

“Nagasaki IR Scheme”



Nagasaki Prefecture and Sasebo City
Joint Council for the Promotion of IR



“Nagasaki IR Scheme”

1 . introduction

This outline of the Nagasaki Integrated Resort (IR) Scheme summarizes the present basic concept of the IR scheme devised by Nagasaki Prefecture and Sasebo City based on discussions held by an expert committee. We will conduct studies to formulate the basic scheme that will include more specific efforts based on this outline, gathering opinions from residents in the prefecture, and related business operators.

2. Necessity of IRs

1) Necessity of IRs

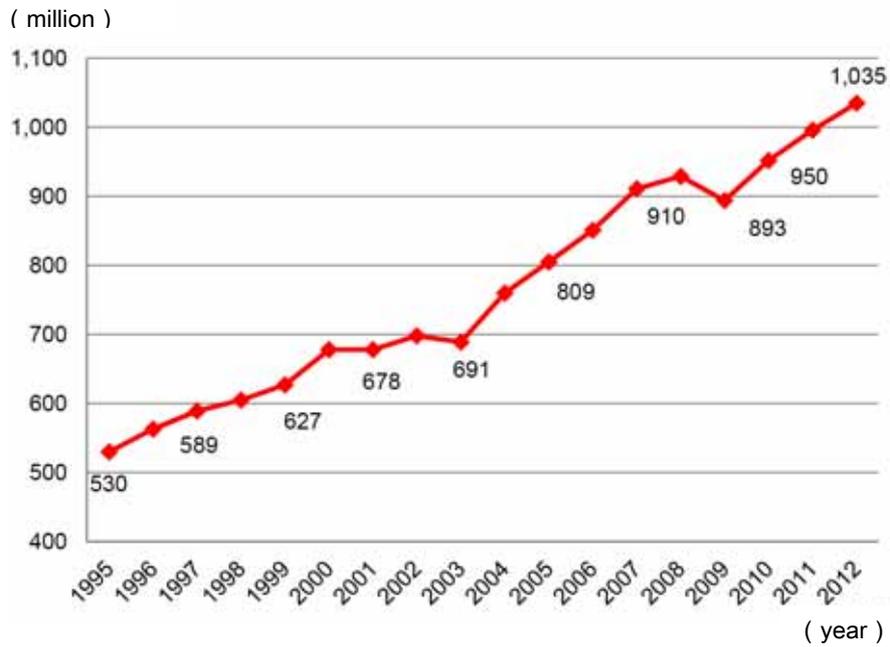
The number of overseas tourists around the world exceeded 1.0 billion in 2012, and there is a growing need for international tourism to Asia. The number of tourists from ASEAN countries to Japan reached 1.1 million in 2013, and is expected to increase significantly in the future.

In this situation, the introduction of IRs has drawn attention as new tourism resources. In Singapore, IRs have attracted many tourists and have produced significant economic effects since their opening in 2010. As a result of the success of the IRs in Singapore, activities toward introducing IRs have already commenced in South Korea, Russia (Vladivostok), and Macao. Taiwan is also conducting a study toward the introduction of IRs.

Casinos, the driving force behind the economic effects of IRs, are said to be legalized in more than 140 countries around the world. They have already been legalized in all of the G8 countries except Japan.

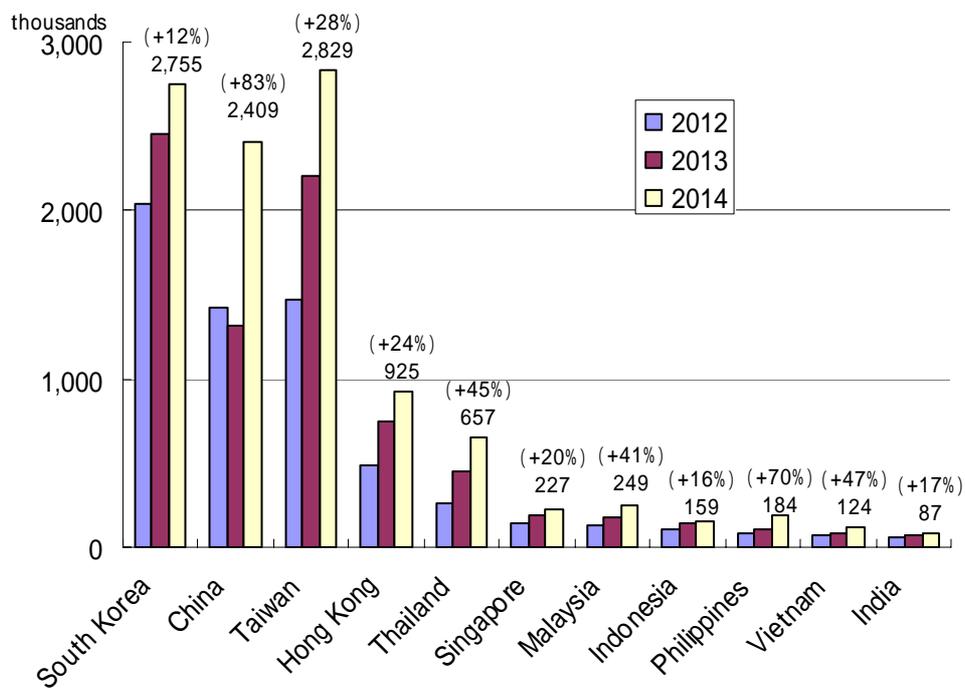
Regarding the introduction of IRs in Japan, the Bill Promoting Implementation of Specified Integrated Resort Areas (IR Promotion Bill) was submitted to the Diet in December 2013. The bill was then abandoned in association with the dissolution of the House of Representatives. However, the national government sees the introduction of IRs as a key growth strategy, including this as part of the Japan Revitalization Strategy and the 2014 Action Program toward the Realization of Japan as a Tourism-Oriented Country.

International Tourist Arrivals



Source: World Tourism Organization (UNWTO)

2014 Foreign Visitors to Japan by Nationality



Source: Japan National Tourism Organization

2) Necessity of IRs aimed at local revitalization

The Japanese economy is showing signs of recovery due to the efforts of the national government to halt deflation and revive the economy. On the other hand, local economies remain in critical condition. It is no exaggeration to say that regional gaps caused by the overconcentration of population and industry in Tokyo reinforce this tendency. Accordingly, it is an urgent issue to stop the flow of people from rural to metropolitan areas including Tokyo, and to make local populations sustainable.

It is expected that the arrival of the age of depopulation will profoundly impact economic society in the future, including the downsizing of the economy and difficulties in maintaining regional economic society.

Under these circumstances, in December 2014 the national government formulated the Comprehensive Strategy for Regional Development, Sustainable Population, and Job Creation and has promoted measures to realize local revitalization.

