうちの3面が埋め立てられ、そこに海鮮料理店およびカラオケハウスが開店した。他方、このような新規の海鮮料理店の開業によって、以前から営業していた海鮮料理店のなかには客足が遠のき、閉店を余儀なくされたところが見られた。漁港の先端に近い2軒が1996年に閉店した。

漁港の対岸に残された養魚池1面も、1996年には改修され、釣り堀施設「巴冬釣魚台」となった。この施設はパリジャワ在住の華人により経営されていた。池にはアカメ科の魚を中心にハタ、フエダイが放たれていた。活魚はいずれもジョホール州南部の養殖漁村クックップから購入され、購入価格はキログラムあたり18リンギットであった。入場料金は1時間で10リンギットとけっして安くはなかったが、近隣の華人、マレー人にとっては手頃なレジャーの場所として受け入れられるようになってきていた。

漁港の突端部には、木造の長い桟橋があった。かつては漁船を係留する場所であったが、水路から排出される砂泥によって干渉化が進行し、1991年当時、すでに使用できなかった。1996年、この桟橋の中ほどから高床の張り出しが設けられ、ビヤガーデンとして使われるようになった。ここには、マレー語で漁業者を意味するヌラヤン(nelayan)という屋号がつけられていた。

以上のような開発を中心的に進めてきたのは華人P氏(1998年当時40才)であった。P氏は、パリジャワ出身で、ムナーの英語系の高校を卒業したのちにクアラルンプールで警察官として就職し、1994年にその職を辞して故郷に戻ってきた。その後、レクリエーション開発の会社を設立し、州政府の認可をうけてさらに開発を進めようとしていた。そのことが漁業地域の振興につながるという発想であった。開発は、「川を愛する計画(Love the River Project)」と命名され、1996年から数年の後には、約1haの湿地帯を緑におおわれた美しい海岸沿いの観光リゾートに仕上げようというものであった。マングローブやニッパヤシの茂みの間にレストラン、ケーロンの櫓に似せたニッパ葺きの小屋、小さな宿泊施設などを造る。観光客はそこからウォーターフロントを楽しみ、海岸に生息する動物や鳥類を観察する。また、マングローブ湿地を歩いたり、マラッカ海峡で魚を釣ったりするのである。(Utusan Malaysia紙, 9, Jul., 1993, New Straits Times紙, 26, Jan., 1996; 30, Aug., 1996; 18, Oct., 1997,)。P氏は一方で、州政府の方針にしたがって環境の保全に努力し、リゾートの近くには自然保護センターを設ける構想ももっていた。しかし、1997年の

マレーシア経済の停滞とともに資金調達の目途がたたなかつた。しかも地元の漁業者からは開発に対する十分な理解をえられなかつた。1998年9月にクアラルンプルで開催された英連邦スポーツ大会以前に完成を予定していたものの、計画は頓挫してしまつた。

おわりに

漁村は、美しい海岸やマングローブ林、そこに生息する様々な生物相といった自然資源や漁業活動、生活様式といった文化的資源さらには水産加工品などの特殊な小生産品を多々有している。それにもかかわらず、漁村におけるツーリズムは、管見の限りでは安定した代替生業とは考えられない。

ここまでマレー半島の諸漁村を俯瞰してきた。これをふまえて、報告者は、これら漁村を大都市およびリゾートとの関係に注目して以下のように3つに分類した。

- ① 大都市や地方の主要都市近郊に立地する漁村
- ② 海岸（ビーチ）リゾートに隣接する漁村
- ③ 大都市やリゾートから隔離された漁村

の3分類である。

大都市あるいは地方の主要都市近郊に立地する漁村としては、クアラルンプル近郊のケタム島、クアラセランゴール、第4章で取り上げたジョホール州ムアー近郊のパリジャワ、さらにはジョホール水道を隔ててシンガポールと向きあうククップなどを例示することができる。いずれも華人が集住する漁村である。島の漁村を除くと、ツーリストは都市域から自家用車を利用して訪れる。彼らが求めるものは、ほとんどの場合、新鮮なシーフードである。したがって、集客施設としては海鮮レストランであるが、施設のほとんどはローカルな小資本で維持されているにすぎない。

ビーチリゾートに隣接する漁村としては、東海岸であれば、クランタン州からトレングヌ州、パハーン州へと続く砂浜海岸に立地する諸漁村、西海岸ではランカウイ島（ケダー州）、ペナン島、パンコール島（ペラ一州）にある漁村などがあげられる。いずれも、大手資本のリゾートに近接して存在する。ただし、リゾートに宿泊するツーリストがこのような漁村へ出向くのは、風景の写真撮影や散策程度であり、いずれも短時間の滞在である。

都市部やリゾートから離れた漁村では、ツーリストを見かけることはほとんどない。このような現状を見るとき、ツーリズムが、はたして漁村において定着し、地域に利益を生みだせることができるのであろうか、疑問に思う。是非はあるにせよ、外部からのそれ相応な資本投下や援助がなされなければ、新たな産業の開発は見込めない。また、パリジャワのように単独での開発を望んだところで無理がある。今後とも、漁業自体の維持・安定を図るための方策について議論することが優先されるであろう。

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Tourism: Key for Survival of the Portuguese in Malacca, Malaysia

Nobukiyo Eguchi

要約

観光は地球規模で普及してきたが、この過程にエスニック・マイノリティを含む多様な社会的弱者が巻き込まれてきた。観光は観光文化を創造し、また、人々のアイデンティティを維持するために大きな役割を果たす一方で、エスニック・グループ自らが自生的なリーダーの下に結集し、観光化を逆手に取って利用していかなければ、グループとして生き残ることは困難ではないかということを、マレーシア・マラッカ市のポルトガル系住民の事例から議論することが本発表の目的である。

マレーシアのマラッカにはポルトガル系住民が 2,000 人余りいるが、その多くが零細な漁業に携わってきた人たちの子孫である。1920 年代、カトリックの神父が貧困なポルトガル人の相互扶助を促進させ、この人たちのアイデンティティと文化を維持させることを目的に、植民地政府とともに、1930 年代の初頭に現在地を購入し、村を建設した。しかし、後年、州政府はこの土地が官有地だと主張し、村内に政府関係の施設を建設したりしてきた。自由保有不動産であったはずが、それを認めないまま今日に至っている。

マラッカでは 1980、90 年代に広大な海面が干拓され、マングローブ林はわずかを残して伐採され、堤防が築かれた。この干拓の理由の 1 つは、観光開発にあった。80 年代前半に、州政府はポルトガル人村にポルトガル広場を建設し、ポルトガル料理や踊り・音楽を観光客に提供した。広場に接するサッカー・グラウンドは潰され、駐車場が設けられた。住民の多くがこの計画に反対したが、強引に実施された。90 年代に村に面する海のさらなる干拓が実施され、残っていたマングローブ林が伐採された。そのため、沿岸部では、かつてのように大量のエビや魚の収穫が期待できず、漁獲量は減り続けている。40 世帯ほどの漁民の困窮化は深刻である。

問題の理由の 1 つは、村の土地が「官有化」されたことと、村の官製的リーダー、レジーダーにあると考えられる。彼は 92 年以来、州政府によって任命されてきた。したがって、政府に協力しなければならない。若者は無気力になりがちで、住民間の統合力は弱い。集団として生き残るために、自生的なリーダーを軸にして州政府の促進する観光化を逆手にとって、コミュニティ全体のために観光化を生かし、自立・自律の道を進むべきであろう。スマム・コミュニティの研究でも見出せたが、自生的リーダーを軸にした取り組みは、多くの社会的弱者に共通した生き方の 1 つではないかと考えられる。

キーワード：マレーシア・マラッカ、ポルトガル人、スマム、エスニック・マイノリティ

Abstract

While tourists have infiltrated literally every corner of the world, ethnic groups and other socially deprived people have been involved in the process. Tourism tends to induce tourism cultures and plays an important role to maintain people's identity. Focusing on the Portuguese in Malacca, Malaysia. this presentation aims to discuss the view that an ethnic group has to integrate under a strong voluntary leader (or leaders) and utilize tourism development promoted by the outsiders for their own goals, otherwise it seems to be difficult to survive as a group, In Malacca there is a Portuguese settlement which was established by two Catholic priests and the then colonial government. Most of the Portuguese population were small-scale fishermen living close to the sea and quite poor. In order to promote mutual assistance and to preserve their culture and identity, land was purchased and a settlement was established at the present location in the early 1930's Later the State Government announced the settlement land was leasehold, not a freehold. And, some government facilities were built within the settlement .It must have been freehold, but the Government has never changed their claim until today..

A large area was reclaimed mainly for tourism development in Malacca since the 1980's and 90's. In the 1980's State Government established a Portuguese Square and served the Portuguese dishes and dances and music to tourists. Next to the Square, a parking lot was set up, destroying a soccer ground. In the 90's another reclamation was carried out. Remaining mangrove forest was destroyed. As a result, the harvest of prawns and fish decreased drastically Around 40 households of fishermen are suffering tremendously.

One of the problems derives from the fact that the status of land was converted from freehold to leasehold. Another reason must be the status of *Regedor* who is the leader of the Settlement and appointed by the State Government. Thus, he has to cooperate with the state. Thus, there is quite weak integration among the residents. Young people are dreaming of migration abroad.

In order to survive as an ethnic group at the Settlement, the residents need to utilize tourism promoted by the State under a good leader. As has been observed in the study of slum communities in the Caribbean, a voluntary approach around a leader (or leaders) must be one of the most important ways to survive for the socially deprived people.

Keywords: Portuguese; *Bumiputera*; Malacca, Malaysia; Ethnic Minority

1. Introduction

This presentation focuses on the Portuguese in Malacca, Malaysia, and aims to discuss the view that an ethnic group has to integrate under a strong voluntary leader (or leaders) and utilize tourism development promoted by the outsiders for their own goals, otherwise it seems to

be difficult to survive as a group.

Studies dealing with ethnic minorities and tourism development have been gradually increasing in number recently, but there are few studies discussing how ethnic minorities utilize the opportunities of globalizing tourism development for their survival in relation to the government. In this presentation the author discusses on the relationship between the Portuguese and tourism development and their survival strategy in the context of the relationship to the State government.

2. History of Multiethnic Groups in the Malay Peninsula

Malacca has the longest history with the Europeans in the Malay Peninsula, and the colonial history of the Peninsula started in Malacca. Before the Europeans' arrival, the Islamic people migrated to the Peninsula from the contemporary Indonesia in the early 15th century. Then, Malacca gradually started to be involved in the active sea trading and played an important role as a trade center with the European and Asian merchants. In 1511 Malacca was occupied by the Portuguese led by Alfonso d'Albuquerque, and was colonized for the following 130 years. Then, in 1641 the Dutch arrived and occupied Malacca for 154 years after the Portuguese. In 1824 the British took over Malacca until the Malay Federation became independent in August 31, 1957. Until then, various ethnic groups migrated to the Peninsula from the contemporary Indonesia and settled in certain regions and formed the basis of today's 14 states.

3. Nation-building after the Independence

Malaysia became independent in 1963. There are three major ethnic groups: Malays, Indians composed mainly of Tamils who migrated as contract laborers for gum-plantations during the British period, and Chinese mainly composed of those from Fujian, Canton, and Hainan who migrated as contract laborers for tin mines. Besides these major groups, there are indigenous Orang-asli, and the Eurasians such as Portuguese, Dutch, and British descendants. In 2007, 66.3% of the total population in Malaysia is *Bumiputera* (Malays and Orang-asli), Chinese 24.9%, Indians 7.5%, and the Others 1.3% (Jabatan Perangkaan Malaysia 2007: 4). Portuguese is classified in the Others with the Dutch and the British. There seems to be around 20,000 Portuguese in Malaysia, and the majority of them seem to be living in Penang and Malacca.

Malaysia has wished to build a powerful nation-state in order to get out of the developing status. Nation-state idealizes to accord the political boundary with the cultural boundary. In

Malaysia it's been thought that the national culture is that of the Malays, and not other ethnic groups. In other words, it's been thought ideal for Malaysia to build her nation-state based on the Malay culture, Islam and the Malay language. *Bumiputera* refers basically to the Malays and Other *Bumipetra* refers to the indigenous people, but the Portuguese are not classified in this category even though their physical appearance is like the Malays through the intermarriages with Malays for centuries.

4. Multiethnic/Multicultural Malacca

Malacca is located on the southwestern coast of Malay Peninsula and northeast of Sumatra. It is 145km south of Kuala Lumpur and 245km north of Singapore. It is connected by highway both with Kuala Lumpur and Singapore. In 2007 Malacca's population is 759,000, and size of the State is the third from the bottom among 14 states. The land area is 1,650km² which is about 1.3% of the total land of Malaysia (Jabatan Perangkaan Malaysia 2007: 1). The State of Malacca is sandwiched between The State of Negri Sembilan in the north and the State of Johor in the east. Malacca used to have one of the oldest kingdoms in the Peninsula, but today there is no king and the Head of State is the chief minister.

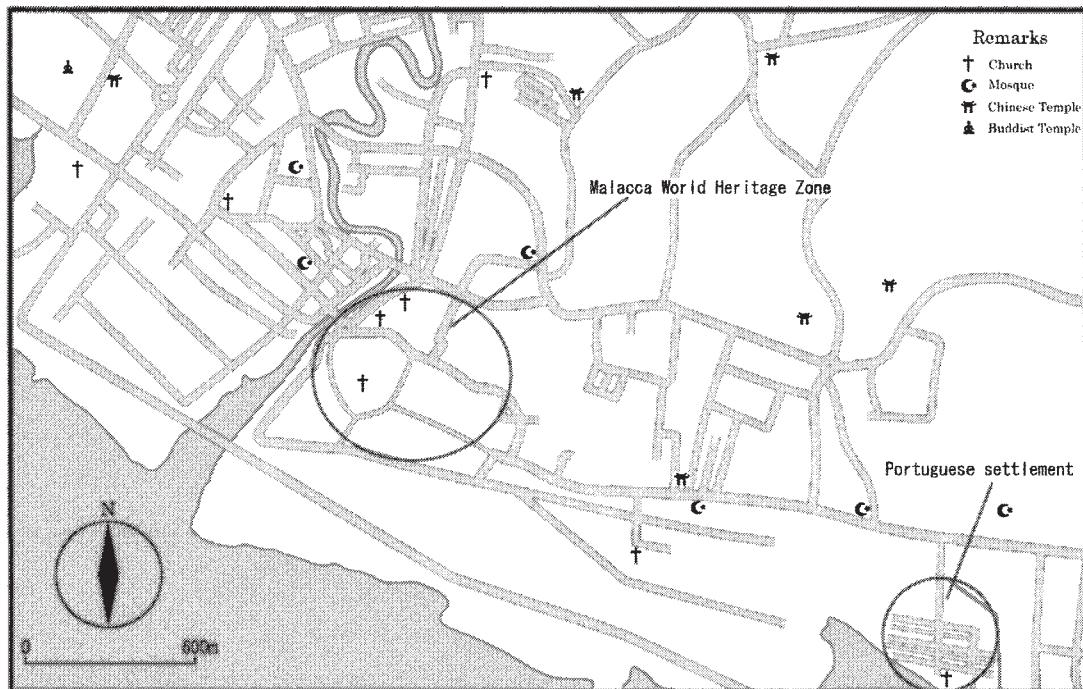
Malacca channel has been quite important to connect the Indian Ocean and the East Asia. Malacca developed as a trade center under the Portuguese (1511~1641) and Dutch (1641~1824) rules, and during the British rule (1824~1942; 1945~1957) it played also an important role. Thus, not only does it have numerous remains and relics such as cemeteries, churches, forts and the other structures built and constructed during the European rules, but relatively many European descendants are in Malacca. The Portuguese are among them. The population of Malacca by ethnic group is as follows: *Bumiputera* 62.4% (Malay 61.1% and other *Bumiputera* 1.3%), Chinese 26.5%, Indian 6%, Others 0.7% and Non-citizens 4.4% in 2006.

Main industries of Malacca are manufactures and tourism. Especially tourism industry has been developing prominently recently. Malacca's slogan appeals: "Visit Historic Melaka Means Visit Malaysia." Malacca has been affected both by various European and Asian cultures. Thus rich cultures exist in the city of Malacca. There are various tourism spots in the old town which were registered to the World Heritage Site with Georgetown, the capital of the State of Penang in July 7, 2008. Hereafter, an increasing number of tourists is expected.

5. Formation of the Portuguese Settlement and Its Characteristics

(1) Establishment of the Portuguese Settlement and Poor Fishermen

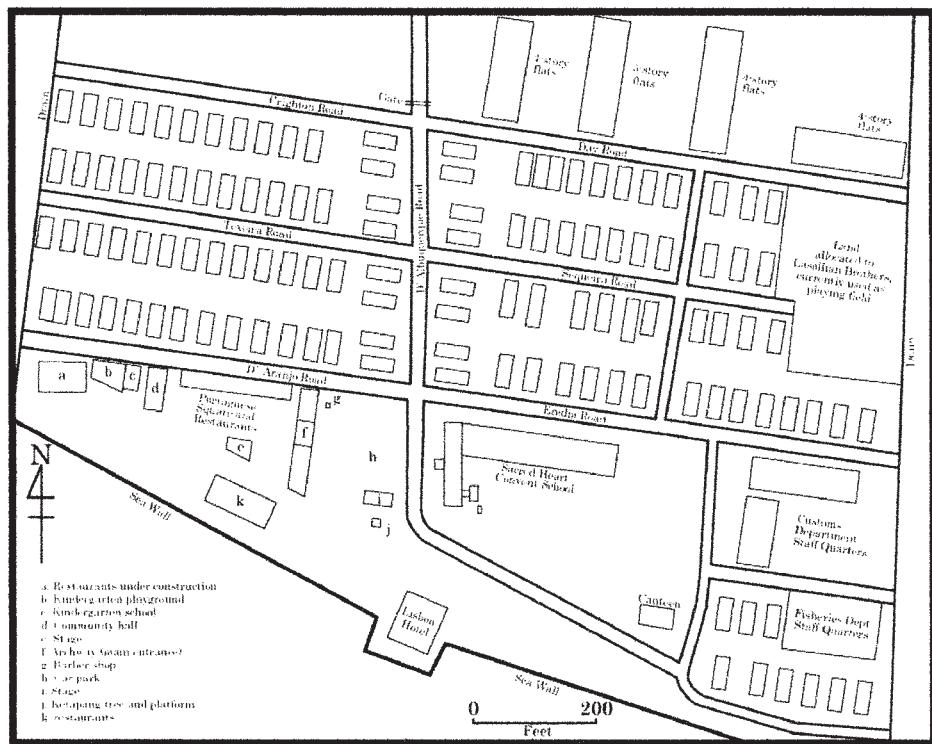
Many of the Portuguese in Malacca live in the Portuguese Settlement. It is located at the seaside of Ujong Pasir 2 km south of the old town (Map 1). There are 110 houses and 118



Map1. Malacca City

households with about 1,200 residents which includes those residents living at flats just outside of the Settlement. There are 4 public apartment buildings adjacent to the Settlement and many other Portuguese are living there (Map 2).

