

2010 年度
国内実地研修報告書

—静岡県浜松市にみる日本の工業都市の多面的課題—

Domestic Fieldwork Report 2010

**Multifaceted Challenges of an Industrialized City in Japan:
The Case of Hamamatsu City, Shizuoka Prefecture**

2011 年 3 月
March 2011

名古屋大学大学院国際開発研究科
Graduate School of International Development
Nagoya University

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はじめに

国内実地研修は、現場での実践的な教育研究活動を重視する国際開発研究科にとって、重要な取り組みの一つであり、海外実地研修とともに研究科共通科目として位置づけられている。その主な目的は、1)「開発現場」を知ることの重要性を実感する、2)フィールド調査の基本的方法や姿勢、調査倫理などを習得する、3)日本の地域開発をめぐる諸問題を学ぶ、4)異なる社会的・文化的背景の学生によるグループ活動を通して、国際的環境における共同作業の経験を積む、の4点である。

2010年度は、ここ何年か調査対象としてきた過疎の進む山村地域から方向を転じ、静岡県浜松市の協力を得て、10月27～29日に訪問調査、11月26日に結果報告会を行った。参加者は31名（博士前期課程1年生30名、同2年生1名、日本人学生10名、留学生21名）、4つのワーキンググループ（WG）に分かれ、教員5名が引率にあたった。

浜松市は、旧浜松市と周辺の11の市町村の2005年合併を経て、現在人口約82万人、面積1500㎢超を擁する政令指定都市である。浜松市は、古くから製造業の街としてさかえ、現在も輸送機械（自動車、オートバイ等）関連産業を中心に世界的に著名な企業が多く、工場立地する。また、浜名湖や天竜川といった自然にも恵まれ、観光業やうなぎ養殖等の水産業も盛んである。同時に、日系ブラジル人を中心に多数の外国人労働者及びその家族が居住し、多文化共生施策に先進的に取り組んできたという特徴も合わせ持つ。しかし、近年、生産拠点の内外への移転が進み産業の空洞化が懸念されていたところ、2008年以降の世界的な経済危機を受け、浜松市における製造業の生産は急激に落ち込み、外国人労働者を含む失業者数も増加した。また、内外の観光客を誘致する取り組みにもかかわらず、浜松市への観光交流客数や宿泊数の伸びは必ずしも芳しくない。さらに、「浜松、浜名湖といえばウナギ」とのイメージに反し、ウナギの生産量も停滞気味である。以上から、WG1は自動車産業、WG2は多文化共生、WG3は観光業及びWG4はうなぎ養殖・加工業にそれぞれ焦点を絞って調査を行った。

浜松市役所、企業、外国人学校、観光協会その他公的及び民間の機関の方々には、ご多忙の中、調査に積極的に協力していただき、学生にとっては、地方自治体の抱える多面的な課題を考える貴重な機会となった。また、結果報告会にも多数の関係者にご参加下さり、開発の現場において政策立案・実施に携わる方々からの率直なご意見を賜った。心から感謝の意を表したい。

名古屋大学大学院国際開発研究科
2010年度国内実地研修委員長
川島富士雄

In front of Hamamatsu City Hall



At Kanzanji



View from Hamamatsu Station



Hamanako Lakeside



Preparatory Seminar



WG1



WG2



WG3



WG4



Findings Presentation in Hamamatsu



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2010 年度 国内実地研修の概要

1. 目的

名古屋大学大学院国際開発研究科は、1995 年以降、正規のカリキュラムの一環として国内実地研修（Domestic Fieldwork、略称 DFW）を実施している。DFW は、1992 年以降本研究科で実施されている海外実地研修（Overseas Fieldwork、略称 OFW）をモデルに考案されたもので、これら二つのプログラムは本研究科が重視する実践教育の支柱となっている。

DFW の主な目的は、日本の地域開発をめぐる諸問題や町おこし・村おこしの取り組みについて現地調査を通じて学ぶことにある。本研究科の修了生の多くは国際開発・協力の実務や研究活動に携わっているが、将来、そうした職務に就く可能性の高い日本人学生や留学生にとって、日本国内での開発事例を学ぶことは発展途上国の開発問題を考える際にも非常に有益であると考えられるためである。そうした学習・調査活動を通して、参加学生が「開発現場」を知ることの重要性を実感すること、そして国際色豊かな構成員でのグループ活動を通して現地調査の基本的姿勢や方法を習得することもまた DFW の重要な目的となっている。

2. 本年度を含む実施実績

これまでの実施実績は下表の通りである。15 回目となる本年度の DFW は、静岡県浜松市に受け入れをしていただいた。現地調査は 2010 年 10 月 27-29 日に実施され、参加学生は 4 つのテーマ別に分かれて、それぞれの視点から浜松市について多面的理解に努めた。本年度も例年同様、調査終了後に調査地を再び訪れ、結果報告をさせていただいた。それによって調査をお引き受けいただいた浜松市の方々に直接、調査結果のフィード・バックを行えたこと、そして市役所の方々を中心とする関係者の方々に貴重なご意見やご指摘を賜うことができ、大変貴重な機会となった。なお本年度の参加学生は日本人学生 10 名と留学生 21 名の計 31 名で構成された。

■ DFW の実施実績

	年度	研修場所	参加学生数（内、留学生数）
1	1995 年	愛知県幡豆郡一色町	10（4）
2	1996 年	愛知県幡豆郡一色町	13（8）
3	1997 年	愛知県加茂郡足助町	19（11）
4	1998 年	愛知県加茂郡足助町	25（14）
5	1999 年	愛知県渥美郡渥美町	36（25）
6	2001 年	愛知県南設楽郡鳳来町	23（14）
7	2002 年	岐阜県郡上郡八幡町	26（18）
8	2003 年	岐阜県加茂郡東白川村	36（16）
9	2004 年	岐阜県加茂郡東白川村	32（15）
10	2005 年	長野県下伊那郡泰阜村	31（17）
11	2006 年	長野県下伊那郡泰阜村	40（19）
12	2007 年	長野県下伊那郡清内路村	25（20）
13	2008 年	長野県下伊那郡阿智村	28（17）
14	2009 年	長野県下伊那郡阿智村	20（15）
15	2010 年	静岡県浜松市	31（21）

（注）2000 年度は研修場所の諸事情により実施されなかった。

3. プログラム内容

DFW のプログラムは、事前研修、ワーキング・グループ（Working Group、以下、WG とする）ごとの調査準備、現地調査、結果報告会の 4 つの活動から構成される。

■ 事前研修

日時	講師	講義内容
5 月 26 日（水）16:30-18:00 ＜必須＞	名古屋大学 川島富士雄 准教授	「日本の地方行政、浜松市の紹介」
6 月 9 日（水）16:30-18:30 ＜必須＞	浜松市役所 主任 中野昭徳 様	「浜松市の産業の現状と産業政策」
8 月 23 日（月）－27 日（金） ＜選択＞ 集中講義	国際協力銀行 技術顧問 鹿野和子 様	国内実地研修特論：「日本の地域開発経験の途上国への導入可能性」

■ ワーキング・グループごとの調査準備

本年度は、参加学生各自の興味・関心に応じて、経済、行政、福祉、教育の 4 つの WG が設けられた。使用言語は日本語及び英語の両方とし、主に参加学生同士で翻訳や通訳を行った。6 月から 10 月にかけて、各 WG は担当教員の指導の下、調査準備を重ねた。それぞれの調査課題の設定、調査時の希望訪問先の選定、詳細な質問事項の作成や調査方法の検討作業を進めた。

グループ	調査課題
WG1 自動車産業	浜松市の自動車産業におけるエコカー技術の導入、工場の海外移転の傾向について。浜松市の行政と企業部門に分けて、インタビューと文献調査を行なった。企業の活動への行政の役割、今後の関係を調査した。いくつかの企業は行政との関係が密接であることが分かった。今後はスマートシティなどの構想によるエコカー技術への支援、まだ始まったばかりである行政による企業の海外進出への支援を期待したい。
WG2 多文化共生	① 経済危機以降の日系人の就労状況と子供たちの就学状況との関係と、課題の分析。 ② 各々の利害関係者がどのように多文化共生や日系人の生活状況の改善へと貢献し、またその中でどういった課題に直面しているのかを明らかにすること。 ③ ①②を基に経済危機の肯定的、否定的影響を特定する。その上で、多文化共生の実現のためにはどのようなことに取り組むべきであるかを明らかにする。
WG3 観光産業	浜松市の観光産業の投影イメージと知覚イメージの分析。投影イメージとは市や各観光施設がホームページ等のメディアを通して投影している観光イメージである。知覚イメージとは実際に浜松を訪れている観光客と潜在的観光客（浜松を訪れたことはないが、観光客となりうる人々）のもつ観光イメージである。それらの調査結果をもとに、いかにして浜松市の観光客を増加しうるかを模索する。
WG4 うなぎ養殖 及び加工	浜松は日本でのウナギ養殖の発祥の地として有名だが、近年、海外から輸入ウナギの影響が日本のウナギ産業全体に影響を及ぼしている。本調査は、浜名湖ウナギの生産が横ばいであるのにも関わらずブランド力や知名度が高い理由を探り、各利害関係者のウナギに関する取り組みを明らかにすることに加え、浜松でのウナギ産業の更なる可能性を模索した。

■ 現地調査

阿智村にて実施された 3 日間の現地調査の詳細は以下の通りである。

	WG1	WG2	WG3	WG4
10 月 27 日 (水) 11:00 -17:00	<ul style="list-style-type: none"> ・ 浜松市産業政策課 ・ 商工会議所 ・ 産業創造センター 	<ul style="list-style-type: none"> ・ ブラジル学校 ・ カトリック浜松教会 ・ 多文化共生センター 	<ul style="list-style-type: none"> ・ 浜松市観光交流課 ・ 浜松城でのインタビュー ・ 浜松駅周辺でのインタビュー 	<ul style="list-style-type: none"> ・ うなぎ関連店舗 ・ 静岡県水産技術研究所浜名湖分場
10 月 28 日 (木) 9:00 -17:00	<ul style="list-style-type: none"> ・ スズキ歴史館 ・ 自動車関連企業 	<ul style="list-style-type: none"> ・ NPO ブラジルふれあい会 ・ コレージ・ムンド・デ・アレグリア校 	<ul style="list-style-type: none"> ・ 浜名湖周辺でのインタビュー ・ 舘山寺周辺でのインタビュー 	<ul style="list-style-type: none"> ・ 春華堂、うなぎパイ工場 ・ 浜松市農業水産政策課
10 月 29 日 (金) 9:00 -15:00	<ul style="list-style-type: none"> ・ エフシーシー株式会社 ・ 小楠金属工業所 	<ul style="list-style-type: none"> ・ 浜松市国際課、セルヴィツ ・ 外国人学習支援センター 	<ul style="list-style-type: none"> ・ フルーツパーク ・ 弁天島観光協会 	<ul style="list-style-type: none"> ・ 舘山寺周辺でのインタビュー ・ 浜松駅内でのインタビュー

■ 結果報告会

結果報告会の詳細は以下の通りである。

項目	詳細
日時	2010 年 11 月 26 日 (金) 13:30-15:30
場所	浜松市役所本庁舎庁議室
出席者	調査に協力してくれた市役所、観光協会、外国人学校等の皆様
報告者	国内実地研修参加学生
内容	<p>ご挨拶 (川島富士雄 DFW 実施委員長)</p> <p>WG1 の報告 (20 分間のプレゼンテーション)</p> <p>質疑応答 (約 10 分間)</p> <p>WG2 の報告 (20 分間のプレゼンテーション)</p> <p>質疑応答 (約 10 分間)</p> <p>WG3 の報告 (各 20 分間のプレゼンテーション)</p> <p>質疑応答 (約 10 分間)</p> <p>WG3 の報告 (20 分間のプレゼンテーション)</p> <p>質疑応答 (約 10 分間)</p> <p>ご挨拶 (川島富士雄 DFW 実施委員長)</p>

4. 担当教員と参加学生の一覧

以下の通り、計 31 名の学生が参加した。男性 16 名、女性 15 名の内訳となっている。

グループ 担当教員	No.	氏名	専攻	性別	国籍
WG1 自動車産業 (川島富士雄)	1	Wu Hui Hua	DICOS	F	台湾
	2	保井 和峰 *	DICOS	M	日本
	3	宮崎 大輔	DID	M	日本
	4	Abdulkadirov Nuritdin	DID	M	ウズベキスタン
	5	Chea Sophea	DID	F	カンボジア
	6	Dang Minh Chau	DICOS	F	ベトナム
	7	Maulana, Rieza Rahadian **	DICOS	M	インドネシア
	8	Puji Basuki	DICOS	M	インドネシア
WG2 多文化共生 (内田綾子)	9	脇田 ゆかり *	DICOS	F	日本
	10	Khaing Su Latt	DICOS	F	ミャンマー
	11	Pen Sothea	DID	F	カンボジア
	12	Mendez, Guerra Carlos Alberto	DID	M	ボリビア
	13	中井 雄大	DICOM	M	日本
	14	大藺 枝里 *	DICOM	F	日本
	15	Natalie-Ann Hall **	DICOM	F	オーストラリア
	16	Henny Rosalinda	DICOS	F	インドネシア
WG3 観光産業 (新海尚子)	17	Jin Zhe	DICOS	F	中国
	18	Indrie Mulyawati	DID	F	インドネシア
	19	近藤 亮佑 **	DID	M	日本
	20	Poejowati Probo Wardani	DID	F	インドネシア
	21	Umer Farooq Dotani	DID	M	パキスタン
	22	Otchia Christian Samen	DID	M	コンゴ
	23	藤井 愛 *	DICOS	F	日本
	24	上杉 高正	DID	M	日本
WG4 うなぎ養殖及び加工業 (伊東早苗)	25	Zheng Jingyang *	DID	F	中国
	26	山田 昂弘	DID	M	日本
	27	土田 裕美	DICOS	F	日本
	28	Ojeah Jacob Onochie	DID	M	ナイジェリア
	29	Maloa, Jeremias Clemente **	DID	M	モザンビーク
	30	Yan Novika Andriana	DID	M	インドネシア
	31	Asuque Brian Taborada	DICOS	M	フィリピン

(注) ** グループ・リーダー * グループ・サブリーダー

DID : 国際開発専攻、DICOS : 国際協力専攻、DICOM : 国際コミュニケーション専攻

5. 本書の構成

本書は、調査地である浜松市の調査協力者をはじめ、国際開発・協力や調査研究活動に係る約150もの国内の諸機関にも送付されている。日本の工業都市開発事例の貴重な記録としても、本書が有効に活用されることが望まれる。

本書の構成は以下の通りとなっている。4つのグループ別の報告書が自動車産業、多文化共生、観光産業、うなぎ養殖及び加工業の順に続く。英語報告には和文要約が、和文報告には英語要約が添付されている。

なお、本書に示された見解、提言、批判などは筆者である学生のものであり、本研究科または担当教員のものではない点にご留意いただきたい。

(文責 Ngov Penghuy)

浜松市の概要

浜松市は静岡県西部に位置する。東西およそ 52 キロメートル、南北およそ 73 キロメートル、面積は 1,558.04 平方キロメートル、岐阜県高山市に次いで全国市町村で第 2 位である。北は赤石山系、東は天竜川、南は遠州灘、西は浜名湖と四方を異なる環境に囲まれ、豊かな自然に恵まれている。同時に、浜松市は首都圏と関西圏のほぼ中間に位置し、東海道新幹線、東海道線、東名高速道路といった交通インフラも充実する。

同市の沿革を見てみると、1911 年に市制が施行され、当時の浜松町から浜松市に移行した。周辺市町村との合併を経験し、直近では、2005 年に旧浜松市を含む天竜川・浜名湖地域 12 市町村の合併により人口は 80 万人を超えた。現在人口 819,842 人（2011 年 1 月 1 日現在）、静岡県下最大、全国市町村で第 15 位である。2007 年、全国で 16 番目となる政令指定都市に移行した。

浜松市の産業別就業者数は第 1 次が 4.8%、第 2 次が 37.0% 及び第 3 次が 56.7% である（2005 年統計）。第 1 次及び第 2 次産業の比率が政令指定都市中、第 1 位であり、第 2 次産業の比率は全国平均（26.1%）を大きく上回る。これらの数字は浜松市が全国有数の工業都市であり、かつ農業と工業が共存する都市であることを示している。

江戸時代、浜松地域では綿花栽培が盛んで、綿織物を中心とした繊維業が興り、天竜川の水運を利用した製材業も盛んであった。この 2 つの産業が織機製作の土台をもたらし、さらに明治以降はこれを基盤として力織機と楽器、次いでオートバイ、自動車、工作機械といった機械産業が順に発展した。ヤマハ、カワイ、スズキ、ホンダといった世界的に著名な企業が浜松地域において創業し、現在もなお多数、工場立地し、それらに関連する部品産業の集積する工業団地が多数形成されている。

浜松市は、農業産出額においても全国市町村で第 4 位（2006 年統計）であり、ミカン、ガーベラ、チンゲンサイといった商品作物の品目別生産額では全国市町村で第 1 位である。特にミカンについては三ヶ日ミカンという日本有数のブランドを擁している。また、浜松市は浜名湖、遠州灘、天竜川といった豊かな水産資源を持つ。アサリ、シラス等の漁に加え、特にウナギ養殖発祥の地として、「浜松、浜名湖といえばウナギ」というイメージが全国的に定着している。浜名湖、天竜川といった豊かな自然は、観光資源としても重要である。特に、浜名湖周辺には舘山寺温泉や弁天島温泉等観光業の盛んな地域が多い。また、上述のものづくりの歴史を活かした「産業観光」にも力を入れているという特徴も持つ。

他方、1990 年の出入国管理及び難民認定法改正を受け、浜松市は日系ブラジル人を中心に多数の外国人労働者及びその家族が居住し、多文化共生施策に先進的に取り組んできたことでも知られる。2010 年 4 月 1 日時点の人口 820,971 人中、28,525 人が外国人登録者であり、その比率は約 3.5% と全国平均を大きく上回る。その国籍別内訳は、ブラジル人（52.4%）、中国人（11.4%）、フィリピン人（10.8%）、ペルー人（7.8%）である。

しかし、工業都市浜松市においても、近年、生産拠点の内外への移転が進み産業の空洞化が懸

念されていた。さらに、2008年以降の世界的な経済危機を受け、同市の製造業の生産は大幅に減少した。とりわけ二・四輪車生産台数は2008年の1,633,112台から2009年には1,081,037台まで落ち込んだ（約34%減）。同時に、環境に対する市場ニーズの変化を受け、ガソリンエンジン車からハイブリッド車や電気自動車へと産業構造の転換が進行しつつあり、輸送用機器関連産業の高度化や光・電子技術関連産業といった新たな産業の創出が大きな課題である。

世界的な経済危機の影響を受け、浜松市の有効求人倍率（月平均）も2008年の1.27倍から、2009年には0.42倍へと急激に悪化した。特にこれが外国人労働者を直撃し、就労状況の悪化は、外国人労働者の子供たちの就学状況にも大きな影響を与えている。このように浜松市は外国人居住者の福祉や教育といった深刻な課題に直面している。

また、農業に目を転じると、浜松市の平成17年の総農家数は14,932戸で、5年前に比べ1,382戸（8%）減少し、15年前の平成2年（1990年）に比べると4,569戸（23%）減少した。経営耕地面積も平成7年（1995年）から17年（2005年）の10年間で1,694ha（16%）減少している。これらは日本全国の傾向とほぼ一致し、浜松市も新規就農者の参入の促進、耕作放棄地の解消といった他の自治体と同様の課題に直面している。

観光業においては、浜松市も他の地域と同様、中国、台湾、韓国等のアジア地域からの外国人観光客の流入に期待し、さまざまな取り組みをしている。しかし、2008年の観光交流客数と宿泊客数は2006年比で減少し、特に宿泊客の割合の向上が課題である。

以上、今年度のワーキンググループが扱った側面を中心に浜松市の特徴とその直面する主要な課題を取り上げた。同市の抱える課題は、日本全体が直面する今日的課題の縮図的な性格を示しているように思われる。本報告書が、日本の工業都市が直面する多面的な課題の理解の一助となれば幸いである。

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第 1 章 *Working Group 1*

Trends of Eco-friendly Technology and Factory Relocation in Hamamatsu City's Automotive Industry

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浜松市の自動車産業におけるエコカー技術の導入、工場の海外移転の傾向について

<要約>

浜松市では、輸送用機器産業が販売額(50.6%)、雇用(31083人)の観点から最も大きな割合を占めており、同市の基幹産業となっている。しかし、自動車産業は現在、ガソリン車からエコカー（ハイブリッド車、電気自動車及び燃料電池自動車）への転換、新興国の台頭、円高など様々な問題に直面している。その中でも、エコカー技術、特に電気自動車(以下、EV : Electronic Vehicle)に関していえば、自動車の電氣化が進んでいる。高い技術力、部品設計に相互調整が必要なインテグラルに区分される自動車において部品の標準化が進み、大規模生産に代表される PC、DVD のようなモジュール製品へとシフトしていくことが予想され、自動車のものづくりに大きな変化が生じている。

浜松市の今後の発展のためには、こうした問題に対し、浜松市の行政や自動車関連産業が適切な対応策を講じていくことが鍵となる。そこで、私たちのグループは近年、注目されるエコカー技術及び企業の海外への工場移転という2つの傾向に対応するため、浜松市の行政または自動車関連企業が現在及び将来にわたってどのような政策、戦略をもっているのかについて考察した。

はじめに、私たちは浜松市役所、はままつ産業創造センター、浜松商工会議所にインタビュー調査を行った。浜松市役所はエコカー技術に関して、主に3つの柱をもっている。1つ目は、はままつ産業創造センターで、様々な研究部会を開くことで、企業に対する技術支援を行っている。2つ目は、自動車関連企業、大学、自治体などが相互に関わる水平的ネットワークの構築を目指すことである。それは、部品の最適調達、研究活動、インフラ整備などを促進すると考えられる。3つ目は、産業クラスタープロジェクトで、そこでも環境技術に対する支援を行っている。また、浜松市役所は、産業空洞化対策として、上記のような各種産業支援政策の他に、教育、環境政策などを含めた包括的な政策などを行っている。一方で、浜松商工会議所は、行政と企業の架け橋となる存在であり、企業活動を促進するための行政への提案、企業向けの相談業務などを行っている。また、浜松商工会議所は、企業の工場移転を支援するために、浜松市役所やジェトロなどと連携することで産業支援のワンストップサービスを実現している。

次に、自動車部品関連会社が、実際にどのように上記の2つの傾向に対応しているのかを知るために、小楠金属工業所と F.C.C. にインタビュー調査を行なった。エコカー技術に関して、小楠金属工業所には浜松市の提供する電氣化に関するセミナーに参加するなど、政府との協力関係が見られるのに対して、F.C.C. には浜松市との協力関係が見られなかった。また、両企業ともエコカー自体が今後、市場を拡大していくのかに対して疑問を抱いていた。また、小楠金属工業所はエコカー技術への資本面でのサポートを必要としていた。海外への工場移転に関して、小楠金属工業所は初のタイ進出を来年に控えているのに対して、F.C.C. は既に海外に進出を果たしている。しかし、どちらの企業も海外への工場移転に関しては、浜松市との協力関係は見られなかった。親会社との資本関係にもよるが、一般的に、海外への工場移転は取引先である親会社の意向が強い傾向がある。最後に、これらインタビュー調査、文献調査に基づき、エコカー技術の開発への資本面でのサポート、スマートシティの構想、自治体と企業の協力による企業の海外進出の促進を提案する。

1. Introduction

1-1. Background of Research

Hamamatsu City is the 16th largest city in Japan, located in Shizuoka prefecture with a total population of 820,000. After the merger of neighboring cities and towns in 2005, the city became one of the Designated Cities¹ in 2007. Major industries of the city are diversified into several different sectors. The largest sector is the manufacturing sector, which is composed of, among others, the automotive industry and musical instrument. Others include fisheries and tourism, which are located along the Hamana Lake and Tenryugawa River.

Among all of the industrial sectors, the manufacturing industry creates the second highest number of employment after the service sector (浜松市商工部産業政策課, 2010a). It also contributes a substantial amount of value added to the local gross domestic product each year, according to the data provided by Industrial Policy Division of the Hamamatsu City Commerce Department. Hamamatsu City is ranked 5th among the designated cities for Shipment Values of Manufactured Goods, at a value of 2,528,433 million yen (Hamamatsu City Government, 2009). This statistic shows the large contribution of the manufacturing industry to the development of Hamamatsu City. In addition to that, more than 50% of all merchandise sale value in the city is attributed to transportation equipment and automobiles. From this data it is easy to see that the automotive industry has supported the development strategy of Hamamatsu City, of which has witnessed a resilient growth in employment, production and tax revenue. Therefore, we decided to focus on the automotive industry in Hamamatsu City.

Despite the aforementioned success of the automotive industry in Hamamatsu City, there are modern day challenges that should be addressed in a concerted manner by those who are concerned with automotive industry and its role in local development of Hamamatsu City. In this research, the focus will be on two increasing challenges, namely the application of eco-friendly technology in automotive products and relocation of the automotive factories from Hamamatsu City.

In the long run, the said issues could have a significant impact on the sustainability of the automotive industry in Hamamatsu City. Adoption of eco-friendly technology has the potential to change the overall industrial structure of the automotive industry. Since the overall industrial structure is changing, this could mean a change, as well, in terms of the assembly manufacturers' relationship with its parts suppliers. Meanwhile, the hollowing out of factories could have a severe impact, such as loss of potential human resources and the decrease in local GDP.

¹ Designated city is a city that has population greater than 500,000 and has been designated as such by an order of the Cabinet of Japan. Local Autonomy Law, Article 252 Section 19 (The Nippon Foundation Library, 1999)

1-2. Research questions and objectives

Research questions

- How does the trend of eco-friendly technology and factory relocation affect the current automotive industry in Hamamatsu City?
- How do local stakeholders design their current and future policies to adapt to those two trends?