Among these measures, enhancing competitiveness in the tourism field is receiving focus because tourism is expected to see significant growth in the future and is considered an important field in the regional industry. In particular, it is required to improve the tourism environment, including proposing extensive tour routes through which visitors can tour and stay conveniently in local areas, and to strengthen the capacity to dispatch information on local tourism to people at home and abroad. It is important to decentralize the concentration of foreign tourists in the vicinity of Tokyo and the so-called “Golden Route.”

To introduce IRs in Japan, it is necessary to create a new flow of people to local areas by introducing IRs aimed at local area revitalization.

IRs aimed at local revitalization will play the role of powerfully conveying the charm of local areas to people at home and abroad, attracting many tourists, and promoting extensive tours in local areas, as local bases for international tourism.

The introduction of IRs aimed at local revitalization will produce various effects, including boosting quality job creation and stemming population decline due to an increase in the nonresident population, while making the most of abundant tourism resources in local areas such as the local nature, history, culture, and hospitality for visitors, which cannot be experienced in the urban environment. These can help realize local revitalization as well as promote the realization of Japan as a tourism-oriented country through local revitalization.

3) Necessity of IRs in Nagasaki Prefecture

With its long history of exchanges with the Asian continent, Nagasaki Prefecture has played an important role in the creation of Japanese culture and the modernization of Japan as a gateway to the West as well as the rest of Asia, and

has fostered a unique regional culture. Endowed with abundant tourism resources such as nature, including a beautiful coastline, spas and fresh agricultural and marine products, the prefecture has received many visitors as one of the most prominent tourist spots in Japan. It also has conveyed the importance of world peace to people at home and abroad as the last atomic bombed place attacked by an atomic bomb.

Nagasaki Prefecture has enacted the Nagasaki Prefecture Tourism Promotion Ordinance, aiming to become a tourism-oriented prefecture. Thus, residents in the prefecture are vigorously engaged in promoting tourism. Due to the residents' efforts, the number of tourists in the prefecture has remained high amid increasingly fierce competition to attract tourists among individual regions in Japan. The number of foreign tourists has also continued to rise.

Meanwhile, Nagasaki Prefecture is faced with long-standing structural problems, such as decreasing population, stagnating prefectural income, and declining regional vitality.

According to estimates from the National Institute of Population and Social Security Research, the population of the prefecture is expected to decrease from the current 1.4 million (1.42 million according to the 2010 census) to less than 1.2 million in 2030. The prefecture's population is decreasing more rapidly than in other prefectures in Japan. One major factor for the decline in population is the outflow of young people to metropolitan areas due to the lack of quality employment opportunities. Accordingly, creating quality employment opportunities is a pressing issue for the prefecture.

The prefecture's ranking of prefectural income has recently hovered around 40th place. This is partly because the proportion of manufacturing industry with high labor productivity is lower in Nagasaki Prefecture than that of agriculture, forestry and fisheries with their low labor productivity, compared to other prefectures.

To overcome these issues, Nagasaki Prefecture needs to take unprecedented measures, making the best use of regional prefectural resources. Introducing IRs will further increase the charm of the prefecture as one of the most prominent tourist spots in Japan, and serve as a trigger for the promotion of tourism in the prefecture as well as in the Kyushu region.

Nagasaki Prefecture can be said to be one of the optimal sites for IRs aimed at local revitalization due to its strong advantages such as: 1) geographical proximity with Asia; 2) international tourism resources with a strong message; 3) synergy effects with Huis Ten Bosch; 4) cooperation between administration, assemblies, and the private sector; and 5) collaboration with various tourism resources throughout the Kyushu region.

3. Advantages of Nagasaki Prefecture

In introducing IRs, it is required to create globally competitive tourist spots and strengthen the international competitiveness of the tourism industry. To fulfill these requirements, the prefecture needs to have strong advantages, such as attractive tourism resources that strongly appeal to foreign tourists and a history and culture unique in Japan. For local revitalization, it is necessary to propose extensive tour routes, making the best use of tourism resources of the surrounding area.

The prefecture has strong advantages as follows: 1) geographical proximity with Asia; 2) international tourism resources with a strong message; 3) synergy effects with Huis Ten Bosch; 4) cooperation between administration, assemblies, and the private sector; and 5) collaboration with various tourism resources throughout the Kyushu region.

1) Geographical proximity with Asia

- The urban population of East Asia, which can be visited in less than three hours, exceeds 60 million people.
Seoul: 1 h 25 min Shanghai: 1 h 30 min Taipei: 2 h 12 min
Beijing: 2 h 28 min Osaka: 1 h 10 min Tokyo: 1 h 45 min
- The possibility of expanding the nonresident population and improving access to Asia in the future

(Nagasaki Airport)

Flight services to Shanghai and Seoul are now offered. Since the airport is offshore, it has sufficient capacity for new flight services. The implementation of 24-hour operation is under consideration.

(Fukuoka Airport)

International flight services to 19 cities including major cities in East Asia are now offered. The airport serves as an international gateway, with 3.18 million international passengers a year. The airport is ranked third Japan after Haneda Airport and Narita International Airport in the number of passengers as well as arrivals and departures (as of December 2014).

(Saga Airport)

Flight services to Shanghai and Seoul are now offered.

2) International tourism resources with a strong message

- The prefecture has international tourism resources with a strong message, such as the history of the last atomic bombed area, “Churches and Christian Sites in Nagasaki,” “Modern Industrial Heritage Sites in Kyushu and Yamaguchi,” and the natural environment including many islands.
- Theme parks, spas, sea, mountains, historical cultural assets, traditional performance arts, foods, etc.

Huis Ten Bosch: Ranked 1st in a ranking of popular tourist spots in Kyushu and Yamaguchi, which was conducted by the travel magazine “Jaran” (ranked 1st in Kyushu in a ranking of customer satisfaction)

Two national parks: Saikai National Park, Unzen-Amakusa National Park

- Efforts to promote stays in old folk houses and homestays, taking advantage of the natural environment

3) Synergy effects with Huis Ten Bosch

- Huis Ten Bosch is one of the greatest local tourism bases in Japan with a developed area of 152 ha and total investment of more than 250 billion yen.
- With the ability to attract approximately 3.0 million people a year (ensuring a stable number of visitors), Huis Ten Bosch has stable management as well as infrastructure and know-how as a high-standard resort facility.

Transportation: JR Huis Ten Bosch Station, Huis Ten Bosch Marine Terminal (direct connection from Nagasaki Airport), visitor parking lots, transportation inside the park (buses, cruisers, rental bicycles, etc.)

Hotels: Three directly-managed hotels, plus Hotel Okura, Hotel Nikko, etc.