Most of the Portuguese here look physically like the Malays. Some of them and their ancestors used to live close to the River Malacca and the Sea as small-scale fishermen and were poor in general. In the 1920's two catholic priests (Portuguese and French) appealed to the British colonial government to build a Portuguese village in order to protect those people from fading away ethnically and to provide mutual assistance. As a result, they agreed to build a settlement at the present site, collecting public donation at first. The colonial government spent



Map2. Portuguese Settlement

a half of the total cost of purchasing land and building houses. The land facing to the sea was covered with mangrove forests and, then, it was freehold. It was registered so on the governmental document. The wet land was reclaimed. At first 164 houses were built and the poorest portion of 207 applicants were approved to move into these new houses. The first set of Portuguese settled here in 1934. And, the, gradually more people migrated in. However, the State government informed the residents that the land was leasehold, not the freehold in 1949. Out of 28 acres of the Settlement land, a portion of land was leased out to a Catholic school based on 99 years contract. Customs facilities and Fisheries were also built in the Settlement without any consultation with the residents. Most of the residents resented this and were afraid of the future eviction. They felt insecure on the leasehold land. Each plot of land is 40 by 80 feet wide and each house stands on land 14 feet by 48. There was a toilet outside, and a house was composed of kitchen, dining room and a bed room. All houses were same design. Since the Portuguese are Catholic, they were not allowed birth control and, thus, population increased in the Settlement. It was not unusual that 4 or 5 households resided under the same roof. It was difficult for most of them to purchase land outside of the Settlement and build houses due to

their poor economic condition.

Today, the residents contract 60 year land leases with the State government. The young villagers organized “Save Portuguese Community Committee” in order to challenge the status of their land against the State government in 1979. They discussed about this issue with the Government many times, but the Government insisted they could not find the document showing the freehold status, and they never approved the claims brought by the residents (Sta Maria 1991: 39).

(2) Settlement Committee and a Matter of Ethnopolitics

Young people tell us that one reason why the state defeated the residents' appeal for freehold status derives from the nature of Settlement Committee. The leader of the Committee is *Regedor* who was elected by the community members and, then, approved by the state government until 1992. In that year the State government announced that new *Regedor* would be appointed by the State government and the community would not allowed to conduct an election to choose a new *Regedor*. There are secretary, treasurer, and other 14 committee members besides *Regedor*. They should be the representatives of the community members and work for the community. However, since the *Regedor* is appointed by the State government and he has power, it is difficult for the residents to appeal against the state. He plays a sort of puppet role for the State.

In 1985 the State government built a Portuguese Square (*Medan Portugis*) in the Settlement in order to promote tourism of Malacca. In the Square a stage and some space for restaurants were prepared. Succor ground used by youngsters almost everyday was converted into parking lots for the tourists to the Square. Two Portuguese residents rented the restaurant space and started to serve Portuguese dishes using prawns and fish from the sea. A small private museum was also set up in the Square, showing some pictures of the early days of the Settlement with wooden houses covered with *nipa* palm and the like. There was a folk music group organized by some residents before the Square was set up. This group showed dances and played music sometimes to the tourists visiting the Square (Sarkissian 2000). Portuguese dances and music were copied from the contemporary Portuguese and a new tradition was, thus, created in the Settlement. They are now an integral part of the Settlement. The Settlement has become a steady destination of tourists visiting Malacca.

6. Tradition Created and Identity

The most prevalent tradition among the Portuguese at the Settlement must be the Portuguese language called *Kristang*. At home the young generation prefers to use English and Malay even though old generations tend to use Portuguese. Let's think of the early times Portuguese arrived in this area. Since most of them were male sailors, merchants, administrators, priests and the like, they intermarried with Malay ladies and so their cultures became integrated. In the areas such as language, belief, rules and so on, tradition could be maintained relatively well through males, but dances and songs which require females could not be preserved well due to lack of the female partners. Thus, tradition in those areas have tended to fade away during the past 400 years. However, the residents of the Settlement could maintain their ethnic identity not only through the use of *Krintang* and Christian belief, but also through the interaction with the State government on land and through tourists visiting the Square. Facing to the others with different belief and attitudes, they have been feeling strong identity as the Portuguese. And, they have been seeking for their culture which supports their ethnic identity.

At the Settlement, a group seeking for culture was formed among the youths in the 1960's. And, it became a movement to reconstruct folk music and dances. They have studied contemporary Portuguese dances and music, and opportunities practicing them have been increasing. Dances and music reconstructed have been becoming new traditions among the residents (Sarkissian 2000). It is the tradition which is created, maintained, and forgotten. In this sense, created tradition must be unauthentic at the early stage, but it becomes authentic among the people practicing those dances and music which became an integral part of the residents. The argument as to whether they are authentic or unauthentic is meaningless among those practicing them, though it interests researchers.

These dances and music are taught to children and shown at the annual events such as *Festa San Pedro* and Christmas. Even though it is said that *Kristang* is used at home, at school either English or Malay is used. It is not often used in everyday life. At church either English or Malay is used. There are many children who can understand *Kristang* when their old folks speak, but they can not speak it. In general, their tradition has been rapidly changing.

7. Tourism promoted by the Government and the Portuguese Dilemma

(1) Reclamation for Tourism Promotion and Fishermen's Poverty

In 1988 Preservation And Conservation Of Cultural Heritage Act was passed in the Malacca State Legislative Assembly. It clearly expresses the powers given to the State Authority to declare any area which, on the advice of the Local Authority and the committee by notification in the Gazette, should be selected for Preservation and Conservation. In 1992, the Malacca

Museum Corporation Act was passed in the Malacca State Legislative assembly (Sta Maria 1991: 70). In 1987 the Malacca Chief Minister expressed that the Portuguese community should not be worried because the Settlement would be well protected when the government introduced an Act of Parliament. When passed, the Act will provide the necessary protection to help and preserve the Portuguese Settlement (*New Straits Times* 10 October, 1987). However, what the Chief Minister expressed was realized in 1992 since there was enlisted as a cultural heritage area. However, it does not mean that the residents' tradition is guaranteed to maintain. There is no security for its continued existence as a home of the Malacca Portuguese community.

The promotion of tourism development was largely realized by reclamation. In 1994 the project of 1,949.2 hectares of reclamation was planned. Around the Settlement, 76.8 hectares were reclaimed, and 5.4 hectares of land covered with mangroves remained untouched next to the Settlement (*The New Straits Times* July 1, 1994). Historically the sea close to land used to be the most important area for fishing to the small-scale Portuguese fishermen. Mangrove forest was crucial for recreating prawns, crabs, and other creatures, and those fishermen who could not afford boats and motors have been fishing with butterfly-nets there. Many sorts of birds are nesting in the mangrove forests, too. It was the sanctuary for various creatures. Thus, not only Portuguese fishermen but Malays and other ethnic groups demonstrated against the reclamation project and appealed against the State government in vain. They could not find easy solutions. The Government promised to pay compensations to those fishermen and to construct a boat harbor in the east of the Settlement.

At the Settlement a small portion was reclaimed and some space for 10 small restaurants was created through the project. Of course, this project was planned and practiced by the State government. This space was rented out both to the outsiders (Malays and Chinese) and the residents, too. And some of the space rented by the outsiders was re-rented out to the residents. At the restaurants fishermen have provided prawns and fish which they caught in the sea. In 2007 *Lisbon Hotel* was built on the Settlement land newly reclaimed by the State government. At the planning stage, the State promised that many residents would be hired at the hotel, but only 2 ladies from the Settlement work at the hotel, and their wage is low. Most of the employees are from Bangladesh, which is a Moslem country, and they work for even lower wages. The State government seems to have utilized the Portuguese image only to promote tourism. Reclamation has forced the fishermen to become poorer. Disappearance of mangrove forest is the major cause. The amount of prawns and fish in general has decreased drastically in the nearby sea. Impoverished fishermen have continued fishing using butterfly nets, but many

of them have been working practically for no harvest. The original motive of setting up the Settlement was to save the poor Portuguese fishermen, but those small-scale fishermen with no higher education have been suffering. Without traditional fishing, it must affect the maintenance of identity as the Portuguese negatively.

(2) Demanding to approve a *Bumiputera* Status and Politics

While affirmative action has been applied to the Malays, Portuguese are not given any special rights enjoyed by the Malays except investing to *Amanah Salam Bumiputera* (*Bumiputera Trust Fund*) in Malacca. And the Portuguese are classified as the Others even though they are an ethnic minority. *Bumiputera* affirmative action has been started in order to correct the economic disparity between the Malays and the other ethnic groups (Chinese and Indians) since 1970. For example, the average monthly income per household by ethnic group in 1990, was 1,169RM for Malaysians, 940RM for *Bumiputera*, 1,631RM for Chinese, 1,209RM for Indians, and 955RM for the Others. However, there were 2,020RM for Malaysians in average, 1,600RM for *Bumiputera*, 2,895RM for Chinese, 2,153RM for Indians, and 1,274RM for the Others. The average income of the Portuguese classified as the Others was rather lower than the *Bumiputera* in 2000 (Jabatan Perangkaan Malaysia 2007: 37). But, the affirmative policy has not been applied to the Portuguese.

The Portuguese have been appealing to the State government to rethink this situation since the 1990's. The Portuguese claim that they are also the *Bumiputeras* since they have been intermarried with the Malays for 400 years and strongly retain the Malay culture even though they are Portuguese. It seems that boundary between ethnic groups seems to be uncrossed easily, but it is crossed easily sometimes. When people judge it profitable to cross the border, it can be realized as far as the others accept it. The reason why the Portuguese are not classified as *Bumiputra* must be the difference in faith. The Malays are Moslem, and the Portuguese are Catholic.

As a result the Portuguese-Eurasians demanded to the central government to classify them as *Bumiputera*, and they received the answer if they could join to UNMO. It is quite an ethno-political matter, and the residents of the Settlement were divided into two groups: one supporting UNMO and the other supporting the other party. The old folks do not want to change their lives, while many of the youths feel differently. There is a big generation gap, too. Some youths lamented that the *Regedor* do not think of their future.

8. Conclusion: It is Difficult to Survive unless the Residents Unite under a Voluntary Leader (or Leaders)

At the Settlement more residents are less confident to be a Portuguese under the condition in which the Portuguese culture has been fading away. While tourism development has been making the residents feel as Portuguese, it has not brought them anything more than dilemma. Since the old town area was enlisted as the World Heritage Site, it is expected to have more tourist arrivals even to the Settlement. Tourism is becoming an inevitable industry in Malacca. As far as the Heritage Village exists, the Portuguese tradition including *Festa San Pedro* seems to be retained through providing to tourists. But, when the number of fishermen decreases and generation change goes on, the identity as Portuguese weakens, and *Kristang* as a traditional language must fade away, and only retained in a form of books at book stores.

The State government has utilized the Portuguese heritage and image just to promote tourism development in Malacca. However, on the contrary, few Portuguese have initiated activities to utilize this chance of tourism development for the entire community. In order to avoid the Settlement becoming a mere theme park of the Portuguese for tourists, the residents' creative and collective action is required. One of the few ways to survive as the Portuguese is lining up behind a leader, forgetting the political and generational difference among them. Such a person must be a voluntary leader who could lead the residents successfully. His or her qualification is the capability to listen to and convince the residents and negotiate persistently both with the State government. He or she must be a respected person, too. Such leaders were found among the slum dwellers in the Caribbean (Eguchi 2008). In order for the socially deprived to survive collectively, voluntary leaders play quite important roles to improve the standard of living, negotiating with NGOs and the State and local governments.

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観光化と近代化の影響：
フィリピン・イフガオ州バナウェの
世界遺産の棚田とイフガオ族の農民を事例として

**The Effects of Tourization and Modernization:
A Case of Rice Terraces of the World Heritage and Ifugao Farmers in Banaue,
Ifugao Province, Philippines**

四本 幸夫

Abstract

The rice terraces in Banaue, Philippines are registered in the World Heritage of UNESCO, and visited by a lot of international tourists. The Philippine national government embarked on the tourism development of Banaue by constructing a huge hotel in 1969. Then, there was a sightseeing boom in the 1980s, when many lodges and inns were constructed. Tourism development promotes modernization which has changed Ifugao people's lives. Ifugao farmers who used to put agriculture on the center of their lives were given a chance to work in tourism so that farming became subordinate. Moreover, the traditional Ifugao houses that are the charm of sightseeing are also disappearing from the scenery of the rice terraces. Along with modernization, farmers replaced the traditional high floor houses with modern concrete houses or barracks made by plywood and tin plates, which are more convenient and accommodating. The roofs of the remaining traditional houses were also changed from cogon grass roofs to galvanized ones as the grass became hard to obtain. In these changes, farmers' try to revitalize agriculture and the government attempts to protect the landscape because they fear that the disappearance of the tradition houses will results in the decrease in the number of tourists. In this study, I try to understand these changes by using ideas of two social processes: tourization and modernization, concepts which are overlapping yet have different characteristics.

Key Words: Tourization, Modernization, Ifugao, Farmers, Rice Terraces

要約

フィリピンのバナウェにある棚田はユネスコの世界遺産に登録されており、多くの国際観光客が訪れる。1969年にフィリピン政府は巨大なホテルの建設を開始し、バナウェの観光開発に乗り出す。そして、1980年代に観光ブームがあり、数多くのロッジやインが建設

された。観光化は近代化を促進し、イフガオ族の人々の生活を変化させていった。農業を主体として生活していたイフガオ族の農民は観光関連の仕事をする機会に恵まれて、農業が次第に従属的なものになっていった。また、観光の魅力であるイフガオ族の伝統家屋も棚田の風景から消えつつある。農民は近代化に伴って、今までの伝統的な高床式の家から便利で部屋数も多い現代的なコンクリートの家や、木やトタンでできたバラックのような家に立て替えていった。残っている伝統家屋も、チガヤが手に入らなくなってきて茅葺から亜鉛メッキの屋根に取り替えられてきた。このような変化の中で、農業を活性化させようとする農民の取り組みや、伝統家屋の消失で観光客が減るのではないかと危機感を抱いている政府の景観保護の模索が続いている。本研究では、これらの変化について、重なつてはいるが異なる特徴を持つ 2 つの社会的プロセス、観光化と近代化の概念を使い理解しようと試みる。

キーワード： 観光化、近代化、イフガオ族、農民、棚田

1. はじめに

バナウェは世界中から多くの観光客が訪れる、フィリピンが世界に誇る有数の観光地である。ここには世界第 8 番目の不思議として知られる有名な棚田がある。この棚田は 1995 年にユネスコの世界文化遺産に登録された。これはフィリピンの山岳少数民族であるイフガオ族が 2000 年以上かけて築き上げてきたものであるといわれている。先住民としてのイフガオ族の伝統、山の上まで続き天国への階段といわれる棚田の美しさ、その棚田を長い間支えてきた石壁などの土木工事の技術力などがバナウェの観光地としての魅力である。

しかし、近年、このバナウェの人々には大きな生活の変化が押し寄せている。それは、観光化と近代化によってもたらされたものである。そして、その生活の変化は観光の魅力である棚田とイフガオ族の伝統にも変化をもたらしている。本報告では、イフガオ族の生活にどのような変化があるのかについて見ていく。また、その原因である社会変動もしくは社会的影響を近代化と観光化という 2 つのプロセスとして、関係しているが異なる特徴を持つものとして分析的に扱う。これは、イフガオ族の生活の変化について、そのように考えたほうが、より彼・彼女の変化を理解できると考えるからである。

2. 研究地と研究対象

(1). イフガオ州バナウェ

イフガオ州はルソン島北部の山岳地帯にある州で、北はマウンテン州、南はヌエバ・ビスカーヤ州、東はイサベーラ州、西はベンゲット州に囲まれている。コルディリエーラ山

地の東側に位置し、山、丘、高原からなる地形である。州は、154 のバランガイ（村）によって 11 の町で構成されている。2000 年の州の人口は 161,623 人であった（Census of Population and Housing 2000）。イフガオ州はフィリピンの中でコルディリエーラ行政地域という少数民族が多数を占める地域にあり、歴史的に鉱産物や森林資源などを搾取しようとするフィリピンの多数派で支配層であるキリスト教徒低地民の圧迫をうけてきた。この地域では、少数民族の権利獲得の為、コルディリエーラ民族解放軍が組織され、フィリピン政府と戦ったというフィリピン南部、ミンダナオ島のムスリムと同じような闘争の歴史を持っている。このような経緯をもったイフガオ州は貧困発生率が高く、2000 年には 55.57 パーセントであった。フィリピンの貧困スポットの 1 つである。

バナウェはイフガオ州の 11 ある町の 1 つで、州の北西部に位置する。南には州都のラガウェがある。2000 年のバナウェの人口は 20,563 人であった。これは、11 ある町の中で一番人口が多い。バナウェには 18 のバランガイがある。中心はバランガイ・ポプラシオンで、町役場、消防署、郵便局、観光案内所、市場があり、ホテル、レストランが並んでいる。そして、多くのジプニー（乗り合いバス）やトライシクル（サイドカー付きオートバイ）が客を待っている。町の中心を川が流れていて、その両岸に学校があり、朝と夕方は学生や児童の通学でにぎわう。

（2）イフガオ族

イフガオ族のイフガオ（Ifugao）という名前は、Ipugo から来ていて、精霊や神などに相対する言葉の“人間”という意味がある。もう一つの Ipugo の意味は、“丘から”である。また、接頭辞の I は“から”を意味する（Dulawan 1980 cited by Sumeg-ang 2003:72）。