Research objectives

- To examine the current challenges facing the automotive industry in Hamamatsu City in terms of eco-friendly technology and factory relocation
- To identify the strategy of the automotive industry which contributes to adaptation to eco-friendly technology and factory relocation
- To identify the strategy of the local government of Hamamatsu City in coping with the impacts of those challenges to its local development

1-3. General information on the automotive industry

This section explains the general information of the automotive industry, particularly in terms of the notions of integral and modular. In this section ‘inside’ means internal structure of individual productions and the ‘outside’ means production in a downstream industry or consumer system.

The first type of product is termed “inside integral-outside integral.” These kinds of products tend to result in low profits because the production included in this category tends to require R&D, resulting in higher costs of production. The automotive industry and the micro personal computer (PC) industry are included in this category. For example, the engine is core technology and each automobile manufacturer has its own special engine. In order to produce such engines, it requires a number of companies such as design and other component producing companies to closely cooperate with each other. Also, Hybrid Vehicles (HV) and Plug-in Hybrid Vehicles (PHV) are included in this category. These products are difficult to be imitated by other companies.

The second product type is termed “inside integral-outside modular.” The products in this category are likely to generate higher profits. The products are sold as standardized goods and therefore, we can expect economies of scale, making the production efficient. Intel MPU, CPU and general electronic components are included in this category. Also, EV components like batteries and motors are likely included.

The third category is “inside modular-outside integral.” By utilizing and combining common components within the companies, they are able to produce customized components. Also, this production tends to satisfy consumer preference due to customization. Built-to-order (BTO) PCs like HP and DELL and machine tools are included in this category. For example, DELL’s business model allows consumers to order and customize their PCs by choosing individual functions such as CPU, HDD, memory, design and size, etc., through an order form

on the internet. PC components are common components, which can be purchased anywhere, but customized ordering systems cannot be imitated easily. This kind of system tends to be relatively profitable.

The fourth is “inside modular-outside modular.” In this type, cost competitiveness is the most important. Design and production plans are rationalized and production is standardized. With utilizing this type of production, however, final product is sold as modular. This product gets double volume efficiency; the first volume efficiency is from components before production while the second is from selling the final product as modular.

In summary, eco-friendly technology used in such products as Electric Vehicles (EV) or Fuel Cell Hybrid Vehicles (FCHV), is considered to be a type of inside modular-outside modular. Compared with the existing automotive industry, which is mainly based upon gasoline engine cars, EV is a type of modular production. Gasoline cars consist of more than 30,000 components, while EV consists of only 10,000 components. In addition, EV does not include engines with clutches produced by companies such as F.C.C. Batteries and motors are more important components in EV.

In order to respond to the impact of eco-friendly technology, the existing automotive industry will need to change its structure dramatically. It means changing from inside integral-outside integral to inside modular-outside modular, which requires production of special components that cannot be copied by other companies. Another option would be to move to inside modular-outside integral, which requires the creation of a system like HP and DELL. In addition, automotive makers will need to change production to respond to the impact of eco-friendly technology. For example, the production of batteries, motors, inverters, converters, etc., should be changed.

Table 1. Impact of eco-friendly technology

Source: 藤本 (2007: 48)

1-4. Current situation of Hamamatsu with regard to automotive industry

Hamamatsu is home to many global scale automotive companies such as Suzuki, Yamaha, Honda and Toyota

and their related sub-contractor companies such as F.C.C. and OGUSU Industry Co., Ltd. (hereinafter OGUSU). During the 2008 global financial crisis, the automotive industry was among those that were severely hit, particularly due to the decrease of demand towards Japanese automotive industry. While some companies have already overcome the crisis, others are still recovering. One example is Suzuki, whose downturn in sales amount of small cars was relatively small in comparison with larger, inefficient engine-based automobiles. This is because the market (Asia, Europe and North America) prefers smaller, more efficient cars in the wake of rising oil prices.

There are two interrelated issues, namely the increasing scarcity of world energy resources that lead to the adoption of eco-friendly technology and relatively high production costs compared with developing countries. These are combined with yen appreciation, which has led to the relocation of factories. Both issues, in the longer term, could have undesirable consequences for Hamamatsu.

With regard to the first issue, automotive companies have similar strategies to gradually shift their technology from gasoline engine based vehicles to hybrid cars and to concentrate more on the Asian market for the purpose of maintaining stability of sales. Both central and local governments are supporting the industry, giving attention to the application of eco-friendly related technology to Hamamatsu automotive companies (interview with Hamamatsu City local government and automotive industry in October 2010). One example is the October 2010 launch of the Suzuki Swift, a hybrid prototype sedan that was backed by the Hamamatsu government (Suzuki, 2010).

With the second issue, special attention must be given to motorcycle producing companies. Compared to car producers, companies such as Yamaha Motor have had to cope with the decrease of domestic market demand and limited government support. Domestic consumers, particularly the younger generation, perceive motorcycles as only leisure or hobby related products. Within their production circle, Yamaha Motor also faces increasing costs for domestic components and labor. As a consequence, during these past few years, Yamaha Motor, followed by its close sub-contractors, have been relocating their factories to developing countries, mostly to Southeast Asian countries such as Indonesia, Vietnam, and Thailand.

With regard to auto assembly manufacturers and their relationship to suppliers, the Keiretsu system is still widely practiced, despite the local government's initiative to push for more independent sub-contractors. We can look at the example of F.C.C., one of the world's biggest clutch producing companies, of which is headquartered in Hamamatsu City. It has a strong capital relationship with Honda, with 20 % of F.C.C. stock being owned by Honda Motor Co., Ltd (F.C.C, 2010:68).

However, in Hamamatsu there are automotive parts producers that are quite independent from assembly manufacturers. One of these is OGUSU, one of the companies examined for this research. OGUSU is supplying hundred types of motorcycle and automobile parts to Suzuki Motor Corporation, Kubota Corporation, Kubota Seiki Co., Ltd. and India's Sakthi Auto Components Ltd. Recently it established OGUSU Industry Thailand Co., Ltd. to expand its business to Thailand based companies and other Southeast Asian countries. It has no capital relationship with any of the assembly manufacturers cited above.

Besides being affected by factory relocation trends, assembly manufacturer and supplier relationships are also changing due to the present demand for eco-friendly technology from the former. For instance, F.C.C. has

already incorporated eco-friendly technology, such as the improvement of its existing clutch (F.C.C, 2010:8).

1-5. Methodology

This report is written using two main sources of information: interviews and literature review. The interviews were conducted with various respondents from the government sector: local government, Chamber of Commerce and the Hamamatsu Industry Innovated Center. Interviews held with respondents in the private sector include one senior officer from an automotive company and two auto parts suppliers, namely F.C.C. and OGUSU. The literature review was compiled from various sources, including books, the internet, and materials provided by the interviewees during the visit. In addition, the group also visited Suzuki Plaza Museum, where the group could observe the history behind the success of Suzuki.

Complete itinerary of WG-1 as follows:

Date	AM-1	AM-2	Lunch	PM-1	PM-2
Oct. 27		Hamamatsu City Industrial Policy Division		Hamamatsu Chamber of Commerce	Hamamatsu Industry Innovated Center
Oct. 28	Suzuki Plaza Museum			Senior officer from an automotive company	
Oct. 29	F.C.C.			OGUSU INDUSTRY CO., Ltd	

2. Local government

The Hamamatsu local government office of the Department of Commerce and Industry in charge of industrial development is split into four divisions: Industrial Policies Division, Enterprise Location Promotion Division, Commercial Policies Division and Tourism and Exchange Division (浜松市, 2010a:3). The labor group is situated inside the Industrial Policies Division. Meanwhile the labor division, coordinating with “Hello-Work,” an employment service center, treats employment issues. The Hamamatsu government is aware of the current crisis that private enterprises are facing, which is characterized by the recession, a decrease in demand in the domestic market, the yen's appreciation, cheaper labor costs of developing countries and others. Nevertheless, at the moment only about 3% of Hamamatsu's total budget is utilized for industrial policies (interview with a Hamamatsu local government officer, 2010).

According to Pierre and Peters (2000:12), governance is defined as “how to steer the economy and society and how to reach collective goals.” Others state that, “the government is the coordinator among government, civil

society and business” (Kimura, 2008:66). In this sense, it is meaningful to take a look at the role of Hamamatsu's government as a coordinator of the automotive industry.

This chapter examines the supporting role of the Hamamatsu government for the automotive industry in terms of the introduction of eco-friendly technology and factory relocation. This chapter is divided into three sections as follows. The first section looks at local government policies for eco-friendly technology, which is composed of Hamamatsu Industry Innovated Center, the establishment of networks among stakeholders in Hamamatsu, industrial cluster projects and other supports. The second section examines local government policies for factory relocation. Finally, the third section summarizes the research and describes possible strategies for the future.

2-1. Local government policies for eco-friendly technology

2-1-1. Hamamatsu Industry Innovated Center

For the industrial development of Hamamatsu, one of the main pillars of industrial policy in the government would be the Hamamatsu Industry Innovated Center (hereinafter the Center). The Center was established in 2008 for the purpose of development and creation of manufacturing industries, nurturing human resources, intellectual property creation and the establishment of new business and management support (はままつ産業創造センター, 2010). Its goal is to provide support for the creation of projects and products of local companies (ibid, 2010). In terms of support for the automotive industry, the Center mainly recognizes two problems: decrease in jobs due to the small number of parts of EVs and HVs, and optimization of part procurement in a globalized market. The Center places a value on the former. The following describes various concrete programs.

First, in terms of human resource development, the Center offers a wide variety of seminars such as management, operation and specialized skills, aiming to bring up future candidates for executive officers in companies, division managers and core human resources, respectively (ibid, 2010). Second, the Center plays a role in arranging research for eco-friendly technology. It has four important themes of technical development for the next generation of cars: lightweight, electronics, information and battery storage (ibid, 2010). In regards to lightweight cars, there are research groups that focus upon the innovation of CFRP (carbon fiber reinforced plastic), titanium, ultra high tensile and magnesium. With regards to electronics, information and battery storage, there are power electronics research groups. For those research activities, various companies who are located in Hamamatsu are involved, including automobile and motorcycle manufacturers, part producing companies and the like. For example, in power electronic research activities, there are meetings, provision of information, seminars and so on.

2-1-2. The establishment of horizontal networks among stakeholders in Hamamatsu

The Hamamatsu government tries to promote the establishment of a networking system among automotive related actors in the region. The automotive industry in Hamamatsu has been symbolized as a vertical pyramid with the top represented by the automobile assembly manufacturers and supported by components supplying

companies. This is called the *keiretsu* system, which in general has been a distinct Japanese system. But in the condition of severe international competition, building transactions only in the *keiretsu* system can be a disadvantage and Hamamatsu seeks to pursue the network model in which various actors such as automobile assembly manufacturers, suppliers, universities, and the local government cooperate with each other.

The Hamamatsu Social Experiment Council on Next-Generation of Eco-Friendly Cars was founded in May 2010 (浜松市, 2010b:1). It aims to enhance the practicability of eco-friendly cars, such as electric automobiles and motorcycles, providing opportunities for experiments and collaborating among various actors. The reason behind this activity is the emergence of electric vehicles and the drastic social change they will bring. Therefore, in this council, there are three divisions. The first division conducts various social experiments to actually drive eco-friendly cars, such as the Suzuki Swift. The second one is to promote research and development of parts and components among local companies. The third one is to promote the arrangement of infrastructure. Participants in the council include Suzuki, Volkswagen, Yamaha Motor, AST, Ensyu Railroad Company, Chubu Electric Power, SoftBank, Hamamatsu Chamber of Commerce, Shizuoka University, the Hamamatsu government, Shizuoka prefectural government and other institutions.

2-1-3. Industrial cluster projects in Hamamatsu

The local government tries to promote the industrial cluster project, supported by the central government. There are two industrial clusters in which Hamamatsu is involved: the Hamamatsu City optical industrial cluster and the Sanen Nanshin revitalization project. The former focuses on the optical industry and the latter tries to create technology for the next generation of transportation equipment, new agriculture, the health and medical industries and the optical energy industry. According to an interview with a local government officer (2010), the government seeks to create and shift into new industries in case existing industry stagnates. Therefore, these industrial clusters can help to create new industries that could be applied to eco-friendly technology.

2-1-4. Other supports

There are also other types of supports given by the government as listed below:

- Hamamatsu venture aid promotion
- Hi cube: an incubation center for those who run businesses
- Techno frontier Hamamatsu
- Institution for techno-polis promotion in Hamamatsu
- Financial support system
- Attracting private companies outside Hamamatsu
- Creation of an industrial estate

(浜松市商工部, 2010)

2-2. Local government policies for factory relocation

Although there are no specific policies for preventing Hamamatsu from de-industrializing, there are some policies that indirectly stop factory relocation by giving incentives to companies to stay within Hamamatsu. All of these contributions, such as the Hamamatsu Industry Innovated Center, the establishment of networks among actors, industrial cluster projects and other policies mentioned above can be incentives for companies to stay in Hamamatsu. In addition, the government tries to establish an attractive environment to influence companies to come and stay in Hamamatsu by providing a good health care system, education system and so on.

2-3. For the future

For the development of eco-friendly technology, the Hamamatsu government is considering to introduce an eco-car tax reduction in the future.

In addition, drastic social change is required for the prevalence of electric cars, since new infrastructure for the use of electric cars is important (紙屋, 2010:89-93). Electric stations should be built starting from houses, public places, and final destinations (offices) of the car owners. In particular, the government should prepare the infrastructure for middle points and final points. To this end, more social experiments are needed.

For the issue of factory relocation, an overall environment that can invite companies to stay in Hamamatsu should be constructed. Therefore, not only industrial policies are promoted, but also other policies that include education and social welfare are required to make Hamamatsu more attractive (interview with a Hamamatsu local government officer, 2010).

The Hamamatsu government also needs to support companies that have the intention to expand their business and establish new factories outside Hamamatsu, especially overseas. In addition, companies which experience difficulties to do business in Japan could receive assistance from the local government to move to countries which have favorable conditions, such as those that have cheaper labor costs, higher degrees of market demand and so forth.

It is important to note that if the automotive production decreases, suppliers can be severely affected. In this regard, they have to expand the transaction partners, not only to their existing assembly manufacturers within the Keiretsu system, but also to other automotive producers. To this end, the local government must have a strategy to encourage the suppliers' interdependency on their current assembly companies.

Nagayama (2010:43) points out that, "new industry in Hamamatsu City is formed by having synergy with existing industries like transportation equipment." For example, existing transportation equipment industries have become the starting points of product innovation for the software and optics industries. On the contrary, the software and optics industries contributed to process innovation of transportation equipment. Also, a chain and accumulation of techniques such as machine, electronics, software systems and optics were brought to the region. Therefore, possible alternatives for the automobile industry need to be considered, applying them to existing technology.

For example, entering into the aircraft industry could be considered by automotive suppliers (前川, 2010:58-60). Certainly automotive related suppliers would have some challenges since they have to adapt to a stricter system for product quality control and have to be prepared for cost-minimizing demand. But at the same time, it has the potential to promote the improvement of techniques and the system of quality control. Also, since participant companies in aircraft related industries are regarded to have a higher quality of products, an increase in order of production would be expected. However, for that reason, investment like the introduction of equipment and the necessary expense for orders would be needed. Therefore, those companies that consider entry into this industry have to think about the special characteristics of the aircraft industry.

3. Chamber of Commerce

Even though the percentage of businesses that are members of the Hamamatsu Chamber of Commerce (hereinafter the Hamamatsu CoC) is ranked as the top in Japan (53.2%), the Hamamatsu CoC still makes efforts to enlarge their members in order to strengthen its organization and meet the goal of enhancement of services for members. Through enhanced organizational infrastructure, it can ensure a stable financial basis of the organization and present positive proposals to the government as an independent and reliable economic organization, without excessive reliance on subsidies from the government.

The main activities of the Hamamatsu CoC are divided into four (浜松商工会議所, 2010):

1. To contribute to community development (e.g. policy recommendations)
2. To support the promotion of local industries (e.g. assistance of international business development for sub-contractors)
3. To promote the development of cooperation among actors (e.g. promotion of academia-government cooperation and the regional economy)
4. To strengthen organization and enhance services for members

3-1. Eco-friendly technology

The introduction of the eco-car technology such as EVs and FCEVs may lead to the phenomenon in that components become fewer and modules can be assembled easily, especially when it comes to the automobile. In that case, competition among component suppliers may become more serious.

In this regard, the Hamamatsu CoC expects suppliers to compete on the quality and design of their parts. In addition, the Hamamatsu CoC promotes the transformation of the industrial structure through academia-government collaboration.

In order to utilize the strength of the Hamamatsu CoC, suppliers should collaborate and share their expertise while trying to convert from the traditional vertical industry structures to a horizontal networking system (浜松市

商工部産業政策課, 2010b:6).

Furthermore, the Hamamatsu CoC has started to cooperate with industry supportive institutions, such as the Hamamatsu Industry Innovated Center, in order to hold network meetings related to new technology.

3-2. Factory relocation

The role of the Hamamatsu CoC is not only to support the local government to implement policies that contributed to construct better business environment in Hamamatsu, but also to provide comments to the government and design development projects to better local industry and help suppliers.

From the local government's perspective, not only headquarters, but also factories are expected to remain in Hamamatsu. However, from the perspective of the private sector, relocating the industry is one of the most efficient ways to maintain business. Even if this kind of gap exists, the Hamamatsu CoC is still making efforts to support suppliers in doing business overseas.

In order to help suppliers to expand overseas business, the Hamamatsu CoC collaborates with JETRO, the Hamamatsu Industry Innovated Center and the International Business Development Council. Depending on the consultation with the suppliers, the Hamamatsu CoC will introduce a support organization. For now, the major consultation is related to process and contract problems in regards to international expansion.

3-3. Future direction

The Hamamatsu CoC claims that they will observe the needs of the private sector and develop business support in a flexible manner. Hence, although we did not find direct support of eco-technology from the Hamamatsu CoC, we may expect suppliers to receive support in the future.

For factory relocation, because it is hard for the local government to help sub-contractors directly, in order to help suppliers move business overseas, the Hamamatsu CoC is going to open branches abroad to assist with on-site consultation.

Moreover, in order to create new industries and new technologies, they try to attract environmental, energy and transportation equipment related industries through offering attractive industrial land.

4. Automotive Companies

4-1. Yamaha Motor

As mentioned, when discussing manufacturing industries in Hamamatsu, the research would be incomplete if limited to talk about four-wheel vehicle manufacturers like Honda or Suzuki. Hamamatsu is also famous as the place where the motorcycle manufacturer Yamaha Motor established its companies and factories.

4-1-1. Eco-friendly technology

Yamaha Motor is well known as a producer of motorcycles, especially sport motorcycles. Thus, the focus is more on how to increase speed and design of their products than on eco-friendly technology development. In other words, the scope of production has an impact on their technology development and relocation strategy.

As a consequence, it is easy to see that when Yamaha focuses on producing strong engines, which can satisfy the hobbies of their consumers, eco-friendly engine development becomes an impossible mission. Actually, Yamaha had planned to develop Smart Power, which is the Company's generic name for next-generation power sources, offering high environmental performance, especially including EVs, fuel-cell and hybrid vehicles (Asahi.com, 2010). For example, they have been developing fuel-cell systems for motorcycles and fuel injection systems for smaller motorcycles. However, until now, a combination of sport engines with eco-friendly technology is still a hard job as "the biggest problem involved in the development of fuel cell systems for motorcycles is how to fit the entire system into the limited space available on a motorcycle" (Yamaha Motor). Thus, in terms of motorcycles, it is difficult to look forward to Yamaha Motor's projects in developing eco-friendly technology.

It should be noted that central government of Japan has policies to support this new technology in the form of subsidies or tax exemptions for eco-friendly products. However, it is easy to see that currently, only automobile products are able to receive the benefit of these support policies (Honda, Toyota, etc). In contrast, for motorcycle producers like Yamaha that do not concentrate on developing eco-friendly technology because their main markets are developing countries where people cannot afford eco-friendly technology motorcycles, they did not receive any support from the central government during the 2008-2009 global financial crisis. As a consequence, Yamaha has been suffering from a difficult financial situation for some time.

4-1-2. Factory relocation

Yamaha Motor's motorcycle products can be divided into two types, including daily life motorcycles (125cc to 150cc engines) and sport motorcycles (250cc and above engines). Both of these types of products have their specific markets. In general, daily life motorcycles are suitable for markets that require several necessary conditions. First, they should be used in countries with relatively hot and humid climates. Thus, northern countries cannot be considered as a strategic market for this product. Secondly, these countries should be developing countries with a high potential for economic development and relatively large populations. Southeast Asian countries and other developing countries like Brazil and India are potential markets for Yamaha Motor. This explains why they have relocated factories to these countries. Presently, in order to run an efficient business, the Yamaha Motor strategy includes moving factories outside of Japan.

Different from daily life motorcycles, the demand for sport motorcycles is increasing globally, even in the EU and the U.S. However, this kind of motorcycle requires two specific conditions compared to the first: high speed and beautiful engine design. Consequently, they also have a substantially higher price than daily life motorcycles.

Thus, production of these motorcycles requires more technology and design investment than the first. In fact,

construction of factories that are responsible for manufacturing this high-cost vehicle in the EU or the U.S. is difficult for Yamaha Motor considering the pressure of the global financial crises in 2008 and 2009. Nevertheless, as is well known, the cost to open a factory in the EU or in the U.S. requires a higher cost than in other developing countries like China or those of Southeast Asia. In addition to investment costs, Yamaha Motors faces obstacles such as high labor costs. Therefore, Yamaha Motor decided to invest in the production of sport motorcycles in Japan. As a result, they have considered concentrating on production for the Japan domestic market in addition to exports.

4-1-3. Future direction

The case of Yamaha Motor is a good reflection of the Japanese government's policies in manufacturing industry. Objectively, it is understandable that it is difficult for motorcycle producers to develop eco-friendly technology that might not bring substantial benefits from the markets of developing countries. In terms of sport motorcycles, it is also impossible for the Japanese government, which is still suffering from the impact of the global crisis, to support or grant subsidies to manufacturers producing goods for people's leisure. Therefore, we can conclude that the current situation of Yamaha Motor is caused by their production characteristics and technology development. In addition, because Yamaha Motors cannot receive support from the government, this company's financial status is in more of a dire situation than that of the automotive industry.

4-2. F.C.C.

F.C.C. is a supplier company comprised of the main company that is located in Hamamatsu and 22 subsidiaries operating around the world. It specializes in the manufacture and sales of clutches and clutch-related components for motorcycles, automobiles and other vehicles. The company has a long history dating back to 1939 when it was established as Fuji Lite Industries Co., Ltd. in Hamamatsu City. At that time the company had already started manufacturing clutches. The name of the company was changed into F.C.C. in 1984 and shortly afterwards in 1988 it started to establish its overseas subsidiary, starting in the U.S. state of Indiana. At the moment, F.C.C. has a number of subsidiaries in the U.S., Thailand, the Philippines, China, Taiwan, Indonesia, Vietnam, the UK and Brazil.

As a supplier company, F.C.C. has a large dependence on Honda Motor Group. The Group owns 20.66% of F.C.C. stocks, representing its top shareholder. In addition, sales to the Group account for roughly 70% of the F.C.C. total sales. Therefore, its financial performance could be significantly affected by sales trends at Honda, by Honda's procurement policies and other decisions.

4-2-1. Eco-friendly technology

In terms of eco-technology trends in the automotive industry, F.C.C. sees it as a major challenge to their way of production because they mainly produce clutches. There is little doubt that the next generation of environmental friendly automobiles and motorcycles will no longer be powered by internal combustion engines,

making clutches no longer needed, as they are unnecessary as drive train components in the electronic or fuel cell electronic vehicles. In the production chain itself, F.C.C. has implemented R&D efforts aimed at protecting the environment. It is developing a porous fiber catalytic sheet that can be turned into a paper catalyst to clean engine exhaust. F.C.C.'s engineers also seek more fuel-efficient clutches. To build a stronger research capability, the Group engages in joint research projects with industry and academic partners. In 2009, it entered into a Comprehensive Collaborative Agreement with Shizuoka University.

4-2-2. Factory relocation

In terms of factory relocation, F.C.C. has maintained a high ratio of overseas production in recent years. Therefore, the financial performance of F.C.C. could be affected by external factors such as: fluctuations in foreign exchange, economic trends and unforeseen changes in the legal and regulatory environment in overseas markets, international risks, such as transfer pricing taxation, political upheaval and natural disasters. Due to global financial crisis and stronger yen, total sales declined in 2010 by 20.1%. Sales declined in almost all markets of Japan by 19.3% on average, and the highest decline was in the North American market, by 26.2%. On the other hand, demand for motorcycle clutches began to recover, primarily in Asia, increasing by 6.5%, and in other regions such as Brazil and UK, by 8.2%.

4-2-3. Future direction

Taking note of the challenge posed by the development of eco-friendly vehicles, it is important for F.C.C. to prepare itself against a situation where vehicles are no longer powered by internal combustion engines. For a medium-to-long term strategy, F.C.C. must develop a second pillar of business outside the area of clutches. In doing this, F.C.C. already has strong fundamentals through their current investment in R&D, including creating several collaborations with academics and research institutes. For the short-term, it seems that F.C.C. could still maintain its operation because the company has a considerably larger portion in motorcycle clutches than automobile clutches.

It was found during the research trip to Hamamatsu City, eco-friendly technology is mostly implemented for automobiles, but not the case for motorcycles. This is due to the expense of this eco-friendly technology and the fact that most of motorcycle production is designated for developing countries that place an emphasis on cost efficiency. With regard to factory relocation, the recent global economic crisis clearly showed that the power of the market has shifted from advanced economies to emerging economies. Therefore F.C.C.'s rapid overseas expansion is a good policy that the company should continue to pursue. Especially in countries such as Indonesia, India, Vietnam and Thailand, motorcycles are very popular and it will be beneficial to F.C.C. to keep their future focus on production of motorcycle clutches.

4-3. OGUSU Industry Co., Ltd.

OGUSU is producing components such as power-train parts for automobiles, motorcycles, agricultural machinery (tractors, combines, and binders) and motors. Sales amounted to 8 billion yen in 2009. Supply destinations are Suzuki (50%) and Kubota (40%). There is no capital relationship with either. As a result, profit is relatively low compared with companies that have closer relations with mother companies. During the research it was found that OGUSU's method of production is high-mix low-volume.