Facility functions: Wide variety of amusement facilities and events, facilities for parties and meetings, swimming pools, spas, marine leisure, study tours of environmental facilities, and various other entertainment functions

Sightseeing: The Huis Ten Bosch Tourism Council offers various tour plans in cooperation with surrounding local governments. (Abundant tourism resources are available such as historical and historic sites, ceramics and spas in Sasebo City and surrounding areas.)

- Active business deployment with a focus on “the world’s best,” “the world’s first,” and “the only one (experience offered only in the park),” typified by the “Kingdom of Light,” the world’s largest illumination event
- Business deployment with the aim of not only promoting tourism, but also establishing a city of tourism and business with a focus on environmental energy and robot technology
- Efforts to develop human resources in the tourism field, including establishing the Huis Ten Bosch Opera School and fostering managerial leaders
- Promoting the building of systems that focus on both effective use of resources and care for the regional environment in order to take the lead in realizing a recycling-oriented society
- Having less impact on the surrounding region from a geographical perspective
- Ability to open IRs before the 2020 Olympic Games by cooperating with existing facilities

4) Cooperation between administration, assemblies, and the private sector

- IR promotion structure supported by both Nagasaki Prefecture and Sasebo City
- Proactive actions, including the adoption of a proposal for early passage of IR-related bills at the prefectural assembly and establishment of the

- Federation of Municipal Assembly Members for Promoting IR Attraction
- Proactive and continuous actions toward the attraction of IRs led by the West Kyushu Integrated Resort Study Group, and requests for IR attraction based on the consensus of all Chambers of Commerce and Industry in the prefecture
- Grounds for the cooperation between industry, academia, public and private sectors, including establishment of the Council for Nagasaki Prefectural World Heritage Registration Promotion, the Nagasaki Urban Management Strategy Promotion Conference, and the Sasebo Future Creation Forum

5) Collaboration with various tourism resources throughout the Kyushu region

- Proximity of a variety of nature, history and culture, such as quality spas, sea, mountains, castles, and foods
 - Ranking of the satisfaction of inbound tourists with popular destinations: 1st: Fukuoka; 2nd: Oita
 - Ranking of attractive spas in Japan: 1st: Yufuin Onsen
 - Ranking of satisfaction with spas in Japan: 1st: Minamiaso Onsen
- Attractive vehicles that can be used as tourism resources, such as the Kyushu Shinkansen, Cruise Train “Seven Stars in Kyushu,” and sightseeing trains
- Kyushu-wide efforts to promote tourism by the Kyushu Tourism Promotion Organization
 - Tourist-attraction and promotional activities (at home and abroad)
 - Improvement of programs for community-based tourism and long-stay tourism (*Kyushu Saruku*, a regular strolling tour guided by local sightseeing volunteers; *Otona no Nagatabi – Kyushu*, theme-based and long-stay travel plans in which visitors stay for three or more nights)
 - Enhancement of recognition (in the Tokyo Metropolitan area; cooperation with the media)
 - Tourism Development Network (with the aim of developing human resources who will promote tourism in the Kyushu region and forming a tourism network)
 - Efforts to foster tour guides proficient in foreign languages throughout the Kyushu region, making use of the Kyushu Asian Tourism Island Comprehensive Special Zone

<p>Goals of the Kyushu Tourism Strategy throughout the Kyushu region in 2023: Economic ripple effect: 5.4 trillion yen Employment effect: 466,000 people Foreign tourists to Japan: 4,406,000 people (1,258,000 people in 2013)</p>

6) Other advantages

- Population of the Kyushu region: more than 13 million (Kyushu region: 13.177 million; Tokyo: 13.196 million)
- Expansion of a transportation network that makes use of the West Kyushu route (Nagasaki route) of the Kyushu Shinkansen (scheduled to open in 2022)
- Warm and gentle climate
- Low probability of large-scale earthquakes

4. Direction of IR scheme

1) How to think of areas in the IR scheme

As areas where measures associated with the introduction of IRs are taken, the following three areas are selected. Based on these areas, we aim to form multilayered and wide-area tourism zones.

i. **Base for international tourism with IR facilities: Huis Ten Bosch area in Sasebo City**

Regarding IR facilities, the area including Huis Ten Bosch, which has the ability to attract many visitors as well as infrastructure and know-how as resort facilities, and its surrounding area are considered a development area. Specifically, the Rotterdam Parking Lot (approx. 27,000 m²) and other parking lots in the park (a total of 196,000 m²) are considered developable sites through transformation to multistory parking lots.

〈Features of Huis Ten Bosch area in Sasebo City〉

- Huis Ten Bosch is one of the greatest local tourism bases in Japan with a developed area of 152 ha and total investment of more than 250 billion yen.
- With the ability to attract approximately 3.0 million people a year (ensuring a stable number of visitors), Huis Ten Bosch has stable management as well as infrastructure and know-how as a high-standard resort facility.

Transportation: JR Huis Ten Bosch Station, Huis Ten Bosch Marine Terminal (direct connection from Nagasaki Airport), visitor parking lots, transportation inside the park (buses, cruisers, rental bicycles, etc.)

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tourism resources are available such as historical and historic sites, ceramics and spas in Sasebo City and surrounding areas.)

- Active business deployment with a focus on “the world’s best,” “the world’s first,” and “the only one (experience offered only in the park),” typified by the “Kingdom of Light,” the world’s largest illumination event
- Business deployment with the aim of not only promoting tourism, but also establishing a city of tourism and business with a focus on environmental energy and robot technology
- Efforts to develop human resources in the tourism field, including establishing the Huis Ten Bosch Opera School and fostering managerial leaders
- Promoting the building of systems that focus on both effective use of resources and care for the regional environment in order to take the lead in realizing a recycling-oriented society
- Having less impact on the surrounding region from a geographical perspective
- Ability to open IRs before the 2020 Olympic Games by cooperating with existing facilities

ii. **Resort area for international tourism that complements the attractiveness of IRs, harmonizing with IRs: Nagasaki Prefecture area centering on Omura Bay**

The Nagasaki Prefecture area centering on Omura Bay is considered a resort area for international tourism that complements the attractiveness of IRs, harmonizing with IRs. We will work to establish a tourist city that promotes tourism, making use of the history of the last atomic bombed area, “Churches and Christian Sites in Nagasaki,” “Modern Industrial Heritage Sites in Kyushu and Yamaguchi,” and the natural environment including islands.

〈Features of the Nagasaki Prefecture area centering Omura Bay〉

- Tour area centering on Omura Bay, where Nagasaki Airport is expanding
- The area is located in the center of Nagasaki Prefecture and serves as an air gateway to foreign countries and isolated islands.
- The area is connected with various areas in the Kyushu region as well as Japan through expressways and the West Kyushu route (Nagasaki route) of the Kyushu Shinkansen, which is now under construction.
- The area has international tourism resources with a strong message, such as the history of the last atomic bombed area, “Churches and Christian Sites in Nagasaki,” “Modern Industrial Heritage Sites in Kyushu and Yamaguchi,” and the natural environment including many islands.

iii. **Extensive tour area that meets various tourism needs: Kyushu region**

The Kyushu region is considered an extensive tour area that meets various tourism needs. We will work on establishing an extensive tour network that makes use of the charm of various areas in Kyushu, such as spas, foods, history, and culture.