イフガオ族の起源については、紀元前 300 年から西暦 850 年の間にルソン島、ビサヤス島、ミンダナオ島に移住してきたマレー人の子孫であるといわれている（マナンハーヤ 2004:70）。しかし、その起源には諸説があり、この他に主に 3 つのイフガオ族の起源に関する理論がある（Sumeg-ang 2003:72）。初期の理論は、イフガオ族研究のパイオニアである、アメリカ人人類学者、ヘンリー・オットレイ・ベイヤーの理論である。それによると、イフガオ族は、約 2000 年前にインドシナからルソン島の西部にあるリンガエン湾に着き、そこから北東に進んで、コルディリエーラにたどり着いた人々の子孫であり、インドシナの水耕と棚田の文化をもたらしたという考え方である。しかし、この理論は最近の考古学、人類学、言語学の新たな発見により、その理論的価値が低下している。2 つ目の理論はこれもアメリカ人人類学者であるフェリックス・キーシングが提唱しているもので、スペイン統治時代の文献を研究し、その時代にスペインの軍事占領を逃れる為にルソン島の北西にあるマガット地域からイフガオ地域に移動してきたという。これは、16 世紀から 19 世紀にかけてマガット地域の人口が急激に減ったこと、スペインの文献にはイフガオ地域で

の棚田に関しての記述がないことなどが彼の理論を支えている。この理論が正しければ、現在、観光において主張されている棚田の 2000 年の歴史は真実ではなく、實際には数百年の歴史しかないことになる。3 つ目の理論はイフガオの歴史家のマニュエル・デュラワーンによるもので、言語、家の構造、背帶機による織物の方法やデザイン、伝説や歌の分析を通して、マウンテン州の西から移住してきた民族であると結論づけている。このように、イフガオ族の起源について定説はないが、イフガオ族が人類学者や社会学者などをひきつける文化を持っていることだけは確かである。

フィリピン先住民族国家委員会の最新のデータによると、イフガオ族の人口はフィリピン全土で 174,631 人で、その内、110,819 人がコルディリエーラ行政地域に住んでいる。次に多いのがその東隣にあるリージョン II のカガヤン・パリーで、61,752 人、そして、南にあるリージョン III のセントラル・ルソンに 1,033 人、西にあるリージョン I のイロコス・リージョンに 1,027 人が住んでいる。

イフガオ州の人口 161,623 人のうち、67.91 パーセントがイフガオ族で、13.73 パーセントがイロカノ族である。また、8.64 パーセントがイカラハン族、残りがガダン族などとなっている (Census of Population and Housing 2000)。イフガオ族にはトウワリ、アヤンガン、カラングヤ、そしてカリンガという 4 つのサブグループがあるが、バナウェには主にトウワリが住んでいる。

イフガオ族は水田耕作を生活の糧として生きてきた。それゆえ、コメや水田にまつわる伝統文化を発展させてきた。また、食料不足を補う為に、さつまいもや豆などを栽培する焼畑農業と狩猟採集もおこなってきた。

3. バナウェの観光

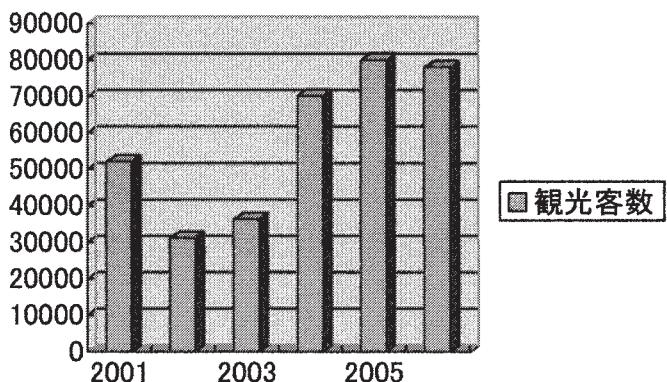
イフガオ州の中でもバナウェはその棚田が有名であり、観光客の約 98 パーセントが他の町ではなくバナウェを訪れる (州の観光局職員とのインタビュー、2008 年 8 月 4 日)。よって、中心地のにぎやかさは州都のラガウェを凌ぐように思われる。バナウェがイフガオ州で観光のメッカとして成り立っている理由は、やはりその棚田の存在である。観光客が訪れる棚田としてはバナウェ・ライステラス、バタッド・ライステラス、バンガアン・ライステラスがある。この内、バタッドとバンガアンの棚田は世界遺産に登録されている。水に関する観光資源では、グイホブ・ナチュラルプール、タッピヤ滝、チャパ滝、ドゥクリガン温泉がある。また、タムアン村、バタッド村、バンガアン村、ポイタン村がイフガオ族の生活を垣間見れる場所として観光資源となっている。他に、ゴハンの伝統家屋に保存されているミイラとプライベートコレクションのイフガオ族の工芸品を展示するバナウェ博物館がある。4 月には、第 3 週におこなわれるウルピ・アド・バナウェ、3 年おきにおこなわれるインバヤ・アド・バナウェのイフガオ文化の祭りがあり、それらは観光客を

呼び寄せる格好の機会となっている。

バナウェは宿泊施設が充実しており、2006 年、州には 40 のホテル、ロッジ、インなどがあるが、その内、24 の施設がバナウェに集中する。1973 年に建設されたバナウェホテルが州内唯一のホテルで、その他はインやロッジである。このバナウェホテルは政府観光省による公営のホテルで、スタンダードが一泊 2,300 ペソ(1 ペソ約 2.6 円)、デラックスが 3,000 ペソ、スイートが 6,000 ペソと、この地域では非常に高価なホテルである。インやロッジはシングルが一泊 300 から 600 ペソ、ダブルが一泊 350 から 800 ペソである。

2001 年と 2002 年は州全体の観光客数の統計はあるが、バナウェの統計はない。しかし、前述したように、観光客の約 98 パーセントがバナウェを訪れるという推測をもとに計算してみる。それに、町レベルの統計がある 2003 年から 2006 年までの観光客数を加えて表で示すと、表 1 のようになる。2001 年、バナウェへの観光客数は約 52,200 であった。それが、2002 年、2003 年と大きく減少する。しかし、2004 年は大きく増加し、70,106 人と、前年の倍ぐらいの観光客が来訪した。2005 年、2006 年はこの傾向が続き、2005 年は 80,096 人、2006 年は 78,014 人の観光客がバナウェを訪れた。

表 1 バナウェの観光客数 2001~2006 年



2006 年の観光客 78,014 人のうち、50,332 人が国内観光客、24,025 人が国際観光客、3,747 人がフィリピン人海外出稼ぎ労働者であった。国際観光客の割合が約 31 パーセントにのぼる。イフガオ州への国際観光客では、イスラエル人が最も多く、オランダ人、ドイツ人、アメリカ人、フランス人、イギリス人、韓国人、日本人、オーストラリア人、カナダ人と続く。

4. バナウェの観光発展

20世紀、バナウェは西欧の文化人類学者により注目されてきた。1900年代初期にはロイ・フランクリン・バートンとヘンリー・オットレイ・ベイヤーが、イフガオ族に関する論文、著書を数多く発表している。また、バートンによる死者を家の柱の前にすわらせておる写真や、入れ墨をした人々の写真など、1910年代のイフガオ族の生活や習慣をとらえた、西欧の人々にとって珍しい光景がカリフォルニア大学バークレー校の博物館の収められている。戦後は、更に多くの研究者がイフガオ族に関する研究成果を発表してきた。エール大学の人類学部長だったハロルド・C・コンクリンは戦前から研究をしていて、約20年間にわたり現地で住み込み調査をした。その集大成が1980年の“Ethnographic Atlas of Ifugao”である。その他には、マニュエル・デュラワンやジューン・プリルプレットなどが代表的な研究者である。現在でも、この地は研究者にとって人気のある地で、今回筆者が、6日間現地に滞在し、人々にインタビューした中で、同時期に、日本人研究者、オックスフォード大学の研究者など少なくとも3人が何らかの調査をバナウェでおこなっていることが判明した。

20世紀初頭にはバートンとベイヤーが、ヘッドーハンターとしての文化を持つ民族としてイフガオ族を西欧の人々に紹介し、興味を抱かせてきた。1910年代のイフガオ族の生活は『ナショナル・ジオグラフィック』で紹介されている。その後も、棚田の美観、灌漑技術、またそれを維持してきた文化に対して研究がすすめられ、それが情報として欧米の人々に伝わっていった。しかし、当時はまだ観光地として海外から観光客が来るような時代ではなかった。ただし、エキゾチックなものとしてこれらの地域の情報が人々に伝わり、後の観光化に影響を与えたと考えることができるであろう。

1969年に再選されたフェルディナンド・マルコス大統領は「コメと道路」を重点政策として高収量品種を使った米の自給率達成と道路、病院、記念碑的な公共建築物などの公共事業に力をいれた（スタインバーグ 2000：201）。このような流れの中で、1969年、政府はバナウェホテルの建設に着手する。このホテルは、この地域には不釣合いな巨大な近代建築のホテルで、1969年にオープンしたマニラ湾の文化センターと同じような国家の威信と近代化を象徴するような建物である。このバナウェホテルは1973年に開業した。マルコスは同時に大統領令260を発布し、世界の文化であるという観点から重要な価値を持つ国のかげがえのない宝としてバナウェの棚田を“国のランドマーク”と指定した。これらは政府主導でバナウェの観光開発を進めようとするものであった。当時は、町の人口も少なく、バナウェは今ほど知られていないかったので観光客も非常に少なかった。その為、バナウェホテルが建設される前は、ベイヤーズホテルという一軒のホテルしかなかった。しかし、国営のバナウェホテルの建設により、政府による観光振興が進んでいった。

1980年代になると観光ブームが訪れる。バナウェの棚田が奇観としてとらえられ、それを支えるイフガオ族の文化が脚光を浴びたのである。その観光ブームに乗り数多くのロッジやインが建設された。主なロッジやインでみると、ハーフウェイロッジが1981年、ラ

スペガスロッジが 1983 年、バナウェビューアインが 1985 年、グリーンビューロッジが 1986 年に開業している。この観光ブームに更なる追い風となったのは 1995 年に棚田がユネスコの世界遺産に登録されたことである。この、世界遺産登録により、これまで以上に国際観光客の来訪を期待できるようになった。また、政府観光省もバナウェをフィリピンを代表する観光地として世界に宣伝している。現大統領のグロリア・アロヨやフィデル・ラモス元大統領がイフガオ族の文化や棚田に興味を持ち来訪している。州レベルでの観光振興は 1990 年に観光局が設立された時から始まる。はじめは、知事室の中にもうけられ、観光担当職員は 1 人であったが、現在は 6 人の観光担当職員をかかえるまでになった。イフガオの祭り、交通手段、宿泊施設の情報などを発信し、観光振興に努めている。

このようにバナウェは欧米の人々に注目されてきた歴史を持っており、それは観光客の特徴にも現れている。2006 年、コルディリエーラ行政地域への国内観光客のうち、78 パーセントがベンゲット州のバギオ市を訪問し、イフガオ州は 7 パーセントしか訪問していない。これに対して、国際観光客を見るとバギオ市へは 39 パーセント、イフガオ州には 40 パーセントが訪問している。コルディリエーラ行政地域において、イフガオ州は国際観光客にとって一番魅力のある観光地なのである (Hangdaan 2006 : 55–56)。

5. バナウェの変化

文化人類学者、社会学者などの研究書や観光の本に書かれているイフガオ族の文化や棚田の景観は過去のものとなりつつある。イフガオ族が伝統的な衣装を身につけるのはお祭りの時や、パフォーマンスを観光客に見せる時ぐらいである。また、イフガオ族が世界中の人に惹きつけてきた棚田が耕作放棄や石壁の修理の放棄などで徐々に崩壊しているのである。そして、伝統家屋が近代建築に取って代わられ、すばらしい景観がなくなっている。ここでは、イフガオ族の農業と家屋において見られる 2 つの変化について述べる。

(1). イフガオ族の農業の変化

イフガオ族は農業を生業として生きてきた。そして棚田は何世代にもわたりおこなわれてきた農業により維持してきた。この農業を支えてきたのは自作農と小作農、農業賃金労働者である。これらのことからわかるように、イフガオ族には社会階層が存在する。基本的にはカダンギュアンと呼ばれる豊かな家族があり、余分な米を生産するだけの十分な棚田を持っており、時には小作農や農業賃金労働者を雇い耕作に当たらせる。それと対照的なのがラワと呼ばれる貧しい家族で、食べるのに十分な土地を持たず、小作や賃労働で生計をたてる (Goda 2002:71)。この 2 つの階層は更に細かい儀礼的階層に分かれていて、動物をいけにえにする儀式の大きさと頻度によって決まる。当然、この儀式の規模と頻度

は貧富の差に影響される。この階層分化は、イフガオ族の相続の型が大きく影響を与えて いるようである。研究者たちはその相続の特徴を primogeniture (長子相続) (Sumeg-ang 2003:87) や the rule of ranked bilateral primogeniture (Goda 2002:69) という言葉を使っている。長子が両親の棚田の多くを受け取るということである。具体的にこれはどういうことかと いうと、例えば、兄弟姉妹が 8 人いるとする。そして、両親は棚田を 3 枚持っているとする。そうすると両親は兄弟姉妹のうち年上の子供から男女に関わらず 1 枚ずつ結婚時に棚田を譲渡する。この場合、年上の兄弟姉妹 3 人は土地持ちであるが、残りの 4 人は土地なしになり、小作や賃労働で生活をしないといけなくなる。また、結婚時に新郎も新婦もそ れぞれの兄弟姉妹の中で年長であれば、双方の両親から相続を受ける。しかし、どちらかが年長でなければ、片方の両親からしか相続はなく、どちらも年長でなければ相続はない。このような相続の伝統がイフガオ族の階層分化を生んだ原因の 1 つであると考えられる。ただし、相続を受けても、自分の棚田だけで 1 年間生活できる家族はそれほど多くはないようだ。

ラワの人々は小作農として、また、田んぼでの賃金労働者などとして生活していたが、観光化に伴い農業以外で生計をたてる機会も増えてきた。バナウェでは観光客相手の木彫りのおみやげを作る仕事やホテルの清掃の仕事など、農業以外の仕事が重要なになってき ている。ここでは、2 人の農民を紹介しよう。

1 人目はパート・バクレオという 47 歳の男性農民である。彼には妻とまだ小さい 4 人の子供がいる。現在、3 枚の棚田を世話する小作農である。今は引退しているが両親も小作農で、自分の棚田は持っていたなかった。今耕作している棚田では 1 枚の棚田からだいたい 600 束の米ができる。これはこのあたりでは 1 番大きな棚田である。収穫した束を半分に 分け、300 束ずつ、棚田の所有者と分ける。1 束からは約 1.5kg の米が取れる。300 束の米でパートの家族の 4 か月分の食料米になる。3 枚あるので 1 年分のお米が確保できるが、米だけを食べるわけではなく、また電気代や日用品などの購入が必要である。よって、農業だけでは十分な収入を得ることはできない。その為にパートは木彫りと籠作りの仕事を している。籠で作る籠は米をいれるもので、1 つ作るのに 2 日かかる。バナウェでは観光客や地元の人々に 1 つ 400 ペソで売る。バギオ市まで出ると、1 つ 700 ペソで売れるので、1 月に 1 回、2-3 日かけて売りにいく。1 ヶ月にだいたい 10 から 15 個の籠が売れる。木彫りのほうは売るのが難しい。普通、3 ヶ月おきにバイヤーがやってきてミニチュアの水牛の木彫りを 3 つほど注文する。その他は、自らバナウェのマーケット行って観光客に売る。農業からよりも、手工芸品からの収入のほうが多いので、農民ではあるがパートにとって 手工芸が主で、農業が従になっている。

2 人目はカーメン・ビニアハウという 53 歳の女性農民である。彼女には夫と 8 人の子供がいる。夫も農民で離れて暮らしている。彼女は仕事場から近い子供の家で暮らしている。カーメンと夫の両親は農民であった。そして、カーメンも夫も兄弟姉妹の中で年長であつ

た為、カーメンは彼女の両親から、夫は彼の両親から結婚時に棚田を相続した。しかし、自分たちの子供が結婚したので、子供がその棚田を引き継いでいる。だから、棚田は保有していない。現在、小作農として、いとこの棚田を耕作している。いとこは年老いており、彼女の子供は学校の先生や政府の役人になったので、カーメンが耕作している。ねずみにどれだけ荒されるかにもよるが、だいたい 400 束の収穫がある。それをいとこと 200 束ずつ分ける。子供のうち、3 人が大学生である。1 人の娘は看護学を学んでいるので、卒業後、アメリカにでも行ってたくさんのお金を稼いできてもらいたいと考えている。カーメンは週に 4 日バナウェホテルでハウスキーパーとして働いている。週に 3 日間休みなので、その時間を使って農業を営んでいる。農業はパートタイムという位置づけである。時折、子供達が耕作の手伝いをする。

このように、バナウェの観光化により、農業以外での生計手段が可能になった。小作農や賃金農業労働者が観光産業にかかわり収入を得ることができるようになったのである。町の観光化は棚田を所有している農民にも変化を与えつつある。棚田の所有者であっても、子供を良い学校、特に大学に行かすにはお金がかかり、農業収入だけでは十分ではない。バナウェは観光化により農業以外の就労機会は増えたが、これら、農業を主体とする農民にとって、観光の恩恵を直接受けてはいない。彼・彼女らの認識からすると、観光客は自分たちの棚田を見るだけで自分たちには何の利益もたらさないのである。そこで、農業本来の仕事で観光化が進んだ社会から何らかの利益を得るような取り組みが始まった。それは観光地として有名なイフガオ州の棚田で生産される有機米をアメリカに輸出するプロジェクトである。2005 年にバナウェの農民を中心に Rice Terrace Farmers Cooperative (RTFC) (棚田農民組合) が設立された。2006 年の 4 月 24 日には、大統領府の協同組合開発庁から認可を受けた。そして、2008 年の 1 月に組合のオフィスをバナウェの裁判所の建物の中に設けることができた。組合はマニラにある Rice Inc. という NGO 団体の援助により活動している。Rice Inc. はフェアトレードの考え方などを基にした実践をおこなっている NGO 団体である。棚田農民組合の目的は、棚田で耕作された米をアメリカ及びローカルマーケットで販売することで、組合のメンバーである農民に利益を還元しようとするものである。2008 年 8 月現在、190 人の農民が組合員で、大多数はバナウェの農民である。その他はイフガオ州のヒングヨン、マヨヤオ、キアンガン、ハングデュアンというバナウェに近い町から参加している。組合員のうち 1 人だけが小作農で残りは全員棚田を所有している自作農である。組合員は 50 ペソの組合費を払い、100 ペソの分担資本金を出す。そして組合員は少なくとも 25kg の米を組合に売らなければならない。組合は組合員から 1kg あたり 50 ペソで買い取る。そして、それを 1kg あたり 100 ペソでアメリカとローカルマーケットに販売する。50 ペソの差額はパッケージの費用と貯蓄に回される。そして、2008 年から利益の分配を組合員に始めた。1kg あたり 100 ペソというのは高価な米を意味する。バナウェの中心にある米屋の店頭で売っている米の値段を見ると、種類によって異なるが