4-3-1. Eco-friendly technology

OGUSU is mainly producing power steering, which is 30% of their total sales. There is no consideration to dramatically change production for eco-friendly technology. They also mentioned, "in order to promote R&D for eco-friendly technology, the company needs more than ten times the scale." Even though there is no plan to implement eco-friendly technology (e.g. EV, FCHV) any time soon, instead they will concentrate on developing the existing technology. Some employees at OGUSU are taking an electronics seminars presented by the Hamamatsu Industry Innovated Center.

4-3-2. Factory relocation

While OGUSU is currently maintaining production in Japan, the company is planning to build a factory in Thailand, due to a proposal by Suzuki, and currently have technical cooperation projects with India and Indonesia. The company did receive a subsidy from the local government when they invested in building a factory in Japan. When small companies like OGUSU decide to relocate a factory overseas, they tend to consider supply destination as well as exchange rate and cost. However, the most important consideration is whether there are supply destinations in foreign countries.

4-3-3. Future policy

In order to respond to the impact from eco-friendly technology, it is first important for parts suppliers to recognize electronic trends. Therefore, the relationship between the local government and suppliers like OGUSU, for example the provision of seminars on electronics, should be promoted more. With regard to factory relocation, OGUSU is considering it though it is difficult for OGUSU to look for the supply destination itself and needs to depend on Suzuki's demand, even if there is no capital relationship between the two companies. The local government should support to coordinate suppliers in Hamamatsu and local enterprises in foreign countries.

5. Situation of countries overseas

5-1. Indonesia

After shocked twice by the 1997 Asian Financial Crisis and the 2008 global financial crisis, Indonesia's automotive market is still growing strong. Prior to the 1997 crisis, Indonesia's automotive industry recorded tremendous growth. During the period of 1994 to 1997, this sector experienced a 20% growth rate on average. It reached 7.1 trillion Rupiah in investment and employs 70,000 workers. Production of automobiles in 1997 reached 390,000 units (Aswicahyono, 1999:1). In addition, within two years of the 2008 global financial shock, Indonesia's automotive market is already reviving.

In ASEAN, Indonesia (483,550 vehicles sold) is said to be the third largest automotive producing country after Thailand (548,871) and Malaysia (536,905) (The Jakarta Post, 2010 & ASEAN Automotive Federation, 2009). The Association of Indonesian Automotive Industries (Gaikindo) records state that Toyota enjoys the largest market share with 38.9%. However, total units sold by Toyota, the world's largest car manufacturer, dropped 8.9% from 209,130 units to 190,471 units.

In Indonesia, aside from hobby/leisure, motorcycles are used both in rural and urban areas for daily mode of transportation due to their relatively efficient use of gasoline and practicalities. In the capital Jakarta, populated by 8.5 million people, motorcycle numbers are already accounting for 8,087,118 units (Vivanews, 2010). Looking at that number alone, no wonder many Japanese based companies are so eager to expand their business in Indonesia. In 2009, according to the Association of Indonesian Motorcycle Industry (AISI), from five main motorcycle producers, 4,787,757 units were sold. Honda led (2,201,147 unit), followed by Yamaha (2,176,757 units), Suzuki (358,352 unit), Kawasaki (50,026 unit) and Kanzen (1,812 unit) (AISI, 2009).

5-2. Vietnam

Vietnam is a developing country in Southeast Asia, with an increasing population of young people that will reach approximately 90 million this year (Vietnam National Assembly, 2010). In addition, in recent years, Vietnam's GDP has been on the rise. These characteristics make Vietnam an ideal market for automotive manufacturing, including automobile and motorcycle producers.

In fact, the Vietnamese motorcycle and automobile markets were opened with the Doimoi economic program, which was started in 1986. During the 90s, there were many manufacturers of motorcycles and brands of automobiles that started to appear on the Vietnamese market but the market only focused on some main manufacturing industries such as agricultural machines, engines or batteries (藤田, 2006: 328-331). However, in the first decade of the 21st century, the number of motorcycles increased quickly and Vietnam became known as the country of motorcycles.

Among manufacturers of motorcycles in Vietnam at that time, Japanese manufacturers were the most attractive for their high quality. Vietnamese consumers believed that the quality of Honda and Yamaha

motorcycles were of the highest quality but they were also considered too expensive, costing an entire year's salary of a Vietnamese workman. While Japanese producers had to cope with this problem, Chinese producers attacked the Vietnamese market with very cheap vehicles. This advantage continued to bring benefits for Chinese manufacturers. To deal with this problem, Honda counteracted with a new series of motorcycles at a cheaper price and higher quality than the Chinese products.

The increase in income of Vietnamese people dramatically affected the motorcycle and automobile market. During the past 10 years, the Vietnamese motorcycle market has changed considerably and the numbers of people who use brand scooters like Honda and Yamaha have been increasing. Moreover, there are more and more people who use cars instead of motorcycles. The demand for cars in the country also makes Vietnam a potential market for Japanese automobile producers.

Realizing that imported cars were not enough for the Vietnamese market, Toyota and Honda saw the opportunity to establish car assembly factories in Vietnam. Along with the development of the automobile market, the demand for parts and components of cars in Vietnam is increasing, leading to an increase in the number of factories and companies that have invested in producing these products in Vietnam. This phenomenon, in some respects, related to the relocation of automobile manufactures in Japan and the region. In conclusion, Vietnam continues to be a potential market for Japanese automotive producers.

5-3. Cambodia

Cambodia is one of the ASEAN member countries where foreign automakers are playing an important role in the expansion of a new automotive industry. In the process of promoting the automotive industry in ASEAN countries, Cambodia was among four countries that received assistance from the Japanese Automotive Manufacturers Association (JAMA) (Cho, 2006:25). Nevertheless, compared with other ASEAN countries, Cambodia's automotive market size is relatively small. For example, in 1999 the number of car owners was only 0.4% among the ASEAN population. However, within the two-year period from 1997 to 1999, the number of car owners experienced the highest growth rate in the region at 21.4%. (Balce, 2000:4)

Recently the industry is expanding along several veins. Not only motorcycles but also cars have become main methods of transportation throughout the country. Companies like Toyota and Suzuki (for cars), Yamaha and Honda (for motorcycles) and Hyundai (for trucks) are the major leading brands.

Together with a few number of small and medium size domestic companies, including OMC Group Co., Ltd., there are also quite a number of foreign distributors who have emerged in the automotive industry, mainly from Japan and Korea (Table 2 below). They are actually the only foreign distributors of automotive products and account for 60% and 40%, respectively.

Furthermore, transportation equipment, composed of vehicles, motorbikes and parts, shared the largest monetary value (15.14%) among all imports in 2010 (MEF, 2010:31). However, there are few domestic small-scale producers manufacturing cars and electric bikes. They mainly reassemble Japanese broken car parts and produce new small cars to serve the domestic market (Carnews, 2009).

In early 2010, for the first time, Cambodia imported various brand cars from China (Gasgoo, 2010). This demonstrates the increasing attractiveness of the Cambodian market for new brand cars imported from abroad. For instance, some of Japan's biggest companies are viewing Cambodia as a good destination to build their factories in order to respond to the growing need for motorcycles. As an example, Yamaha Motors Cambodia and Toyota Tsusho Corp. are constructing a joint venture for their factory that will become the biggest assembly plant of motorcycles in Cambodia. Operation is set to start in 2011 (Khmer Weekly, 2010).

Table 2: Automotive distributors in Cambodia

South Korea	Japan
<ul style="list-style-type: none"> • Ssangyong Motor • Camko Motor Company • Hyundai Amco Cambodia Co.,Ltd. 	<ul style="list-style-type: none"> • Cambodia Suzuki Motor Co., Ltd. • Mitsu (Cambodia) Co., Ltd. • Mitsubishi Corporation Phnom Penh Liaison Office • Phnom Penh Honda Co., Ltd. • Toyota (Cambodia) Co., Ltd. • Yamaha Motor Cambodia Co., Ltd.

Source: Cambodia Yellowpages (2010)

6. Policy suggestions

- Financial support for the development of eco-friendly technology

According to the interview with OGUSU, in order to invest in eco-friendly technology, financial support will be required from banks or other financial institutions. However, banks tend not to lend money to parts suppliers. The local government should improve their activities in two important areas. First, the local government should serve as an advocate, encouraging financial institutions to adjust their regulations in providing funds to suppliers. Second, the local government should facilitate networking between sub-contractors and financial institutions so that both parties can receive adequate information on supply and demand of financial support.

- The creation of a "Smart City"

EV must be supported by initiating the development of Hamamatsu Smart City, which includes a smart grid, smart meters, efficient houses, solar power, secondary batteries, battery stations for EV and so on. EV cannot be considered without the notion of a Smart City since the establishment of such supporting infrastructures is essential to attract people to purchase EV. In order to expand EV, the concept of the Smart City needs to be considered as a whole. The local government should consider not only EV but also other functions of a Smart City.

- Cooperation between government and companies in negotiating with countries overseas

Factory relocation should not always be considered as a threat, but rather can be considered as an opportunity for the local government. Sometimes companies that wish to do business abroad tend to not have enough capability. The local government could provide advisory assistance to companies in negotiating with host countries. By providing support for these companies, the local government could also provide incentives to keep the headquarters in Hamamatsu City.

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第 2 章 *Working Group 2*

Multicultural Coexistence in Hamamatsu City: Challenges after 2008 Economic Crisis

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1. Introduction
2. Relationship between Education and Labor for the Nikkei in Hamamatsu City
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浜松市における多文化共生 — 2008 年の経済危機後の課題 —

<要約>

1. 調査背景

日本とラテンアメリカとの間には歴史的に強い繋がりがある。19 世紀末から 20 世紀初頭にかけて、日本人はより良い居住地を求めてラテンアメリカへ集団移民を開始した。その結果、現在ブラジルには世界で最多の日本人移住者やその子孫たちが住んでいる。一方で 1990 年代に入ると、これらの人々の子孫である日系人たちが大勢日本へと働きに来るようになった。1990 年の出入国管理及び難民認定法（通称入管法）の改正に加えて、日本のバブル景気とブラジルの経済的混乱といった背景が日系人たちの渡航を後押ししたのである。こうして、日系人たちは日本における最大規模の移民単純労働者の集団を成すようになった。

浜松市は日本でも有数の、非常に多くの日系人労働者を抱える市である。また、そのために早くからこういった移民労働者との共生を模索してきたことも知られている。

しかしながら、2008 年に起こった経済危機は、浜松市に住む日系人たちの生活を大きく圧迫した。就労状況はもとより、日系人の子供たちの就学状況も大きな影響を受けている。浜松市はさらなる多文化共生の実現を進めるにあたって、新たな課題に直面している。

2. 調査目的

先述した背景を基に、本調査は以下の三つの調査目的を定める。

第一には、経済危機の影響という点で日系人の就労状況と子供たちの就学状況との関係を分析し、新たな課題を特定することである。

第二には、各々のステークホルダー（利害関係者）がどのように多文化共生や日系人の生活状況の改善へと貢献し、またその中でどういった課題に直面しているのかを明らかにする。

第三には、上記の二つの焦点から得られた結果を基に経済危機の肯定的影響と否定的影響を検討する。その上で、多文化共生の実現のためにはどのようなことに取り組むべきであるかを考察する。

3. 調査方法

文献調査、参与観察およびインタビューを行った。インタビューは、浜松市役所企画部国際課、浜松市多文化共生センター、コレージョ・ピタゴラス浜松校、学校法人ムンド・デ・アレグリア、浜松市外国人学習支援センター、カトリック浜松教会、NPO ブラジルふれあい会、セルヴィツォ・アセソリアの計 8 箇所において行なわれた。

4. 調査結果

2008 年に起こった経済危機の結果、日本に住む日系人の 6 割もの人々が職を失うこととなった。両親の失業は子供たちの退学につながる。こうして高等教育を受ける道を閉ざされた子供たちは、単純労働

に従事することになり、悪循環から抜け出すことができない。移住者が日本での永住を選択する傾向にあることを考慮すると、このような悪循環は日系人だけの問題ではない。長期的に見るならば、このような問題は福祉政策や支援の増大、社会的費用など莫大な負担に帰結するだろう。

一方で、浜松市では多文化共生を実現すべく様々な主体が活動を行なってきた。日系人の子供達への多様な言語教育は特筆すべき点である。経済危機後にも、多文化共生への取り組みは続けられている。例えば多文化共生センターはカウンセリング事業をはじめるとともに、日系人の就職支援も行なった。また、ムンド・デ・アレグリア校と外国人学習支援センターは同じ建物で活動することとなった。これは人々の対話を促進するという点で大きな前進である。

前述のように、経済危機は日系人たちに様々な側面で深刻な影響を与えたが、肯定的な影響もある。第一には、教育の重要性が日系人や地方自治体の間で再認識されたことである。とくに雇用を確保するために日本語の習得が見直されることとなった。第二には、日系人コミュニティ、地方自治体、日本人コミュニティなどの間での対話が促進されたことである。

このように多文化共生の促進に力を注いできた浜松市であるが、課題はまだ残されている。多文化共生の実現は、政策の施行や財政援助など中央政府の支援があつてこそ達成されうる目標である。

5. 提言

上述の調査結果を受けて、浜松市における多文化共生への三つの提言を行う。

第一に、コミュニティレベルにおいては移民、日本人といった枠を超えた多文化間のさらなる対話の機会を増やしていくことが求められる。

第二に、地方自治体のレベルでは、日系人の支援において、病院などの公的な社会的リソースと、ボランティアなどの非・公的な社会的リソースとの連携を強化する多文化ソーシャルワークのアプローチが有効であろう。また各種学校の認定手続きについては再考の余地がある。加えて、日本語の学習に関しては、それが日本社会への同化ではなく社会参加につながるよう、日系人のニーズとバランスをとっていく必要がある。

第三に、国レベルにおいても、まずは各種学校認定の過程を再考することが求められる。また現在議論されている労働者派遣法の改正は、日系人の雇用に複雑な影響を及ぼし得る。そのため改正が行なわれる場合には、雇用者や仲介業者の被雇用者への責任についての議論を同時に進めていくべきである。そして最後に、移住してきた人々の安定した生活を可能にすべく、長期的視野に立った包括的な政策を担う外国人庁の設立が切望される。

<謝辞>

本調査の実施におきましては、国際課を中心とした浜松市役所、多文化共生センター（HICE）、コレジオ・ピタゴラス浜松校と学校法人ムンド・デ・アレグリア、外国人学習支援センター、カトリック浜松教会、NPO ブラジルふれあい会、セルヴィツー・アセソリアの各訪問先にて、お忙しい中、とても多くの方々にご協力頂きました。また、調査を運営してくださった先生方と、特に内田先生の熱心なご指導のお陰で無事調査を終えることが出来ました。ここに感謝の意を表します。

1. INTRODUCTION

1-1. Background Information

Japan and Latin America have a strong historical relationship. The Japanese began to migrate to Brazil in 1908 with the voyages led by Kasato Maru. After the Meiji Restoration, restrictions for travel abroad were withdrawn and many Japanese began to emigrate in search of better living conditions. As a result, today Brazil is home to the world's largest population of immigrant Japanese and their descendants.

In the 1990's, Japanese descendants (Nikkeijin or Nikkei), mainly from Brazil, started traveling to Japan in great numbers to work. After immigration laws were relaxed in 1990, the employment conditions in Japan combined with the economic turmoil in Brazil motivated many Nikkeijin to take advantage of the preferred visa status the Japanese government made available for them. These guest workers quickly became the largest group of foreign blue-collar workers in Japan.

Hamamatsu City is home to a great number of migrant workers in comparison with other areas of Japan and has reacted to the increase in their numbers from an early stage. Specifically, the city government has tried to promote 'multicultural coexistence' between Japanese and foreign residents. Multicultural coexistence is a kind of policy that aims at fostering mutual understanding among people who have different values, cultures, ethnicities, languages and so forth. It is similar to policies of multiculturalism that have been introduced in typical countries of immigration countries such as Canada or Australia from the 1970's. In Hamamatsu City, the need for a multicultural policy had been recognized as early as the mid-1990's. "Hamamatsu Sengen", declared in 2001 in collaboration with 12 other nearby cities with large populations of foreign residents, calls for the promotion of a society in which all members can participate to increase mutual respect for, and understanding of different value systems and cultures, and to establish the rudiments of a society where rights are respected and duties are carried out. The Hamamatsu Global City Vision, since 2001, also states that the city will work toward the promotion of multicultural coexistence, which will enhance relationships among residents with diverse cultural backgrounds.

As of September 30, 2010, registered foreign residents totaled 27,529 people, accounting for 3.36% of Hamamatsu City's total population of 820,317. Of this total, 14,068 are Brazilian (about 58% of the city's foreign population), making it home to the nation's largest Brazilian community (HICE HP; see Figures 1-1, 1-2 and 1-3). To cooperate with such a large number of foreign residents, it is necessary for Hamamatsu City to create a more comfortable society for all.

However, the global economic crisis since 2008 has caused serious damage to society and pushed up the national unemployment rate from 4.0% in 2008 to 5.1% in 2009 (Ministry of Internal Affairs and Communication 総務省「平成 21 年度労働力調査」). Such conditions have put the livelihood of both Japanese and foreign residents at risk, especially those who were engaged in the manufacturing and service industries as unskilled workers. Hamamatsu City is famous for its manufacturing industry and hosts a lot of foreign blue-collar workers as mentioned above. Thus, this research will investigate the impacts of the economic crisis in terms of foreign residents

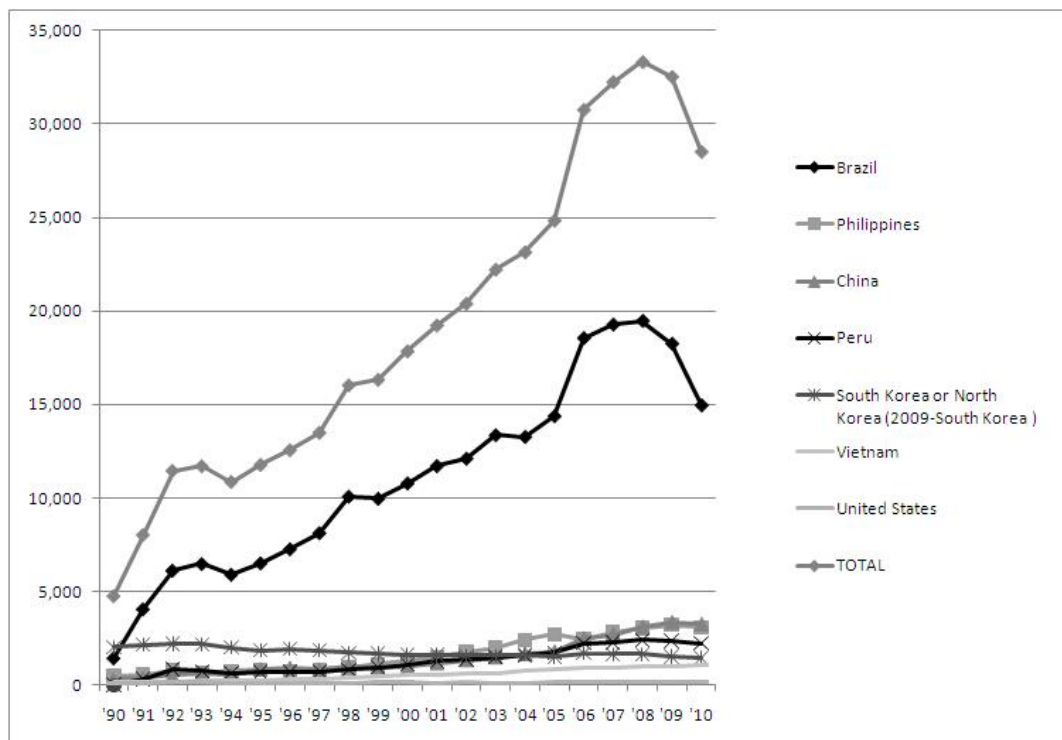
in Hamamatsu City.

Figure 1-1 Percentage of Brazilians Among Registered Foreigners (2009)

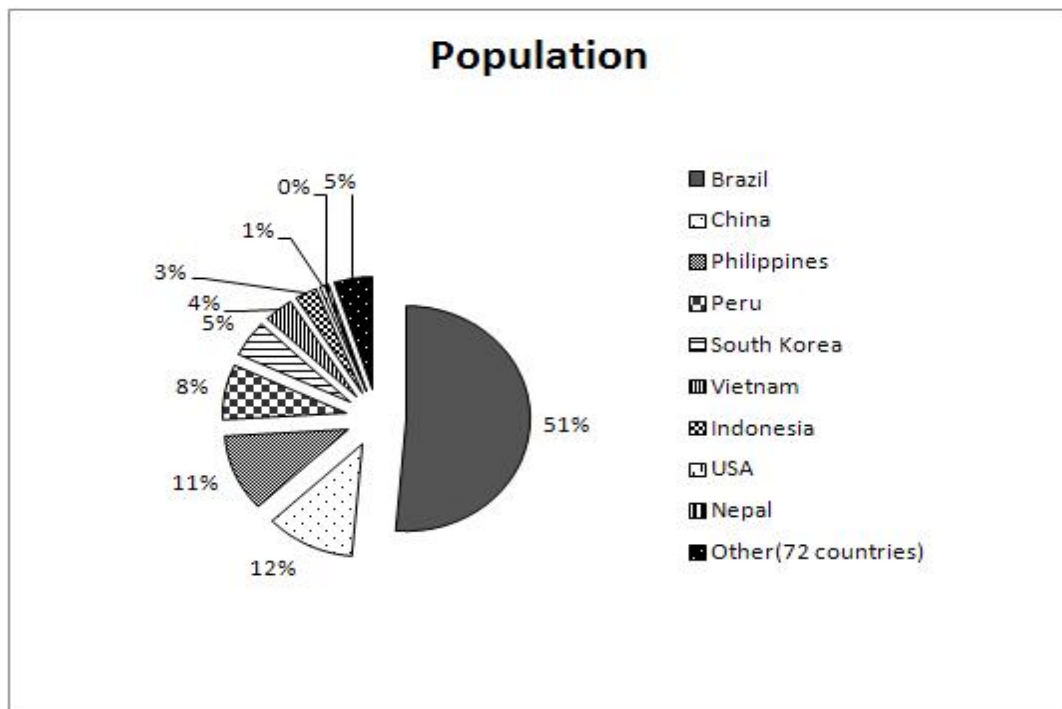


Source: Ministry of Justice 法務省「登録外国人統計統計表 09-99-03」

Figure 1-2 The Changing Non-Japanese Resident Population of Hamamatsu City



Source: HICE

Figure 1-3 Hamamatsu City Non-Japanese Resident Population (as of August 2010)

Source: HICE

1-2. Research Objectives

The objectives of our study were to investigate the effects of the 2008 economic crisis on the Nikkei in Hamamatsu City, discuss the roles of various stakeholders working towards a peaceful multicultural environment, and determine what issues need to be addressed in the future in order to achieve multicultural coexistence.

First, we will analyze the relationship between education and labor for Nikkei in Hamamatsu City through the impacts of the economic crisis in 2008, and identify what new challenges are arising. Second, we will focus on the activities of local stakeholders in regards to multicultural coexistence in Hamamatsu City: children's education, Nikkei's employment and the specific agenda of governmental bodies. In doing so, we will investigate their contributions and the difficulties each are facing in attempting to improve living conditions for Nikkei and to promote a multicultural society. Finally, based on the above results, we will identify positive/negative effects of the economic crisis and determine what issues need to be addressed in the future, in order to achieve multicultural coexistence. In addition, we will make recommendations to three sections: the local community, municipal bodies (city and prefectural) and the Japanese national government.

1-3. Rationale of Research Topic:

As more Nikkei have settled in Hamamatsu City, the city has engaged in various programs to promote

multicultural coexistence policies. In 2000 the city established a foreign residents' assembly (Hamamatsu Foreign Residents' Council for Integration) to create a forum for dialogue between the city administration and foreign residents. In 2001 Hamamatsu City became a founding member of the Committee for Localities with a Concentrated Foreigner Population (Gaikokujin shuju-toshi kaigi: 外国人集住都市会議). Furthermore, the Hamamatsu Multicultural Centre (HICE) has served as a bridge between the municipal government and the city's foreign residents, providing counseling services, language classes and other exchange opportunities.

On the other hand, Nikkei workers have faced many problems, such as working conditions and insurance, as well as children's education. In particular, with the global economic crisis being faced since 2008, the manufacturing industry has slumped and about 60% of Nikkei factory workers in Hamamatsu City have found themselves unemployed. Many children have quit school as a direct result of their parents' unemployment. In Hamamatsu City, there are six private schools for Nikkei children, which have provided education in their native languages. These schools saw a sudden decrease of students after 2008, partly due to the fact that tuition fees are relatively high, and partly as a result of the return of many Nikkei to Brazil. As an emergency measure, the Japanese government adopted a return ticket policy between April 2009 and March 2010. This policy, in principle, offered Brazilian and other Latin American guest workers 300,000 yen toward their airfare, as well as 200,000 yen for each dependent, on the condition that they would not reapply for a work visa for 3 years. As a result, during this period the Brazilian population in Hamamatsu City decreased by about 20%.

Many scholars have studied the situations of Japanese Brazilian migrants and multicultural policy in Hamamatsu City since the 1990s. Based on fieldwork conducted in Hamamatsu City between 1994 and 1996, Roth discussed the marginalization of Nikkei as contract workers, focusing on their interactions with Japanese in factories and neighborhoods (Roth 2002). Other studies have investigated the policies and social services of the local government, as well as conditions of ethnic schools in Hamamatsu City (Ikegami 2001, Nakatsugawa 2005, Nakai 2007). Few scholars, however, have researched the connections of Nikkei labor and education, especially after the 2008 economic crisis.

We hope our case study of Hamamatsu City will contribute to further understanding and realization of multicultural coexistence in other municipalities in Japan, as well as foreign countries. Since our group itself is multicultural, consisting of graduate students from several countries (Australia, Bolivia, Cambodia, Indonesia, Myanmar and Japan), this research will be a unique project that approaches local conditions in Japan with a transnational perspective.