〈Features of the Kyushu region〉

- We will facilitate development of the area as a whole by enhancing extensive tours, thereby producing synergy effects with the charm of individual areas (urban functions and diversity of nature and culture).
- Proximity of a variety of nature, history and culture, such as quality spas, sea, mountains, castles, and foods
 - Ranking of the satisfaction of inbound tourists with popular destinations: 1st: Fukuoka; 2nd: Oita
 - Ranking of attractive spas in Japan: 1st: Yufuin Onsen
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- Kyushu-wide efforts to promote tourism by the Kyushu Tourism Promotion Organization
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 - Enhancement of recognition (in the Tokyo Metropolitan area; cooperation with the media)
 - Tourism Development Network (with the aim of developing human resources who will promote tourism in the Kyushu region and forming a tourism network)
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2) Basic concept – Realizing a new tourism revolution in Nagasaki, a cradle of Japan’s industrial revolution

In the situation where rapid growth in Asia is intensifying competition in international tourism, it is an urgent issue to improve bases for international tourism that can powerfully convey Japan’s charm to the world. From the perspective of local revitalization, new efforts are required to facilitate a shift from sightseeing tours centering on the Golden Route to extensive tours to local areas.

Under these circumstances, the introduction of IRs, which have never been seen in Japan, will serve as a driving force for promoting such a shift. To build Japan's first IR and truly transform Nagasaki Prefecture as well as Japan into international tourist destinations, it is necessary to promote unprecedented and innovative efforts.

Located in the most western end of Japan, Nagasaki Prefecture has served as a gateway of Japan since ancient times. It has played a role as the starting point of major revolutions in both industry and culture. In particular, it fostered and produced those who played valuable roles in creating modern Japan from the end of the Edo period (1603–1868) through the Meiji period (1868–1912). It also has taken a role as a cradle of Japan's industrial revolution.

In addition to this history, Nagasaki Prefecture has world-class culture and history, such as the history of the last atomic bombed area and two candidates for a World Heritage Site "Churches and Christian Sites in Nagasaki," and "Sites of Japan's Meiji Industrial Revolution: Kyushu-Yamaguchi and Related Areas."

Huis Ten Bosch, one of the major tourist spots in the prefecture, has been involved in advanced business activities including the health, environmental, and other industries, and business activities that focus on being "the world's first" and "Japan's first," in order to establish a city of tourism and business.

With the aim of enhancing international competitiveness and local revitalization, Nagasaki Prefecture and Sasebo City will work to revolutionize Japan's tourism industry, taking full advantage of the history and tourism resources of these areas through the introduction of IRs. They also aim to realize a tourism revolution to build a growth model of local areas, in which local areas overcome regional issues for themselves.

Tourism revolution aimed for by Nagasaki Prefecture

i. Creating a new flow of people from the Golden Route to local areas by establishing bases for international tourism

We will work to establish new bases for international tourism representing Japan, making the most of the advantages of Nagasaki Prefecture, such as geographical proximity with Asia, international tourism resources with a strong message, and synergy effects with Huis Ten Bosch. In so doing, we aim to drastically strengthen the capabilities of Nagasaki Prefecture and the Kyushu region to disseminate information to people at home and abroad, in order to create a new flow of people from the Golden Route to local areas.

ii. Establishing a hospitality network of Nagasaki and Kyushu to make the most of a variety of tourism resources in the Kyushu region

Making optimal use of the advantages of Nagasaki Prefecture, including

collaboration with various tourism resources throughout the Kyushu region, we will promote not only tourism within the prefecture but also custom-made tourism where visitors can freely enjoy a variety of tourism resources in the region, with visitor-intensive IR facilities as the core. Thus, we aim to enhance tourism throughout the Kyushu region.

iii. Creating new tourism and opening a frontier for international tourism business in cooperation with other industries

We will work to create new tourism, such as green tourism, island tourism, and health tourism, and take measures to promote the tourism industry and other industries alike. To this end, we will make the best use of efforts to promote stays in old folk houses and homestays, taking advantage of the natural environment including many islands, and the efforts of Huis Ten Bosch to establish a city of tourism and business with a focus on environmental energy and robot technology, and its grounds for business activities that focus on being “the world’s first” and “Japan’s first.”

3) Direction of efforts to realize the basic concept

To realize a tourism revolution to overcome regional issues, we will consider improving the environment to introduce IRs and maximize their effects based on the direction mentioned below:

i. Creating a new flow of people from the Golden Route to local areas by improving bases for international tourism

We will work to improve new bases for international tourism representing Japan, making the most of the advantages of Nagasaki Prefecture, such as synergy effects with Huis Ten Bosch, geographical proximity with Asia, and international tourism resources with a strong message. In so doing, we aim to drastically strengthen the capabilities of Nagasaki Prefecture and the Kyushu region to disseminate information to people at home and abroad, in order to create a new flow of people from the Golden Route to local areas.

○ Improvement of IR facilities with Huis Ten Bosch as the core

- Maximizing synergy effects with Huis Ten Bosch
 - Implementing additional development mainly targeting the Rotterdam Parking Lot (approx. 27,000 m²) and other parking lots in the park (a total of 196,000 m²), and adopting a design symbolizing IRs in Nagasaki Prefecture
 - Establishing new entertainment functions, including high-grade hotels, shopping centers and restaurants, introducing casinos, etc.
 - Adopting functions to showcase tourism in Nagasaki Prefecture and the Kyushu region and to guide visitors (providing opportunities for visitors to experience a variety of history, culture, foods, and spas in Nagasaki and Kyushu, introduction of concierges for tourism and local guides, etc.)
- Resort area where everyone can relax, enjoy, and learn
 - Providing a place where visitors can relax, enjoy and learn, targeting a