1kgあたり30ペソから38ペソで販売していた。組合の米は香りの良い有機栽培の米として売られている。アメリカに輸出する米のパッケージには棚田の写真があり、「第8番目の不思議—ティナワンライス」というタイトルがついている。ティナワンライスとは一期作の米という説明がある。また、「フィリピン・イフガオの名高い棚田からの大昔からの米の種類」という宣伝文句が添えてある。これまでの販売実績は2005年が800kg、2006年が3トン、2007年が7トン、2008年は10トンを目標にしている。また、2008年7月には生産された米を展示し、ローカルマーケットでの販売を始めた。棚田農民組合の取り組みは、観光化が進み農業の地位が低下していく中で、観光で有名になったことを逆手にとって農業を活性化させていくこうというものであると考えられる。

(2). 家屋の変化

イフガオ族の伝統的な家はバレ(Bale)とよばれる。バレは4本の柱からなる茅葺の高床式の家屋で、釘を使わずに建てられる。はしごで約2メートルの高さまで登る。部屋は1部屋で、貧富の差により異なるが、典型的な家のサイズは4x6メートル四方である(Yap 2005:6)。部屋の片隅には囲炉裏があり、そこで料理をする。部屋の横は小さな物入れになっている。天井裏があり、そこに米などを貯蔵する。柱にねずみ返しがあるので、米は食べられたりしない。家の下は土間で、木彫りの彫刻を作ったり、洗濯物を干したりしている。電気、水は使えないでの、洗い物は外です。また、家の中ではろうそくかランプを使う。

研究者の書物やバナウェを紹介する観光本の写真は、棚田に階段状に伝統家屋が点在したり、半円形のひな壇のような棚田の底に伝統家屋が集まっている写真など、棚田とイフガオ族の伝統を象徴するバレが写っている美しい写真がほとんどである。観光客の多くはその美しい光景を見にバナウェにやってくるわけであるが、実際に来てみると棚田に点在する家屋のほとんどはバレではなく、カンポ(Kampo)と呼ばれる現代風の家々である。カンポにはコンクリート作りの家やトタンや木で作ったブラックのような家がある。お金のある家族はコンクリートの立派な家を建てるが、お金がないとブラックのような家になる。また、高床式の家を見つけても、それは茅葺ではなく、赤茶色に塗った亜鉛メッキの屋根であることが多い。観光に携わる現地の人々や棚田に住んでいる農民たちによると、観光客は現代風の家々を見て失望するようである。実際に観光客に話を聞くと、バナウェに来る前は伝統家屋がもっとあると期待していたようである。州の観光局や観光で生計をたてる人々にとって気がかりなのは、バナウェの風景がポストカードや観光パンフレットの写真のようにあまり美しいものではないということが、観光客が自分の国に帰って口伝で伝わり、観光客が減ってしまうことである。そこで、州政府や観光省の考え出したことは、伝統家屋の亜鉛メッキの屋根が銀色で太陽に反射していて見苦しいので、無料で赤茶

色のペンキを配り屋根を塗ってもらい、茅葺に近い色にすることである。しかし、それも根本的な解決にはなっていない。

このような変化はバナウェの場所にもよるが、中心のポブラシオンでは 1970 年代後半から人々はカンポを建て始めた。そして、現在、ポブラシオンにはコンクリート造りの家々ばかりである。川を挟んでポブラシオンの向かいにあるバランガイ・ボコスのヌンタマンガン村では 1980 年代に大きな台風があり、多くの家が壊された。それを機会に一軒一軒、新しく家を建てるときに、バレではなくカンポを建てていった。バレは何軒かが残っているのみである。また、同じくボコスのパナルンガン村では、1995 年から 2000 年ごろバレがカンポに替わっていった。

では、何故伝統的な家がなくなってきたのであろうか。これは、イフガオ族の人たちがバレに対して不便を感じているからである。以前はバレの 1 部屋に何人も暮らしていました。しかし、現在では、子供部屋を確保して、勉強ができる環境作ってあげたい。また、家の中で電気や水を使えるようにして便利な暮らしがしたいという欲求がある。家族、特に学校に通っている子供がいる家庭が家を建てようとする時、バレを立てる人はまずいない。また、今あるバレを維持しようとしている人々にとっても、茅葺の屋根を保つのは難しくなっている。屋根に使うのはイネ科の多年生草本のチガヤと呼ばれる植物で、水田の畦、路傍、芝地などに生える。一般に世界の最重要害草の内の 1 つに数えられるが、アジアやアフリカでは家畜のえさ、紙や茅葺の原料になってきた（富永他 2007: 17）。このチガヤが最近、バナウェでは手に入らなくなっているのである。かつて、チガヤは雑草であるため、農民は刈り取っていたが、屋根に使う分は取ってあった。しかし、現在では屋根への需要がないので、チガヤは根こそぎ取られるという。よって、チガヤが手に入らなくなった。今、チガヤを手に入れようとすると、低地から購入しなくてはいけない。それは、高地のバナウェのものと違い質の悪いものであるという。また、屋根の葺き替えは 2 年に 1 回おこなわなければならぬので費用がかさむのである。

このような変化により、現在、遠景として棚田を見た場合、棚田にある人々はカンポばかりである。

6.まとめ：観光化と近代化—変化をもたらすもの

本研究では、バナウェのイフガオ族の農業と家屋の変化を見てきたが、ではその変化をもたらしているのは何であろうか。結論から先に言うとそれは観光化と近代化である。20 世紀、アメリカの影響により、教育システムや行政システムが近代化してきた。1901 年にトマサイツと呼ばれる約 500 人のアメリカの教師がフィリピンに来て世俗教育を推進した。また、1960 年代以降、数多くのアメリカの平和部隊ボランティアが来て、発展という名のもとに伝統的なものを近代的なものに置き換えていった。その中で、フィリピンの農

村部でも農民の子供たちにも教育の機会が増え、政府や企業で働く人々が出てきた。このように近代化が教育の機会と農業以外での就労の機会を作ってきたというフィリピン社会の大きな社会の変化がある。この変化は近年のグローバル化で加速しており、農村部からもマニラや海外に出稼ぎに行く人々がいる。これらの人々は近代の合理主義や効率主義を農村部にもたらしている。このような近代化の影響はバナウェにも押し寄せ、農業外就労の機会を増やしてきた。また、近代的な考えは家の選択にも及んできた。伝統的なバレではなく、より便利で効率のよいカンポを選ぶようになったのである。これらは観光地であろうとなかろうと、フィリピンの農村部に見られる変化であるから、近代化の影響と考えるのが妥当である。

次に観光化の影響であるが、これは、これまで近代化の影響を促進してきた。バナウェは他の農村地域と比べ観光化が進んでおり、農業外での仕事のうち、観光産業にたずさわれる機会がある。これにより、伝統的なものの考え方を古いと考える、農民を出自とするロッジのオーナーや、ジプニーの経営者などが現われてきた。これら観光により成功してきたインやロッジのオーナー、レストラン経営者、みやげ物店経営者など、財を成した人々はコンクリート造りの大きな家を建てるようになった。また、オーナーなどにはならないまでも、手工芸品を作ったり、ホテルで働いたりして、出稼ぎに出なくても農業外収入を得て、バラックもしくは小さなコンクリートの家を建てることができるようになった。これらは観光化が近代化を促進している現象であるといえよう。観光化されていない農村部と比べて近代化の速度が速いのである。

一方で、観光化は近代化のプロセスを抑える働きもある。これは、観光が近代化の流れと軌を一にするマス・ツーリズムなどと共に発展してきたが、オールタナティブ・ツーリズムというポストモダン的な形態も観光には内包しているからである。アグリ・ツーリズムやコミュニティ・ツーリズムなど、棚田と伝統家屋の保存を重視するオールタナティブ・ツーリズムの流れが最近バナウェに押し寄せている。だから、棚田を荒廃させない取り組みや伝統的な家屋であるバレをどのように保存して、イフガオ族の本来の伝統を守つていこうかという模索がなされつつあるのである。

バナウェは観光化により近代化が促進されたが、その近代化が観光産業を衰退させる可能性があるというジレンマをこの町は今経験している。

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Who can be Hilltribes?
Can ethnic minorities acquire a “better life” by participating in ethnic tourism?

Kayoko Ishii¹

要約

本発表の目的は、少数民族観光の影響で、少数民族のあいだに多様な立場の分裂が生じるというとき、何によって、どのような立場の分裂が生じるのかを検討した。具体的には、法的地位の違いと、観光産業に関わる仕事から得る収入の違いに焦点を当てて分析した。

調査対象はチェンマイ市内の集住地区に住むアカの人々とし、分析手法としては、集住地区の各世帯に対して行った世帯調査から、各人の職種と収入を比較検討した。

分析の結果、たしかに法的地位の違いによって観光産業に関わる職業から得られる収入に違いがあることがわかった。また、その違いが生じる主な理由として、以下の3つの理由が考えられた。(1) 安定的・高収入の職業に就ける機会が国籍保持者に限定されているため。(2) 「売り子」の中でも、法的地位の違いによって、販売形態などが決まり、法的地位が弱いほど売上げの少ない形態でしか販売ができないため、(3) 日雇い労働においても、法的地位によって賃金が異なるため。

Abstract

This research aims to analyze the different stances that arose within the minority group as a result of ethnic tourism and the reasons behind them. The research focuses on analyze income gap among each legal status holders. First, it is alalyze if there is an income gap among legal status holders. Next, the reasons for the income gap are examined. This examination focuses on the case of the Akha tribe, which resides in the inner city of Chiang Mai. This tribe is closely involved with the tourism industry in Northern Thailand.

As a result, income gaps exist among legal status holders. The main reasons for the income gaps appear to be as follows: (1) lack of uniform opportunities for gaining a stable, high-income occupation (only nationality holders are allowed to hold stable occupations), (2) lack of uniform opportunities for choosing the style of vendors, which affects the income gap, (3) different working conditions as compared to day laborers (people with no authorized identification card have no bargaining power when it comes to back-paid or low wages).

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Introduction

Past research has reported that ethnic tourism proves beneficial for the minorities who are regarded as objects of ethnic tourism in two dimensions—economically and culturally. However, few studies have explored the gender and generation gaps prevalent in this “benefit.” This paper investigates whether tourism provides minorities with opportunities that help uplift their lives or merely offer them temporal income.

To further investigate this point, this paper will analyze the case of one of the *Akha* Hilltribes of Thailand, and the tourism industry, in Northern Thailand. The analysis would be based on a household investigation conducted among some *Akha* communities residing in the inner city area of Chiang Mai. First, the background of the *Akha* residing in the city as well as the tourism industry in Northern Thailand would be outlined. Second, the research findings would be investigated. Third, the research results would be analyzed in the context of sociological perspectives.

As a result, the following two aspects would be considered as dimensions of current ethnic tourism in need of re-evaluation: (1) the income opportunities in the tourism sector provided to minority people tend to be temporary and unstable, and (2) those who do not have proper identification documents in Thailand tend to be merely exploited as cheap minority labor rather than being profitably utilized with respect to their ethnic minority identity.

1.Theoretical Perspectives on Minority and Tourism

There have been numerous studies on ethnic tourism and its effects on local communities. In earlier studies, particularly those discussing the effects of ethnic tourism on ethnic relations around or within the minority, two main standpoints have been suggested by researchers.

First, some researchers suggested that ethnic tourism offers opportunities to reevaluate the value of the minority’s culture or ethnicity (Esman 1984:464). Therefore, ethnic tourism sometimes contributes to revive the confidence of the minority’s culture and identity (Bras 2001:101; Bruner 1991:247; Henry and Bankston III 2001:1040), or it sometimes reforms the ethnic power balance in the area (Adams 2006:17).

Other research indicated that ethnic tourism may have caused a rift within the minority group

(Zeng 2001:101). This kind of research often indicates that the ethnic image in ethnic tourism is based on the ethnic image, which is constructed through the interaction among host, guest, and tourist mediator, treated as a commodity in the context of the tourism industry (Cohen 2001:67). The ethnic image tends to be adopted so as to satisfy the tourist's expectations (Bruner and Kirshenblatt-Gimblett 1994:467). Since, tourism is one of the highly-invested industries pursued by stakeholders or governments, this ethnic image can gain returns by attracting more tourists (Chok, Macbeth, and Warren 2007:49). As a result, some members of the minority group keenly accept their ethnicity, believing that they can stand to gain from it; however, some members believe and act otherwise (Zeng 2001:101). Therefore, the minority people were divided on the basis of their different viewpoints (Michaud 1997:147).

Many researchers have pointed out the abovementioned phenomenon; however, few have empirically examined how and why these different viewpoints evolved within the minority group. The present study adds another dimension—how minority people are divided when faced with ethnic tourism—to the current literature concerning minorities and ethnic tourism. There are several dimensions that need to be mentioned with respect to the benefits of ethnic tourism for minority people; however, this study focuses on the dimension of economic impact, since it is difficult to analyze all the various types of impact in a paper. I will discuss other dimensions in other papers. This study focuses, specifically, on the legal status and income level of the minority people.

As a case in point, this study will discuss the *Akha* residents belonging to an inner city community in Chiang Mai, Northern Thailand, because tourism plays a significant role in the acquisition of means of livelihood of these residents.

2. Methodology and Data

This study is primarily based on an analysis of the interviews conducted among comprising 380 *Akha* people belonging to an inner city community in Chiang Mai. The interviews were conducted during February–March 2008. A bilingualistic *Akha* man, who was fluent in Thai and *Akha*, was our translator. A Japanese NGO staff member, who worked with the community for more than five years, acted as our coordinator. Since not all family members were available at the given time, the interviews were held with those residents who were available in that duration.

For the analysis, the following cases were omitted from the sample: (1) foreign spouse/partner of *Akha* person residing in the *Akha* community, and (2) short-time visitors to the community. With regard to the first case, I met a (Northern) Thai man and a French man, who were spouses/partners of *Akha* women and resided in the community or in the vicinity. They shared the household with their *Akha* wives and families; however, I chose to exclude them because they may have a privilege in terms of legal status, language, and racial impact as compared to mainstream Thai residents. In terms of visitors, it is a common practice among *Akha* residents to migrate to cities and villages for a long period of time. However, I included all individuals who are self-reported (or reported by family) as residents of the community. I omitted cases in which subjects stated, “I basically live in another city/village. I am visiting my family (etc.) for a short period.”

Further, the following cases were also included in the sample: (1) half-*Akha* people who may have a non-*Akha* father, and (2) people who are not formally recognized as *Akha*, a Hilltribe of Northern Thailand, by authority. There appeared to be half-*Akha* people, who may have a non-*Akha* father among the respondents, particularly, among the younger generation. However, I included these people in the sample, so long as they reported themselves or were reported by their family as *Akha*. Since they reside as a member of the *Akha* community, they tend to lead the life of an *Akha*. With regard to the people who are not formally recognized as *Akha*, I included all the residents who portrayed themselves as *Akha* in the community. Today, the Thai government is faced with a difficult task—to decide on a demarcation, which separates the “Hilltribes of Thailand,” who have resided in Thailand for generations from the refugees, who have migrated from Myanmar to Thailand in recent years. As a result, there still are many *Akha* people who are not admitted Thai nationals or who do not possess an authorized foreign resident’s card. Among those people who do not possess authorized documents required for being identified as an *Akha*, I included all those who recognize their *Akha* ethnicity, whether authorized or not.

As earlier research points out, the *Akha* may change their ethnic identity according to the situation (Toyota 1998:214). I, however, used samples comprising the people who reported themselves as *Akha* during our interview at the community, as a sample of *Akha* residents belonging to the inner city of Chiang Mai.

The interview questions elicited information about the subject’s gender, age, educational background, their household members, their current occupation, and the household income. Based on these responses, I analyzed whether the *Akha* people gain benefits from the tourism industry or how this “benefit” works in their favor.

This study is based on voluntary participations to the survey by the *Akha* residents, as there are no formal statistics available on them. Thus, this research frame displays an awareness of its limits as follows. First, the selection of the sample group may involve a slight bias. I must confess that the respondents tended to be families who hailed from the same or a nearby village of the translator. However, despite this limitation, I am confident that this research has produced adequately significant results. There does not arise any place for a bias in terms of the distribution of age, gender, and occupation within the samples. Moreover, the age and gender distribution were quite similar to that of a prior research conducted on the *Akha* residents in the inner city of Chiang Mai.

Second, all results were obtained from self-reports of the respondents and their families. In addition, we, too, did our best to get the respondents to trust us; for instance, we assured them that neither we nor this survey had any connection with the police. This was necessary as our sample could include some people who were cautious about revealing their legal status or their real income. Although we did our best to make them understand that our interviews will be used purely for statistical purposes, some respondents may have planned their responses with vanity since they were interviewed in front of another community member; we could not isolate them for a solitary interview. However, as a result, a portion of people with Nationality, authorized foreign resident's card and no identification are divided, and income range for each job were reasonable range. Thus, we assume that the results of this research have some implications, which are worth considering.

3. Ethnic Minority and Tourism in Northern Thailand

Akha residents of an inner city community of Chiang Mai

Akha is one of the “authorized” subgroups of the Hilltribes of Thailand. Since the 1950s, the Thai government started to intensify border control (Kesmanee 1994:680). Since then, the people residing in the border area were categorized as “Hilltribes” (chawkhaw) and placed under the control of the government (Bhrusasri 1985:2; Furui, 1993:31). The Thai government has proclaimed that approximately 1% of the Thai population (700 thousand people) belongs to the Hilltribes of Thailand (TRI 1995:5).

In the process of placing these people under governmental control, “development aid” was utilized (Kampe 1996:155–156; McCaskill 1997:26; Tapp 1990:149)². After a few decades of

² For details on “development aid,” see Bhrusasri 1985; Sutthi 1995. For a transition of the theoretical backbone for “development aid,” see McCaskill 1997.