1-4. Research Methodology and Limitations of the Study

To analyze multicultural co-existence in Hamamatsu City, we conducted research, literature reviews, interviews and direct observation in the field. Literature was reviewed to grasp the historical process of the multicultural policy in Japan and to find basic data about foreign residents in Hamamatsu City. Interviews were conducted with subjects who are involved with the Nikkei population in terms of education, policy and their

community.

However, these interviews had limitations. First, the fieldwork was conducted within a limited time schedule, as can be seen in the itinerary below, and interviews were quite rushed. Second, we were unable to interview many Nikkei directly due to schedule and language issues. On top of this, it was difficult for us to find detailed characteristics or problems of Nikkei in terms of employment, as we overlooked the option of visiting the government-based employment organization, “Hello Work.”

1-5. Itinerary

We visited several locations in Hamamatsu City to collect data, which can be grouped under three main topics: multicultural policy (Hamamatsu City Hall International Section, Multicultural Centre), education (two ethnic schools: Colegio Pitagoras and Colegio Mundo de Alegria; Foreign Resident Study Support Centre; Catholic Hamamatsu Church), and responses of Nikkei (NPO Brazil Fureai-kai, Servitu Import Shop). Below is the actual schedule of the fieldwork.

Date	AM 1	AM 2	Lunch	PM 1	PM 2
Oct.27		Colegio Pitagoras Brasil		Catholic Hamamatsu Church	Multicultural Center (HICE)
Oct.28	NPO Brasil Fureai-kai			Colegio Mundo de Alegria	
Oct.29	City Hall	Servitu		Foreign Resident Study Support Center	

2. RELATIONSHIP BETWEEN EDUCATION AND LABOR FOR THE NIKKEI IN HAMAMATSU CITY

Although employment conditions and school attendance were already problems for the Brazilian residents before the economic crisis, afterward the scenario has become even worse. The loss of jobs for Nikkei (approximately 60%) in Hamamatsu City has resulted in further loss of the young generation’s education opportunities. A large number of Nikkei parents have taken their children out of Brazilian schools, which are very

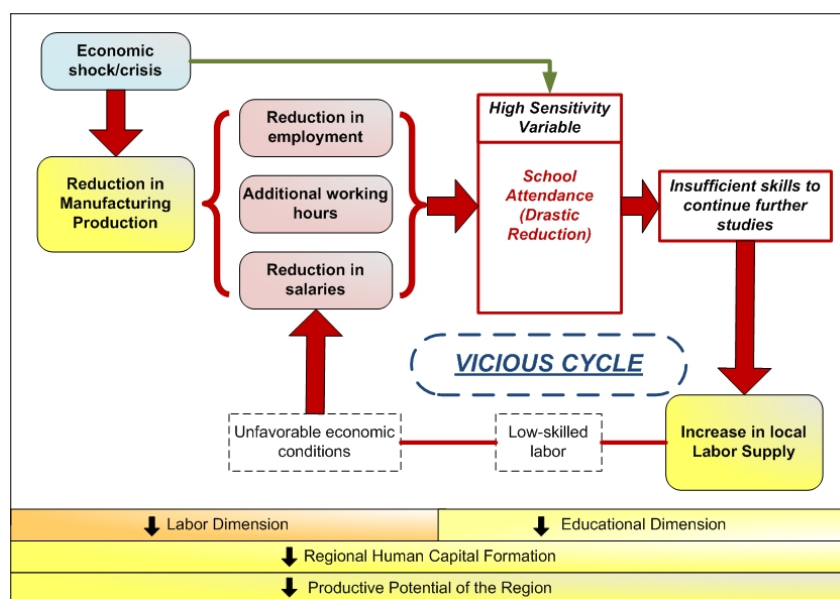
expensive by Brazilian standards and have become even harder to pay for as parents' wages decrease. Under this scenario, the best alternative would be to place children in less costly Japanese public schools. Unfortunately, cultural differences, bullying and the language barrier create a gloomy study environment for Nikkei children. For this reason, many Nikkei avoid sending their children to public schools. It is obvious that job losses have decisively affected the future education of Nikkei children.

Based on the development literature (Todaro and Smith 2009) and the findings of the fieldwork, Figure 2-1 represents graphically how labor and education are intimately related. As education is one of the main determinants of human capital and productivity of the region, the link between labor and education has strong implications for economic and social development. In the case of Hamamatsu City it was observed that the recent economic crisis affected labor conditions, which in turn, reduced school attendance. Given the socio-economic conditions of the Brazilian workers and students, the interaction between education and labor under negative economic shocks tends to generate a vicious cycle with negative implications for the cultural harmony and potential productivity of the region.

2-1. Impact of Economic Shocks on Labor Conditions

As documented by many scholars, the direct effect of the recent economic crisis was the reduction in the demand of manufacturing production. When there is a contraction of demand, a new equilibrium point is reached where the new price and quantity supplied tends to be lower than before. Also, the economic theory predicts that as soon as there is a reduction in the supplied production, firms usually adjust by reducing labor costs. In order to achieve this, firms might have two options: reducing salaries and/or reducing number of employees.

Figure 2-1 The Labor-Education Relation and the Vicious Cycle in Hamamatsu City

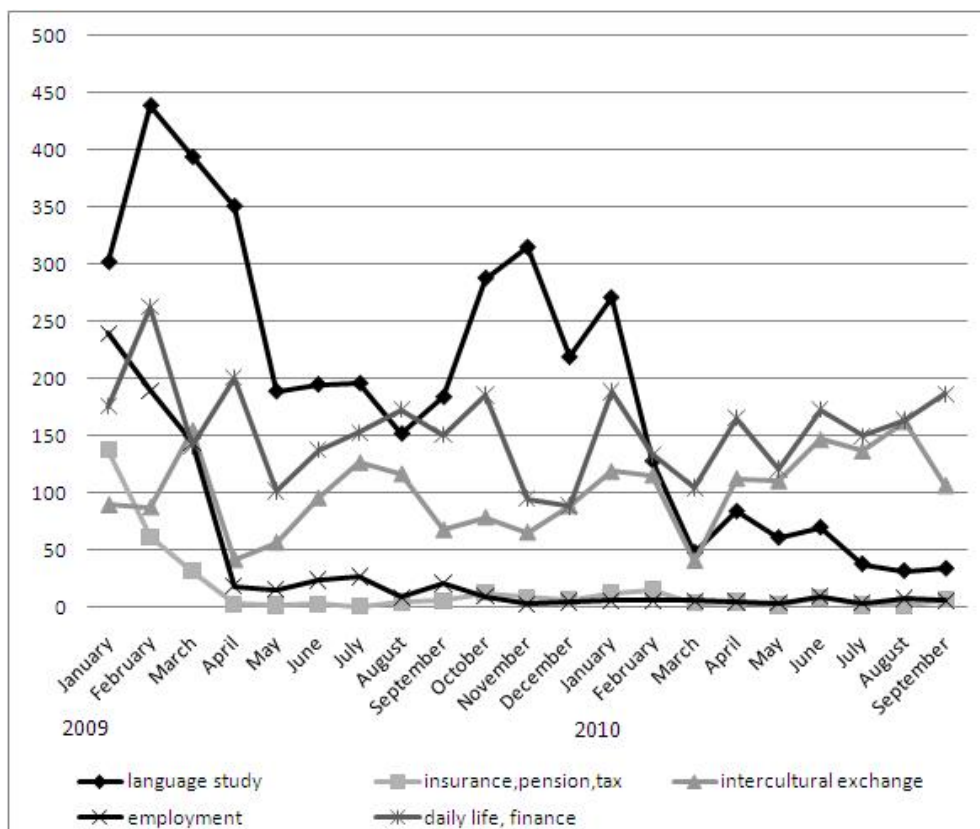


Source: Todaro and Smith (2009) and authors' interviews during the fieldwork

This economic phenomenon was observed in Hamamatsu City, and according to the information provided by HICE staff members, after the economic crisis the number of people looking for information about new jobs has notably increased. At HICE due to an increase in inquiries, three employees in the employment section have been increased to five. Notably, inquiries about Japanese language study, as well as daily life and finance, showed a sharp rise in February 2009. As stated, the period of the return ticket policy was between April 2009 and March 2010. According to another interviewee at the NPO, in addition to the 19,500 Nikkei throughout Japan who returned to their home country using the return ticket policy, about 50,000 Nikkei returned at their own expense. Many Nikkei wanted to come back to Japan as soon as possible because the salary in Japan is still higher than in Brazil, even though the economic conditions there are better than before. In addition, they knew that it was difficult for them to find jobs immediately in Brazil or to catch up with the skills of other Brazilians because they had lived in Japan for a long time and had not received sufficient education in Brazil.

Another labor effect was also noted; according to school teachers, after the crisis parents could not attend school meetings presumably due to an increase in working hours. The logic behind this is related to the previously explained labor effects, when employment is reduced, the remaining workers are required to cover production gaps resulting from a reduced number of workers. Additionally, to compensate for lower salaries, workers might be willing to work additional hours to maintain the previous level of their salary.

Figure 2-2. Number and Topic of Counseling in Portuguese at HICE



Source: HICE

Many Nikkei lost their jobs because most of them were employed on a contract basis. The agents/go-betweens made it possible for them to be employed without being able to speak Japanese. The Japanese workforce is known for its flexibility in that there is a large supply of contract or temporary workers who are essentially a disposable source of labor. According to the survey conducted with 2773 Brazilians 15 years old and above, living in Hamamatsu City from January to February 2009 (Ganbare! Brazil-jin kaigi 2009: がんばれ！ブラジル人会議 2009), only 38% had jobs. Among those employed, 65% were indirectly employed through temporary employment agencies and 31% lived in apartments provided by these brokers (meaning they must vacate these apartments in the event of termination of employment). In addition, 83% had worked only as temporary workers and 52% had 3-year visas, while 43% had permanent visas. As much as 75% were not covered by social insurance and among them, 47% were not covered by employment insurance either. Of the respondents, 40% answered that they wanted to return to Brazil but could not, and their reasons were financial difficulties (69%) and fewer job opportunities in Brazil (13%).

When the Nikkei lost these jobs or their contracts were not renewed, it was even more difficult for them to find new jobs, as their level of Japanese proficiency is generally low. In addition, a new Worker Dispatch Law (Roudousha haken hou: 労働者派遣法) is being discussed in the Diet that, if passed, will outlaw many forms of contract work especially in the manufacturing industry. This will mean that Nikkei will have to find direct employment. This is almost impossible for them without Japanese proficiency, as they will need to write resumes, attend interviews, read and sign employment documents, etc., even if the job is in a factory and does not require any Japanese proficiency. According to the interviewee at NPO Brazil Fureai-kai, although the NPO has helped these workers find jobs in alternate industries, such as local forestry, job placement is still difficult for those suffering from the crisis.

2-2. School Attendance as a Highly Sensitive Variable

As stated, about 60% of Nikkei in Hamamatsu City suffered from the job loss caused by the economic shock. The above survey conducted in 2009 shows that 32% of Brazilians had children of school age (20% sent them to Japanese public schools, 9% to Brazilian schools, and 3% to no school, mostly for economic reasons.) In the case of those who had planned to return to Brazil someday, 48% sent their children to Brazilian schools, while 33% sent them to Japanese public schools. Because their parents could no longer afford school fees, many students who regularly attended schools, were forced to drop out. According to the data collected from the fieldwork, the number of students in the ethnic schools visited had noticeably decreased. In the case of Mundo de Alegria, there were about 30 students who dropped out of school within the first 4 months of the economic crisis. Similarly, Colegio Pitagoras Brasil had gone through the same experience after the economic crisis. Up to present, the number of students has fallen from over 200 (Before 2008) to only approximately 60. The dropout has made these children's futures unclear in the sense that their future paths seem to be quite limited. With the insufficient skills they gained in Japan, they cannot be ensured to be able to continue their studies in their home country when they return.

2-3. Understanding the Dynamics of the Vicious Cycle

2-3-1. Inadequate skills to Continue Further Studies

The ethnic schools in Hamamatsu City are forced to bear the whole responsibility for preparing children for higher education upon return to their home countries, in the event that their parents decide or are forced to return home. This responsibility apparently seems too heavy for the schools alone to handle, as they have to also struggle with various challenges to ensure the smooth operation of their school. If they fail to achieve, these double-limited students, who master neither Japanese nor their mother tongue, will face difficulties entering universities back in their home countries. In addition to this, they will likely also have a hard time trying to adjust to the lifestyle and culture. As a result, instead of going to universities, these teens may decide to walk on the labor-based path, subsequently leading to an increase in the local labor supply. Alternatively, being aware of the low probability of entering university back home due to insufficient qualifications, they may decide to continue to live in Japan, struggling and following in their parents' footsteps of employment in low-skilled jobs. As a result, this could generate a cycle of intergenerational poverty.

2-3-2. The Difficulty of Settling down in Japan

During the fieldwork, having the opportunity to interact with students in the schools visited, it was learned that some do wish to settle down in Japan, saying that they love this country. However to them, the notion of being educated in a Japanese university and finding employment here remains a myth. The economic shock plays a big part in this. Due to their parents' loss of employment, these children are prepared to return home even sooner than planned. In addition, due to their lack of Japanese proficiency and financial constraints, it is extremely hard for them to realize their dreams of attending a university and working in Japan.

2-3-3. Education and Job Opportunities

The economic crisis in 2008 has established a great awareness among the Nikkei about the importance of education, particularly for employment. Presently, for Nikkei to obtain a stable job here in Japan, they are required to acquire Japanese proficiency in terms of speaking, writing and reading, which is quite a challenge. Japanese plays a crucial role in upgrading productive skills, protecting job contracts and insurance. According to the survey above, 53% of Brazilians had minimum Japanese conversational ability, while 20% had none. Additionally, 53% could read or write Katakana and Hiragana while 38% could not. The survey shows that the unemployment rate was lower among those who had Japanese conversation ability (intermediate level) and Japanese writing ability (Katakana & Hiragana). If available, 79% answered their willingness to join daily Japanese classes. Interestingly, 60% answered that they had Japanese friends and this group was more likely to be employed than those who did not. Japanese classes are being provided to those who have lost their jobs. For instance, of the 400 who participated in the job-hunting seminar organized by HICE, 70% of them successfully found a job. However, for a Nikkei, being under mental stress to acquire enough Japanese proficiency in such short period of time in order to hunt for jobs is

incredibly challenging.

2-4. Long Term Implications

The effects of the recent economic crisis reduced the aggregate industrial production of Hamamatsu, which in turn, negatively affected the employment conditions of the city. The employment effects of the crisis are reflected in the reduction of personnel in factories, lower salaries, and additional working hours. In addition, there are emotional and psychological effects placed on the well-being of Brazilian families due to the negative employment conditions.. Parents have lower resources (time, money and energy) to satisfy the needs of their kids.

As a long-term implication, a generation experiencing the vicious cycle between education and labor might undermine the cultural harmony and socioeconomic development that Hamamatsu City is trying to achieve. If educational objectives of the Brazilian schools are not achieved, the less educated Brazilian residents will tend to stay in Japan looking for lower levels of subsistence. This might contribute to increase the low skilled labor supply, and therefore, salaries would tend to be even lower for this labor group. Increasing inter-generational poverty and welfare dependence is a very important threat that should be avoided. It is true that the problem of “working poor” is not unique to foreign residents in Japan, but often it is magnified in their case, due to lack of family/support networks in the host country.

3. ROLES OF THE STAKEHOLDERS

In response to this difficult situation faced by Nikkei in Hamamatsu City, many organizations are conducting a range of community activities. We can observe two main objectives of stakeholders in regards to multicultural coexistence in Hamamatsu City: children’s education and Nikkei’s employment. The specific agenda of the government can be drawn from an examination of the local and national government policies. Interviews and observation were conducted at eight specific locations to investigate the role of these stakeholders (i.e. the activities in which they are engaged), their contributions and the difficulties each is facing.

3-1. Educational Facilities

3-1-1. Colegio Pitagoras de Brasil and Colegio Mundo de Alegria

Hamamatsu City is home to six ethnic (Nikkei) schools, two of which were included in this study: Colegio Pitagoras de Brasil and Colegio Mundo de Alegria. These two schools differ fundamentally in that the former is one of three off-shore campuses of a Brazilian-based private institution, whilst the latter is a not-for-profit initiative run by a Japanese national. However, both share the same objective, which is to offer children an education in their native language, in a secure and innovative environment, based on the curriculum of the home country.

Over 200 students were enrolled at Pitagoras Hamamatsu prior to the economic crisis, but this number has fallen to approximately 60. The curriculum is aimed at preparing children to re-enter school or enter university in Brazil when they return but in addition, includes two 40-45 minute sessions of Japanese classes per week. Parents are given the choice between sending children to school for the entire day or just the morning session. For economic reasons, many choose the latter, but those who attend the afternoon session have the opportunity to review lesson content, complete homework, study Japanese, etc. As in many other Brazilian schools, donations from the Brazilian government are an important source of finance. This is especially crucial, as Pitagoras Hamamatsu is not recognized as a school by the Shizuoka prefectural government, placing it as a private/profit-seeking enterprise, which requires it to pay high tax rates.

Picture 3-1 Colegio Pitagoras de Brasil



Source: Authors

In Mundo de Alegria's case, both Brazilian and Peruvian students are accommodated for with separate curriculums instructed in Portuguese and Spanish, respectively. The school was established in 2003 and in 2010 was relocated to the second floor of the city-government commissioned Foreign Residents Study Support Centre. It is a significant case, as it is an ethnic school run by a Japanese. The school states its objective as giving children the opportunity to continue their studies in their mother tongue uninterrupted, and therefore avoid impeding their academic performance or creating 'semi-lingual'/'double-limited' speakers. In addition to this, Mundo de Alegria takes pride in its Japanese language education, administered by a team of six staff, and ideally consists of one hour of Japanese tuition per day, based on proficiency level. Classes are also available to specifically prepare students for the internationally recognized Japanese Language Proficiency Test (JLPT). As the principal states, Japanese language education is essential – and is becoming more and more so with the increasing tendency towards permanent residency – to provide students with the skills for functioning in Japanese society on a daily basis. By not only teaching students Japanese, but teaching them *in* Japanese (for example hands-on science, physical education

and music classes conducted in Japanese), this school can develop students' communicative ability. Although the school aims to reduce the financial burden on families as much as possible, the cost of Japanese classes is set at 1,000 yen per student per month, in order to increase awareness among foreign parents of the importance of Japanese language education.

One of Colegio Mundo de Alegria's most significant contribution to multicultural coexistence in Hamamatsu City is the interaction it facilitates between foreign students and Japanese students. Several years ago, the school began to contact local public schools in the area and extend offers of joint athletic events etc., through which not only can foreign students have the rare opportunity to interact with Japanese peers and practice their Japanese, but Japanese children are also able to develop their intercultural understanding and broaden their perspectives from an early age.

Mundo de Alegria was the first Latin American school in Japan to be recognized by a prefectural government in 2004 under the category 'Miscellaneous School,' which entitles it to certain subsidies, and became the forerunner in a wave of applications and recognitions of Brazilian schools for this category. The principal of this school has also acted as a bridge between the immigrant community and large Japanese enterprises, successfully requesting funding from many powerful Hamamatsu-based companies.

3-1-2. Catholic Hamamatsu Church

A third educational organization, the Catholic Hamamatsu Church, was also visited as part of this research. With the sudden increase in foreign student dropouts in Hamamatsu City following the 2008 financial crisis, this church began to provide an informal and supportive environment for children to attend lessons. Children are served with breakfast, lunch and snacks, educated in class, and provided with a social environment in which they can play and interact with their peers so that they can continue their emotional and social development.

Initially this initiative was conducted free of charge and with the overall aim of teaching children Japanese language in order to integrate them into society. Funds were collected from religious organizations and private donors and the Japanese government provided a grant of approximately 5 million yen for the year 2009. However, from 2010, the objectives of the church have come to merge with those of the two schools mentioned above and after successfully receiving recognition from the Brazilian government, it has begun conducting classes in Portuguese, based on the Brazilian curriculum. To meet the requirements for recognition, the Catholic Hamamatsu Church needed to hire qualified instructors and therefore, has switched to a fee-based system. While external funding provides the main financial basis for operations, the church asks for monthly tuition of 20,000 yen per student with the goal of encouraging parents to have a sense of responsibility for their children's education and prioritize it over other financial issues. In addition to the Brazilian curriculum, students are also taught Japanese language once per week.

Picture 3-2 Hamamatsu Catholic Church



Source: Authors

3-2. Combating Unemployment

3-2-1. Foreign Resident Study Support Centre and Multicultural Centre (HICE)

Two initiatives commissioned by the Hamamatsu City government are conducting differing but complementary activities. The first, the Foreign Resident Study Support Centre, was established in January 2010 and is essentially an educational institute, although it differs from the schools above in that its target is not children but adults and its main aims are to teach Japanese language to foreign residents. It is also providing opportunities for Japanese residents to learn about foreign cultures. There are also Japanese culture classes as well as Portuguese classes aimed at Japanese residents. In terms of Japanese language classes, the beginner level classes are the most popular. The centre is the only one of its kind in Japan and was established to respond to the growing need for foreign residents to acquire Japanese skills to assist them in finding a new job.

The second initiative is the Multicultural Centre of Hamamatsu Foundation for International Communication and Exchanges (HICE). HICE was established in 1982 and incorporated in 2008. The centre's main objective is to promote communication between Japanese and foreign residents through community events. This centre has been offering counseling services for foreign residents since 1991, which has become the core of their activities following the economic crisis. The service offers counseling in Portuguese, English, Spanish, Chinese, and Tagalog, as well as a 'one-stop' counseling corner. Free legal consultations are also offered once per month. In 2010, the centre identified the need to incorporate more professional psychiatric services to support the deteriorating mental health of foreign residents following the crisis and from 6 July 2010, started to provide counseling by a Nikkei psychiatrist in cooperation with the Hamamatsu Mental Health and Welfare Center. In addition, various seminars have been conducted to provide information about how to access welfare benefits and other assistance available. In May 2009, MHLW (Ministry of Health, Labor and Welfare) entrusted HICE with a new program of Japanese classes called

“Chance! Nihongo,” to provide Japanese language skills for Nikkei to assist in finding employment. So far approximately 70% of about 400 students of these classes have been successful in finding employment. In August 2009, HICE was also entrusted by Hamamatsu City and the Ministry of Education to start “Project Juntos” (“Project Together”) to support the studies of foreign children and adolescents, not only those of Brazilian background, but also Filipino and Vietnamese. Four classes have been organized in collaboration with the Brazilian community and volunteer groups. “Project Juntos” also dispatches Japanese language teachers to ethnic schools.

3-2-2. NPO Brasil Fureai-kai and Servitu Import Shop

Some other parties that significantly contribute to solving post-crisis problems are social groups or particular individuals in the community. Based on our research, there are two major stakeholders who deal with this problem: NPO Brasil Fureai-kai and Servitu Import Shop. In different ways, both stakeholders share the same goal to use the available capacity and resources to support the Nikkei community post-crisis.

With 12 staff and 180 volunteers, NPO Brasil Fureai-kai has been assisting Nikkei to deal with various life problems: homelessness, food, job-loss and so forth, since its establishment in December 2008. The organization played an important role during the crisis to identify the people in crisis and provide them with solutions. Their belief is that without sufficient information, people will easily fall into trouble. In addition to the web-based Portuguese radio station ‘Phoenix,’ which has been run by a Nikkei chairman of the NPO since 2002, a website has been created through which people can register to be members to share and also receive information in Portuguese. Foreigners can register their unemployment status and how critical their situation is. In 2009 the office received some 50 calls daily from people in need of urgent assistance. In all, about 15,000 families came, and about 1,200 people, who were finding it difficult to survive, were helped. By having a chairman who also has a radio station, the NPO benefits because the radio can be a funnel of information and simple survival tips of how to get along in Japan. In addition, to support Nikkei who lost jobs, this NPO established an agricultural cooperative and promoted agricultural business.

Servitu Import Shop is a popular Brazilian restaurant and import grocery store owned by a 2nd generation Nikkei. During the crisis, many people suffered from loss of employment, homelessness, and starvation. Servitu Import Shop took initiative in collecting and distributing food to those who were suffering. The owner also stated in the interview that item prices were lowered to assist people in crises that were unable to buy food and necessities. The store has also participated in many community events and in 2008 created the event “Arigatou Nihon” to commemorate the 100th anniversary of Japanese migration to Brazil and foster good will between the Japanese and Brazilian communities in Hamamatsu City.

Based on the above findings, it can be concluded that various stakeholders, both government funded and community-based, are involved in dealing with the crisis. One important issue regarding this matter is how to organize proper cooperation in order to establish more comprehensive action. According to observations made during the study, it seems that parties are still working mostly separately, which could be undermining the ability to achieve the most effective results.

3-3. The Role of Government Bodies: Local and National

The Hamamatsu City government has been playing a significant role in the development of multicultural coexistence, before and after the crisis. Hamamatsu City is well known for being a pioneer of policies in this area. In 2001, the city hosted the first Committee for Localities with a Concentrated Foreign Population, through which municipal governments cooperate to share information and expertise for multicultural coexistence and make requests of the central government. The city has also made efforts to discuss the issue with other cities on an international scale. In 2010, Hamamatsu City hosted the 3rd United Cities and Local Governments Asia-Pacific Congress (UCLG ASPAC) and the mayor of Hamamatsu City exchanged experiences with panelists from Australia, Korea, and Indonesia in the session of “Multicultural Society.” The Hamamatsu City government also provides, through its International Affairs Section, various forms of assistance for foreign residents. These include providing and translating information essential for daily life and dispatching interpreters. Although the employment situation is beyond the scope of the city government (this is the responsibility of the MHLW), it is responsible for commissioning and funding organizations such as HICE and the Foreign Resident Study Support Centre to carry out their activities.

Despite these efforts, the Hamamatsu City government, like many municipalities in Japan, faces limitations regarding multicultural policies due to the lack of support from the central government. Until 2009, there was no particular section of the national government dedicated to immigrant/foreigner related issues, and although a ‘section for promoting policies concerning foreign settlers’ has been established, its role is currently limited to creating a set of guidelines and objectives for dealing with these residents. Municipal and prefectural governments continue to urge the Japanese government to create an agency for the comprehensive development and implementation of clear, strong policies.