- broad range of people including senior citizens, families, and business persons
- Improving IRs, targeting a broad range of people, including the middle class and wealthy
- **Using the geographical proximity with Asia**
 - Facilitating the attraction of a rapidly growing number of tourists from Asian countries to Japan
 - Implementing 24-hour operation for Nagasaki Airport, enhancing the CIQ function, increasing international regular flight services, etc.
 - Actively using Fukuoka and Saga Airports
 - Promoting multilingualism, and expanding the size of duty-free shops
- **Dissemination of the history and culture of prayers, which should be shared with people around the world**
 - Presence of history and culture that should be disseminated from Japan to the world
 - “Prayers” for world peace as the last atomic bombed area in the world
 - “Prayers” described as miracles in the history of Christianity, which continues to be embraced against oppression
 - Strongly conveying Japan’s valuable history and culture from Nagasaki Prefecture to enhance Japan’s international presence
 - Boosting international exchanges with “peace” as a keyword
 - Designing pilgrimage tours to Nagasaki Prefecture, which is suggested as a new Christian pilgrimage destination in association with the candidacy of “Churches and Christian Sites in Nagasaki” as a World Heritage site
- **Use of the natural environment including the sea and islands that cannot be enjoyed in urban areas**
 - Providing entertainment through which visitors can enjoy the natural environment, such as the sea and islands
 - Establishing an international resort area centering on Omura Bay, located in the center of Nagasaki Prefecture and connected with isolated islands and regions at home and abroad as an air gateway
 - Promoting nature-experience-type tours, including a cruise and other marine leisure, stays in old folk houses, homestays, and trekking
 - Establishing an environmentally friendly resort area
 - Preserving an archetypal image of Japan consisting of the sea, mountains, and islands
 - Promoting environmentally friendly development, including improving “Umi no Michi (Sea Road),” making use of renewable energy and environmentally friendly ships

- **Use as a gateway of Japan and the history of international exchanges**
 - Developing Asian and international strategies, taking advantage of history and culture as a gateway of Japan
 - Promoting international exchanges, making use of the history and culture of Nagasaki Prefecture
 - Dispatching information, making use of the history of international exchanges
 - **Rapid opening of IRs, targeting big events**
 - Rapidly opening IRs, targeting the Rugby World Cup 2019 and 2020 Olympic Games
 - Conveying the charm of Nagasaki Prefecture and the Kyushu region to the world, and encouraging foreign tourists to travel to local areas by rapidly improving IRs, targeting big events
- ii. **Establishing a hospitality network of Nagasaki and Kyushu to make the most of various tourism resources in the Kyushu region**

Greater synergy effects will be achieved by conveying the charm of Nagasaki Prefecture and the Kyushu region from a multifaceted perspective in association with the formation of bases for international tourism through the introduction of IRs.

To spread the effects of tourists visiting bases for international tourism through a wide area, it is necessary to promote both long-stay tourism and excursion tourism.

Given the increase in independent travel and the advantages of Nagasaki Prefecture and the Kyushu region with its variety of high-quality and abundant tourism resources, we will promote the establishment of a hospitality network to realize custom-made tourism through which visitors can freely enjoy sightseeing, not depending entirely on single-model routes.

- **Establishment of a hospitality network in Nagasaki and Kyushu**
 - Creating a new flow of people by establishing a hospitality network in Nagasaki and Kyushu with IRs as the core
 - Creating a new flow of people from the Golden Route to local areas by establishing bases for international tourism through the introduction of IRs and actively dispatching information to people at home and abroad
 - Promoting tourism in the Kyushu region by adopting functions to showcase tourism in Nagasaki Prefecture and the Kyushu region and guiding visitors in IRs (providing opportunities for visitors to experience a variety of history, culture, foods, and spas in Nagasaki and Kyushu, introducing concierges for tourism and local guides, etc.)
 - Forming themes for extensive tours through which visitors can trace the stories of nature, landscapes, World Heritage sites, etc.

- Improving access by developing road systems and using helicopters for transfer between bases
- Making use of sightseeing trains, including the Cruise Train “Seven Stars in Kyushu”

○ **Conveying the charm of local areas in Japan to the world**

- Encouraging tourists to travel throughout the Kyushu region, including isolated islands, peninsulas, and underpopulated areas, which have not attracted much attention as tourist destinations so far, making use of IR facilities
 - Proposing tours through which visitors can trace the historical background of candidate World Heritage Sites in the Kyushu region, where historic properties are distributed even among isolated islands and underpopulated areas
 - Promoting nature-experience-type tours, including a cruise and other marine leisure, stays in old folk houses, homestays, and trekking
 - Encouraging visitors to participate in nature-experience-type tours, making use of concierges for tourism

(iii) Development of the international tourism business frontier through the creation of new types of tourism and cooperation with other industries

Opportunities to realize new types of tourism such as green, island, and health tourism should be created, through the promotion of guest houses converted from old residential houses located on islands or in other rich natural environments, homestay with local families, and projects to build an international tourism city such as eco-energy generated in Huis Ten Bosch and robot technology, utilizing the business environment of this region where “world first” or “Japan first” is highly appreciated.

Rather than focusing on the tourism industry only, projects to create a virtuous economic cycle throughout the region should be implemented in cooperation with other industries, from primary to tertiary industries.

Creation of new types of tourism

- Increase the number of people involved in tourism throughout the region by promoting green tourism, island tourism, and other experience-oriented tourism activities utilizing the natural environment in the region:
 - Promote ocean leisure including cruises, stays at guest houses converted from old residential houses, homestay with local families, and nature tourism including trekking;
 - Offer courses for visiting and learning about the history of historic sites on islands and remote areas in the Kyushu region, including UNESCO World Heritage candidates.
- Promote progressive projects to build a tourist business city:

- Introduce state-of-the-art “smart” hotels in cooperation with environment/energy saving businesses and the robot industry;
- Cooperate with the agricultural sector (agricultural factories), promote health tourism, and cooperate with the imaging technology industry (projection mapping) and game industry;
- Promote incentive tours, conferences, and other business tourism.

Development of international-standard human resources in tourism

- Develop human resources to host overseas visitors, from business travelers to sightseers:
 - Develop human resources who can attend to overseas tourists with hospitality;
 - Develop human resources who can work not only at key IR facilities, but also at transportation facilities, sightseeing spots, and business exchange events;
 - Develop a wide variety of professionals, including entertainers, tour guides, and medical interpreters;
 - Cooperate with higher education institutions such as Nagasaki International University, and utilize overseas students studying in the region;
 - Build a virtuous cycle of human resources in tourism through various measures, including the provision of scholarship, to encourage people educated in Nagasaki to gain experience in tourism in other prefectures or abroad, then return home to contribute to tourism in Nagasaki.

Cooperation with other industries, from primary to tertiary industries

- A wide range of industries are related to IR and sightseeing:
 - Accommodation, transportation, travel agency, retailing, advertising, cultural, content/entertainment/event, apparel, fashion, real estate development, construction design, construction, facility/equipment maintenance, information/financial system, agriculture & forestry, education, etc.
- Promote related industries through the construction of IR facilities for the increase in tourists visiting the region:
 - Promote the local consumption of products produced in the region, and promote local products to wealthy overseas visitors (luxury foods served at IR facilities, tableware, etc.)
 - Provide global companies (shipbuilding, insurance, etc.) in the region with locations for their business meetings, and invite international companies to hold corporate conferences in the region;
 - Strengthen the security of the environments for hosting visitors by introducing state-of-the-art ICT technologies (including face recognition security systems) to offer improved hospitality to VIP tourists;
 - Increase the attractiveness of the region by introducing dynamic imaging

- technologies and offer attractive content;
- Share the information owned by IR operators, such as information on international needs (foods, services, etc.), international-standard services, and knowhow to attract tourists and encourage them to stay longer and spend more.