“development effort,” it was inevitable for mountainous villages to be integrated into the national/urban society/economy (Jatuworaphruek 1997:1; McCaskill 1997:50; Tapp 1990:167). Many villagers left their villages and migrated to urban areas (Hoare 1982³:1; Jatuworaphruek 1997:1; Toyota 1998:197). The main reasons for rural-urban migration, common to migrants, are assumed to be as follows: (1) loss of cultivable land, because of the national forest protection regulation (McKinnon 1997:117; Sutthi 1989:107; Toyota 1998:208), (2) efforts to avoid increased drug problems in the mountainous villages (Toyota 1998:209), and (3) desire to liberate themselves from traditional social norms such as marriage, etc. (Toyota 1998:210).

According to prior studies on *Akha* residents in the inner city of Chiang Mai, the total number of *Akha* residents were estimated to be about 2,000 in 1996 (Toyota 1998:197) and 1,020 in 2004 (Bunaysaranay 2004:45). According to Toyota, the *Akha* people began living in the inner city since the 1970s (Toyota 1998:204).

According to the most recent investigation, Bunaysaranay’s research, the gender distribution of the *Akha* city residents are more or less divided (489 males and 531 females) (Bunaysaranay 2004:45). This distribution was quite similar to that of my sample (113 males and 120 females). With regard to age distribution, about 17% of the respondents were 0–10 years old, around 30% were 11–20 years old, 30% were 21–30 years old, 10% were 31–40 years old, and 8% were above 41 (Bunaysaranay 2004:45). In a ward, the younger generation constituted the biggest group of the sample. With respect to their educational background, people aged 30 years and above rarely had any experience with the system of Thai national education (Bunaysaranay 2004:53). Around 10% of the people in their twenties had any educational experience. The rate then augments upto 70% for the younger teenage generation (Bunaysaranay 2004:53). In a ward, people belonging to the older generation, 30 years and above, reside in the city with a relatively inadequate educational background.

Tourism and Hilltribes in Northern Thailand

According to prior studies and historical materials, the development of the tourism industry in Northern Thailand is as follows. In the 1950s, Thailand realized the potential importance of the tourism industry—to gain foreign currency in the context of national socioeconomic development (United Nations 1996:22–26). However, during the same period, the Thai government had to overcome several other urgent problems, and the international state of affairs was quite unstable in

³ The year of publication may be slightly different; it was impossible to find out the exact year although I did check for the same.

those days. Thus, not much was done with regard to the development of tourism during that period (Harron 1991:15).

It was in the late 1970s that Thailand actually embarked on their projects to promote the tourism industry in Thailand (Harron 1991:15; Truong 1990:163). Bangkok had already built touristic infrastructures to accept GIs during the Vietnamese war (Truong 1990:161). At the end of the war, Thailand started developing the tourism industry in Thailand (Harron 1991:15; Truongz 1990:163) and, later, expanding the tourism development in each region of the country (Ishii 2008b:108–109). In the process, Northern Thailand was one of the main targets of tourism development, following Southern Thailand which comprised cities such as Phuket (Ishii 2008b:108).

Ancient records reveal that Thai officials and local Thai agents did not expect the hilltribes to be tourist attractions the initial stage (Leepreecha 1997:272). Venerable temples and natural landscapes such as water falls and caves were regarded as tourist attractions by the Thai (Leepreecha 1997:272). However, Western tourists favored the deep forests over the mountainous regions, preferring to wander through forests and visit the hilltribal villages (Cohen 2001:38; Dearden 1992:221). In the early days, tourists hired private guides to lead them through the mountainous regions. Then, some guesthouses started to act as mediators between those guides and the tourists. A few years later, travel agencies seem to have taken over as mediators, affiliating with tour guides, both for mountainous region tours as well as city tours (Dearden 1992:221). Tours wherein one could wander through the mountainous regions and visit the hilltribal villages used to be called the “jungle tours,” now known as the “trekking tours.” It is in this way that the ethnicity of the Hilltribes started to become a tourist attraction.

In 1968, a Northern Thai couple, who were visiting the Polynesian Cultural Center, came up with an idea to start a similar cultural center in Northern Thailand. On returning to Thailand, they put their idea into practice and began constructing a cultural center in Chiang Mai (Bangkok Post 1996:5). They recruited villagers from the mountainous regions; these people began displaying their dancing skills to the tourists in the form of a “genuine hilltribal dance” at the cultural center in Chiang Mai (Toyota 1998:204). This supposedly marks the start of commodification of the “Hilltribal-ness” in the inner city region.

Today, few decades later, there are approximately 250 local travel agents that offer tourists trekking tours to hilltribal villages (Ishii 2008b) and at least four restaurants that offer the hilltribal

dance shows⁴. Apart from these attractions, there are many kinds of hilltribal handicrafts, postcards, and even videotapes, which explain the hilltribal customs, sold in souvenir shops and sometimes at airports. In the three decades of tourism promotion in Northern Thailand, the hilltribes became one of the main tourist attractions in the tourism industry in Northern Thailand.

4. Research Findings

My research comprised 380 samples. After referring to the results of the past investigation conducted by Bunaysaranay, I concluded that my sample includes about 37% of the entire *Akha* population in the city (Bunaysaranay 2004:45). However, I excluded the following: (1) children below 14 years, (2) senior citizens over 60 years, (3) full time students, (4) women who are a few-months pregnant or women who have a new born baby, and (5) incarcerated persons. After elimination, the total sample comprised 195 persons—102 males and 93 females.

Within the sample, their legal status, their occupation, the distribution of persons involved in that occupation were as follows.

Occupation and its distribution within the sample

It is not easy to identify the dividing line between tourism related occupations and non-tourist occupations. In the interview, I investigated whether his/her job is a tourist related one or not, for ambiguous occupations such as a cook or a waitress. If he/she works at a café or a restaurant in a tourist area, I regard it as a tourism related occupation; whereas, if he/she works at local diners, I regard it as a non-tourist occupation. It is, obviously, impossible to investigate whether or not occupations are specifically related to tourism, particularly, when the young Thai generation, over the last few years, is quickly emulating the West in terms of lifestyle. Along the same vein, some of these local Thais become regulars at cafes or bars formerly occupied by tourists. In this study, I define tourism related occupations in a wide context, because the purpose of our study is to find out the income earned by an *Akha* in tourism related occupations, and not to know whether or not an *Akha* is rigidly working in the tourism industry.

TABLE 1
Number of persons and average income depends on occupation

Job related to tourism	No. of persons	Average income	Job not related to tourism	No. of persons	Average income		No. of persons	Average income
Waitress	3	11,960	Office worker	3	7,160	Not working	17	0

⁴ As counted by the author and her local friends in 2008

Sweeper	1	4,480	Factory worker	1	5,000			
Bar staff	4	11,833	Governmental officer	2	11,100			
Bar sweeper	1	4,480	Diner staff	5	4,560			
Flower vendor	14	4,323	Farmer	14	1,279			
Staff at hamburger shop	1	7,000	Orderly	1	3,000			
Day laborer	30	4,383	Gin mill	2	4,620			
Hotel cook	1	5,000	Diner cook	1	7,000			
Hotel sweeper	3	4,467	Rag collector	1	5,000			
Souvenir vendor	56	4,269	Parking supervisor	3	2,660			
Souvenir maker	6	5,127	Cloth shop keeper	1	2,240			
Barbeque booth vendor	15	10,867						
Souvenir merchant	7	28,657						
Pick up staff for vendors	1	4,200						
Total	143	7,932	Total	34	4,874	Total	17	0

From the above results, it is possible to state that about 74% of the sample is working in a wider context of tourism related occupations; most of them are employed as various kinds of vendors or day laborers. Further, it is obvious that quite a few people gain a formal employee status.

Legal status and its distribution within the sample

There are three possibilities for an Akha resident of Chiang Mai city to hold a legal status—if he/she holds proper Thai nationality, if he/she does not have proper documentation, and if he/she holds the “authorized foreigner’s card”⁵ (Ishii 2008a). The number and distribution of the sample, which depends on the legal status, is as follows.

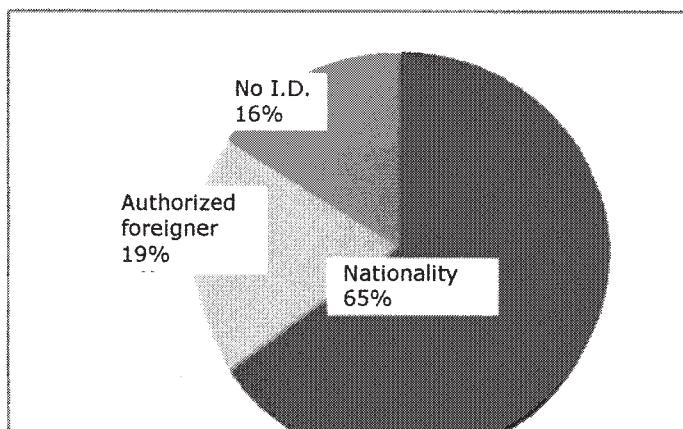


TABLE 2
Number and distribution of the sample by legal status

Legal status	No. of persons	Distribution
Nationality	126	65%
Authorized foreigner	38	19%
No I.D.	31	16%
Total	195	100%

FIG. 1. --- Distribution of residents depending on legal status

⁵ See Ishii 2008a for details.

The above table shows that about 65% of the sample has already acquired Thai nationality. However, 19% holds only the authorized foreigner's card, and 16% does not have any legal status at all.

Legal status and average income

When most persons in a sample are working as some kind of street vendor, is there still any difference in the income levels between persons of different legal statuses? The following figure demonstrates that average income depends on legal status.

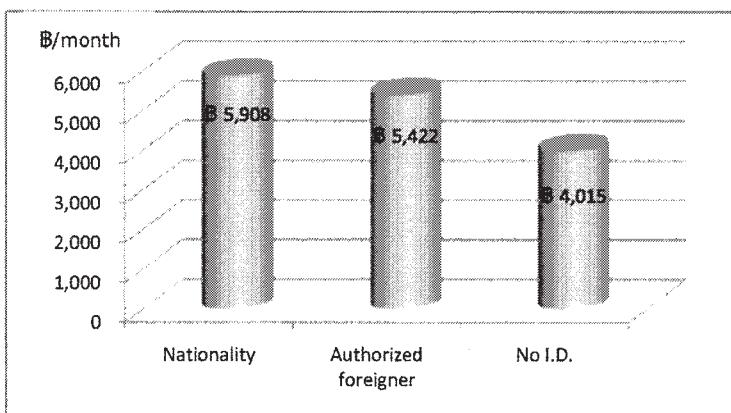


FIG. 2. --- Average income by legal status

Table 2 shows that there are obvious differences among the average income of each legal status.

5. Analysis and Discussion

Why are there income gaps among people depending on their legal status when most of them are working in similar kinds of jobs (vendors)? The key answer seems to be implicit in the following points.

1. Among the *Akha* community members, there are a few well earning people who raise the average income in the group. First, there were two persons working as governmental officials; this job is regarded as one of the very "good jobs" apart from that of an office worker. Second, there were wholesalers who sell the "hilltribal sovenirs" to foreign merchants. Lastly, there were people who sell souvenirs every weekend not only in Chiang Mai but also in Bangkok. To gain employment as a company office worker or a government official, holding Thai nationality is a prerequisite. Wholesalers who have to be in contact with local merchants in each area and vendors in Bangkok are required to periodically travel outside Chiang Mai city. This free travel is only allowed to those who hold Thai nationality. In case they still do not have any official documents, they are always faced with the threat of getting caught by the police as illegal residents. This threat arises during long distance journeys as officers often check the passenger's identification card on prefectoral

borders. Despite having a foreigner's card, most of them are not free to traverse particular borders such as the district border or prefectural border⁶. In particular, only Thai nationality holders are allowed to engage in occupations generating high income. It is obvious that not all nationality holders can gain good employment and income. However, it is certain from this that nationality holders are allowed opportunities to earn a high income or acquire a socially stable occupation if they possess adequate abilities and put in the required efforts. Others who possess an authorized foreigner's card or have no legal status are denied opportunities to rise to a better position, even if they are willing to contribute with their abilities and efforts.

TABLE 3
Detailed samples of high income group

Gender	Educational Background	I.D.	Occupation	Monthly income
M	None	Nationality	Office worker	12,000
F	None	Nationality	Wholesaler	32,000
M	None	Nationality	Wholesaler	22,000
M	None	Nationality	Wholesaler	20,000
M	None	Nationality	Wholesaler	30,000
M	4 years	Nationality	Wholesaler	40,000
F	None	Nationality	Wholesaler	12,600
M	None	Nationality	Wholesaler	44,000
M	16 years	Nationality	Government officer	18,000

2. Even among vendors working in the same area, there are many status differences (Ishii 2007). If they sell souvenirs on a table or on a mat placed on the pavement, their income is much better than walking vendors. However, even people selling souvenirs on the mat must make a monthly contract with landowners or building owners. Landowners/building owners only accept contracts with people who hold any kind of formal identification documents, namely, someone who is a national or an authorized foreigner (Ishii 2007). As a result, people who still do not have any authorized identification card must choose the least profitable job with the highest possibility.

⁶ See details on the scope of rights allowed for authorized foreign resident's card in Ishii 2008a.

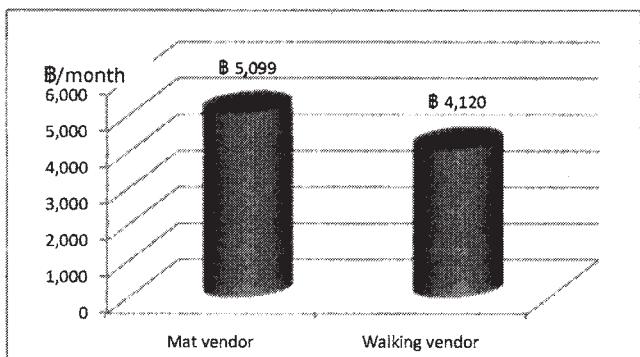


FIG. 3. --- Income gap between walking vendor and mat vendor

3. If the legal status of people working as day laborers is “week,” their work conditions, including payment, could be worse even if they work at the same construction site. The respondents who still do not have any authorized identification card often state that “back pay is common among us.” Even those who work with payment, which falls below the minimum wage, or those who face back pay cannot contend, for fear of losing their jobs or perhaps getting caught as illegal workers by the police.

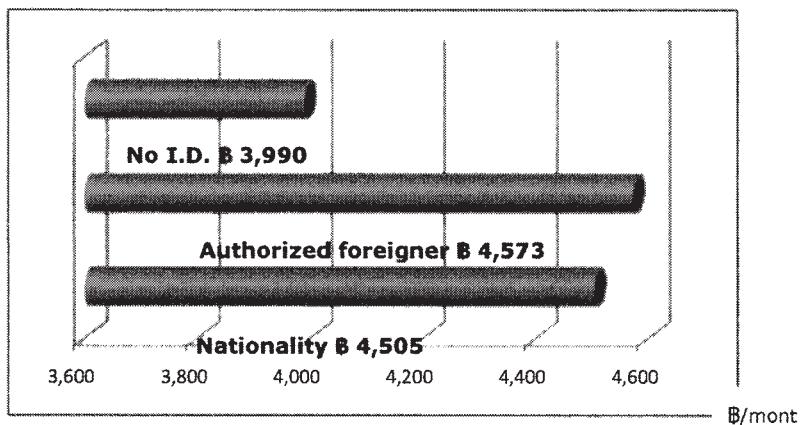


FIG. 4. --- Income gap due to legal status among day laborers

The abovementioned three points are considered as the main reasons leading to an income gap among each legal status holder.

Conclusion

What gives rise to different standpoints within an ethnic minority in the context of ethnic tourism? More specifically, is a different legal status one of the reasons to divide a minority group

into different status groups on the basis of their income? In my view, based on the above investigation, legal status is definitely one of the factors required to divide a minority group in the context of “participating” ethnic tourism with respect to the sample. The reason behind this view is that there are obvious income gaps among the *Akha* people who hold Thai nationality, who have an authorized foreigner’s card, and who have no authorized identification.

The main reasons for this income gap seem to be as follows: (1) different opportunities to acquire a stable, high income occupation (only nationality holders are allowed this opportunity), (2) different opportunities to choose the type of vending, which affects the income gap (with respect to souvenir vendors, only those who hold Thai nationality or an authorized foreigner’s card are presented with opportunities to earn well), and (3) different working conditions of day laborers (people with no authorized identification card are powerless in the case of back-paid or low wages). There certainly are people who are Thai nationals and are yet stuck with the lowest income. However, they are offered different opportunities to raise their income, which depend on their legal status. If they hold Thai nationality, they may be able to find a way to earn a better income depending on their ability or effort. However, if they only have an authorized foreigner’s card, it would be practical for them to become a vendor and find the best vending conditions suited for their abilities. On the other hand, if they do not have any authorized identification card, despite excellent abilities or great efforts, their job opportunities are limited to cheap labor⁷.

These results have some implications for the debate on the segmentation of ethnic minorities in the context of ethnic tourism, because, today, the ambiguous border between ethnic minority people and undocumented migrants is already a topic greatly focused on under ethnic tourism (Collins 2007:67). This study demonstrates that the complexity of legal status within a minority group could be one of the factors responsible for the segmentation of ethnic minority groups in the context of ethnic tourism.

Acknowledgements

⁷ It is true that there are exceptions, and legal status is not always fatal. I also know an exceptional case of a woman, who used to be a beggar during her childhood without any authorized identification, and who went on to become a rich businesswoman. Thus, we cannot assert that ascribed legal status decides a person’s fate. However, with regard to the previous example, it is important to know that even that businesswoman first acquired Thai nationality by appealing to the government with aid from an NGO. Fortunately, she was able to build her life as a businesswoman, after her efforts resulted in her gaining a Thai nationality. However, this exception is greatly owed to her personal ability, and this cannot be applied to or expected from everyone.