4. CONCLUSIONS

As a direct consequence of the global financial crisis of 2008, up to 60% of Nikkei workers in Hamamatsu City have found themselves unemployed and in a considerably unstable financial condition. This has resulted in the loss of educational opportunities for the children of the Nikkei and, consequently, employment opportunities. This creates the risk of becoming a vicious cycle for the generations to come. Unemployment leads to financial instability that leaves Nikkei unable to bear the costs of sending their children to schools and this in turn jeopardizes their children’s chances of continuing further studies both in Japan and in their home countries. Many cases are already being seen of young Nikkei being forced to opt for low-skilled factory positions, despite their dreams of higher education. In addition, finding these jobs will become increasingly difficult if the Worker Dispatch Law is passed.

Given the growing trend of Nikkei towards permanent residency, being stuck in a vicious cycle of economic instability will become not only a problem for the Nikkei themselves, but also for Japan as a whole. The long-term

costs of welfare and other support measures could be enormous and the social costs of creating this kind of powerless minority, seen by the native majority as guests who have overstayed their welcome, may be irreversible.

A large number of actors have been playing various roles in the facilitation of a harmonious multicultural society in Hamamatsu City. As the research has shown, this has become an issue requiring even more urgent action following the economic crisis. Hamamatsu City is unique in that Nikkei students have a wide range of options in terms of educational institutions. Apart from standard Japanese public school education, these include ethnic Brazilian/Peruvian education with various levels of focus on integration into Japanese society or re-integration in home countries and Catholic-based community education, as well as an innovative and unparalleled Japanese language learning facility commissioned by the city government.

Although multicultural coexistence was greatly challenged by the 2008 economic shock, the city has tried to develop its multicultural policy according to the new situation, through programs such as HICE in the form of multicultural counseling and job-search training. The integration of Colegio Mundo de Alegria and the Foreign Resident Study Support Centre into one building in 2010 has been a significant step towards mutual understanding between not only the municipalities and the ethnic schools but also Japanese and Nikkei residents. This, among other policy initiatives, has made Hamamatsu City a leader in the promotion of multicultural coexistence in Japan. In many ways, this city can be exemplified to assist other municipalities in dealing with this issue. However, a truly harmonious multicultural society, which must have as its basis in a stable education, employment and financial environment for the Nikkei, can only be achieved with the support of policies and funding from the central government.

Although the financial crisis has caused severe damage on many levels, it can also be argued that it has brought about several positive outcomes. One of these is that it has triggered an increased awareness among Nikkei and government bodies about the importance of education (especially Japanese language education) for employment. Focusing the efforts of the administration and the community on education could have invaluable long-term benefits for this society. The crisis has also created more opportunities for dialogue and cooperation between the city government, the Nikkei community, and the Japanese community in Hamamatsu City. Organizations like the Catholic Hamamatsu Church, Servitu Import Shop and Brazil Fureai-kai have begun cooperative community activities that could be continued into the future, and efforts of the city may increase the Nikkei community's trust in the government. In turn, the city has seen the active and enthusiastic participation of many members of the Nikkei community in combating the crisis.

5. RECOMMENDATIONS

The following are several recommendations that the authors offer, aimed at three different actors: the community, the municipal government, and the central government.

5-1. For the Local Community

In order to achieve multicultural coexistence in Hamamatsu City, it is important to nurture a sense of cultural sensitivity in society. Nikkei and all residents with a foreign background need to be integrated and viewed as equally important members of society. This could be done through involving foreign residents in existing community activities, which can work to not only empower the foreigners themselves, but also promote understanding within the Japanese community. Creation of new and innovative, large-scale activities for joint participation on equal grounds, also needs to be actively incorporated. However, the enthusiasm and participation of not only the Japanese community, but also of the immigrants themselves is crucial in this process. The Nikkei community also needs to present successful elder Nikkei as role models for the next generation and motivate them to endeavour to achieve in their studies and become bridges of understanding between the two cultures. Finally, as apparent in the interviews conducted in this study, there is an urgent need for Nikkei parents to consider placing a much higher value on education and foster this value in their children. This could also be supported by community activities for raising awareness about this issue.

5-2. For Municipal Bodies (City and Prefectural level)

In recent years, municipalities in Japan have begun to realize the importance of multicultural social work. In Hamamatsu City, the foundations of effective multicultural social work can already be seen in the counseling provided by HICE. However, in order to make formal social resources (hospitals, welfare and employment offices, etc) more accessible to foreign residents, collaborations with their informal social resources (volunteer groups, churches, ethnic self-help groups, and Japanese language classes in the community, etc.) will be highly beneficial. Thus the activities of these informal social resources can be more encouraged and supported.

This report also recommends the reconsideration of the system of recognition/subsidies for ethnic schools by the prefectural government. Schools that are not recognized are forced to pay high tax rates and even after recognition, the funds received only cover a very small proportion of the cost of running the school. As discussed above, this in turn has a negative effect on students' education.

It is important also to ensure that Japanese language education not be implemented with the objective of forcing assimilation upon the Nikkei/foreign community. An appropriate balance between the willingness of foreigners and encouragement/increased opportunities offered by the government is important for creating a harmonious multicultural society.

5-3. For the Japanese Government

Japanese society is required to be more flexible in terms of multicultural policy and acceptance of foreign workers. With the declining birthrate and aging population, it will soon face a serious labor shortage - as high as 17

million in the next 25 years - and a growing number of international workers will be expected. Therefore, it is increasingly significant to promote awareness of interdependent relationships between foreign and Japanese residents. This needs to be incorporated not only into policies, but also intercultural/multicultural education.

Nevertheless, paternalistic policies by the government should be avoided, as this inhibits the development of independence of foreigners and runs the risk of invoking the discontent of the Japanese public. Especially during this economic crisis, in which Japanese residents are also facing unemployment and financial issues, it is important to gain the understanding of the community about welfare policies to support foreigners and implement these policies with cooperation from the immigrant community, rather than in a one-sided manner. Failure to do so could result in a backlash and create intense friction between the Japanese and immigrant communities. In order to empower foreign residents, equal partnerships and collaboration with their leadership are important.

Revision of the legal requirements for “miscellaneous school” status is also an issue. Between November 2008 to February 2010, 18 Brazilian schools were forced to close, leaving a remainder 81 schools in Japan (Kojima 2010:16). Many Brazilian schools receive no government subsidies, as they have yet to obtain the “miscellaneous school” status. It is difficult for Brazilian schools to fill legal requirements, such as owning school land and buildings, and having assets worth half of their annual school operation expenses. Since 2004, the Ministry of Education, Culture, Sports, Science and Technology has instructed local governments to ease requirements for the status but only a few have done so. Many Brazilian schools do not even understand the meaning of the “miscellaneous school” status and the complicated application procedures in Japanese. In addition, while the guidelines are set by the national government, the actual decision to recognize schools is up to each prefectural government, which could lead to inconsistencies and inefficiencies. This research recommends that the guidelines for this recognition, the transparency of these, and the procedure for their implementation be reconsidered.

The central government should also consider reform of labor legislation and the promotion of CSR (Corporate Social Responsibility) among Japanese companies. The present temporary work system was fully implemented by the revision of Worker Dispatch Law in 2004, which gave permission to allow temporary workers to be dispatched to the manufacturing sectors. Since then, manufacturing industries, particularly car and electronic companies, have rapidly increased cheap temporary labor with the aides of employment brokers. While this move helped Japanese industries recover from the economic slump of the 1990s, the lifetime employment system since the post-World War II period has been undermined.

Temporary workers enjoy few of the rights and benefits that protect full-time regular employees. Increasing employment brokers allowed manufacturers to hire the workers indirectly without pension or social security. Above all, temporary workers are vulnerable to sudden lay-offs, under economic recession, without any dismissal compensation or unemployment benefits.

Since 2009, the Japanese government has considered revising the Worker Dispatch Law and the prohibition of dispatching workers to the manufacturing industry. If this is realized, it will become necessary to protect temporary workers, including Nikkei, by clarifying the responsibilities of employers and brokers through labor law reform. In order to maintain sustainable development at a local and national level, Corporate Social Responsibility (CSR) will

increase its importance as an indispensable element of Japanese corporate management in the future. Japanese corporations will need to take a balanced approach to managing their companies, with an eye to the overall stakeholders, including employees, customers, and local citizens.

Finally, as previously asserted by scholars and municipal governments, there is also a need to establish an “Agency for Foreign Residents” in the central government. In 2009, “The Office for the Coordination of Policies for Foreign Residents” (Teiju-gaikokujin shisaku suishin shitsu: 定住外国人施策推進室) was established in the Cabinet Office and the “Basic Guidelines related to Policies for Foreign Residents of Japanese Descent” were also created in August 2010. These guidelines acknowledge the necessity of accepting foreign residents as members of Japanese society by providing more opportunities for Japanese learning and multi-lingual support systems. However, the current role of this office (with a staff of only four) is limited to the integration of efforts by various ministries through an annual joint conference and the publishing of general statements on its web page. The roles of this office should be extended to include comprehensive handling of all issues related to a multicultural society, including the establishment of a legal framework such as an anti-discrimination law.

Nothing can be more valuable than the promotion of the positive aspects and benefits of a multicultural society. If all stakeholders and members actively participate in the formation of this society, stability for the Nikkei and the Japanese alike can be a long-term reality.

6. POSTSCRIPT: MULTICULTURAL COEXISTENCE AND GLOBAL COMMUNITIES

As students of international development studies, understanding and living in a multicultural environment is a fundamental part of our lives. The recognition and acceptance of the differences in one another’s cultures and identity create a safe community in which people are treated equally and more importantly, they can hold onto their dreams. Today, globalization is pushing the consolidation communities and especially, the younger generations will face new social and cultural arrangements that might require better communication, more coordination and patience to understand, not only our own differences, but also common goals in creating a harmonic society. Every country is dealing with multicultural factors and co-existence at some level and, therefore, there might be some universal lessons and experiences that could be informative for expanding the current perception of multiculturalism.

In Bolivia, for example, there lives an important community of Japanese descendants, specifically in the city of Santa Cruz. In order to preserve their original (Japanese) cultural legacy, the Bolivian national government authorized the foundation of a colony named “Okinawa,” where Japanese descendants live in harmony following many Japanese and Bolivian customs. The desire from the Japanese decedents to understand and enjoy more of the Bolivian culture is admirable. For instance, every year in February there is a very old, traditional Bolivian festival. For that event, people from the Okinawa colony practice traditional Bolivian dances. After months of preparation, they participate in the festival and not only tourists from all the prefectures of Bolivia, but also tourists from many

countries admire the beautiful cultural symbiosis it represents.

In the case of Indonesia, the problem of multicultural coexistence is very complicated as the country consists of hundreds of multi-ethnic groups. Unfortunately, the coexistence among these groups somehow remains difficult. Tension is high and relationships are sensitive to political, social and religious issues. Unsolved problems can lead to conflict and war. Foreign immigrants who have come and settled in Indonesia generally come from China and India as traders. Thus far, the government of Indonesia does not have specific policies relating to coexistence with these migrants. Recently, Indonesia tends to be a sending country rather than a recipient country of foreign labor (mostly semi- and unskilled labor). The number of cases of conflict surrounding overseas Indonesians has been increasing recently, mostly because these laborers have low levels of education and face serious problems in communication due to the lack of particular language proficiencies. As recommended for Nikkei in Japan, Indonesian workers could benefit from improving their level of skills and education. This could lead to their empowerment in society.

It can be concluded that multicultural coexistence is not easy but an essential vision for the global village today. In order to advance multicultural coexistence, it is important to promote understanding of our interdependent relationships, as well as respect for different cultures and values on both sides of receiving societies and migrants. Sharing experiences and lessons in each place will greatly help us achieve this common goal.

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第 3 章 *Working Group 3*

Hamamatsu City as a tourism destination in Japan: Projected versus Perceived image

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5. Perceived image of Hamamatsu
6. Importance - Performance Analysis
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9. References

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観光地としての浜松市（投影イメージと知覚イメージ）

<要約>

調査背景

浜松の GDP は 1997 年から 2007 年にかけて平均 1.03% 成長している。第 3 次産業は 0.77% 成長しており、なかでもサービス産業は 2.17% 成長している。つまり、サービス産業は経済成長と浜松市の持続的な発展の観点から見て、有望な分野であるといえる。

調査目的

本調査の狙いは、いかにして浜松市を訪れる国外および国内の観光客数を増加できるかを研究することである。そのために、浜松市が現在もつ投影イメージと観光客の持つ知覚イメージの相違を分析した。投影イメージとは、浜松市や各観光施設がホームページやパンフレット等、メディアを通して投影している浜松の観光イメージを意味する。知覚イメージとは、実際に浜松を訪れている観光客と潜在的観光客（浜松を訪れたことはないが、観光客となりうる人々）のもつ浜松の観光に対する観光イメージを意味する。

調査方法

投影イメージ分析は、主に浜松市の HP や各観光施設の HP・パンフレット等の分析と、観光交流課の職員の方々や各観光施設、観光協会の方々へのインタビュー結果を基に、浜松市がどのようなイメージを提供しているのか分析した。知覚イメージ分析は、現地にて行った質問票によるアンケート結果と、インターネット上で行ったアンケートの結果を基に、観光客の抱く観光地としての浜松市のイメージを分析した。さらに、人々が観光に行く際に重要視する項目と投影側が提供するイメージとの比較、前者と浜松の観光における満足度との比較などを行った。

調査結果

投影イメージの分析結果（4-4. Table 3）によると、浜松の第一の投影イメージは産業であった。「ヤマハ」や「ピアノ」、「創造性」など産業に関係する言葉がそのような結果を示している。第二の投影イメージは宿泊施設とアクセスであった。浜松市は大阪と東京の中間地点に位置し、新幹線や高速道路等の交通の便に優れていることや浜松駅周辺にはホテルや旅館等の宿泊施設が整っていること等がその要因として挙げられる。第三の投影イメージは景観であった。浜松には浜名湖をはじめとした豊かな自然資源があることや様々な祭りイベントが開かれていること等がその結果を反映している。また、舘山寺温泉観光協会発行のパンフレット（4.4 Figure 4）にも見られるように観光地としての浜松の投影イメージとして浜名湖が重要な位置づけにあることがわかる。

知覚イメージの分析結果（5-4. Table 13）によると、浜松の観光パフォーマンスのなかで、観光客が最も高い満足度を示したのは、飲食物の質であった。これは、浜松の特産物である「うなぎ」の貢献度が高い。そして、比較的低い満足度であったのは歴史的名所・博物館であった。

投影イメージと知覚イメージの分析結果を比較すると、両者には隔たりがあることが判明した。一方、インポートランス・パフォーマンス分析の結果（6-2. Figure 6）によれば、浜松を訪れた観光客の観光に対する重要度と満足度の間にも差異が生じており、具体的には、歴史的名所・博物館への重要度が高いにも関わらず、その満足度は低い値を示した。

今回の調査結果が、浜松市の観光業の更なる発展に寄与できることを切に願う。

Hamamatsu city as a tourism destination in Japan: Projected versus Perceived image

1. Introduction

1-1. Background

Hamamatsu City is one of the biggest municipal cities in Japan. Located roughly halfway between Tokyo and Osaka, Hamamatsu is renowned for being a city of industry, music and tourism. As for a city of industry and music, Hamamatsu has a long tradition in both the manufacturing industry and the musical instruments industry, mainly due to the success of world-class companies such as Suzuki, Yamaha, Honda, Kawai, Roland and Hamamatsu Photonics. The manufacturing industry by itself contributes to 34% of the Hamamatsu GDP and has been supporting the city's economic growth for ages.

As a whole, Hamamatsu's GDP has grown an average of 1.03% from 1997 to 2007. This growth rate was mainly affected by the primary sector, which is growing at an average of -3.23% for the same period of time whereas, the secondary and the tertiary sectors have grown an average of 1.68% and 0.77%, respectively. The main contributors in the growth of both sectors are the manufacturing and service industries. The first has grown an average of 2.14%, while the latter has grown 2.17%. This led the service industry to become the most promising sector in terms of economic growth and sustained development of Hamamatsu City.

As a part of the service industry, tourism is one of the fastest-growing sectors in the world and it is currently perceived by many countries as an impetus for economic growth for the simple reason that it has important direct and indirect impacts on many other economic sectors. This sudden recognition of tourism has increasingly induced competitiveness among tourism destinations, even within a country.

Hamamatsu is relatively unknown as a city of tourism in Japan. However, the number of tourists has been increasing for the past ten years. For example, the number of tourists visiting Hamamatsu has increased from 16,652 in 1997 to 18,578 in 2007. Day-trip tourists account for 99% of the increase, while overnight tourists have been stagnant.

Unlike many cities in Japan, Hamamatsu is endowed with various and significant tourist attractions, such as dunes, hot springs, a lake, sand hills, forest resources, historical culture and manufacturing industries. This creates room for many activities, including 154 different annual events (tea ceremony in Hamamatsu and Takane Castles, kites festival, The Princess Road and Yukata Festival, etc.) and a variety of outdoor activities, such as water sports, cycling, hiking or fishing in the natural surroundings of the Enshu Coast, Hamana Lake (Hamanako), the Tenryu River and the Akaishi Mountain. Located in the same prefecture with the highest mountain in Japan, Hamamatsu offers a nice view of Mt Fuji. The city has also a surprising land area of 1,511.17 km², making it the second largest city in Japan. In terms of population, Hamamatsu has 820,818 residents¹ with a great deal of foreign residents working and enhancing cultural diversity. In 2007, the Hamamatsu became a city designated by government ordinance after merging with 11 surrounding cities and towns in 2005.

¹ In 2010

1-2. Rationale of research

In the context of world economic uncertainties, due mainly to the recurrence of crises and shocks, defining alternative industries that can support economic development has become a central concern for many countries. Therefore, tourism has been identified as one of the few viable economic opportunities to sustain development. In the case of Hamamatsu and many cities in Japan, tourism can play a key role to revitalize Japan in days of economic stagnation, declining birthrate and aging population by the expansion of the number of people interacting through tourism.

This recognition of tourism as an alternative for supporting economic development and population growth has led to the promotion of Japan as a tourism-oriented nation. Indeed, the advantage of a tourism-oriented nation is to increase the number of international tourists, revitalize regional communities, improve lives and increase domestic spending, enhance exchange and stimulate the economy.

Thus, the aim of this research is to study how to increase the number of both international and national tourists in Hamamatsu City. This will be undertaken by analyzing the difference between Hamamatsu's current projected image and the visitor's perceived image of Hamamatsu.

Hamamatsu is the biggest tourism destination in the Hamanako Tourism Zone², one of the 30 existing tourism zones in Japan. Competing with Kyoto, Tokyo, Osaka, Okinawa and Hiroshima, Hamamatsu has a weak image as a tourist destination, even among Japanese people. For this reason this study will try to provide information regarding the overall image of Hamamatsu from the perspective of actual visitors, as well as the image that Hamamatsu projects in its marketing campaigns.

2. Research objectives

Due to increasing local competition of tourism destinations in Japan and changing visitor profiles in Hamamatsu City, a positioning analysis of tourism destinations in the market seems to be the starting point of a tourism marketing strategy. Thus, the main objective of this research is to analyze the perceived image of Hamamatsu as a tourism destination in Japan.

Hence, research questions are:

- What are the images projected in Hamamatsu media?
- How do current visitors perceive Hamamatsu as a tourism destination in Japan?
- How to improve the image of Hamamatsu as a tourism destination and increase the number of both local and international visitors?

² Together with Kosai and Arai in Shizuoka Prefecture.

3. Methodology

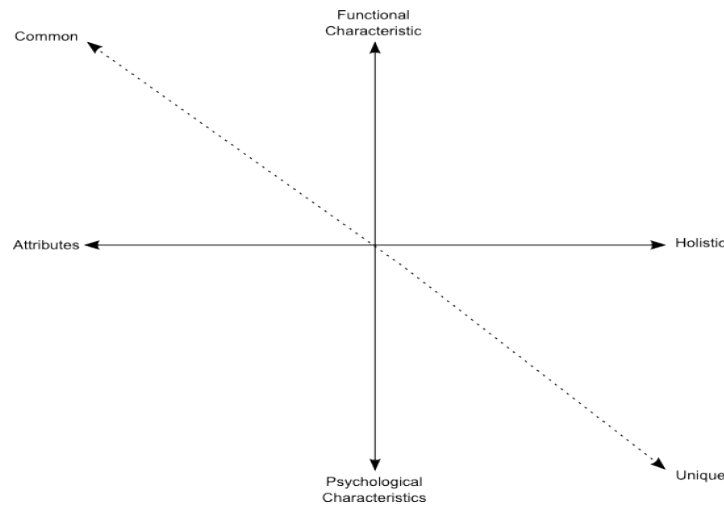
3-1. Research framework

3-1-1. Destination image

Destination image has been successfully used in a destination's marketing strategy as an important concept in understanding tourists' destination selection process. As argued by Jenkins (1999), destination images influence both the decision-making behavior of potential tourists and the levels of satisfaction regarding the tourist experience. However, there is still no consensus among researchers on its definition. Hunt (1975), Phelps (1986) and Calatone (1989) suggest a vogue definition of tourism destination image. According to Hunt (1986), destination image is defined as "perceptions held by potential visitors about an area." Catalona et al, (1989) proposed a similar definition, describing destination image as "perceptions of potential tourist destinations."

Both definitions restrain destination image to potential visitors or areas and exclude current and past visitors who have experienced the destination. While studying the pre-travel and post-travel images of Menorca, Phelps (1986) proposed a broad definition of destination image as, "Perceptions or impressions of a place." But Pearce (1988) pointed out that the term "image" in these definitions is holistic and used to describe an overall mental picture – a destination stereotype. Therefore, they are too difficult to be conceptualized and measured.

Crompton (1979) used a more comprehensive definition of destination image in his study on measuring the image of Mexico in different States of the United States. He defined destination image as the "sum of beliefs, ideas and impressions that a person has of a destination." However, for the purpose of this research, destination image will be defined as "the expression of all objective knowledge, impressions, prejudice, imaginations, and emotional thoughts an individual or group might have of a particular place" (Lawson and Baud Bovy, 1977). As argued by Jenkins (1999), this definition encompasses both the personal images and the stereotyped images shared by groups. Moreover, the term "destination," in the context of this study, is limited to large entities, such as major cities like Hamamatsu, rather than individual attractions or resorts. Therefore, the framework of image presented in Figure 1 could be used as a basis for conceptualizing destination image.

Figure 1: The component of Destination Image (Echtner and Ritchie, 1993)

This graph shows the free dimensions of Functional-Psychological, Attribute-Holistic, and Common-Unique. Functional characteristics refer to more tangible, observable and measurable aspects of the destination (prices, size, infrastructure, etc.), while psychological characteristics refer to more intangible or aspects that are difficult to measure, such as the atmosphere or the friendliness of local people. Echtner and Ritchie (1993) suggested that a destination image should comprise a perception of individual attributes (such as climate, accommodation facilities, etc.) as well as more holistic impressions (mental pictures or imagery) of the place. The Common-Unique dimension is based on the fact that tourists tend to visit places that are different from their home.

3-1-2. Importance-Performance Framework

Importance-Performance Analysis (IPA) is an easily applied technique for measuring attribute importance and performance so as to enhance the development of effective marketing programs. Martilla and James first introduced this in 1977 as a performance indicator of the automobile industry in order to assist in understanding customer satisfaction as a function of both expectations concerning the significant attributes and judgments about their performance. From mid-1980s, IPA technique started to be applied to the tourism and hospitality industry.

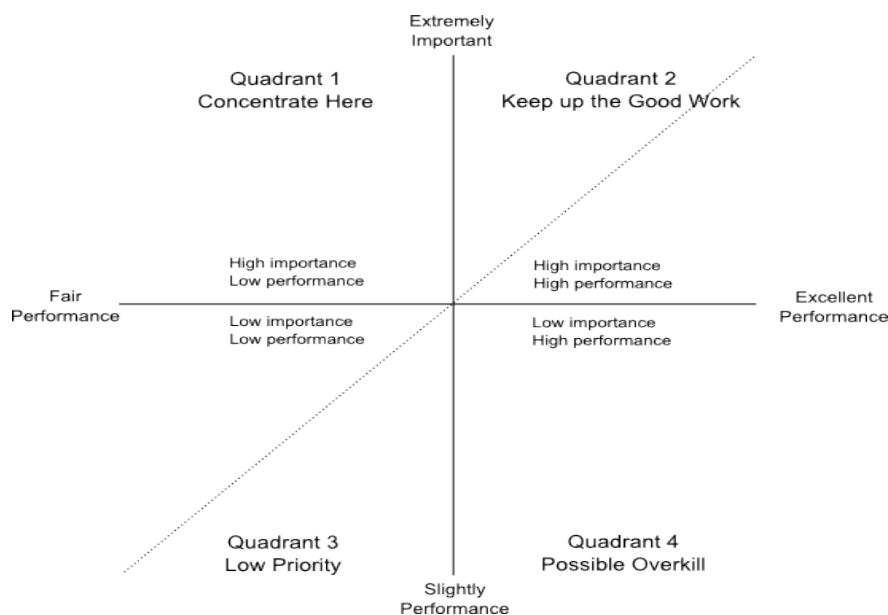
IPA is based on the assumption that satisfaction is affected by both the importance of an attribute and perceived performance of that attribute. Designed for easily transferring results into actions, this framework will help us to investigate strengths and weaknesses of Hamamatsu destination attributes and identify their underlying importance as perceived by tourists. The advantage of this framework is that it gives more impetus in perceived image analysis by incorporating importance analysis. According to Barsky (1995), lower importance ratings are likely to play a lesser role in affecting overall perceptions, while higher importance ratings are likely to play a more critical role in determining customer satisfaction.³

Implementing the IPA technique requires four steps. In the initial stage, a set of attributes is developed via a

³ Cited by Krisana Kitcharoen, The Importance-Performance Analysis of service quality in administrative departments of private universities in Thailand, ABAC Journal Vol. 24. No. 3, p.21.

literature research to accurately describe and reflect the topic of the study. Sometimes a focus group completed by conversations with responsible department personnel and experts should be done in order to identify determinant and key attribute specific to the subject or destination. Following the identification of attributes, a questionnaire is developed where respondents are asked to rate, on a five-point Likert-type scale (1=low, 5=high), both the importance and the performance of a particular attribute. By using a central tendency (mean, median) or a rank-order measure, the attribute importance and performance scores are ordered and classified into high or low categories. By pairing these two sets of rankings, each attribute is plotted into one of the four quadrants of the IPA grid, labeled as “Possible Overkill,” “Keep Up The Good Work,” “Low Priority” and “Concentrate Here”.