(4) Direction of the introduction/improvement of functions at IR facilities

With their multi-functional (including entertainment) tourist attraction complexes and the services offered at their facilities, IRs are intended to attract sightseeing and business tourists both from Japan and abroad, encourage them to spend more in the region, and promote people-to-people exchanges.

For this purpose, IR operators are required to introduce not only common IR functions, but also unique, creative functions based on their own experiences, taking into consideration both visitors' needs and the characteristics of the region.

Future additions/improvements to IR functions must be planned, based on the basic concept, in accordance with the following policies, taking into consideration of the needs of tourist and opinions from IR operators.

Sightseeing base function

- Offering “relaxation,” “entertainment,” and “learning” that satisfies a wide range of visitors:
 - Provide facilities that satisfy a wide range of visitors such as seniors, families, business tourists, middle-aged visitors (including various grades of accommodation that satisfy different types of visitors, shopping facilities, restaurants, new entertainment facilities, and casinos)
 - Offer unique experiences available only in this region
(Improvement of the MICE function unique to the region, such as by using theme parks for MICE events; introduction of a “world first” or “Japan first” world-class amusement function, healing experiences spent in a relaxing atmosphere far away from the hustle and bustle of city life, experience-oriented tours to explore islands and other nature in the region and enjoy ocean leisure; sales of local products such as pearls, fishery products, and pottery ware, etc.)

Round-trip base function

- Providing tourist information on the Nagasaki/Kyushu area to promote round-trips around the area
 - Introduce the function to showcase sightseeing in Nagasaki/Kyushu
(to experience the rich history and culture, cuisine and hot springs)

of Nagasaki/Kyushu)

- Improvement of transportation to support round-trips
 - Assign “round-trip concierge,” and tour guides (professional tour coordinator who introduces and coordinate trips around the Nagasaki/Kyushu area)
 - Improve the various transportation facilities (improve access by land, air (helicopter), and sea (cruising))

Regional development basis function

- Improvement of human resource development
 - Develop human resources in tourism who have the ability to attend to tourists with excellent hospitality
(Develop human resources who can offer high-level services in a wide variety of fields related to tourism, such as attending to foreign tourists, offering hospitality services at transportation facilities or sightseeing spots, or offering business support to business tourists)
 - Offer international exchange opportunities for young people
(Employ overseas students studying in the region; use them to help provide opportunities for exchanges between overseas tourists and local youth)
- Promotion of progressive tourism businesses
 - Actively introduce progressive tourism businesses such as those offering progressive accommodation functions and services
(Promote “smart” hotels and cooperation with other industries including the environmental industry)

(5) Creation of a virtuous cycle to revitalize the region by introducing IRs

Based on a review of experiences in other countries and a calculation by a study group, it is expected that the introduction of IR will generate a great economic effect.

In order to actually generate and enhance such an economic effect, it is not desirable to depend on a large amount of development investment by a small number of business operators. Rather, it is necessary that each company engaged in IR take their own measures to revitalize the entire region by offering human resources or knowhow.

It is also necessary to build a system to invest the income generated in the improvement of transportation, promotion/maintenance of historical cultural heritage in the region, development of new tourist businesses and industry, or introduction of anti-risk measures, thus contributing to the building of a virtuous cycle to revitalize the region. With such a virtuous cycle each company must contribute in many fields, such as promotion of culture and the economy in the

region.

Economic effects

Since the government has not decided on a national policy including the tax rate, it is impossible to provide a precise estimate of the economic effects. However the West Kyushu Integrated Resort Study Group estimates the economic effects as below. The study group is considering preparing a more precise estimate, while reviewing the effect of the government's decision on the relevant systems.

- The estimate by West Kyushu Integrated Resort Study Group (2012)
 - Initial investment: 50 billion yen
 - Estimated number of tourists: Annual increase of 3.2 million tourists (About 10% of all tourists visiting Nagasaki Prefecture)
 - Estimated economic effects in the West Kyushu area: About 254 billion yen (about 6% of Nagasaki Prefecture's GDP)
 - New employment opportunities: About 11,062 employees (about 2% of employees in Nagasaki Prefecture)
- * Estimate of economic effects if a casino hotel is opened at the current Rotterdam Parking Lot
 - Economic effects of 181.3 billion yen/year excluding initial investment, and 7,460 new jobs
 - Levies paid to the national or local governments: 6.6 billion yen (assumed tax rate: 11% of sales)
- * This estimate is based on only a casino hotel being opened at the location of the current Rotterdam Parking Lot (27,000m²) of Huis Ten Bosch. If the entire site is redeveloped as an IR area, the economic effects are expected to be larger.

Policies to use the levies paid by the casino operators to create a virtuous cycle to revitalize the region

The use of levies paid by the casino operators will be considered for the following:

- Use of the levies paid by the casino operators
 - Investment to realize a "Tourism Industry Revolution"
 - 1) Investment in the promotion of tourism (conservation and use of World Heritage sites and other historical and cultural heritage sites, and building of a tourism city)
 - 2) Improvement of facilities for round-trip tours (improvement of passenger transportation to the Kyushu area)
 - 3) Investment in tourism (development of new tourist industries,

development of human resources, and promotion of new industries, etc.)

➤ **Investment in the needs of local communities**

- 1) Anti-risk measures (support to operate a social environment monitoring organization and anti-gambling addiction organization in the local community, etc.)
- 2) Conservation of the natural environment (conservation of the environment of Omura Bay, support for activities to improve water quality, etc.)
- 3) Improvement of the quality of welfare and education (childcare support, scholarship, etc.)