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タゴールのシャンティニケータンとベンガルのバウルの適応戦略

村瀬 智

Abstract

In 1961, during the Rabindranath Tagore's centenary celebrations, Visva-Bharati University opened the Uttarayan to the public. The Uttarayan was Tagore's home in Santiniketan, during the last years of his life. At the same time, the University established Vichitra, a Tagore museum adjoining the Uttarayan compound, which houses a variety of the Poet's effects —— his original manuscripts, letters, original drawings and paintings his personal effects, presents and awards received by him from different countries. At that point of time, the Government of West Bengal began to manage directly "Santiniketan Tourist Lodge" somewhere near by the University. It was the first full-scale hotel in this area. Tagore's Santineketan was recognized as significant resources for tourism.

This paper will focus on the Bauls of Bengal, a group of people who are mendicant musicians. By becoming Bauls, they were able to escape from crises in their lives. But they have still lived under difficult conditions. With high growth of Indian economy since 1991, a considerable number of the metropolitan new-rich have purchased villas in Santiniketan area. Moreover, it has been a boom in resort hotel construction. Keeping their identity as mendicant Bauls, they have sometimes organized a music team playing for the new-rich. The Bauls have adapted themselves to the new environment, and tried to get stable economic condition.

Keywords: Tagore, Visva-Bharati University, Bauls, villa, resort hotel, adaptive strategy

要約

1961 年、詩人タゴールの生誕 100 年祭が、ヴィシュヴァ・バーラティ大学を中心に、ボルプール・シャンティニケータン地域で盛大に行なわれた。それを記念して、タゴールが晩年を過ごした大学構内の邸宅（ウッタラヤン）が一般公開されるようになった。また、邸宅に保管されていた直筆の原稿、自身が描いたデッサンや絵画、書簡、邸宅を訪問した客人との記念写真、受けとった贈り物など、すべての遺品を展示するための博物館が、ウッタラヤンの敷地内に開設された。さらに、大学から程近い場所に、西ベンガル州政府直営の「シャンティニケータン・ツーリストロッジ」が開設された。それは、この地域で最初の一般観光客用の本格的な宿泊施設である。「タゴールのシャンティニケータン」は、重要な観光資源だと考えられたのである。そして大学周辺には、民間経営のホテルや土産

物店がつぎつぎを開店した。

本報告では、ベンガル地方の「バウル」とよばれる宗教的芸能集団をとりあげる。ベンガル社会の一群の人びとは、「バウルになる」ことによって人生の危機を切り抜けることができたが、あいかわらず社会的な弱者であった。バウルは、「バウルである」という彼らの文化的独自性を保持しながら、インド社会の急速な経済成長にともなうシャンティニケータン地域の観光現象に対してどのように適応し、経済的基盤を確立しようとしているのかを考察する。

キーワード：

タゴール、ヴィシュヴァ・バーラティ大学、バウル、別荘、リゾートホテル、適応戦略

インド・西ベンガル州ビルブム県のボルプールは、コルカタの北西約 160 キロ、急行列車で約 3 時間の地方都市である。ボルプールに隣接するシャンティニケータンは、詩人タゴールが創設したヴィシュヴァ・バーラティ大学の所在地として有名である。

本報告では、ベンガル地方の「バウル」とよばれる宗教的芸能集団をとりあげる。ベンガル社会の一群の人びとは、「バウルになる」ことによって人生の危機を切り抜けることができたが、あいかわらず社会的な弱者であった。バウルは、「バウルである」という彼らの文化的独自性を保持しながら、インド社会の急速な経済成長にともなうシャンティニケータン地域の観光現象に対してどのように適応し、経済的基盤を確立しようとしているのかを考察する。

① 「バウルの道」

ベンガルのバウルは、「マドゥコリ」をして生活している。ベンガル語の辞書は、マドゥコリという語を、「蜂が花から花へと蜜を集めるように、一軒一軒物乞いをして歩くこと」と説明している。すなわちバウルとは、「みずからバウルと名のり、バウルの衣装を身にまとい、人家の門口でバウルの歌をうたったり、あるいは神の御名を唱えたりして、米やお金をもらって歩く人たち」のことである。バウルは、世捨て人のようなゲルア色の衣装を着て、「門づけ」や「たく鉢」をして生活費を稼いでいるのである。

マドゥコリの生活は、ひとりの人間が「バウルになる」ためにも、また「バウルである」ためにも不可欠の要件である。これは彼らが選んだライフスタイルである。そしてこのライフスタイルそのものが、彼らが主張する「バウルの道」(バウル・ポト) の基本なのである。バウルの道とは、「マドゥコリの生活にはじまり、神との合一という究極の目標にいたる道」である。それは「人間の肉体は、真理の容器」という彼らの信仰に基づいている。バウルの説明は実に明快である。「わたしたちは富をもたない乞食です。わたしたちの唯一の財産は、この肉体です。しかし、この肉体には神が住んでおられる。それ以

上に何が必要ですか」と語るのである。

おおくのバウルが説明してくれた「バウルの道」を要約すると、つぎのようになるかと思う。・・・人は、もしバウルの道にしたがうならば、だれでもバウルになれる。ただし、バウルの道の第一歩では、（カーストの義務を放棄し）マドゥコリの生活を採用しなければならない。バウルの道の究極の目標は、人間の肉体に存在する神と合一し、神を実感することである。バウルと名のり、バウルの歌をうたい、マドゥコリの生活をするだけでは、バウルの道の半分しかすすんでいない。バウルの道の究極目標に到達するには、バウルの歌を通じてバウルの宗教をまなび、ヨーガの修行を通じて自己の心身を鍛えなければならない。そして最終的に、バウルの「サドナ」とよばれる宗教儀礼を実践しなければならない。そのためにはグルの導きが必要である。

②マドゥコリの生活：もうひとつのライフスタイル

バウルに、なぜ彼らがバウルになったのかという質問をすると、十中八、九、「子どものころから歌や音楽がすきだったからだ」という答がかえってくる。しかし、個々のバウルのライフヒストリーを詳細に検討してみると、長期にわたる心理的・経済的不安を経験したのちに、バウルになったようである。

ベンガル社会の一群の人びとが、なぜバウルの道をえらんだのかを、ただひとつの要因をあげて説明することはできない。彼らがバウルになった動機には、いくつもの要因が複雑にからみあっているのがふつうである。それらは、慢性的な貧困、低いカースト身分による抑圧、父母の別居による家庭崩壊、本人の意志のはいりこむ余地のない結婚に対する不安、世代間の反目、乳・幼児期における親の死、そして土地所有権や相続権をめぐる争いなど、解決できない抑圧の具体的な経験である。しかし、大多数のバウルに共通していることは、程度の差はあれ、彼らが貧困生活から脱却できないで苦しんでいたことである。

このように、バウルになる動機となった要因のおおくは、カースト社会に内在している特質や矛盾に由来するようである。そしてそれらの要因が彼らを脱出できない貧困において、結果として生じた感情的な緊張や心理的な不調和は、バウルには、「現実」であるが「耐えがたい」と感じられていたようである。カーストの地位や身分による限界、インドの家族制度や結婚制度の本質、経済的な不安定さなどに起因するこれらの社会的・心理的な問題に対する解答は、「苛酷な現実に耐える」か「耐えがたい現実から自由になる」かの二者択一である。このような状況のなかで、わたしがインタビューしたバウルのおおくは、自分の身に降りかかった問題に対する意味ある解決策を、文化的に是認された「世捨て」、すなわち「マドゥコリの生活」に見いだすことができたのである。彼らは、世捨て人の生活様式を模倣することによって、人生の危機を切り抜けることができたのである。

マドゥコリの生活は、個人の選択肢が制限されたカースト社会における、選択可能な

「もうひとつのライフスタイル」である。インド文明には、カースト制度にともなって、それと矛盾する世捨ての制度が、文明の装置として組み込まれているのである。

③プロの音楽家の出現

詩人タゴールが、20世紀初頭にバウルの歌や宗教の豊潤さを世に紹介して以来、それまで「奇妙な集団の風がわりな歌」とおもわれていたバウルの歌と音楽が再評価されるようになった。タゴールの影響により、その後ベンガル人学者によって膨大な数のバウルの歌が採集され、なかには注釈つきのりっぱな歌集として出版されるようになったのである。1951年、タゴールが創設したヴィシュヴァ・バラティ大学は、国立大学となった。大学はそれ以後、「ポウシュ月の祭典」（ポウシュ・ウトショブ）や「マーグ月の祭典」（マーグ・ウトショブ）を主催するようになった¹。大学は、祭典のプログラムのひとつとして、バウルの歌の音乐会を開催するようになったのである。

このようなヴィシュヴァ・バラティ大学の積極的な後援をきっかけに、1950年代後半には、バウルの歌と音楽は、「ベンガル民俗文化の不可欠の部分」と認識されるようになった。しかしこのことは、ベンガルのバウルの「宗教的求道者」という側面よりも、「民俗音楽家」という側面を強調することになったのである。音楽的技量に卓越したバウルは、ベンガルの上流階級の邸宅での私的な音乐会に招かれたり、大都会での祭典やラジオ・テレビにも出演するようになった。また、バウルの歌や音楽のレコードやカセットテープが商品として販売されるようになった。さらに、外国公演にも招聘されるバウルも出現するようになったのである。

ベンガル社会の急激な変化に呼応するように、一部のバウルは、マドゥコリの生活をやめ、プロの音楽家としての道をあゆみはじめた。彼らは音楽チームを組織し、バウルの歌を音乐会でしか演奏しなくなった。また、音乐会を開設し、アマチュアの音楽愛好家にバウルの歌や音楽を教えるようになった。彼らは、契約による出演料や授業料によって生活費をかせぐようになったのである。レコードやカセットテープに録音を依頼されたバウルは、バウルの歌や音楽の商業的価値を知った。また外国公演に招聘されたバウルは、外国人の心をもひきつけるバウルの歌や音楽の魅力に気づいた。さらに、野心のあるバウルは、プロの音楽家としての活動の機会のおおいコルカタに移住したのである。

ほとんどのバウルは、今日でもベンガルのいなかの村々をまわり、人家の門口で歌をうたったり、神の御名を唱えたりしながら、一軒一軒マドゥコリをして生活している。しかし彼らは、コルカタに移住し、自宅には電気や水道はもちろんのこと、冷房装置や温水装置も完備し、テレビや電話、運転手つきの自家用車まで所有するプールノ・チャンド

¹ ベンガル暦のポウシュ月（12月中旬～1月中旬）とマーグ月（1月中旬～2月中旬）は、季節としては冬であるが、1年でもっとも気候のおだやかな時期である。

ロ・ダシュ²のような、プロの音楽家として成功した「スター」の生活も知っている。今日の若いバウルが、バウルの歌を一握りの米と交換するために「門口」でうたうよりも、気前のよい祝儀が期待できる「舞台」でうたいたがるとしても、それは当然である。そして彼らの関心が、宗教や儀礼に精通したバウルになることよりも、歌手として人気のあるバウルになることだとしても、それは不思議なことではない。

④シャンティニケータンの観光地化

1961年、タゴールの生誕100年祭が、ヴィシュヴァ・バーラティ大学を中心に、ボルプール・シャンティニケータン地域で盛大に行なわれた。それを記念して、タゴールが晩年を過ごした大学構内の邸宅（ウッタラヤン）が一般公開されるようになった。また、邸宅に保管されていた直筆の原稿、自分が描いたデッサンや絵画、書簡、邸宅を訪問した客人との記念写真、受けとった贈り物など、すべての遺品を展示するための博物館が、ウッタラヤンの敷地内に開設された。さらに、大学から程近い場所に、西ベンガル州政府直営の「シャンティニケータン・ツーリストロッジ」が開設された。それは、この地域で最初の一般観光客用の本格的な宿泊施設である。「タゴールのシャンティニケータン」は、重要な観光資源だと考えられたのである。

シャンティニケータンの観光地化にともなって、ヴィシュヴァ・バーラティ大学周辺に、民間経営のロッジや土産物店がつぎつぎと開店した。大学主催の「ポウシュ月の祭典」や「マーグ月の祭典」が開催中でなくとも、インド人観光客でにぎわうようになったからである。

「シャンティニケータン」という地名は、「平和の郷」という意味で、そのひびきのよい名前は、インド人だけでなく、外国人にもアピールしたようである。1960年代後半から、ヴィシュヴァ・バーラティ大学に外国人留学生が増えってきた。また、自由な旅行を楽しむ外国人バックパッカーも増えてきた。欧米や日本などの先進的産業社会では、体験型の海外旅行ブームがおこったのである。アメリカやヨーロッパで、英語版の「地球の歩き方」のようなガイドブックが、つぎつぎと出版されたのである。インドは訪問国として若者に人気があった。それには、ビートルズのジョージ・ハリソンがインドのシタール奏者ラヴィ・シャンカールに弟子入りしたことや、シンガーソングライターのボブ・ディランがプールノ・チャンドロ・ダシュ（バウル）とアメリカ各地で共演し大成功をおさめたことなどが、大きく報道されたことも影響を与えたのかもしれない。

² Purna Chandra Das (1935-)：プールノは、プロの音楽家として成功した最初のバウルである。1954年、彼は「アカシバニ」（インド国営放送のベンガル語名）に出演し、その傑出した歌唱力で一躍有名になった。彼はその後、インド国内だけでなく海外にも活動の場を広げ、ソ連（当時）、アメリカ、ヨーロッパ、日本など世界各地で公演を行っている。彼は「バウルはマドウコリの生活をやめるべきだ」と主張している。

⑤マドウコリのパターンの変化（その1）

バウルは、人家の門口でバウルの歌をうたったり、あるいは神の御名を唱えて、マドウコリをして生活費を稼いでいる。それは、ベンガルの町や村の、「ベンガル人の家の門口」のことであった。しかしバウルは、1970年頃から、ヴィシュヴァ・バラティ大学のホステルに住む外国人留学生や、ツーリストロッジに滞在する外国人旅行者も訪問するようになったのである。彼らは、外国人にバウルの歌をうたって、金銭を要求するようになったのである³。

さらにバウルは、やはり1970年頃から、人家の門口でマドウコリをするだけなく、列車の中でも歌をうたって稼ぐようになった。乗客には、バウルの歌を求めるインド人観光客や外国人旅行者も少なからずいたからである。

列車のなかで歌をうたって稼ぐことの最大の利点は、天候に左右されず、きびしい夏や雨期にも容易に行えることである。ベンガルの夏には、「ルー」とよばれる熱風が何日もつづく。手に触れるものは、すべて熱く感じられる。雨期になれば、すこしは涼しくなる。しかし、雨期には時には川があふれ、道が流される。夏や雨期は、村にマドウコリに行くのが困難な時期なのである。

しかし、この利点にもかかわらず、バウルのおおくは、列車のなかで歌をうたって稼ぐよりも、村でのマドウコリを好むようである。その理由のひとつは、列車のなかは、いつもざわざわした雰囲気にあるからだ。バウルが歌をうたっていても、さまざまな物売りが大声をはりあげて、混んだ車内をとおりすぎてゆく。そこは、演奏者のバウルにとっても、聴衆の乗客にとっても、十分な環境とはいがたい。

もうひとつの理由は、そこでは、バウルが不特定多数の正体不明の乗客を相手に歌をうたわなければならないことがある。このことは、ボルプールのS地区に住むBDBの証言によくあらわれている。

「おおぜいの乗客のなかには喜捨をしたくない人もいるでしょう。それでもその人は人目を気にして、20ペイサか25ペイサの小銭を与えるでしょう。しかし、わたしがどこかの村のだれかの家の中庭でうたっている姿を想像してごらんなさい。そこには数人の聴衆しかいないけれど、彼らはわたしの歌をじっと聴いてくれる。そして、わたしの歌に満足した村びとは、一握りの米をよろこんで与えてくれます。それは、列車のなかの不本意な小銭よりもはるかにうれしい」。

バウルは、列車の無賃乗車を黙認されている。しかし、無賃乗車を黙認されているのはバウルだけではない。乞食や物売り、そして世捨て人も無賃乗車を黙認されているのである。

³ 1972-74年に、ヴィシュヴァ・バラティ大学に留学したタケウチ・ワクは、バウルの突然の訪問を受けたときの印象を報告している [Takeuchi 1976: 28-36]。

村でマドウコリをするバウルは、経文を唱えて物乞いをするボイラギ（ヴィシュヌ派の出家修行者）やファッキール（イスラム神秘主義の行者）などと同様に、世捨て人の範ちゅうの人間である。しかし、列車のなかで歌をうたって稼ぐバウルを、一般の乗客はどうのようにみているのだろうか。バウルは小銭を求める乞食なのか。それとも、歌の押し売りをする物売りなのか。

⑥インドの経済危機と経済政策の転換

1990年8月のイラクのクウェート侵攻がきっかけとなり、91年1月に湾岸戦争が始まった。この影響で原油価格が高騰し、また、中東に出稼ぎに出ていたインド人労働者からの送金が止まった。この結果、インドは外貨準備が輸入の約2週間分にまで減少するという深刻な国際収支危機に陥った。

社会主義経済により国内産業の保護を優先してきたインド政府は、1991年から経済自由化路線へ変更する経済改革を開始した。具体的には、国内における産業規制の緩和や、貿易・諸外国からの投資の自由化を進展させ、高い経済成長の実現を目指す政策である。

⑦急速な経済成長

1991年の経済改革が功を奏し、1992年以降のインドの国内総生産（GDP）は順調に伸展している。1993年から2003年のインドの平均GDP成長率は5.9%であるが、同じ時期の日本の成長率は1.2%であるので、インドが着実に経済成長を続けているのがわかる。

つぎの「表1」は、「インドの所得別世帯構成の推移」を示したものである。

	1985	1989	1992	1995	1998	2001
低所得層(45,000ルピー)	65.3	58.9	58.2	48.9	39.8	34.6
下位中所得層(45,001~90,000ルピー)	25.2	26.9	25.4	30.7	34.5	37.3
中所得層(90,001~135,000ルピー)	6.9	10.1	10.4	11.9	13.9	13.9
上位中所得層(135,001~180,000ルピー)	1.5	2.7	3.7	5.0	6.2	6.8
高所得層(180,001ルピー~)	1.1	1.4	2.3	3.5	5.7	7.3

表1：インドの所得別世帯構成の推移（単位：%）

出典：NCAER（インド国立応用経済研究所）

「表1」をみると、経済成長にともない年間の世帯収入が45,000ルピー以下の低所得層が減り、年間の世帯収入が90,000ルピー以上の中所得層以上の占める割合が、1985年度の9.5%から2001年度には28%まで拡大している。「表1」にはないが、中所得層以上の割合は、2005年度ではさらに34.5%にまで拡大しており、いわゆる中間層が増大していることがわかる。インドというと「貧困」というイメージが強かつたが、人びとの生活