Figure 2: Extended Importance-Performance grid(adapted from Bacon, 2003; Martilla & James, 1977)



The four quadrants are used to prescribe prioritization of attributes for improvement. Bacon (2003) suggested an extension of the IPA grid by adding an upward slope (a 45 degree line) to highlight regions of differing priorities. Any attribute below the line must be given priority, whereas an attribute above the line indicates otherwise. This line is known as the iso-rating or iso-priority line, where importance equals performance. Figure 2 depicts the extended IPA grip.

3-2. Destination image measurement

Due to the composite nature of destination image, two major techniques have been used for its measurement. The structured method uses close-end questions to measure the cognitive and affective components of destination image by applying a semantic differential and/or a Likert-scale on a set of attributes. This method has the advantage of using sophisticated statistical techniques and facilitating comparison between destinations. However, it fails to measure the holistic dimension of destination image. The unstructured method, on the contrary, aims to

examine the complex structure of destination image and measures the holistic dimension. It uses open-end questions and gives room for the tourist to freely describe his or her impressions of the destination. However, the level of detail provided by respondents might be highly variable and thus difficult to analyze.⁴

This research is therefore going to use both structured and unstructured methods in order to take advantage of them. As showed in the questionnaire in the appendix, a set of 12 attributes are used to measure destination image of Hamamatsu. They are extracted from the rich summary made by Jenkins (1999) on attributes used by researchers to measure image. Finally, the image attribute has been contextualized to fit the reality of Hamamatsu.

Table 1: Attributes

	Attributes
1.	Accommodation facilities
2.	Clean and green city
3.	Costs / price level
4.	Difference customs / culture
5.	Friendliness of local people
6.	Historical sites / museums
7.	Local infrastructure / transportation
8.	Quality of food
9.	Natural attraction
10.	Shopping facilities
11.	Tourism information and support
12.	Overall performance

Source: Authors

3-3. Data collection

The aim of this research is to analyze both projected and perceived image of Hamamatsu as a tourism destination. Therefore, different data collection techniques are used as far as the two objectives are concerned.

3-3-1. Projected image

Projected image is the image projected by different stakeholders involved in tourism promotion in Hamamatsu. The first step is thus, to carry out a stakeholder analysis in order to identify all the tourism stakeholders in Hamamatsu (government agencies, tour operators, private and so on). Then, an internet search on Yahoo and Google will be carried out using key word such as “tourist in Hamamatsu” and “visiting Hamamatsu” to identify all the media related to tourism in Hamamatsu. A sample of English webpages were listed and grouped

⁴ For further details on structured vs. unstructured techniques in destination image, see Echtner and Ritchie (1991) and Jenkins (1999).

according to stakeholder for content analysis.

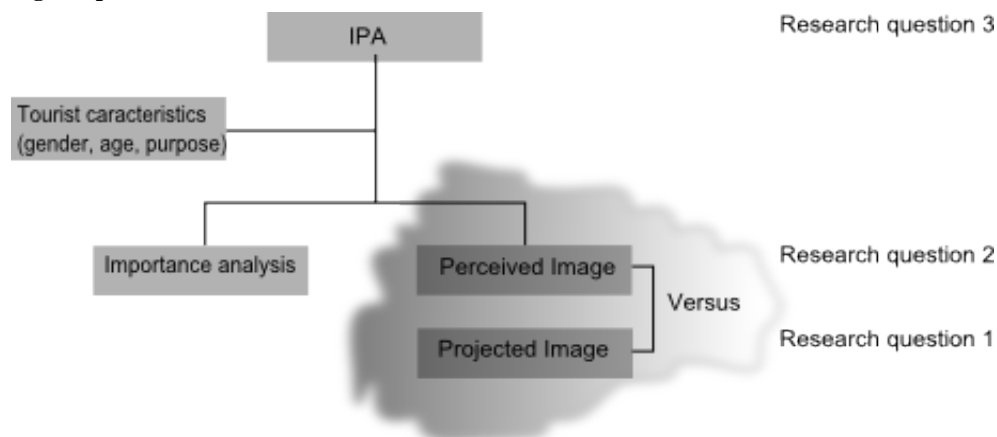
3-3-2. Perceived image

This study captures perceived image from current and/or past visitors of Hamamatsu. We adopted a face-to-face interview and interviewer-completion form, where the interviewer reads out the questions from the questionnaire and records the answers. The sample was gathered by using a convenience sampling procedure, where researchers are free to approach potential respondents at major tourist attractions and administrate the questionnaire. Thus, two techniques are used for questionnaire administration due to the limitation of only a three-day period for fieldwork period in Hamamatsu. The first wave consisted in administering an online questionnaire⁵ using social networks such as Facebook and Mixi, and also by emailing contacts. The form was available from October 26th to November 6th. The second wave was carried out in Hamamatsu with tourists visiting Hamamatsu during the fieldwork period of October 26th to 29th. The team was separated into two groups and distributed questionnaires to tourists in major tourist attractions, as referred to in the research schedule in the next section.

3-4. Data analysis

Data analysis will be carried out following the operational framework below:

Fig 3: Operational Framework



Source: Authors

The starting point of data analysis was the projected image. A computer-assisted content analysis was applied to the website in order to determine the frequency of key words used to describe Hamamatsu as a tourism destination. Then, the most frequent words were selected and a factor analysis was done on those words in order

⁵ The English and Japanese versions of the questionnaire can be found respectively at <https://spreadsheets.google.com/viewform?hl=en&formkey=dEIRSVNud3ZLaHhTV2JZcHVfbIRMOWc6MQ#gid=0> and <https://spreadsheets.google.com/viewform?authkey=CMb3mc4I&hl=en&formkey=dGZMYlp5OHlZTUZPc1RiT3FrX0JYbVE6MQ#gid=0>

to determine the projected image of Hamamatsu as a tourism destination. As for the research question 2, the perceived image will be analyzed using a perceptual map. A bootstrapped analysis of variance (Anova) was executed on the attributes in order to address the possible selection bias due to the data collection methods. Furthermore, perceived image was mixed up with the importance of attributes to build an IPA map for policy analysis and recommendation. Here, suggestions were made on how to improve the image of Hamamatsu as a tourism destination and increase the number of both local and international visitors. This was the answer of research question 3.

4. Projected image

4-1. Tourism stakeholders' analysis

In this section, we would like to talk about the current situation of Hamamatsu tourism based on face-to-face interviews at city hall, Hamamatsu Castle, Hamamatsu Tourism Convention Bureau, Hamamatsu City Tourism Information Centre, Hamamatsu Flower Park, Kanzanji Hot Spring Association, Hamamatsu Fruit Park and Maisaka Town Tourism Association.

4-1-1. Department of tourism exchange, Hamamatsu City Hall

The Department of Tourism Exchange is one department of the Division of Commerce and Industry. Its main tasks are public relations and to promote tourism and conventions. According to officials, the tendency of tourists has changed. In the past, group tourism was the typical type of tourism before, however lately, individuals or small group tourism has become the main type. This type of tourist is called “new-tourism” and therefore Hamamatsu is offering tourism plans that focus on individual activity, such as cycling and self-exploration of the local culture and history. This plan called the Hamanako Tourism Area Maintenance Project (浜名湖観光圏整備計画) was started in 2009 and offers overnight stay plans (more than 2 nights 3 days). The target is older people, women's groups and international tourists from China, Taiwan and Korea. Another plan is the “One Stop Service” which takes over from the Hamanako Tourism Area Maintenance Project and creates a location where tourists can get tourism information, buy local products, book a hotel, etc. This project is aimed at attracting tourists to stay and enjoy tourism in Hamamatsu. In order to attract international tourists, Hamamatsu city officials regard both golf and job training as important issues because they believe that people who had been to Hamamatsu have the possibility to diffuse Hamamatsu into their home countries.

In terms of images offered as a tourism destination, the focus is on Hamanako, oranges, natural resources and industrial tourism. In regards to industrial tourism, an Unagi (eel) Pie Factory is famous and gathered the most visitors to an industrial facility in Japan in 2009. This factory offered factory tours at no cost and visitors received a mini souvenir after the tour. This factory isn't supported by the city tourism association but still managed substantial sales. On the other hand, the city government supports small factories such as a sauce factory and

musical instrument factory in order to attract tourists. Concerning Hamanako and other natural resources, the Department of Tourism Exchange doesn't have specific plans for promoting these natural attractions due partly to the fact that natural resources are managed by another department. However, the tourism department carries out one project that encourages citizens to discover places with nice views inside Hamamatsu. Therefore, although Hamamatsu City doesn't emphasize tourism attractions so strongly, the private sector could contribute, for example by actively spreading the image of Hamamatsu "eel."

4-1-2. Hamamatsu castle

Hamamatsu Castle is a reconstructed *hirayama*-style Japanese castle. It was the seat of various fudai daimyō who ruled over Hamamatsu Domain, Tōtōmi Province, in what is now central Hamamatsu, Shizuoka Prefecture. It was built by General Ieyasu Tokugawa in 1570. With the Meiji Restoration, the remaining military structures of the castle were destroyed, outer moats filled in, and outer baileys sold off. The central portion of the castle remained owned by the city as a park. There is a small museum inside which houses armor and other relics of the Tokugawa clan, as well as a miniature model of how the city might have looked at the start of the Edo period. Surrounding the museum is Hamamatsu Castle Park, which is planted with numerous sakura trees. A large bronze statue of Ieyasu Tokugawa also stands in the park. The castle is currently run by a private railway company that wants to have cooperation from both the city and local people. The number of tourists has increased due to a fad created by a televised historical drama, while international tourists from Korea and China have also increased because of attraction efforts by the city. As promotion strategies, they distribute information through the internet, magazines and brochures, as well as by promoting an event at New Year's Day, which serves a meal.

General Ieyasu Tokugawa established the castle in 1570 and spent a difficult time there until 1584, when thereafter, he achieved national unification of Japan. Therefore, the castle is also known as "success castle" (出世城). Tourists who want to wish for success come to this castle. The castle is also surrounded by cherry trees, adding to the natural attraction when they are in bloom.

According one interview, a staff worker at the castle considers the city of industry as the first image of Hamamatsu as a tourism destination. He also states that the castle was created by the local people and therefore should be maintained by the local people with help in cleaning up the surrounding park surrounding.

4-1-3. Hamamatsu Tourism Convention Bureau (HTCB)

The Hamamatsu Tourism Convention Bureau (HTCB) was established in 1989 and in 1997 the Tourism Association was merged into HTCB. In addition to running the Tourism Information Center, HTCB makes use of the culturally, socially and economically dominant location of Hamamatsu and surrounding area to invite domestic and foreign conventions. Included in convention promotion, is the support of sightseeing attractions, the increase of international mutual understanding, support of the regional economy and improvement of culture.

1. Invitation of convention and support
2. Invitation and acceptance of tourists

3. Public information and public relations
4. Sightseeing and investigation into convention planning
5. Collection and offer of information
6. Management of Hamamatsu Tourist Information Center
7. Management of Saigagake Museum

Actually, it is too difficult to attract many tourists by Hamamatsu only. Thus, HTCB, the Chamber of Commerce of Hamamatsu City and the city office are creating the INBOUND project with other cities in Chukyo area, such as Takayama City and Gifu Prefecture. As a result, they have thus far set two tour courses: Takayama-Hamamatsu-Nagoya and Iseshima-Hamamatsu-Toyohashi.

HTCB not only pays attention to national markets but also makes an effort to investigate international activities. For example, it has a partnership with the large, potential tourist market of Shenyang, China. In addition to its 27 million population, there are also seven other cities that have a population of over 1 million in Shenyang's vicinity. The HTCB is also planning to invite school trips from Korea.

Regarding our interview, HTCB regards Hamanako as the image for Hamamatsu City. Head of HTCB also explains that promoting Hamamatsu as a tourism destination is a very difficult task. Most tourists would like to stay here only for one night because Hamamatsu is located in the middle of the "Golden Route" between Osaka and Tokyo. People can arrive at Hamamatsu from Osaka in the evening and leave Hamamatsu for Tokyo in the morning.

4-1-4. Hamamatsu City Tourism Information Centre

The JR Hamamatsu Station reopened this as the Hamamatsu sightseeing information office on December 16, 2005. The sea, mountains, lakes, rivers and all the cities are depicted on large panels and visitors can see Hamamatsu at first sight. In addition, it provides sightseeing information for Hamamatsu and the west Shizuoka area, as well as English speaking local residents who give sightseeing tours on a volunteer basis. A lot of Brazilian and other foreigners who work for Japanese companies are living here and they come to this information center on weekend. All are welcome to utilize the facility.

As for the number of visitors, the centre serves around 300 during the week and more than 400 people on the weekend. When big events are held in the area, more than 700 people typically visit the center. During the interview with one of the staff persons, he noted that if Hamamatsu is to be promoted as a tourist destination that is should be promoted as the city of music.

4-1-5. Hamamatsu Flower Park

Hamamatsu Flower Park was established in 1949 as an independent association that aims to promote welfare for citizens through gardening and understanding nature. The roles of this park are to develop excellent breeds of plants, producing an excellent nursery garden, exhibition, teaching techniques for gardening, etc. For the visitors, the flower park offers a variety of flower gardens such, as a rose garden, azalea garden, western style garden,

Japanese style garden, rare plants and seasonal flowers.

The park's strategy for attracting more tourists consists of three main pillars. The first is the reinforcement of gardening culture through the construction of a Mosaiculture memorial garden. Mosaiculture refers to a work that consists of both art and gardening. The second pillar is the cooperation with other tourism sites and agencies to promote the sale of discount tickets, joint promotion campaigns, etc. The third is to listen to customers' voices through a questionnaire and incorporating this in the management strategy. This is significant because the flower park has competition from a garden park also located in Hamamatsu City that is quite similar and is free charge.

The image of Hamamatsu as a tourism destination is Hamanako and eel according to an employee of the flower park. He responded that tourists often have the images of eel and Hamamatsu Gyoza (a type of dumpling) for tourism in Hamamatsu despite the fact that local people don't necessarily associate Hamamatsu with those images.

4-1-6. Kanzanji Hot Spring Association

The Kanzanji Hot Spring Association (KHSa) 昭和6年地元有志にて開設され、自主宣伝活動をしていた「館山寺保勝会」を昭和28年に発展改組し、「かんざんじ温泉観光協会」として発足、現在にいたります。was established in 1931 by local volunteers as was self-publicized as “Meeting Kanzanji Yasushi Masaru,” The association was reorganized in 1953 to develop the “Dry Ridge Hot Springs Tourism Association” and has remained as such to this day.

There are many attractions there including the Hamanako Garden Park, the Hamamatsu Flower Park; the Hama Matsu Fruit Park, the Hamamatsu Zoo, a ropeway to Dry Ridge, Hamanako Paruparu, the Hamanako Orgel Museum and others.

Since it is needed to be financially independent and privatized, the KHSa invests its budgets into R&D. Its SWOT analysis is an example of this. The analysis reveals that as a strength Kanzanji area has a variety of tourism-oriented resources available. In northern area, fresh vegetables and fruits are produced, while the southern area is well known for its fishing and tourists come to this area to enjoy those food. On the other hand, this area suffers from its financial limitation to restore the old accommodation and tourism-attraction facilities. Based on these detailed analysis, the KHSa highly concerns its efficient and effective policy management for higher profitability.

The head of the KHSa expresses Hamamatsu as the city of “local production for local consumption”. Utilizing the existing natural resources in Hamamatsu, Kanzanji area can serve fresh food to the tourists. The variety of agricultural products is high. Eel and orange are the representative products.

4-1-7. Hamamatsu Fruit Park

The Hamamatsu Fruit Park was established in 1996 as agricultural park. It has 160 kinds of tropical, temperate zone and Japanese fruits. This park was established to revitalize the town that is famous for orange growing however, the price of oranges soon came down. Visitors are mainly families with small children and most tourists come using their own cars. As a result, the number of tourists depends on car related reasons, for example

the reduction of highway toll to 1,000 yen on weekends. The main attraction is picking fruit. In this park, 15 kinds of fruit, such as oranges, apples, plums and pears can be picked and eaten. Tourists can pick fruits that are at their peak of ripeness. Other attractions include various kinds of entertainment for children, as in playing with snow, playing in the river near the park, fishing, day camping, etc. The park faces challenges because it doesn't have a relationship with the local community. This leads to a limitation of picking fruit. In order to receive more tourists and increase quality products, a relationship with local farmers is necessary. Another challenge is difficulty with group tourists because fruits that are picked by tourists are sold by weight. Therefore, it takes too much time to calculate and they cannot accommodate such tourists.

Our interviewee answered that the personality of the Hamamatsu people is the image of Hamamatsu. He stated that their personality is frank and open hearted and that this is the attraction of Hamamatsu as a tourism destination according to him.

4-1-8. Maisaka Town Tourism Association

Maisaka Town belongs to the Nishi Ward of Hamamatsu City and is famous for the island of "Bentenjima," which offers beautiful scenery. Since the opening of the railway in 1889, Bentenjima was known for its beautiful landscape and became tourist site. The attractions of this area are shellfish in spring, sea swimming in summer, fishing in autumn and scenery in winter. Moreover, this area is the place where Hamanako and Enshu (遠州灘) open sea meet. Therefore, a variety of marine resources, such as blowfish (フグ), soft-shelled turtles (すっぽん), a small, white fish called Shirasu (シラス) and oysters are available. Therefore, this tourism association tries to utilize these resources for tourism. Bentenjima has difficulty to receive tourists. After the bankruptcy of one hotel that had received many international tourists, international tourism has plummeted. Moreover, the number of domestic tourists fell to nearly 25% of the number of tourists in 1990s. Many domestic tourists had come and stayed at hotels managed by their employers. However, after the recession most of companies gave up to supply rooms for their employees. This is the one reason for the decreased number of domestic tourists.

4-2. Projected image of Hamamatsu: A web-site content analysis

In order to determine the projected image of Hamamatsu as a tourism destination, a content analysis was carried out on the following websites under tourism in Hamamatsu and related sub-categories⁶: Hamamatsu City (cf. <http://www.city.hamamatsu.shizuoka.jp/foreign/english/index.htm>), Hamamatsu Tourism Convention Bureau (cf. <http://hamamatsu-daisuki.net/hamacon/en/index.html>), The Japan National Tourism Organization (cf. <http://www.jnto.go.jp/eng/>), the Chubu Wide-Area Tourism Portal Site (cf. <http://www.kandou10.jp/en/>), and two private websites (cf. <http://www.servinghistory.com/> and <http://www.tripadvisor.com/>). Table 2 displays a list of 95 most frequent meaningful words used to describe Hamamatsu as a tourism destination in the websites mentioned above.

⁶ The URLs are cited in the website for content analysis section of the Reference

Table 2: The 95 most frequent words used to describe Hamamatsu as a tourism destination

accommodations	edo	hamana	park	sunset
airport	environment	historic	people	support
art	event	honda	piano	suzuki
automobile	excellent	hotel	plants	taste
battle	exhibits	industry	popular	technology
beautiful	experience	information	railway	temperature
blossom	facilities	instrument	resort	temple
boat	factory	international	resource	textile
bus	famous	kind	restaurant	tokugawa
business	festival	leisure	rich	tower
car	fishing	machinery	river	tradition
castle	flower	manufactured	sand	train
community	food	motorcycle	scenery	transport
company	foreign	mountain	shinkansen	unagi
concert	fruit	museum	shop	unique
convenient	fuii	music	shrine	university
creative	gallery	nakataiima	sightseeing	vacation
culture	garden	nature	spot	value
dune	guide	ocean	statue	yamaha

Source: Authors calculation based on website content analysis

Some words like “eel” and “Unagi” were under most frequent words. Some adjectives like “creativity,” “famous” and “kind” were kept in the analysis. The adjective creativity is used by Hamamatsu to project Hamamatsu as a city of creativity with an eye to the future based on civic cooperation and by living in balance with the natural environment. Famous was found informative when associated with other words. It was therefore kept in the analysis to understand the stereotypical holistic images of Hamamatsu.

The next step was to reduce the 95 words from the content analysis into a smaller number of image concepts by means of factor analysis. Table 3 summarizes the results of component analysis with Varimax rotation for projected image of Hamamatsu as tourism destination. All the 95 words were reduced to three factors that explained 86% of the total variance. The factors were named as industry (Factor 1), accessibility and accommodation (Factor 2) and landscape (Factor 3).

Table 3: Factor analysis of projected image of Hamamatsu⁷

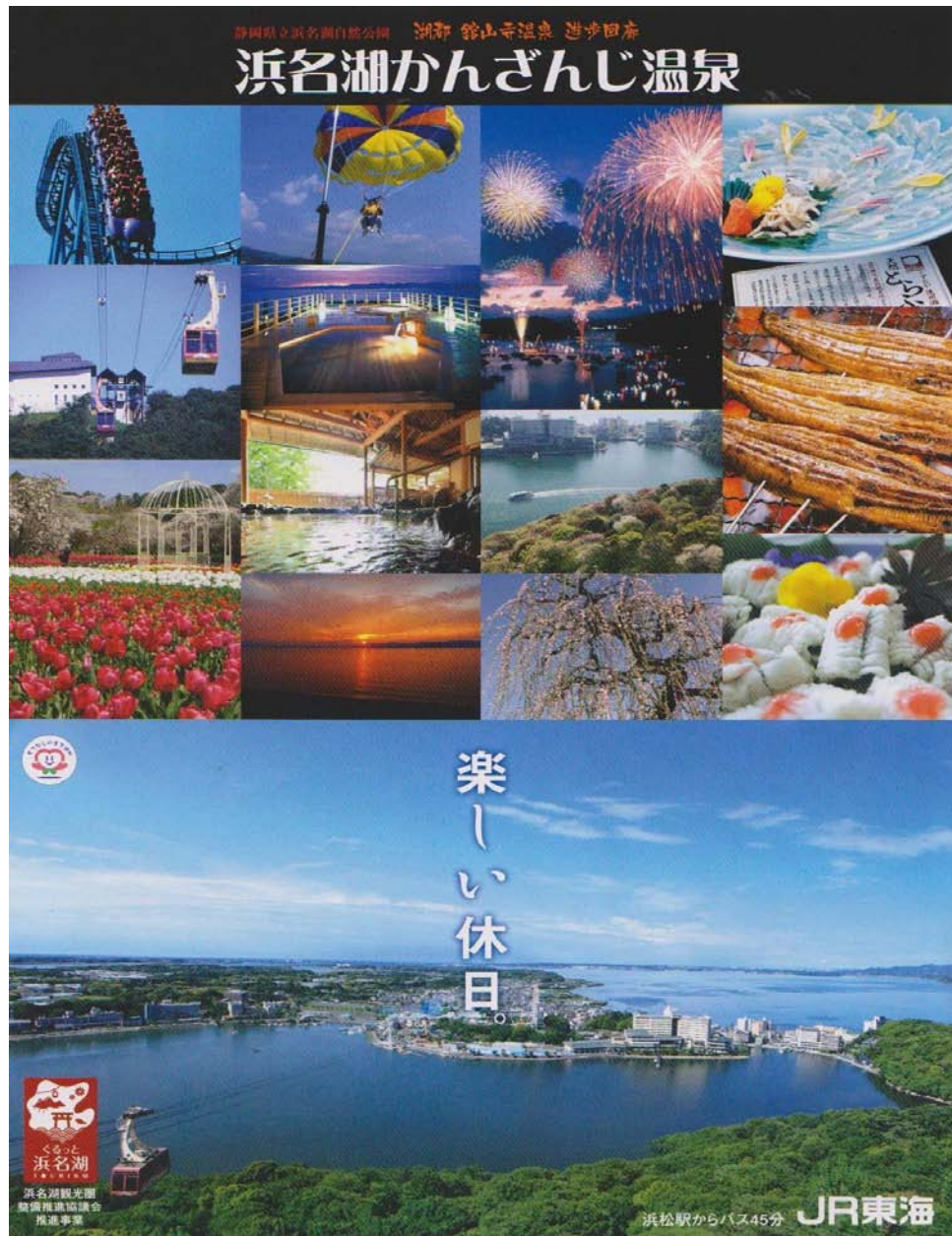
Destination image factors			
Factors	F1	F2	F3
	Industry	Accessibility and accommodation	Landscape
Variance explained	40.978	25.067	20.305
Eigenvalue	34.421	21.056	17.056
Variables and communalities			
creative	.998		
company	.997		
industry	.988		
environment	.986		
technology	.982		
piano	.980		
yamaha	.971		
bus		.992	
railway		.992	
festival		.955	
castle		.944	
train		.910	
shop		.910	
accommodations		.910	
spot			.917
edo			.911
event			.910
leisure			.905
sightseeing			.902
kind			.881
hamana			.823
river			.812
mountain			.761
fishing			.723

Source: Authors

Hamamatsu's first projected image is industry. Hamamatsu has produced many renowned entrepreneurs and technologies. The images related to accessibility and accommodation has important correlations. Hamamatsu has useful accessibility because it is located in the middle between Tokyo and Osaka, accessible by both the Shinkansen and highway. In addition, Hamamatsu has many hotels around the train station and much potential to invite more hotels. Therefore, this correlation implies is probably coming from the "One Stop Service Policy promoted by Hamamatsu. Finally, Hamamatsu is also projected as a landscape because of its abundance of natural attractions. Projected images also depend on the stakeholders. Figure 4 is the cover of brochure provided by the Kanzanji Hot Spring Association. As shown, the largest picture is Hamanako, which is dominating approximately half. The other pictures are eel, a fireworks festival, leisure sports, a hot spring, an amusement park, the Flower Park, etc.

⁷ This table presents selected words that did load higher.