• **IR operators' requirements to contribute to the local communities**

- Contribution to the promotion of tourism, culture, and the economy in the region (e.g. support for budget tours for tourists within and outside the region, promotion of Kyushu/Nagasaki in Japan and abroad, launch of the literature award, and development of human resources in tourist industries)
- Contribution to the protection of the surrounding environment, including conservation of the social environment in local communities
- Education campaigns to raise awareness of gambling addiction (financial support to make educational materials)

Present condition ~ Huis Ten Bosch(HTB) & Sasebo City ~

	H T B & adjacent land	Sasebo City
Hotel	Three directly-managed hotels, plus Hotel Okura, Hotel Nikko, etc. Hotels:7, Guest rooms: 1,577	Hotels:196, Guest rooms: about 6,000
Retail	Shops: about 130	Shopping streets, Shopping mall duty-free shops : 43 (in Nagasaki)
Food & Beverage (F & B)	Shops: about 50	Shops: about 1,357
MICE	180 ~ 1,800 guests	Arkas Sasebo (2,000 guests) , Sasebo Gymnasium(5,000 guests)
Entertainment	< Theater > JRA HALL, MUSEHALL < Museum > Huis Ten Bosch Museum, etc. < Theme park > Huis Ten Bosch	< Theater > Arkas Sasebo, Sasebo Civic Hall < Museum > Sasebo City Museum Shimanose Art Center, Museum of UTSUWA History, etc. < Theme park > Kujukushima Pearl Sea Resort, Kujukushima Zoological and Botanical Garden ORIKIRARA,etc.
Education (human resource development)	< higher education institution > Nagasaki International University	< higher education institution > University of Nagasaki, Nagasaki Junior College, National Institute of Technology Sasebo College

5 Measures to improve access

(1) Basic Policy

In order to realize a large economic effect by introducing IR and building tourism bases in the region, it is necessary to improve transportation facilities that can carry an increased number of tourists and useful for round-trip tours for tourists to visit various parts of the region. In order to prepare an environment in which a wide range of people from across the world can enjoy sightseeing in the region without getting bored, the existing transportation infrastructure will need to be improved, with new transportation facilities built.

(2) Policy to improve transportation facilities to maximize the effects of IR

1) Access by land (roads)

- In order to alleviate traffic congestion in the area surrounding Huis Ten Bosch, the Hario By-pass and other arterial roads will be constructed.
- Higashisonogi Road (a high-standard regional road: Higashisonogi to Sasebo)
- Construction of Nishisonogi Road (a high-standard regional road: Nishisonogi-Saikai-Sasebo)
- Increasing the number of lanes to 4 (between Sasebo-Chuo IC and Takeo Jct.) (immediate works are desirable)
- Construction of Nishikyushu Expressway (Matsuura-Sasa Road)
- Improvement of transportation capability by a revamped bus timetable (increase in the number of services) (in addition to services to and from Nagasaki Airport, and services to and from other sightseeing spots in the region)
- Improved access to and from Fukuoka Airport and Saga Airport (increase in the number of bus services)

2) Access by land (train)

- Construction of Kyushu Shinkansen Line, Nishikyushu Route (Nagasaki Route)
- Improvement of transportation along the JR Sasebo Line (Nagasaki Prefecture and Sasebo City has requested the government to expand the free-gauge train service to Takeo-Onsen Station and beyond. An investigation on the improvements needed in transportation capability will be conducted by Nagasaki Prefecture and Sasebo City.)
- Improvement of transportation by revamping the train timetable (increase in the number of services) and increasing the number of passenger cars
- Improvement of access from Nagasaki Airport to Omura Station (connection between air routes and land routes/railways)

3) Access by air

- Maintenance and promotion of international flight routes (from Shanghai and Seoul)
- The launch of flight routes to East Asian cities
- Promotion of a smoother CIQ process for international flights
- Expansion and improvement of the heliport at HTB for the convenience of VIP visitors
- 24-hour operation of Nagasaki Airport and preparation of secondary transportation and late-hour check-in at accommodation facilities for passengers arriving on late-night flights
- Improvement of access from Nagasaki Airport to Omura Station (connection between air routes and land routes/railways)

4) Access by sea

- Attracting international passenger services, including regular passenger services
- Promotion to attract international cruise ships
- Improvement of the multi-purpose international terminal at Sasebo Port
- Promotion of smoother a CIQ process for international passengers
- Increase in the number of train services from Nagasaki Airport to Huis Ten Bosch, building larger, faster ships to improve transportation capability, and introducing cruise ships to make the traveling time more enjoyable.
- Suggestion of tours at a port of call that appeals to cruise ship passengers
- Invite cruise ships to stay at the port (overnight stay)

5) Others (common policies)

- Creation of a fun atmosphere to enjoy the waiting time at terminals or traveling time (sightseeing trains and ships, etc.)
- Adjustment of timetables of all transportation companies to realize smoother transfers

6 Measures against social risks

(1) Basic Policy

To reduce concerns about casinos, which is a function of the IR, it is necessary to take measures to minimize any risks, learning from the experience in other countries.

Basic measures to reduce the social risks of casinos are national laws and regulations, as well as self-imposed restrictions by casino operators. However, local communities also must take necessary measures in cooperation with the national government and casino operators.

The local communities must, in cooperation with the national government and casino operators, take all possible measures to reduce the risks in the following four areas. The underlined measures are especially important for local communities.

(A) Measures to exclude criminal groups

(i) Measures to prevent intervention by organized crime groups in the operation of casinos

1) Launch of the Casino Regulatory Committee

In order to maintain order and secure safety in the opening and operation of casinos, the national government will establish an organization to regulate casinos (Casino Regulatory Committee).

2) Regulations on the opening and operation of casinos

The Casino Regulatory Committee will impose strict regulations on casino operators. The committee will assess the entities that own and/or operate casinos, and grant them licenses/certificates. The committee will also monitor and supervise casinos.

3) Establishment of social environment monitoring organizations and agreements between the local community and casino operators

In order to monitor the environment in the local community, and ensure the appropriate operation of casino facilities, a social environment monitoring organization will be established by the local municipality, police, and residents' groups in the local community.

The monitoring organization and casino operators will enter into an agreement that stipulates measures to protect the living environment, prevent crime, protect youths, and prevent gambling addiction, as well as the casino operators' contribution to the local economy. A mechanism (laws and ordinances, etc.) to force the casino operators to perform their duties under this agreement must be established.

4) Establishment of an organization to exclude organized crime groups

In order to prevent undue claims by organized crime groups and share information of such groups in the construction stage as well as the operational stage, an organization to exclude organized crime groups will be established.

(ii) Measures to prevent illegal activities by casino visitors

1) System to prevent the admission of inappropriate persons

A system to prevent the admission of persons whose admission is considered to be inappropriate (e.g. persons related to any organized crime groups, welfare recipients, persons with limited legal capability such as minors, adult wards, and persons under curatorship) must be established.

(a) Assessment and decision of inappropriate persons

Establishment of an organization to decide inappropriate persons

Establishment of criteria to decide inappropriate persons

(b) Treatment of information of inappropriate persons

The organization to decide inappropriate person or the police will provide casino operators with information on persons whose admission to casinos are inappropriate.

Based on the information provided above, casino operators shall prevent the admission of inappropriate persons to casinos.

(c) Prevention of the admission of inappropriate persons

A system to perfectly match actual persons with the data on inappropriate persons must be established.

· Introducing a pre-registered membership system (in order to allow time to confirm that a person is not an inappropriate person), requiring casino patrons to submit a document to warrant that they are not a member of an organized crime group or related to such a group, maintaining data on inappropriate persons, and developing and using a system to recognize such persons

(d) Assessment method

The government organization must monitor the measures taken by casino operators to prevent the admission of inappropriate persons as well as their management of personal information.