は着実に豊かになっているのである。事実、自動車や二輪車、家電製品の購入も増えてい
るし、携帯電話、パソコン、インターネットの利用も急速に増えている。

⑧別荘とリゾートホテルの建設ラッシュ

1988 年当時、シャンティニケータンの北 1 キロ、プランティック駅の西側は、広々とした野原だった。ところが、1990 年代後半になると、野原は宅地造成され、コルカタ在住の富裕層の別荘がつぎつぎと建てられた。いずれも豪邸である。また、大資本の開発による分譲邸宅もつぎつぎと売りだされた。たとえば、2005 年に第 1 期工事がはじまり、2007 年に第 2 期工事が完了した 180 棟からなる「ショナル・タリー」（「黄金の船」の意）の守衛によると、家主はコルカタ、デリー、ムンバイなどの大都市の富裕層で、なかには映画スターも入居しているという。ただし、家主はこれらの邸宅を別荘として使用しており、常時住んでいるわけではない。しかし、邸宅の管理や手入れをする使用人やメイドが住む別棟の小屋があり、常駐している。

また、1990 年代後半になると、シャンティニケータン地域には、高級リゾートホテルがつぎつぎと建てられた。その数は 20 をこえる。1 泊 3000—4500 ルピーの超高級ホテルから、1 泊 1000—1500 ルピーの高級ホテルまで、種類はさまざまである。これらのリゾートホテルは、1960 年代から 80 年代に建てられた、1 泊 100 ルピー前後の、宿泊だけのツーリスト・ロッジとは性格が異なる。休日をシャンティニケータンの別荘や高級リゾートホテルで過ごす新興富裕層が増えているのである。観光地シャンティニケータンが高級化しているのである。

⑨急速な物価の上昇

急速な経済成長は、物価の上昇をともなう。つぎの「表 2」は、1988 年と 2007 年の物価や流通貨幣を比較したものである。

	1988	2007
コルカタ(空港-市内)の prepaid-taxi の運賃	Rs. 60.00	Rs. 250.00
鉄道運賃(Howrah-Bolpur, Express, 2nd Class, 159 km)	Rs. 18.00	Rs. 48.00 (2002 年改定)
米1キロの値段	Rs. 4.00	Rs. 22.00
流通紙幣の種類	1, 2, 5, 10, 20, 50, 100 (Rupee)	10, 20, 50, 100, 500, 1000 (Rupee)
流通硬貨の種類	5, 10, 20, 25, 50 (paisa)	50 (paisa)

	1 (Rupee)	1, 2, 5 (Rupee)
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表2：インドの物価と流通貨幣の比較

関西空港からコルカタ行きの飛行機は、どの航空会社も深夜着である。ホテルの予約をする習慣のないわたしは、空港からプリペイド・タクシーを利用して、市内の安ホテル街サダル・ストリートに直行するのが常である。空港のプリペイド・タクシーなので、法外な運賃を請求されることはないのであるが、それでも運賃は毎年確実に上がっているのを実感する。深夜なので交通渋滞はない。約1時間でサダル・ストリートに着く。途中、運転手との雑談のなかで、米1キロの値段を聞くことにしているが、1988年には4ルピーだったのが、2007年には22ルピーということだった。米の値段を市場で確認しているので、運転手のいうことは、毎年ほぼ間違いない。それにしても、米の1キロの値段が、20年間で5倍以上にもはね上がっているのである。1991年の経済改革以降、人びとの生活は着実に豊かになったといわれている。しかし、「表1」の年間の世帯収入が45000ルピー以下の低所得層というのは、1日の収入が1ドル未満の「絶対的貧困層」に当たる人びとで、2001年には、まだ全人口の34.6%にも及んでいる。急速な物価の上昇は、貧困層を直撃しているのである。

⑩マドウコリのパターンの変化（その2）

バウルは、1970年頃から村でマドウコリをするだけでなく、列車のなかでも歌をうたって稼ぐようになった。乗客には、バウルの歌を求めるインド人観光客や外国人旅行者もいたからである。しかし、1990年代の中頃から、列車で稼ぐバウルがめっきり少なくなった。そして2002年から、車内で稼ぐバウルをまったく見かけなくなった。

バウルが村でマドウコリをする場合、喜捨として受けとるのは、米や季節の野菜などの「現物」である。それに対し、列車内でうたって稼ぐバウルが受けとるのは、もっぱら「現金」である。

1980年代まで、インドのローカル列車に乗ると、ポケットには20ペイサや25ペイサの小銭がいくつも必要だった。つぎつぎと来るバウルや乞食、床を清掃する少年などに与えるために必要だったのである。乞食に「1ルピー紙幣しかないから、75ペイサの釣り銭をくれ」とはいえないからである。ところが、1990年代中頃から、流通する紙幣や硬貨が高額になってきた。1988年には流通していた5ペイサ、10ペイサ、20ペイサ、25ペイサの硬貨がなくなった。50ペイサ硬貨はまだ流通しているが、市場ではほとんど見かけなくなった。物の値段の最低額は、現在では1ルピーである。しかし、乗客はバウルや乞食に「1ルピー硬貨」を与えるのにはちゅうちょするようである。人びとは、まだ「1ルピーの価値」を記憶しているのである。結果として、バウルや乞食を無視する乗客が増えた。この傾向は、もっぱら列車で歌をうたって稼いでいたバウルには打撃であろう。

バウルや物売りは、列車の無賃乗車を黙認されていた。しかし 2002 年から、車内の物売りには営業許可証が必要となった。そして、車内で歌をうたって稼ぐバウルの無賃乗車も黙認されなくなった。車内で歌をうたって稼ぐことは、「営業行為」とみなされるようになったのである。バウルは、インド人観光客や外国人旅行者の利用する昼間の急行列車には乗らなくなった。列車で稼ぐのは、割に合わない仕事になったのである。結果として、バウルは村でマドゥコリをする回数が増えた。

村へマドゥコリに行くために列車を利用するバウルは、乞食や世捨て人と同様に、あいかわらず無賃乗車を黙認されている。バウルが利用するのは早朝の普通列車である。検札官は、「チケットはもっているか」と、一応は問い合わせる。しかし、バウルが「マドゥコリをして食べているので、チケットを買うことができない」というと、黙認してくれるという。

⑪ 「10 ルピー・バウル」

シャンティニケータンの SP 地区に住む GDB は、自分のことを「10 ルピー・バウル」とよんでいた。彼はわたしの隣人のひとりだった。最初は挨拶を交わす程度だったが、間もなく私の家に毎夕のように来るようになった。わたしの本棚に、バウルの歌の主要な歌集がそろっているのを見つけたからである。

GDB が自分のことを「10 ルピー・バウル」とよぶように、彼の稼ぎは、その日によつて変動はあるものの、およそ 1 日に 10 ルピーであった。つぎの「表 3」は、1988 年 1 月 1 日から 12 月 31 日までの、一年間の彼の稼ぎをまとめたものである⁴。

「10 ルピー・バウル」の経済活動	日 数	収入 (ルピー)
村や町でのマドゥコリ	125	1445.80*
列車でうたって稼ぐ	64	615.70
村や町でのマドゥコリと列車での稼ぎ	13	215.00
祭りやメラへの参加	16	72.00
演奏会への参加	10	60.00
要請によりうたう	8	539.00
その他	25	280.00
休日	117	0
合 計	378**	3227.50

* コメや野菜などの現物は、市場価格に換算し、ルピーで表示した。

** マドゥコリをした日の夕方に、歌を要請された日などは、両方を 1 日と計算した。

表 3 : GDB の経済活動 (1988 年)

⁴ GDB の 1 年間の稼ぎの分析については、拙稿 [村瀬 1992: 112-122] を参照。

GDB は、数年前から列車で歌をうたって稼いでいる。しかし彼は、現在でも週に 3 日は村にマドウコリに出かけるという。そして、彼が村で 1 日マドウコリをすると、米 2 ~3 キロ、季節の野菜 1~2 キロを集めることができるという。それは 20 年前と変化していない。彼が村人から喜捨として受ける米や季節の野菜などの「現物」の価値は、物価の上昇に影響されない。バウルは、村でマドウコリをするかぎり、収入減とはならないのである。

⑫観光客相手の音楽チーム

1950 年代から 60 年代にかけて、いち早くプロの音楽家の道を歩むようになったのは、音楽的技量に卓越した一部のバウルにかぎられていた。しかし、1990 年代の中頃から、ボルプール・シャンティニケータン地域に住む「ごくふつうのバウル」も、気の合った仲間と音楽チームを編成するようになった。シャンティニケータン地域につきつぎとできた新富裕層の別荘やリゾートホテルから、演奏を依頼されることが増えたからである。バウルは、村にマドウコリに出かけるときは単独行動であるが、演奏の依頼を受けると音楽チームを組むのである。

シャンティニケータンの SP 地区の GDB も、そのような音楽チームに所属している。音楽チームは 5 人編成で、リーダーは、1990 年代に SP 地区に移住してきた BDB である。メンバーは、BDB と GDB のほかに、タブラ（太鼓）奏者、バーンシ（竹の横笛）奏者、そしてハルモニウム（箱形の手押しオルガン）奏者である。このうちバウルは、BDB と GDB で、楽器演奏だけでなくボーカルも担当する。あとの 3 名は音楽愛好者で、ほかに職をもっている。しかし、演奏依頼があると、全員がバウルの衣装を着用して出かける。観光客相手の音楽チームには、しばしば「バウルもどき」が紛れ込んでいるのである。

BDB と GDB は、詩人タゴールで有名なシャンティニケータンを訪れた外国人観光客や、遠来の客をもてなす金持ちのベンガル人に請われて、ときどきバウルの歌をうたうことがあった。また、ほかの音楽チームのパートタイムのメンバーとして、別荘やリゾートホテルで演奏することもあった。しかし彼らは、2000 年頃から、別荘の管理人やリゾートホテルのマネージャーから、「自分の音楽チームをもっていますか」とか、「全部込みで演奏料はいくらですか」とかの問い合わせを受けるようになったのである。たぶん BDB と GDB の人柄が好印象を与えたのだろう。こうして、BDB の提案で、聴衆のリクエストに柔軟に対応できるように、タブラ、バーンシ、ハルモニウムの奏者を加えて、観光客相手の 5 人編成の音楽チームが誕生したのである。彼らは、観光客相手の演奏のことを「プログラム」とよんでいる。

リーダーの BDB は、自宅に看板を掲げ、名刺をつくり、シャンティニケータンのリゾートホテルのマネージャーや別荘の管理人に挨拶回りをした。2005 年には携帯電話にも加入した。彼の営業活動は功を奏し、演奏依頼も徐々に増えているという。

BDB の音楽チームは、繁忙期の休日には 1 日に数カ所からの演奏依頼を受けることがあるが、閑散期には月に 2~3 回のこともあるという。それでも平均すると、週に 1~2 度の演奏依頼を受けるという。BDB の 5 人編成の音楽チームの出演料は、2 時間の演奏で平均 1000 ルピーである。出演料は各メンバーに平等に分配される。しかし、リーダーの BDB には、依頼者から 100~300 ルピーの祝儀が、別途に渡されることがある。また個々のメンバーにも、演奏を気にいった聴衆から 20~50 ルピーの祝儀が渡されることがある。それらの祝儀は、受けとった者のものになることは、メンバー全員の了解事項である。

⑬バウルの年間の稼ぎ（概算）

さて、バウルの 2006-2007 年の稼ぎを、シャンティニケータンの GDB を例に概算してみよう。

GDB は、現在でも週に 3 日は村にマドゥコリに出かける。これを概算すると、彼は年間に 165 日マドゥコリに出かけたことになる。彼が村で 1 日マドゥコリをすると、村人からの喜捨として、米 2~3 キロと、季節の野菜 1~2 キロを受けとるという。2007 年の市場価格では、米 1 キロの値段は 22 ルピー、季節の野菜 1 キロの値段は、平均すると、およそ米の半額である。GDB の 1 日のマドゥコリで得た喜捨を、市場価格に換算して概算すると、71 ルピー-50 パイサ (Rs.71.50.-) ということになる。つまり彼は、マドゥコリで年間 11,797 ルピー-50 パイサ (Rs.11,797.50.-) 稼いだことになる。

GDB は、週に 1~2 回、プログラムに出演するという。これを概算すると、彼は年間 83 回のプログラムに出演したことになる。彼は 1 回のプログラムで、平均すると 200 ルピーの出演料を受けとる。したがって、年間のプログラムの出演料として、16,600 ルピー (Rs.16,600.00.-) 稼いだことになる。

バウルは、数年前から列車のなかで歌をうたって稼がなくなった。その理由は、すでに述べたように、列車で稼ぐのは、割に合わない仕事になったからある。さらにバウルは、メラや祭りに参加しなくなった。それは、ベンガルで主要なメラや祭が行われるのは、秋の米の収穫がおわり、もっとも気候のおだやかな霜期と冬に集中しているからである。その時期は観光シーズンで、観光地となったシャンティニケータン地域の繁忙期である。したがって観光客相手の音楽チームを編成しているバウルには、割りに合う仕事が殺到する時期もあるからである。

GDB が、村にマドゥコリに出かけなかった日や、プログラムに出演しなかった日を休日とみなすと、それは年間 117 日となる。週休 2 日のペースは、20 年前と変化していない。

GDB のマドゥコリとプログラムによる稼ぎは、不確定要素のおおい祝儀を除いて概算すると年間 28,397 ルピー-50 パイサ (Rs.28,397.50.-) となる。これらの概算をまとめると、つぎの「表 4」のようになる。「表 4」は、「表 3」のように、日々の稼ぎを集計した厳密

なものではない。あくまでも概算である。

GDB の経済活動	日 数	収入(ルピー)
村でのマドゥコリ	165	11,797.50
プログラムに出演	83	16,600.00
列車でうたって稼ぐ	0	0
メラや祭への参加	0	0
休日	117	0
合 計	365	28,397.50

表 4 : GDP の年間の経済活動 (2006-07 年、概算)

⑪バウルの適応戦略

今までの議論を整理しながら、「表 3」と「表 4」を比較すると、インド社会の急速な経済成長にともなうシャンティニケータン地域の観光現象に対する、バウルの適応戦略がうかびあがってくる。

まず気づくのは、バウルにとって、マドゥコリで生活することの重要性である。マドゥコリの生活は、ひとりの人間が「バウルになる」ためにも、また「バウルである」ためにも不可欠の要件である。これは彼らが選んだライフスタイルである。

バウルが村人から喜捨として受けとるのは、米や季節の野菜などの「現物」である。「現物の価値」は、インド社会の急速な経済成長にともなう物価の上昇に影響されない。バウルは、村でマドゥコリをするかぎり、収入減とはならないのである。

「表 3」と「表 4」をみると、GDB の 2006-07 年の稼ぎ (Rs.28,397.50.-) が、1988 年の稼ぎ (Rs.3,227.50.-) に比べ、8.8 倍になったことがわかる。この期間の米 1 キロの値段が、1988 年の 4 ルピーから 2007 年の 22 ルピーへと 5.5 倍の上昇なので、彼の稼ぎは物価の上昇を上回っている。これは、別荘やリゾートホテルで観光客相手のプログラムという、割りに合う仕事が増えたからである。

観光客が求めているのは、シャンティニケータンの別荘やリゾートホテルで、バウルの歌や音楽を聴いたり、バウルの演奏で踊ったりして、家族や友人と楽しむことである。バウルもそのことを十分に承知している。バウルは、観光客相手の音楽チームを組織するときに、聴衆のリクエストに柔軟に対応できるように、バウルではないタブラ奏者やバーンシ奏者、ハルモニウム奏者を加えた。また演奏依頼があると、メンバー全員がバウルの衣装を着て出かけるようにした。バウルは、インド社会の急速な経済成長にともなうシャンティニケータン地域の観光現象に対して、自身の文化的独自性を保持しながら観光客相手の音楽チームを組織するという方法で適応し、経済的な基盤を確立しようとしているの

である。

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Human Development and the Role of Tourism --- From Capability Approach

人間開発とツーリズムの役割：ケイパビリティ・アプローチの観点から

Ikemoto Yukio

要約

社会的弱者が観光を逆手にとって自分たちの生活の改善に結び付けていくか。本稿では、社会的弱者であって、観光に利用されることの多い少数民族を取り上げる。少数民族の伝統的な踊りや衣装は観光の対象となる。観光に関わることができれば、いくらかの収入を得ることができるだろう。しかし、観光を逆手にとるということをそのような狭い視点で捉えるべきではない。社会的弱者が弱者であるのは、社会階層の底辺に置かれているからである。その構造が低所得の原因となっているのであり、その構造を変えなければ所得を少しばかり増やしても大きな効果は得られないだろう。もうひとつ社会階層の底辺に置かれていることの悪影響は健康に現れる。これは疫学的研究によって、不平等な階層社会ほど健康への悪影響が大きいことが明らかにされている。観光客は、一時的にではあるが、この不平等な構造の中に入り込む。観光客が弱者に対してどのような態度をとるか（尊重するのか、見下すのか）によって、この不平等な構造を改善することもできるし、悪化させることもできる。「倫理的観光」が求めているものは、前者の態度である。残念なことに、わざわざ「倫理的観光」を強調しなければならないということは、いかに「罪深い観光」が多いかということでもある。

Abstract

How can socially vulnerable people make use of tourism to improve their life? This paper mainly deals with ethnic minority people as the socially vulnerable. Their traditional dancing and costumes are often used as targets for tourism. They may earn a small amount of money if they are involved in tourism. However, the impact of tourism should not be confined to such a narrow perspective as income generation. The reason why they are vulnerable is that they are put at the bottom of social hierarchy. This structure causes their low income and this structure should be changed if the problem of low income is to be solved. An adverse effect of their low position in social hierarchy appears in health. Epidemiological evidences have proved that more unequal society has more serious impact on health. Tourists intervene in this hierarchy, though temporarily. Their attitude to the vulnerable people (namely, respect or disrespect) will affect the unequal structure (favourably or unfavourably, respectively). What the “ethical tourism” ask for tourists is the attitude of the former. Very

unfortunately, the fact that ethical tourism is emphasized indicates how many people are travelling guilty trip.