Figure 4: Cover of brochure provided by the Kanzanji Hot Spring Association



5. Perceived image of Hamamatsu

5-1. Sample demographic characteristics

As previously mentioned, the perceived image is obtained from an online survey (both in English and Japanese) and fieldwork survey conducted at various tourist spots in Hamamatsu over three days. Table 4 provides information regarding the demographic characteristics of the respondents; gender, age, annual income level, and

origin. The total number of respondents received in both surveys is 241, 47.3% male and 52.7% female.

Of the total surveys, most of the respondents were in the age range of 20 to 39 years old, 71.4%, and among these, around 74% were online respondents. However, this condition differs slightly from the fieldwork results, with the age ranges of 20 to 29 years old and more than 60 years old dominated the on-site visitors to Hamamatsu with 31.6% and 28.6% respectively. Further, most of the respondents from the online survey earned up to 3 million yen of annual income, while almost a gave no response. However, it must be pointed out that the online survey was conducted through social networking by the researchers, who are college students, and therefore it was difficult to reach respondents from higher income levels and in older age groups. Nevertheless, since the online respondents were also potential tourists who were also actively involved with internet activities, it is important to contemplate their opinion in this research. Thus, the majority, 52.3% of respondents, earned up to 3 million yen per year, while 21.6% of the respondents earned more than 3 million yen. As for origin, 67.1% of the online respondents came from Asian countries other than Japan while 21% of the other respondents were Japanese and the remainder were from outside of Asia. In the meantime, the results from the fieldwork survey showed Japanese visitors outnumbering visitors from Asia and other countries visitors with 74.5%.

Table 4: Respondents' profile

		Type of survey							
		Online survey in English		Online survey in Japanese		Fieldwork @Hamamatsu		Total	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
Gender	Female	37	34.9%	30	81.1%	47	48.0%	114	47.3%
	Male	69	65.1%	7	18.9%	51	52.0%	127	52.7%
Age	Less than 20 years old	9	8.5%	0	.0%	6	6.1%	15	6.2%
	20 to 29 years old	36	34.0%	28	75.7%	31	31.6%	95	39.4%
	30 to 39 years old	60	56.6%	4	10.8%	13	13.3%	77	32.0%
	40 to 49 years old	0	.0%	5	13.5%	10	10.2%	15	6.2%
	50 to 59 years old	1	.9%	0	.0%	10	10.2%	11	4.6%
	More than 60 years old	0	.0%	0	.0%	28	28.6%	28	11.6%
Annual Income level	Less than 1 million Yen	42	40.8%	16	43.2%	19	21.6%	77	33.8%
	1 to 3 million Yen	33	32.0%	8	21.6%	27	30.7%	68	29.8%
	3 to 5 million Yen	4	3.9%	1	2.7%	9	10.2%	14	6.1%
	More than 5 million Yen	2	1.9%	1	2.7%	10	11.4%	13	5.7%
	No response	22	21.4%	11	29.7%	23	26.1%	56	24.6%
Origin	Japan	0	.0%	30	81.1%	73	74.5%	103	42.7%
	Asia	90	84.9%	6	16.2%	14	14.3%	110	45.6%
	Other	16	15.1%	1	2.7%	11	11.2%	28	11.6%

5-2. Tourism experience in Japan

Table 5: Place visited in Japan

		Origin							
		Japan		Asia		Other		Total	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
Place visited in Japan	Hokkaido	66	64.1%	12	12.1%	5	17.9%	83	36.1%
	Sendai	47	45.6%	7	7.1%	4	14.3%	58	25.2%
	Tokyo	95	92.2%	75	75.8%	25	89.3%	195	84.8%
	Yokohama	77	74.8%	40	40.4%	9	32.1%	126	54.8%
	Kyoto	100	97.1%	55	55.6%	19	67.9%	174	75.7%
	Osaka	83	80.6%	56	56.6%	17	60.7%	156	67.8%
	Kobe	66	64.1%	35	35.4%	9	32.1%	110	47.8%
	Nara	24	23.3%	27	27.3%	12	42.9%	63	27.4%
	Hiroshima	58	56.3%	29	29.3%	11	39.3%	98	42.6%
	Fukuoka	53	51.5%	40	40.4%	9	32.1%	102	44.3%

Table 5 summarizes feedback from the respondents regarding the question, “Which places have you visited since you came in Japan?” The results show that the most frequently visited city in Japan is Tokyo, with a total of 84.84%. The second and the third most frequently visited are Kyoto and Osaka. This result is understandable considering that those cities are the three biggest cities in Japan and it is also in line with the reason of respondents who have visited those cities. According to the feedback of open question “What did attract you the most when visiting those cities?” most of tourists mentioned factors that related with culture and historical places. Since Tokyo, Osaka, and Kyoto have many historical sites to visit and they are centers of Japanese culture, it is obvious that these cities are the most visited cities in Japan.

Table 6: Reason for traveling by origin

		Origin							
		Japan		Asia		Other		Total	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
Reasons for traveling	Natural attractions	25	28.4%	23	25.0%	6	25.0%	54	26.5%
	Culture and historical place	33	37.5%	36	39.1%	9	37.5%	78	38.2%
	Hanging out with friends&family	0	.0%	1	1.1%	3	12.5%	4	2.0%
	Big and Modern city	7	8.0%	12	13.0%	3	12.5%	22	10.8%
	Hospitality of local people	0	.0%	3	3.3%	1	4.2%	4	2.0%
	Festival and special events	1	1.1%	2	2.2%	1	4.2%	4	2.0%
	Food	18	20.5%	3	3.3%	0	.0%	21	10.3%
	Uniqueness of the city	3	3.4%	3	3.3%	1	4.2%	7	3.4%
	Closeness	1	1.1%	3	3.3%	0	.0%	4	2.0%
	Cleaness	0	.0%	6	6.5%	0	.0%	6	2.9%
	Total	88	100.0%	92	100.0%	24	100.0%	204	100.0%

Japan image's as a country that is endowed with ancient, unique and interesting culture, as well as magnificent landscapes, seems successfully engraved in tourists' minds (both Japanese and foreigner tourists). Table 5 shows that most tourists declared factors related with culture and historical places and natural attractions as reasons for traveling in Japan. From the results of the survey, there is no significance difference in interest between Japanese and foreign tourists for these two reasons. However, the table also presents that culinary tourism (food) is especially attractive for Japanese tourists, but not for foreigners.

Table 7: Reasons for traveling by income level

		Annual income level									
		Less than 1 million Yen		1 to 3 million Yen		3 to 5 million Yen		More than 5 million Yen		No response	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
Reasons for traveling	Natural attractions	15	23.1%	18	30.0%	4	33.3%	1	10.0%	14	29.8%
	Culture and historical place	25	38.5%	22	36.7%	4	33.3%	5	50.0%	19	40.4%
	Hanging out with friends&family	1	1.5%	2	3.3%	0	.0%	0	.0%	1	2.1%
	Big and Modern city	8	12.3%	6	10.0%	1	8.3%	2	20.0%	4	8.5%
	Hospitality of local people	2	3.1%	2	3.3%	0	.0%	0	.0%	0	.0%
	Festival and special events	1	1.5%	2	3.3%	0	.0%	1	10.0%	0	.0%
	Food	8	12.3%	3	5.0%	2	16.7%	1	10.0%	5	10.6%
	Uniqueness of the city	2	3.1%	3	5.0%	0	.0%	0	.0%	1	2.1%
	Closeness	2	3.1%	1	1.7%	0	.0%	0	.0%	1	2.1%
	Cleaness	1	1.5%	1	1.7%	1	8.3%	0	.0%	2	4.3%
	Total	65	100.0%	60	100.0%	12	100.0%	10	100.0%	47	100.0%

Table 7 portrays the reason for travelling to some cities in Japan categorized by income level of the respondents. Respondents with higher levels of income (more than 5 million yen) tended to be attracted by factors that related with culture and historical places. For middle and low-income people, there was nothing noted as significantly different for reasons to visit any specific tourist destination. They visited their destination because of either an interest in its natural landscape (+/- 33%) or culture and historical sites (+/- 33%).

Table 8: "Travel with" by age

		Age											
		Less than 20 years old		20 to 29 years old		30 to 39 years old		40 to 49 years old		50 to 59 years old		More than 60 years old	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
How do they usually travel	Alone	0	.0%	6	8.6%	12	16.2%	2	20.0%	0	.0%	0	.0%
	Family	11	78.6%	15	21.4%	19	25.7%	5	50.0%	7	70.0%	16	59.3%
	Friends	3	21.4%	47	67.1%	39	52.7%	3	30.0%	3	30.0%	11	40.7%
	School trip	0	.0%	2	2.9%	4	5.4%	0	.0%	0	.0%	0	.0%

Table 9: "Travel with" by origin

		Origin							
		Japan		Asia		Other		Total	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
How do they usually travel	Alone	2	2.8%	13	12.6%	5	19.2%	20	10.0%
	Family	37	51.4%	30	29.1%	6	23.1%	73	36.3%
	Friends	32	44.4%	55	53.4%	15	57.7%	102	50.7%
	School trip	1	1.4%	5	4.9%	0	.0%	6	3.0%

Tables 8 and 9, presented above, are recapitulations of answers related to the question, “With whom do you usually travel with?” From the results, it can be concluded that Japanese and foreign tourists have similar patterns. They tended to travel in groups or accompanied by either family or friends. In spite of this, the percentage of foreigners who traveled with friends as company is relatively higher than the Japanese respondents. Moreover, the percentage of foreign respondents who traveled alone is comparatively higher than Japanese respondents.

In recapitulation by age, it shows that tourists from ages of 20-29 and 30-39 have quite similar prototypes in that they are more likely to travel accompanied by friends than family. On the other hand, relatively mature people in the age group of 40-59, tend to travel with their family.

5-3. Tourism experience in Hamamatsu

Table 10: Incidence of Hamamatsu visitors

		Origin							
		Japan		Asia		Other		Total	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
Visited Hamamatsu	No	11	10.7%	86	78.2%	15	53.6%	112	46.5%
	Yes	92	89.3%	24	21.8%	13	46.4%	129	53.5%
	Total	103	100.0%	110	100.0%	28	100.0%	241	100.0%

The above table shows the number of people from Japan, Asia and other countries that have and have not visited Hamamatsu. In the Japanese respondents column, of a total of 103 questioned, 92 have visited and 11 have not visited Hamamatsu revealing a rather high percentage of 89.3%. This demonstrates the interest level of the people visiting the city. However, looking at the results of the Asian respondents, it exposes that only 21.8% people have visited, demonstrating among other things, that they are not well informed regarding tourism of Hamamatsu City. As for the category of visitors from other countries, among 28 respondents, 13 have visited revealing a moderate number of 46%.

Table 11: Living place of Hamamatsu visitors

		Visited Hamamatsu		
		No	Yes	Total
		Column N %	Column N %	Column N %
Region	Chugoku	4.3%	.0%	1.9%
	Kanto	13.8%	14.8%	14.4%
	Kinki	7.4%	12.2%	10.0%
	Koushinetsu	8.5%	.0%	3.8%
	Kyushu	30.9%	2.6%	15.3%
	Tohoku	.0%	.9%	.5%
	Tokai	35.1%	69.6%	54.1%
	Total	100.0%	100.0%	100.0%

The table above displays the Japanese respondents who have visited Hamamatsu and their regional composition in Japan.

The highest share of the visitors interviewed, 69.6%, are from the Tokai area, whereas there were no visitors from Koushinetsu and Chugoku areas.

Table 12: Tourism experience

		Origin							
		Japan		Asia		Other		Total	
		Count	Column N %	Count	Column N %	Count	Column N %	Count	Column N %
Main purpose of visit	Business	9	12.9%	6	28.6%	5	50.0%	20	19.8%
	Education	13	18.6%	7	33.3%	4	40.0%	24	23.8%
	Other	5	7.1%	4	19.0%	1	10.0%	10	9.9%
	Vacation	36	51.4%	3	14.3%	0	.0%	39	38.6%
	Visit Friends&Family	7	10.0%	1	4.8%	0	.0%	8	7.9%
Lenght of stay in Hamamatsu	1 night	26	38.2%	4	20.0%	1	10.0%	31	31.6%
	2-3 nights	16	23.5%	11	55.0%	3	30.0%	30	30.6%
	More than 3 nights	2	2.9%	1	5.0%	3	30.0%	6	6.1%
	One day visit	24	35.3%	4	20.0%	3	30.0%	31	31.6%
Would you like to visit Hamamatsu again	No	16	23.9%	5	26.3%	0	.0%	21	22.1%
	Yes	51	76.1%	14	73.7%	9	100.0%	74	77.9%
Would you recommend Hamamatsu to others	No	22	28.6%	5	26.3%	2	20.0%	29	27.4%
	Yes	55	71.4%	14	73.7%	8	80.0%	77	72.6%

Table 12 portrays the purpose of travel for the interviewed respondents. The purpose for visiting has been divided into the five main categories of business, education, vacation, family and friends and others, respectively. The results show that one of the main purposes to visit Hamamatsu is to enjoy relaxation by spending vacation in the calm and beautiful environment of Hamamatsu. The same attribute is also applicable to the Asian tourists, as their result also shows the visit is for the purpose of vacation. In addition, travel for business purposes is only 12.9% for Japanese, 28.9% for Asians and 50% for others, accordingly. Japanese respondents typically stay for one night while Asian & others travelers are more likely to stay 2-3 days. Common among all groups is the aim to visit Hamamatsu again. This commonality shows that the city has the potential to attract visitors. Tourists are satisfied with the arrangements and infrastructure.

The results are self-explanatory and demonstrate the perceived image of Hamamatsu City. It is hoped that if the local government of Hamamatsu continues efforts for the promotion of the tourism industry, the city will gain high revenue and will be in a position to compete the other travel destinations in Japan. Sustainability in implementing strategic plans for the sake of promoting and endorsing Hamamatsu as a tourism destination will bring prosperity to the people of Hamamatsu, in particular and Japanese in general.

5-4. Perceived image of Hamamatsu

The image of Hamamatsu as perceived by tourists who visited was determined through a list of 12 attributes evaluated on a five-point Likert scale. Tourists were asked to rate each of these 12 attributes according to how they thought Hamamatsu performed. Attributes were then considered positively or negatively perceived if their mean is above or below the neutral “3.00” value. In Table 11 the attributes are arranged from most to least highly perceived, based on the whole sample of responses. Table 13 reports also the Bootstrap ANOVA test used to estimate the difference of perception among Japanese, Asian and other international tourists.

Table 13: Bootstrap Anova of perceived image

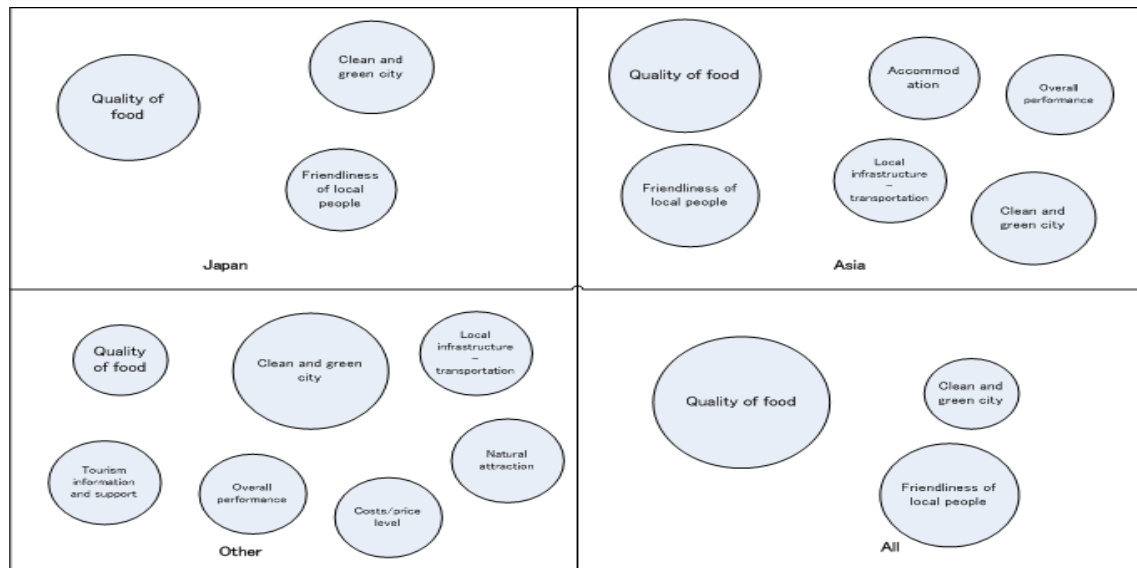
	Origin								Anova test p-value
	Japan		Asia		Other		Total		
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
Quality of food	3.9	1.0	4.0	0.9	3.8	0.8	3.9	0.9	0.869
Clean and green city	3.5	1.0	3.9	0.8	4.3	0.9	3.6	1.0	0.006**
Friendliness of local people	3.6	1.0	3.7	1.1	3.4	1.2	3.6	1.0	0.632
Natural attraction	3.4	1.0	3.5	1.2	3.7	0.9	3.5	1.0	0.686
Overall performance	3.4	0.8	3.6	1.0	3.9	0.9	3.5	0.9	0.108
Accommodation	3.3	0.9	3.9	0.8	3.5	0.9	3.4	0.9	0.014*
Local infrastructure/transportation	3.2	0.9	3.7	1.1	3.9	1.0	3.4	1.0	0.027*
Costs/price level	3.3	0.9	3.5	0.9	3.8	0.7	3.4	0.9	0.078
Tourism information and support	3.1	0.8	3.3	1.1	3.9	1.0	3.2	0.9	0.017*
Difference customs/culture	3.2	1.0	3.0	0.9	3.5	0.7	3.2	0.9	0.420
Shopping facilities	3.0	0.8	3.0	1.0	3.4	0.9	3.0	0.8	0.310
Historical sites/museums	3.0	1.0	3.0	1.1	3.2	1.0	3.0	1.0	0.930
* Significant at 0.05 level.									
** Significant at 0.01 level.									

Table 13 illustrates that the “quality of food” is the most important perceived image of Hamamatsu. Hamamatsu is actually famous for eel (Unagi) because of the Hamanako, which is considered to be the home of the highest quality Unagi. Therefore, Unagi dominated the spontaneous awareness of Hamamatsu and it is widely purchased or recommended as a unique souvenir from the area. The p-value (0.869) means that the perception of Hamamatsu associated with the quality of food is the same among Japan, Asian and other international tourists. Hamamatsu is also perceived as a “clean and green city” but this perception depends significantly on the origin of the tourist. Other international tourists had a high perception of Hamamatsu as a “clean and green city,” compared to Japanese tourists. Hamamatsu is the leading region for the cultivation of gerbera in Japan and has large flower-related facilities, such the Flower Park and Garden Park where the Pacific Flora 2004 (Shizuoka International Garden and Horticulture Exhibition) was held. All tourists share the same perception that Hamamatsu’s people are friendly. This evidence is supported by the fact that due to its industrial activity, Hamamatsu welcomes many foreigners to support economic activities. Hamamatsu has now more than 27,000 foreign residents, including approximately 14,000 Brazilians, more than any other city in Japan.⁸

Hamamatsu’s image perceptions differ slightly by tourists. As depicted in the Figure 4, compared to Japanese, Asian tourists have a wider image of Hamamatsu. The difference is that Asian tourists also perceived the image of Hamamatsu in regards to accommodations and local infrastructure. These attributes are probably natural for Japanese since Japan enjoys modern infrastructure everywhere. Other international tourists have a slightly different perception compared to Japanese and Asian tourists. They perceived Hamamatsu as a clean and green city, with good local infrastructure, sufficient tourism information and support and reasonable cost/price level.

⁸ <http://www.hi-hice.jp/HICEeng/index.php>

Figure 4: Correspondence Map of perceived image



6. Importance - Performance Analysis

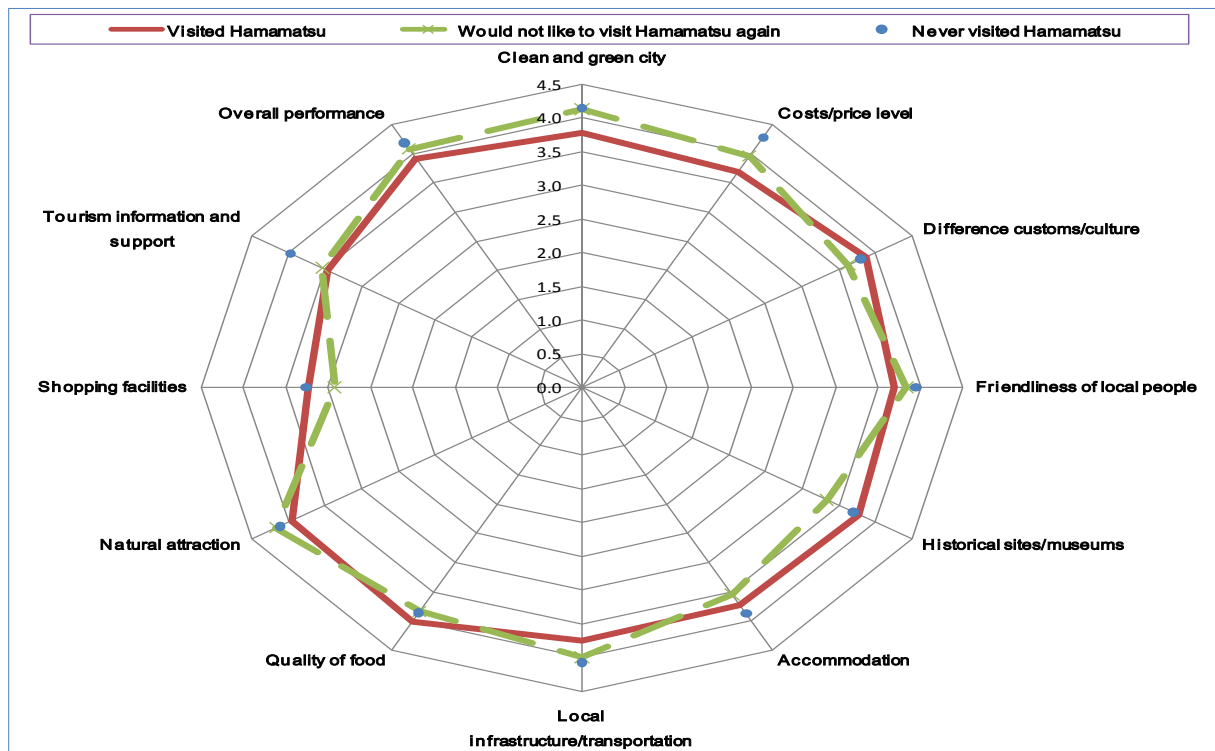
6-1. Tourist expectation

This section addresses the issues of tourist expectation before deciding to visit a tourist destination. We evaluated, on a five-point Likert scale, the level of importance that tourists give to 12 attributes related to a tourism destination. A bootstrapped analysis of variance was carried out to compare the difference of expectation among tourist. The following table presents the destination attributes bootstrapped mean, while the following figure summarizes the expectation of tourists in 3 segments. Accounting for 46% of our sample size, the first segment is made of those who have never visited Hamamatsu, while the second segment brings in those who have visited Hamamatsu (54%). Finally, the third segment is composed of those who have visited Hamamatsu but would not like to visit again. They count for 9% of the total sample size.

	Japan					Asia					Other					Total				
	Mean	Bootstrap ^a				Mean	Bootstrap ^a				Mean	Bootstrap ^a				Mean	Bootstrap ^a			
		Bias	Std. Error	95% Confidence Interval			Bias	Std. Error	Interval			Bias	Std. Error	Interval			Bias	Std. Error	Interval	
				Lower	Upper				Lower	Upper				Lower	Upper				Lower	Upper
Clean and green city	3.78	.00	.11	3.56	4.00	4.06	-.01	.09	3.86	4.23	4.11	.00	.21	3.67	4.48	3.95	.00	.06	3.82	4.07
Costs/price level	3.73	.00	.12	3.49	3.95	4.15	.00	.10	3.95	4.34	4.11	.00	.16	3.78	4.41	3.97	.00	.07	3.83	4.10
Difference customs/culture	4.03	.00	.10	3.85	4.22	3.74	.00	.10	3.52	3.93	3.50	.00	.24	3.00	3.96	3.83	.00	.07	3.70	3.97
Friendliness of local people	3.68	.00	.10	3.47	3.86	3.93	-.01	.10	3.73	4.10	3.79	.00	.25	3.26	4.23	3.80	-.01	.07	3.67	3.93
Historical sites/museums	3.81	.00	.10	3.61	4.00	3.72	-.01	.10	3.51	3.91	3.57	.00	.24	3.09	4.03	3.74	.00	.07	3.60	3.86
Accommodation	3.67	.00	.10	3.47	3.86	3.99	.00	.10	3.81	4.19	3.50	.01	.18	3.15	3.84	3.80	.00	.06	3.67	3.92
Local	3.69	.00	.11	3.47	3.90	4.10	.00	.09	3.91	4.28	3.96	.00	.20	3.54	4.34	3.91	.00	.06	3.78	4.03
Quality of food	4.20	.00	.10	4.00	4.38	3.78	-.01	.10	3.58	3.97	3.57	.00	.23	3.10	4.00	3.94	.00	.07	3.80	4.07
Natural attraction	3.92	.00	.10	3.71	4.12	4.08	.00	.09	3.90	4.26	4.18	.00	.20	3.73	4.55	4.02	.00	.06	3.89	4.15
Shopping facilities	3.22	-.01	.10	3.02	3.42	3.31	.00	.11	3.10	3.51	3.04	.00	.25	2.53	3.55	3.24	.00	.07	3.11	3.38
Tourism information and	3.25	.00	.10	3.06	3.44	4.15	-.01	.11	3.92	4.35	3.61	.00	.20	3.21	4.00	3.70	.00	.07	3.57	3.83
Overall performance	3.99	.00	.10	3.79	4.19	4.13	.00	.10	3.92	4.30	3.89	.01	.19	3.50	4.24	4.04	.00	.06	3.92	4.17

a. Unless otherwise noted, bootstrap results are based on 1000 stratified bootstrap samples.