2) Securing the fairness of the games

In order to secure the fairness of the games, the government must establish necessary requirements as well as monitor and supervise the casino operators' performance of their duties under this agreement.

3) Appropriate use of chips and other money equivalents used at casino facilities

In order to monitor the appropriate use of chips and other money equivalents at casino facilities, the government must prepare necessary criteria. The government also must monitor and supervise the casino operators' performance of their duties.

4) Introduction of monitoring and anticrime facilities and organizational structure by casino operators to prevent and report crimes

The government must establish necessary standards for the casino operators' monitoring and anticrime facilities and systems to prevent and report crimes. The government and local municipalities must monitor and supervise the casino operators' performance of their duties.

(B) Measures to maintain security

(i) Measures to prevent the corruption of public morals

1) Keeping a certain distance to separate casinos from public institution such as schools and hospitals

The government must establish necessary standards for the location of casino facilities. The government and local municipality

must monitor and supervise the casino operators' performance of their duties.

If necessary, the local municipality will issue an ordinance to establish additional regulations at its discretion.

(ii) Measures to prevent deterioration of the living environment (noise, scattered garbage, traffic congestion, etc.)

1) Regulations necessary to maintain the public environment

The government must establish necessary regulations (permitted facilities and equipment, opening hours, noise, vibration, light level, advertisements) to protect the environment. The government and local municipality must monitor and supervise the casino operators' performance of their duties.

If necessary, the local municipality will issue an ordinance to establish additional regulations at its discretion.

2) Introduction of monitoring and anticrime facilities and organizational structure by casino operators to prevent and report crimes (Repeated)

3) Establishment of social environment monitoring organizations and agreements between the local community and casino operators (Repeated)

(C) Measures to protect young people

(i) Educational programs for young people

1) Educational programs for minors

- Improvement of risk education in accordance with the Education Ministry guidelines
- Development of human resources in the educational sector (more frequent training opportunities, etc.)
- Preparing manuals and visual educational materials

2) Activities to raise awareness targeting minors

- Activities to raise awareness through advertisements, campaign activities, and lectures

(ii) Regulations for advertisements and promotional campaigns

The government must establish and enforce regulations for advertisements and promotional campaigns by prohibiting TV and newspaper advertisements. The casino operators must observe such regulations and establish self-imposed regulations, if necessary. The government and local community must monitor and supervise the casino operators' performance of their duties.

If necessary, the local municipality will issue an ordinance to establish additional regulations at its discretion.

(iii) Restriction of the admission of minors

The admission of minors must be strictly restricted by requiring the casino operators to check the person's ID with a photograph. The government and local community must monitor and supervise the casino operators' performance of their duties.

(iv) Establishment of an anti-gambling addiction organization in the community

The government must establish an organization to take measures to prevent gambling addiction. This organization shall research gambling addiction and conduct educational activities to raise awareness of gambling addiction, while establishing a counseling and treatment system.

To complement the activities of this government organization, a local organization shall also be established to take measures to cope with gambling addiction. This organization shall conduct research into gambling addiction, and conduct educational activities to raise awareness of gambling addiction, while establishing a counseling and treatment system, especially focusing on the building of a network from counselling to medical treatment, and offer training programs for doctors and counselors.

(vi) Establishment of social environment monitoring organizations and agreements between the local community and casino operators (Repeated)

(D) Measures to prevent gambling addiction

(i) Prevention methods

- 1) Educational activities to raise awareness of gambling addiction (repeated)
- 2) Regulations for advertising and promotional campaigns (repeated)
- 3) Keeping a certain distance to separate casinos from public institutions such as schools and hospitals
- 4) Admission fee
The admission fee must be stipulated by the relevant law.
- 5) Admission restriction through a self-exclusion program
A self-exclusion program, family exclusion program, and third-party exclusion program will be stipulated by the relevant law. The casino operators must, in cooperation with the government and local municipality, refuse the admission of inappropriate persons in casinos. The government and local community must monitor and supervise the casino operators' performance of their required regulations, as well as their

management of personal information.

(ii) Establishment of a counseling/medical treatment system

Establishment of an anti-gambling addiction organization in the community
(Repeated)

(2) Suggestions and requests for the government

In order to take effective measures to reduce the risks in introducing IR, the suggestions and requests in the following items must be submitted to the government.

1) Necessity to clarify responsibilities borne by the national government and the local municipality

The government must have the primary responsibility to take measures to reduce social risks, such as intervention by organized criminal groups, deterioration of public security, negative influence on young people, and gambling addiction. The local municipalities must complement the role of the government to cope with these problems. However, it is necessary to clarify the responsibilities of the government and local municipalities.

2) The government's system to exclude inappropriate persons

In establishing a system to exclude inappropriate persons from casinos, many problems are expected to occur, such as obtaining the personal information of inappropriate persons, deciding inappropriate persons, and identifying inappropriate persons at the entrance of a casino. As such, the government must establish an effective system. Local municipalities should be responsible for the provision of necessary personal information.

3) Establishment of social environment monitoring organizations in the local community

The Casino Regulatory Committee will monitor the operation of casinos in accordance with relevant national laws and regulations. However, local municipalities also should monitor the operation of casinos to fulfill their accountability to residents, and take necessary remedial action, if necessary.

The government should include local social environment monitoring organizations in its system and provide support to such organizations, if necessary.

4) Improving and strengthening measures to prevent gambling addiction

To prevent gambling addiction, it is necessary for national-level organizations to comprehensively take all necessary measures, such as the establishment of a counseling/medical treatment system, educational programs for young people, and research on gambling addiction.

Local municipalities should also complement the role of the

government by taking a more on-site approach. The government should include local anti-gambling addiction organizations in its system and provide support to such organizations, if necessary.

7 The understanding and support of local residents

In order to introduce IR and maximize its effects throughout the entire region, it is necessary to reach agreement with local residents, and gain cooperation from them.

We have held several briefing sessions to explain the effects of IR in and around Sasebo City. We will continue to hold briefing sessions based on the outline plan in Nagasaki Prefecture. We will share information with local residents, prepare a plan that reflects their opinions, and continue the briefing sessions.

Promotion of correct information of IR and discussion

- Asking for public comments and holding briefing sessions for residents throughout the prefecture

For successful introduction of IR, a promotion organization will be established, through which both local municipalities and the private sector will work together to attract IR operators.

The establishment of a promotion organization through which both local municipalities and the private sector will work together

- Proactive activities to attract IR operators

8 Future schedule

Based on this outline plan, we will invite residents to submit public comments and hold briefing sessions for each area. Then we will develop a final plan, taking into consideration the opinions of prefectural residents and IR operators. Based on the directions of the government's bill, we will establish a promotional organization, through which both municipalities and the public sector shall actively work to attract IR operators.