Keywords: capability approach, ethnic minority people, dominance hierarchy, ethical tourism

1. Introduction

How can socially vulnerable people make use of tourism to improve their life? This is the research question of our project. To answer this question, we need to define what is the improvement of life. It seems intuitively evident that it does not exclusively mean increase in income because income is just a means to live a life and our life is composed of non-economic as well as economic aspects. Therefore it is completely misleading to evaluate tourism in terms of income. Instead this paper focuses on their low social status. Therefore more specific question of this paper is how tourism can improve their social status. In order to answer this question, we start our discussion by showing that socially vulnerable people are considered to be at the bottom of social hierarchy. The indicator that is used to put them at the bottom is income. Once they are put at the bottom in terms of income, their other attributes such as culture are also considered “backward.”

Then how does social status affect their life? Epidemiological analysis provided a lot of evidence that low social status affect adversely their health, which is an important aspect of quality of life. The adverse effect becomes stronger in a more unequal society. Inequality of a society may be measured in terms of income but it is just an indicator of dominance hierarchy of the society. The degree of dominance becomes higher in a more unequal society where the majority people look down the socially vulnerable people. Such dominance hierarchy can be seen often when we visit villages of ethnic minority people. Our visit has some impacts on this hierarchy. When we respect their culture and treat them as equals, their position can be improved, though the impact may be very small. To the contrary, we also look them down, their relative position will be even worsened. This paper applied such experience to the case of tourism. Those who emphasize the importance of the attitude of tourists is “ethical tourism.” Their recommendation is in essence to respect the life of local people. We cannot argue the role of tourism to vulnerable people without distinguishing the attitude of tourists.

2. Socially Vulnerable People at the Bottom of Social Ranking

The main topic of this research project is how to make use of tourism for improving the life of socially vulnerable people. First of all, it should be emphasized that improving their life does not necessarily mean to increase their income. This may be easily understood if you think that income is

just a means to buy something, which is necessary and useful for the life. More important thing is the ends of life, or something that the person values and tries to obtain with the money. If we misunderstand this relationship, we will be misguided by income, evaluating everything in terms of income, and led to wrong directions. For example, when we discuss “the role of tourism,” many of us tend to evaluate it in terms of how much income it generates to those involved in tourism. In this calculation, other influences of tourism such as culture and environment are neglected and in many cases, people are *forced* to change their life in order to increase income, affecting other aspects of life adversely. This is exactly the point that requires cultural anthropological assessment. When I visited a city that was losing population by declining industries, they discussed how to “activate” their community. Their discussion focused on how to generate income by attracting tourists and completely lacks consideration on how it affects their daily life or how to make their community livable. It seemed to me that the city would become an uncomfortable and unlivable place, especially for old people.

This idea is derived from my experience in field research of poverty alleviation in some countries in Southeast Asia. Several years ago when I was conducting a research on poverty, I visited a village in a remote area in a developing country, accompanied by some government officials. The village was officially classified “extremely poor” because of their extremely low cash income. Many of the villagers were ethnic minority people. They said they were happy at the beginning because they expected aids from the government. But it accompanied a lot of burden. They were “analyzed” why they were “poor” and they were diagnosed that their poverty was attributable to their “backward” culture and prescribed that their culture should be changed to that of the majority. For example, they were forced to stop living in raised-floor house and to live in unfloored one, which is of course the majority’s style. They argued that raised-floor house is very dangerous for babies because they may be injured by falling down from the floor. This argument is clearly nonsense because they have a long tradition and knowledge to avoid such injury but they discussed this seriously. Even the ethnic minority people argued in the same way, though I thought they didn’t believe it. They might be taught this argument when they attended seminars for poverty alleviation. They just repeated this argument to me. After the meeting with the government officials, one of the villagers confessed personally to me that he thought this argument was ridiculous.

There are many other instances of this kind of discrimination against ethnic minority people and all of them have the same effect to rank them at the bottom of the society. Every indicator is used to prove the superiority of the majority and the inferiority of minority. The most powerful is the income. Every other indicator is ranked in accordance with income level. Their culture was considered

“backward” because of their low income, though superiority of culture has nothing to do with income level. When we discuss that poor people have some defects and need to be helped, we put them at the bottom of social ranking. Income is an easy indicator that put low-income people at the bottom of the society. However, income shows us too little about their real problems. It conveys too little information of the quality of life of the poor people. It shows us too little about what kind of life they live. For example, a Buddhist who is living a simple life with a small income may be living a richer life than a waster who is living a wasteful life with a lot of income. We need to shift our informational base from income to various aspects of life, or what kind of life the person is living. This is the Quality of Life (QOL) and theoretically what the Capability Approach of Amartya Sen and Martha Nussbaum is intended to capture¹.

When we are talking about poverty, we usually put the poor people at the lowest end of social hierarchy, making them the people who need help, or in other words, who cannot live by themselves. Even when we discuss about development, we are making a large number of countries “developing,” which implies “less developed,” “backward,” and “inferior.” After teaching development economics at universities for more than ten years, it seems to me that the subject creates a sense of “superiority” among some of the Japanese students, though the others think the people in developing countries to be equal to themselves. It is the former who often make trouble in developing countries when they visit there to help “the poor people.” Their attitude hurt the dignity or self-respect of those who are treated as “poor.” The “poor” people refuse to be put at the lower position because they have been suffered from their subordinate position. Such a relative relationship usually goes through the society from the top to the bottom. In an unequal society, such a relative position matters². Such an order is

¹ The *capability* is composed of vectors of what a person can do and can be, which is called *functioning*. Though Sen shows some examples of the functioning such as being well nourished, participating community activities and refuses to show a complete list, Nussbaum [2000] showed her capability list as follows:

1. Life: Live a life of normal length, not dying prematurely.
2. Bodily Health: Good health, adequately nourished, having adequate shelter.
3. Bodily Integrity: Being able to be secured against assault.
4. Senses, Imagination, and Thought: Being able to use these senses.
5. Emotions: Being able to have attachments to things and people outside ourselves.
6. Practical Reason
7. Affiliation: Being able to live with and toward others, to recognize and show concern for other human beings, to engage in various forms of social interaction.
8. Other Species: Being able to live with concern for and in relation to animals, plants, and the world of nature.
9. Play: Being able to laugh, to play, to enjoy recreational activities.
10. Control over One’s Environment
 - (A) Political Environment
 - (B) Material Environment

² There is an interesting article by Leijonhufvud which shows the dominance hierarchy among

called “dominance hierarchy,” which has serious effects on human well-being as shown in the next section.

3. Dominance Hierarchy, Inequality, and Health

According to Wilkinson [2005], any society is located between two extremes. The one is unequal society with dominance hierarchy, “based on power and coercion, in which the lion’s share goes to the strongest and social relations are ordered according to differentials in power as a reflection of the potential for conflict” (*ibid.* p.22) and the other is egalitarian one, which is “based on fairness and a recognition of each other’s needs.” He insists that the latter can be found in “our prehistoric hunting and gathering ancestors” where we can see “the predominance of reciprocity, gift exchange, and food sharing.” This means that human society became less egalitarian since agriculture began. In the hunting and gathering society where people rely directly on natural resources, which is called “immediate return system,” they need not accumulate wealth. They could live “from hand to mouth.” They shared whatever they got by hunting and gathering. They had a lot of spare time for enjoying their life. In this sense, their society was “affluent.”³ However, when human being started agriculture, they had to keep some foods until the harvest, which is called “delayed return system,” and results in inequality. As Sahlins argued, it is really dubious whether the former is “less developed” or “poor” than the latter. We unconsciously tend to believe “our society” is “developed” and “richer” than “their society.” By thinking in this way, we put ourselves at a higher position than others. So-called “economic development” is a justification for this belief, without discussing what “development” really means. It seems that its hidden aim is to put non-industrial societies into the lower end of the hierarchy of “development.”⁴

However, this does not mean that any societies of human beings evolved toward dominance hierarchy. Among developed countries, some countries such as the USA is known to be one of the most unequal society in the world,⁵ while others such as those in northern Europe are known to be equal. And Japanese society has been changing to be more unequal since the 1990s. These arguments

economists. At the top are mathematical theorists and at the bottom are non-mathematical applied economists such as development economists. By the “bicycling reaction,” which will be explained later in this paper, development economists are looking for some people whom they can look down. And they are the people in developing countries and “poor” people.

³ Sahlins [1974].

⁴ The same argument in the case of “education” is done in Illich [1997].

⁵ As Amartya Sen [1992] argues, this does not mean all aspects of the society is unequal. The Americans may believe that their society is equal in the sense that freedom is given equally to everyone.

are mainly based on income inequality. However, unequal income distribution itself does not matter at all unless it affects our well-being. The relationship between income and our well-being is not so simple as widely believed. Income affects our well-being only indirectly because it is just the means to achieve our well-being. Wilkinson proved epidemiologically that people's health which is one of the important aspects of our well-being, worsens as the income inequality increases. Among indicators which worsen as the income inequality increases are death rates, infant mortality rates, life expectancy. Then how is this relationship related to the dominance hierarchy of a society? He argues that income inequality is an indicator of the dominant hierarchy. Dominance hierarchy in unequal societies directly affects people's health.

Wherever the dominance hierarchy is prevailing, we can see the so-called "bicycling reaction." Wilkinson explains, "The image is based, of course, on someone leaning forward on a racing bike, as if bowing to superiors, while kicking down on inferiors." How a society is unequal is indicated by how many people adopt this reaction.

In the case of poverty in developing countries, some people may be interested in it because they really feel sympathy to the poor people but for the others it may be just to "kick down" the inferior (or the poor people) to put themselves at a higher ranking. Studying development economics has the same affect for some people to have a sense of superiority to developing countries. Even education itself has the same effect to non-educated people. It seems that inequality matters in such attitude of people.

Tourists also can be classified into these two types. One is a type of dominance hierarchy, whose purpose to visit developing countries to see "primitive barbarian" and to look for some people whom they can look down as the "bicycling reaction." The other is a more egalitarian type whose purpose is to see the culture or life of the people as equals. The former is called "guilt trips" while the latter is called "ethical trips." The aims of ethical tourism are shown below:

How to avoid guilt trips

Tourism is the world's largest service industry, employing around 200 million people across the world. It can be a huge force for fighting human and environmental exploitation.

Anyone can be a responsible tourist and Avoid Guilt Trips. There are big things you can do and small things you can do, but they all make a difference to someone's life.

Take action and have a better holiday!

- 1) Be aware
- 2) Be open: Something may seem bizarre or odd to 'you', but it may be normal and just the way things are done to 'them'. Try not to assume that the western way is right or best.
- 3) Our holidays - their homes: Ask before taking pictures of people, even children, and respect their wishes. Talk to local people. What do they think about our lifestyle, clothes and customs? Find out about theirs.
- 4) "One school pen": Giving to children encourages begging. A donation to a project, health centre or school is more constructive.
- 5) Be fair: Try to put money into local hands. If you haggle for the lowest price, your bargain may be at the seller's expense. Even if you pay a little over the odds, does it really matter?
- 6) Be adventurous: Use your guidebook or hotel as a starting point, not the only source of information. Find out what's going on by talking to locals, then have your own adventures...
- 7) Ask questions
- 8) Think before you fly
- 9) Be controversial!
- 10) Be happy

By taking any, some or all of these actions you are personally fighting tourism exploitation. Enjoy your guilt-free trip!

Source) <http://www.tourismconcern.org.uk/>

The essence of ethical tourism is to treat local people as equals and to respect their life, culture, and environment. However, the fact that we have to emphasize ethical tourism implies, to the contrary, how many people are still traveling developing countries with unconscious discrimination against local people and culture. Some travelers travel developing countries to look for "barbarian" people, and some visit a graveyard of local people, steal bones of the dead, or spray graffiti on the tombstone. Benefit of a small amount of money that tourists bring to local people will be exceeded by the cost that the local people are looked down and put into the lower end of the dominance hierarchy. "Guilty tourists" will aggravate the dominance hierarchy by looking down the vulnerable people, putting them down even lower the hierarchy. Such attitude affects the well-being of the local

people adversely in the epidemiological sense. To the contrary, “ethical tourists” will improve the relative position of local people by respecting their life and culture. It is ethical tourism, not guilty tourism, that can improve the life of vulnerable people by making use of tourism.

So far we have discussed bilateral relationship between tourists and local people. But our concern is socially vulnerable people in a society, and therefore we have to take the social structure in the local community into consideration: Socially vulnerable people and non-vulnerable people. Therefore adding tourists, the relationship is trilateral. Tourists are outsiders and our question is how outsiders can affect the local dominance hierarchy.

4. Dominance Hierarchy and Outsiders

The socially vulnerable people are found at the lower end of the dominance hierarchy of a society. Because of such disadvantageous position, they suffer not only economically but also in other aspects of life such as health as the epidemiological analysis shows. Sen[1992] wrote:

The extent of capability deprivation can be quite remarkably high in the world's most affluent countries. For example, a study by McCord and Freeman (1990), presented in *The New England Journal of Medicine*, indicates that men in the Harlem region of the prosperous city of New York have less chance of reaching the age of 40 or more than Bangladeshi men have. This is not because the residents of Harlem have lower incomes than the average Bangladeshi does. The phenomenon is more connected with problems of health care, inadequacy of medical attention, the prevalence of urban crime, and other such factors that affect the basic capabilities of the Harlem resident (Sen, 1992, p.114).

Therefore in order to improve the well-being of the socially vulnerable people, their position needs to be changed to a higher one in the dominance hierarchy. Our question is how tourists can change their relative position. Exactly speaking, it is a role of outsiders, not only of tourists but also of other kinds of visitors such as professors who come to the site for research. In this case, their position is even higher than the majority people. Nussbaum [2000] write women's relative position in a family from her own experience in India.

More generally, programs targeted at women usually raise their status in the family. Chen describes the way in which the BRAC literacy program increased not only women's real economic options but also, and to some extent independently, the perception of their worth

as agents in the family. The fact that they were seen to be learning and acquiring skills made them seem more important than they had seemed before. Similarly in Andhra Pradesh, after only six months in the government women's project the women reported that their contribution was taken far more seriously by their husbands. Seeing them organized into a group, seeing them effectively demanding services from the local government – and just seeing that national government officials came to see not the men of the village, but the women – made women seem like powerful people who can do things. (I couldn't help noticing this reaction myself, as a circle of men formed around the women and me, as we talked sitting on the floor; the men watched from a distance, taking in the fact that a foreign professor come to interview their wives and daughters.) Women reported that these factors by themselves have changed men's treatment of them. There was an initial period of suspicion and resentment; but then the men began to respond positively to the fact that the women's collective was getting things done for the villages as a whole. Seeing women as active bargaining agents who were winning some benefits for the village, they began to have more respect for them in the home. They asked their opinions more often, there was some decline in domestic abuse, and the men simply took more care about their own hygiene and bodily appearance (Nussbaum, 2000, pp.287-288). (Underline is added.)

This is a case that the relative position between women and men was changed by outsiders. A professor of Chicago University could have some impact on the relative position of women in the family by talking seriously with women as equals, while neglecting men.

I also have the very same experience in some countries in Southeast Asia. When I visited a village of ethnic minority people, which was officially classified "extremely poor," the government officials who accompanied me emphasized how backward the people and their culture were. As mentioned above, the raised-floor house was considered as one of the symbols of their cultural backwardness. But when I said the typical Japanese house was also raised-floor one, adding that unfloored house is dirty and not good for health, I knew the government officials were embarrassed and the "poor" people were smiling. When we have lunch together, the local people cooked rice boiled with green peas for us. We ate just the rice with green peas and salt, and the government officials explained to me that this was evidence of how poor they were because they did not have enough rice and had to add green peas. For them an indicator of poverty is whether they have enough rice to eat. However, it is evident that this indicator is very strange because it depends on culture: Western people do not eat rice so much. More important thing is whether they have enough nutrition to live. I simply said to them, "I like rice boiled with green peas very much. When I was a child, my mother often cooked it

for me. It is also good for health. Nowadays Japanese people eat miscellaneous cereals for health.” They were embarrassed again. When they said, “Buddhists are wasting their resources which should be used for investment and so they are poor.” And I said, “Most of Japanese are Buddhists.” What I tried to do in these conversations was to improve the relative position of the ethnic minority people.

For the ethnic minority people, poverty matters not because of low income but because of low status. Once they are classified “poor,” every attribute of their culture is considered “backward,” which proves superiority of the majority people⁶. They need to find out poor people in the country and in this sense they are ethnocentric. They will criticize ethnocentrism in the West but they are ethnocentric to the minority in their own country. This is the “bicycling reaction.”

Income is a very difficult indicator because it conveys the idea that earning more income is good. When we interview some people about their income, the interviewees will understand that earning more money is good and may try to increase income by expanding their business. But only some of them will succeed. If we ask them about their quality of life (QOL), it conveys the idea that improving QOL is good. We bring different idea of “development” to them⁷.

5. Conclusion

The contribution of tourism for socially vulnerable people is not confined to income aspect. More important contribution may be to improve their social status. Socially vulnerable people are usually suffered from their low social status not only economically but also in other aspects of life. Health is one of them. Their poor health condition is attributable not only to their low income but also to their low social status, which is proved epidemiologically. In this paper, ethnic minority people were used as an example of the socially vulnerable people. Their income is usually lower in the society and often deemed to be poor. Since the 1990s when the international aid shifted its focus to poverty, they were often targetted by the poverty eradication policy. Though their economic life might have been improved, they often lost their dignity and self-respect. Their culture was considered “backward” and to be replaced more “advanced” one of the majority people. And they lost their confidence on

⁶ The minority people are classified finely into small groups while the majority people are classified very broadly so that many of them are classified into a category.

⁷ Outsiders include foreign students and development experts of NGOs. Foreign students may go to “poor” village in developing countries to write a thesis. Some of them think they have higher education and know more than the local people. They are not interested in the local culture. They believe they can “help” the “poor” people, though the local people do not think they are poor, or they need help. Such students make trouble in the village. NGO staffs who do not pay attention to the local culture will cause problems by “creating” unacceptable culture.

their own culture.

Tourists are looking for something scarce and valuable. When tourists come to see the ethnic minority people, they have some impacts on the social status of the latter. If the former respect the latter's culture, it will improve the latter's social status. This is an important attitude of "ethical tourists." To the contrary, "guilt tourists" look down the local people, speak ill of them, and make their social status worse. We know many cases of guilt tourists. Even young tourists believe they believe they are superior to the local people. There is no simple relationship between tourism and vulnerable people. What matters most is the attitude of the tourists, ethical or guilt.

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おわりに

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