Figure 5: Tourist expectation



This figure shows that those who visited Hamamatsu have lower expectations in general. Their highest expectation is in regards to the quality of food (mean = 4.01), but they are also more or less concern about natural attraction (mean = 3.95), difference in customs/culture (mean = 3.86), clean and green city (mean = 3.76), historical sites/museums (mean = 3.77) and local infrastructure/transportation (mean = 3.75). Attention is then directed towards those who visited Hamamatsu but stated they wouldn't visit again. This category of visitors has, on average, a different expectation than the group of those who visited. The former expect less about the quality of food (mean = 3.83) than the latter. On the contrary, they value natural attractions more (mean = 4.16), clean and green city (mean = 4.13), the overall performance of the city (mean = 4.08), local infrastructure/transportation (mean = 4.00) and costs/price level (mean = 3.95).

Furthermore, those who never visited Hamamatsu have higher expectations for a tourist destination. The top five most important attributes were cost/price level (mean = 4.28), overall performance (mean = 4.19), clean and green city (mean = 4.14), natural attraction (mean = 4.12) and local infrastructure (mean = 4.08). These attributes reflect the "value for money" of a tourist package that a tourist destination must offer to attract visitors. Due to pollution and global warming issues, more tourists are concerned about environmental issues when choosing tourists destinations. Therefore, adding a green aspect on a tourism package seems to be an attractive attribute for tourists.

Moreover, when addressing the issues of tourist expectations, more than the decision to visit a tourist destination as per the origin of the tourist, we find out that the previous top five most important attributes are still valid, mainly for international tourists. This is presented by Table 14.

Table 14: Bootstrap Anova for expectation

	Origin								Anova test p-value
	Japan		Asia		Other		Total		
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
Clean and green city	3.8	1.1	4.1	1.0	4.1	1.1	3.9	1.1	0.104
Costs/price level	3.7	1.2	4.2	1.1	4.1	0.9	4.0	1.1	0.016*
Difference customs/culture	4.0	1.0	3.7	1.1	3.5	1.3	3.8	1.1	0.033*
Friendliness of local people	3.7	1.0	3.9	1.0	3.8	1.3	3.8	1.1	0.231
Historical sites/museums	3.8	1.0	3.7	1.1	3.6	1.3	3.7	1.1	0.59
Accommodation	3.7	1.1	4.0	1.0	3.5	1.0	3.8	1.0	0.022*
Local infrastructure/transportation	3.7	1.1	4.1	1.0	4.0	1.1	3.9	1.1	0.016*
Quality of food	4.2	1.0	3.8	1.1	3.6	1.2	3.9	1.1	0.003**
Natural attraction	3.9	1.0	4.1	1.0	4.2	1.1	4.0	1.0	0.36
Shopping facilities	3.2	1.0	3.3	1.1	3.0	1.4	3.2	1.1	0.487
Tourism information and support	3.3	1.1	4.1	1.1	3.6	1.0	3.7	1.2	0.00*
Overall performance	4.0	1.0	4.1	1.0	3.9	1.0	4.0	1.0	0.432

* Significant at 0.05 level.

** Significant at 0.01 level

* Significant at 0.05 level.

** Significant at 0.01 level.

Indeed, before deciding a tourist destination, other international tourists have high expectations for natural attractions (mean = 4.21), costs/price level (mean = 4.18), clean and green city (mean = 4.15), local infrastructure/transportation (mean = 4.01) and overall performance (mean = 3.98). Asian tourists have almost the same expectations with other international tourists, except for price, giving more importance to price level (mean = 4.21), while other international tourists expect more natural attractions. Japanese tourists place the most importance on quality of food (mean = 4.18) and difference in culture/custom (mean = 4.01).

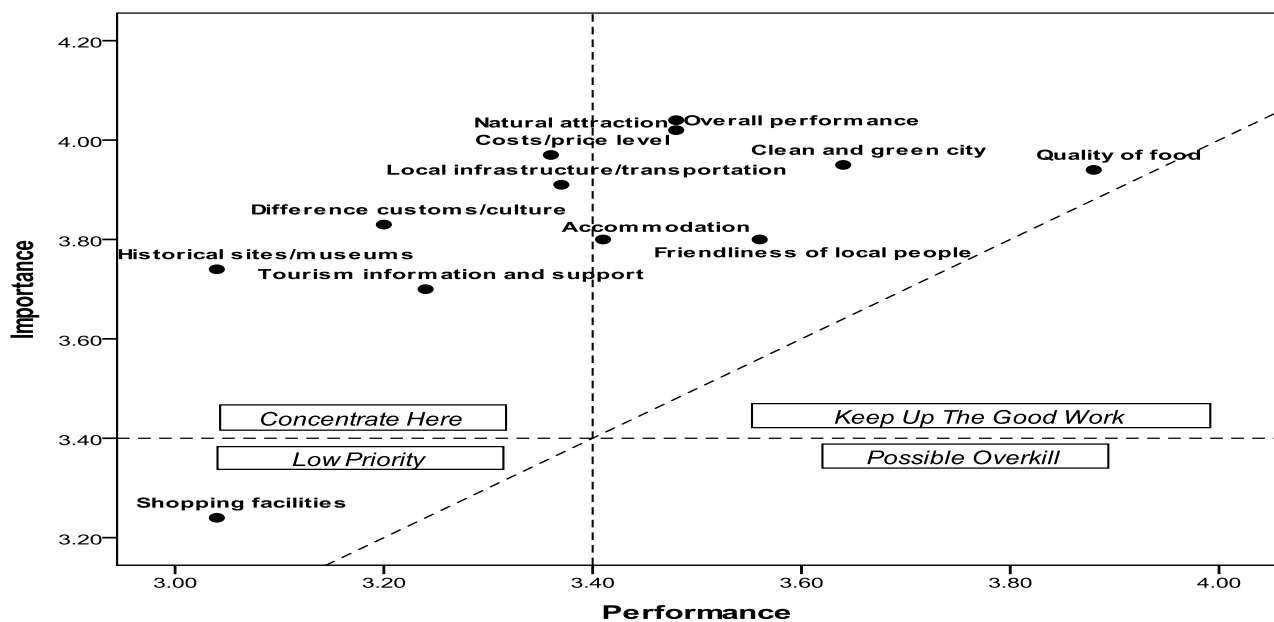
6-2. Importance Performance Analysis

6-2-1. IPA for all tourists

After identifying the perceived image of Hamamatsu and tourists' expectations based on 12 tourist destination attributes, the Importance Performance Analysis is used to assess whether Hamamatsu is adequately providing these attributes. This IPA grid plots the performance of Hamamatsu as perceived by tourists who visited Hamamatsu and the importance that those same tourists give to a tourist destination attribute before they decide to travel. Results in Figure 6 depict the IPA with attribute ratings for all tourists. Among the 12 attributes related to Hamamatsu as a tourism destination, six attributes are located in the "Keep Up The Good Work" quadrant, indicating that the image attributes were perceived to be very important to tourists and at the same time, tourists rated Hamamatsu for a high level of performance on those attributes. These six attributes are natural attraction, overall performance, clean and green city, quality of food, accommodation and friendliness of local people. Therefore, Hamamatsu should try to maintain the level of these attributes, because they are important attributes that have sustained a positive tourism image. Furthermore, Hamamatsu should move these image attributes to the 45-degree upward-sloping line in the IPA grid. This line is called the iso-rating line representing a perfect balance between importance and performance, with a zero performance gap.

According to the tourists, Hamamatsu didn't do a good job of meeting their expectations regarding the historical sites/museums, tourism information and support, difference customs/culture, local infrastructure/transportation and cost/price level. In the Figure 6, this quadrant signifies the features in which Hamamatsu needs to concentrate on higher performance to achieve customer satisfaction. Shopping facilities however fall in the "Low Priority" quadrant. Therefore, relatively fewer resources should be devoted to this attribute since it was regarded as low in both importance and performance.

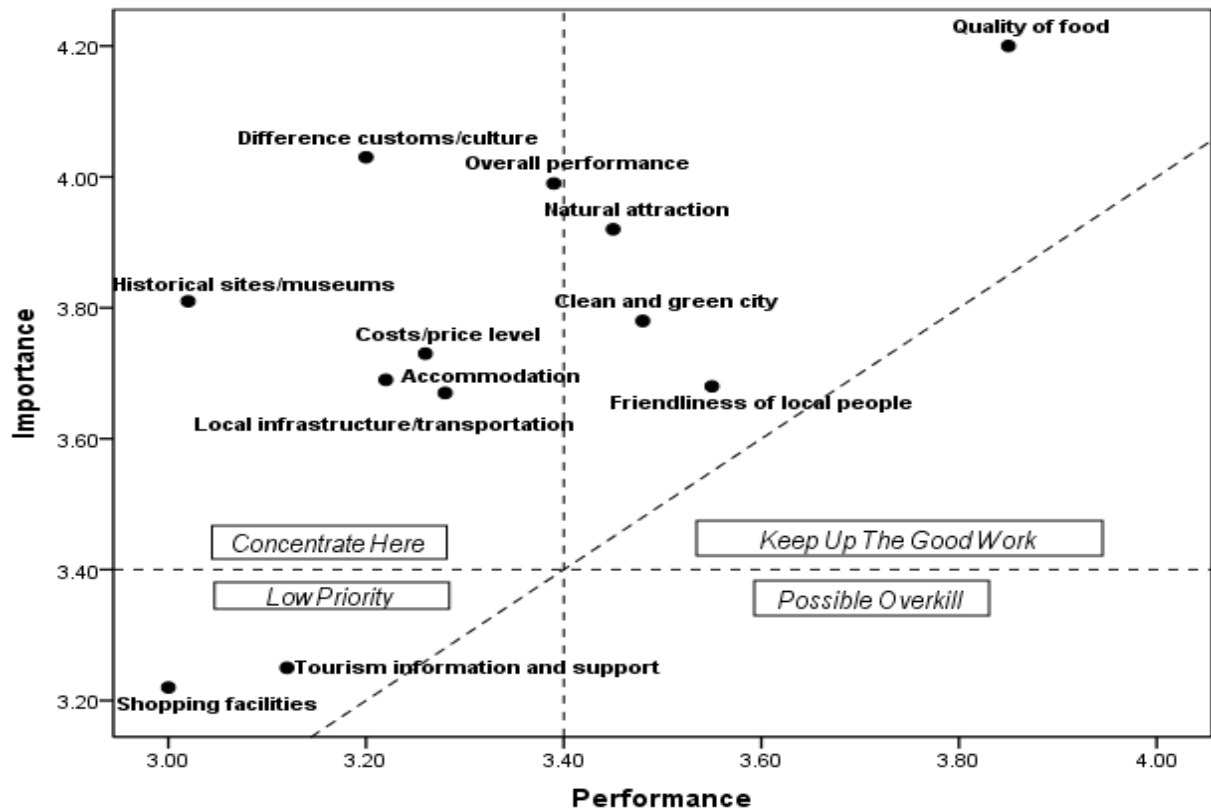
Figure 6: IPA grid for all tourists



6-2-2. IPA for Japanese tourists

In order to attract Japanese tourists, Hamamatsu should increase its performance in the areas of quality of food, clean and green city, friendliness of local people and natural attraction. Even though all those image attributes appear in the "Keep Up The Good Work" quadrant, it was shown that performance in these categories were not rated very high (all are less than 4). Special attention should be paid to natural attraction because it's closed to the indifference performance location on the border of "Keep Up The Good Work" and "Concentrate Here." The risk is that this attribute can be underperformed and easily fall into the "Concentrate Here" quadrant. Moreover, all those image attributes should be moved to the iso-rating line for a perfect balance. The area of high importance relative to low performance was seen in the attributes of historical sites/museums, difference customs/culture, cost/price level, accommodation, local infrastructure and overall performance, which all fell into the "Concentrate Here" quadrant. Particular attention should be paid to those image attributes, especially the overall performance, to attract more Japanese tourists. However, tourism information/support and shopping facilities fell into the "Low Priority" quadrant demonstrating that Japanese tourists don't need much support or tourism information since they are able to access to the information resources by themselves.

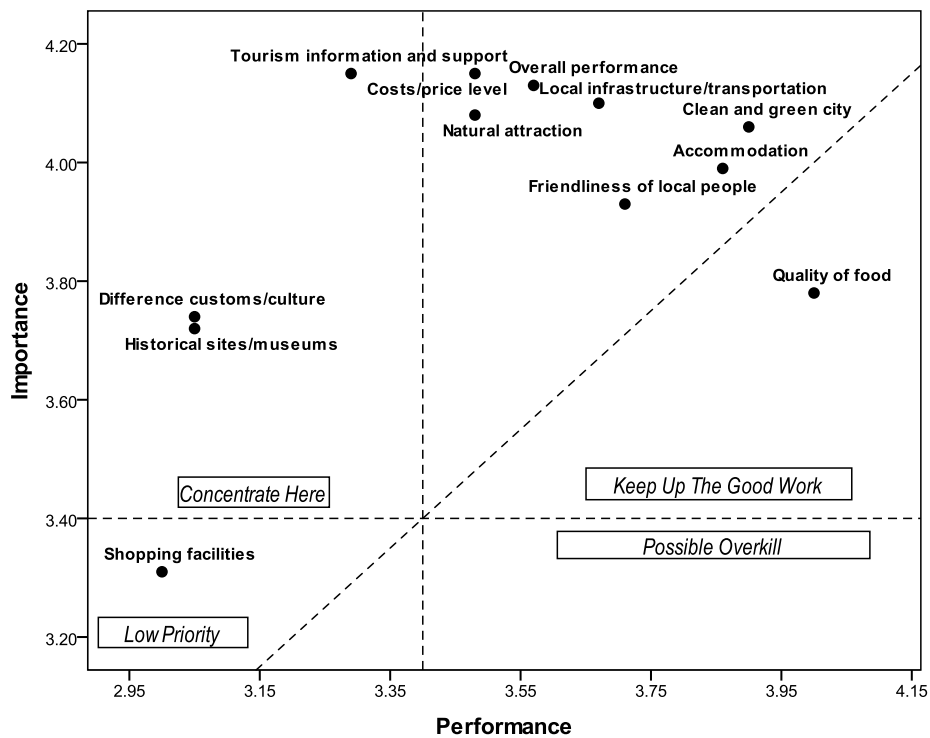
Figure 7: IPA grid for Japanese tourists



6-2-3. IPA for all tourists and for Asian tourists

Even though Hamamatsu's performance is fair on average, performance of the attributes of historical sites/museums, tourism information and difference customs/cultures didn't satisfy the expectations of Asian tourists. Hamamatsu is trying to provide tourism related information in Chinese and Korean but more work needs to be done to increase the effectiveness of these image attributes for Hamamatsu to meet the expectations of Asian tourists. Moreover, almost all the image attributes that fell into the "Keep Up The Good Work" quadrant are away from the iso-rating line. Thus, Hamamatsu should also increase the performance of natural attraction, friendliness of local people, accommodation, clean and green city and local infrastructure/transportation, to improve overall performance.

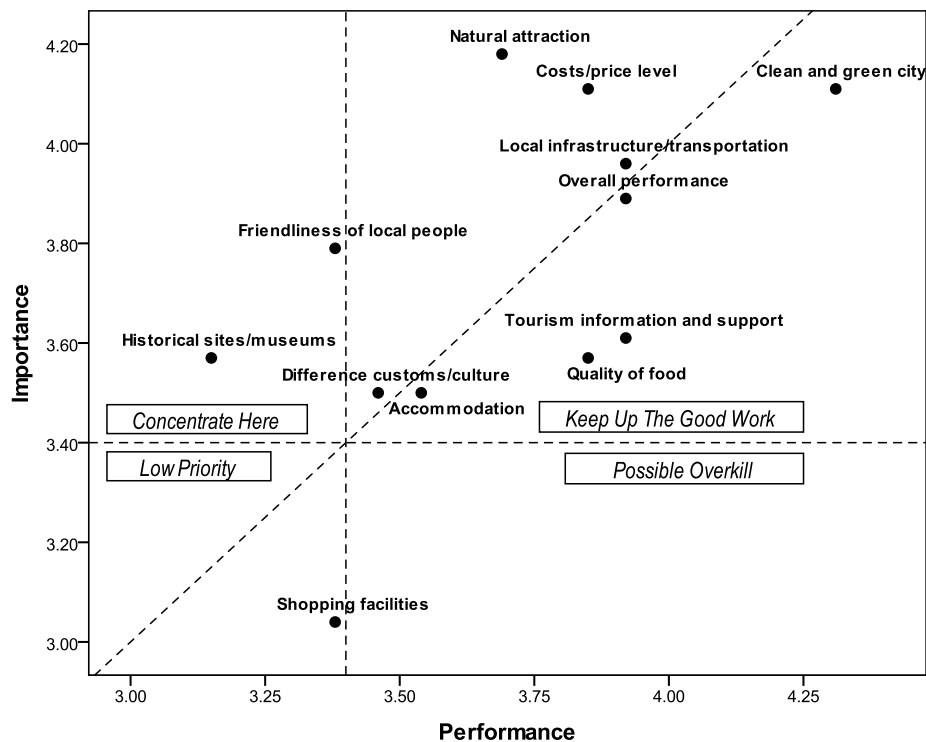
Figure 8: IPA grid for Asian tourists



6-2-4. IPA for other international tourists

Nine image attributes were perceived to be very important to tourists and at the same time, tourists rated Hamamatsu with a high level of performance on those attributes. They fell into the “Keep Up The Good Work” quadrant. This is a good starting point for any marketing strategy for this category of tourist. However, more efforts are necessary to move these image attributes to the iso-rating line. Historical sites/museums and friendliness of local people fell into the “Low Priority” quadrant. Particular attention should be paid to those attributes since Hamamatsu’s performance was found very low, especially for historical sites/museums.

Figure 9: IPA grid for other international tourists



7. Conclusion

This study emphasized the importance of tourist images for travel destinations and examined the projected and perceived image of Hamamatsu as a tourism destination in Japan. With the internet becoming a prominent means of destination marketing and promotion, this paper analyzed the content of website materials related to travel to Hamamatsu so as to determine the most frequently mentioned words used to describe Hamamatsu as a tourism destination. Then a factor analysis was applied on these words (95 words) to produce the projected image of Hamamatsu. This study also used online and fieldwork structured questionnaire based survey (241 respondents) to assess the image of Hamamatsu as perceived by tourists. The Importance-Performance Analysis between expectation and satisfaction levels was then used to identify strengths and weaknesses of Hamamatsu's tourism-related image dimensions so that necessary efforts can be made to ensure that tourists' expectations are met. The findings indicated a significant gap between projected image and perceived image of Hamamatsu. The results also found gap between images of Hamamatsu as projected by promoters. Some Hamamatsu promoters are narrowly positioning Hamamatsu as mainly being an industrial city, with a relatively tight emphasis on culture and history, while other Hamamatsu promoters are positioning Hamamatsu in regards to Hamanako. On the other hand, tourists perceived Hamamatsu in relationship to the quality of food, especially Unagi. Furthermore, tourists in Japan are placing a high importance on historical sites, museums and culture but Hamamatsu's performance in

these tourism attributes were found to be very low. Hamamatsu City should attempt to mitigate the gap between the projected and perceived images for successful tourism promotion and Hamamatsu's economic growth.

8. Acknowledgment

It is a pleasure to thank those who made this DFW paper of the Working Group 3 possible. Prof. Shinkai's encouragement, guidance and support from the initial to the final level enabled us to complete our research about the tourism in Hamamatsu city. Without her support, this paper could have not born the meaningful research outcomes. At the same time, we would like to express our sincere gratitude to Prof. Kawashima, Prof. Ito, Prof. Uchida, Prof Penghuy and Ms. Ichianagi for providing us with an opportunity to conduct this research and also constructive advice to our research.

We are also heartily thankful to the City Hall of Hamamatsu city, Hamamatsu castle, the Hamamatsu Tourism Convention Bureau, the Hamamatsu City Tourism Information Centre, the Hamamatsu Flower Park, the Kanzanji Hot Spring Association, the Hamamatsu Fruit Park and the Maisaka Town Tourism Association. Their kind understanding and allocating limited time to our fieldwork are fundamental to our research.

Lastly, we offer our regards and blessings to all of those who supported us in any respect during the completion of the DFW.

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第 4 章 *Working Group 4*

Eel Industry in Hamamatsu - Strategies, Challenges and Prospects

和文要約

1. Introduction
2. Research on Eel Cultivation and the Role of Shizuoka Prefectural Research Institute of Fishery
3. Processing Eel Industry: The case of Maruhama Association and Shunkado Group
4. Government Policy towards Eel Industry
5. Comments and Suggestions
6. Conclusion
7. Acknowledgement
8. References

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浜松市におけるウナギ産業の戦略・課題・展望

要約

天竜川や浜名湖でシラスウナギが豊富に取れることに加え、エサとなる魚が多く採れることや、主要道路が近くを通過していることによる輸送の利便性から、浜松は日本でのウナギ養殖の発祥の地として有名になった。浜名湖ウナギの生産者はその伝統的な養殖を守り、地元産というコンセプトを大切にしており、浜名湖ウナギの本日までのその知名度、人気は保たれている。しかし、近年の環境の変化により、ウナギの安定性確保が大きな課題となっており、それに加えて国内の他県における生産増や輸入ウナギの増加が懸念されている。

本調査ではインタビューを通して、近年の浜名湖ウナギの生産が横ばい、相対的に減少傾向にあるにも関わらず、そのブランド力や知名度が現在もなお高い理由を探り、浜松におけるウナギ産業の更なる可能性を模索した。

結果として、ウナギ産業における利害関係者（例：研究機関、加工関連企業、浜松市役所）へ、浜松ウナギ産業に対する考えや各々の戦略を聞き取ることによって、それぞれの関係者が直接的、もしくは間接的に浜松ウナギのイメージ作り、品質管理という2点へ注力していることが明らかになった。

また、マーケティングに関しては地元産や地産地消を重視していることが明らかになった。つまり、市場拡大より生産品質を大切にすることである。また持続的で安定した生産と消費を目標にしていることが浜松ウナギ産業の特徴といえる。これは規模の経済の導入が難しく、小規模ビジネスが多く点在する開発途上国において適用可能な考えである。

しかし、ウナギ産業が国内のみならず中国、台湾といった規模で拡大していることを考慮すると、品質を重視したウナギの生産加工技術、ノウハウに加えて、市場自体の拡大戦略をとるといふ、もう一つの柱を立てる必要性があると思われる。これは現存するブランド力を生かして、ウナギ関連商品を民間企業との連携により開発し、新たな市場を開拓するということである。

研究機関

静岡県水産技術研究所浜名湖分場の取り組みは浜名湖ウナギの品質やブランド力を保つことに関連しており、より質の高いウナギを養殖するための技術や資源管理、そして病気などの問題の解決策を生産者たちに提供している。他の魚介類に比べてウナギの生態は解明されていない部分が多く残っているために、養殖の技術やノウハウは非常に有用である。また、室内にある養殖池の水温調節にかかる費用高騰や、ウナギの病気、稚魚確保の難化といった問題点が近年深刻化しているために、長年に渡って静岡水産技術研究所ではこれらの問題に対する研究に取り組んできた。

ウナギ稚魚の孵化や完全養殖に加えてウナギの病気に対する研究も盛んに行われており、その中でも、温度調節によって病原体を減らす研究が主である。これは、生産者の要望によるもので、その理由は薬を使わないからである。研究者は生産者と直接コミュニケーションをとることによって、常に現場において必要とされている課題に取り組んでいる。

またこれらの研究以外に、漁業組合が取り入れているトレーサビリティ制度における記録法のチェックや項目の基準作りに貢献している。このように研究所では技術開発に限らず、生産品質の維持・改善

の土台作りに関わることによって浜名湖ウナギのブランド力に間接的に貢献していると言える。

加工・製造業

浜名湖ウナギ自体の加工は漁業組合である丸浜が行っており、浜松市内での販売やレストラン経営に加え、インターネット販売も行われている。しかし、ウナギを使った商品で全国的に有名なのは、春華堂のウナギパイである。ウナギの加工品としてのウナギパイを製造している春華堂グループでは浜名湖ウナギそのものではないが、ウナギパイを有名にすることによって、浜松市はウナギの生産で有名というイメージを消費者に広げることには貢献しているといえる。

春華堂は豊富な商品展開をすることに加え、工場見学ができる施設を新しく設置することによって、品質管理の高さを消費者にアピールし、同時に更なる興味を喚起している。また、近郊の県に設けられている高速道路のサービスエリアや土産ショップでの販売を展開しており、浜松の土産といえばウナギパイである、という印象をさらに多くの消費者に強く与えているといえる。だが、国内の特定範囲での市場のみを重視しているにも関わらず、ウナギの加工を行っている丸浜といった、他のウナギ産業関係者との協力は見受けられなかった。

浜松市の政策

他県との違いとして、浜松では地元産のウナギのみを利用していることが強みであるが、逆にこれは生産増加に制限をかけているという弱みにも繋がる。しかし、浜松市は市場拡大よりも地産地消を政策の軸にしており、地元の生産者や消費者のニーズに密着した政策を設けている。

生産者支援は生産基盤を安定させるために必要不可欠であり、浜松市の政策において力点がおかれている。また包括的な計画として、養殖業全体の作業部会を設けて生産者や研究者によって課題を明確にし、その解決策案を踏まえた浜松市水産振興基本計画（平成21年度 - 平成30年度）を作成し、これに基づいた政策を行っている。浜松市は市内の生産者のニーズを元に、県が設ける規制を緩和するため、交渉や連絡のパイプライン役を担っている。言い換えれば他の利害関係者とのネットワーク作りの支援しているのである。また、トレーサビリティ制度といった比較的新しい制度に必要な資金を融資をすることでも生産者を支えている。

また、これまでの浜名湖ウナギのブランドイメージへの直接的な貢献としては、マスコットキャラクターによるプロモーションや地産地消を推進するための浜松市水産物旬カレンダーの制作がある。

1. Introduction

1-1 Background and problem statement

The eel industry in Hamamatsu City, Shizuoka Prefecture, is one of the most prominent in the region. Eel is not the only fishery product that the industry relies on but is traditionally the most recognized, having larger effects on other sectors like tourism and a linkage to different businesses in Hamamatsu. By observing Table 1, we can see that eel production in Shizuoka Prefecture is not the largest. However, the production in Hamamatsu is the most famous in the country due to the brand, marketing and cultural recognition of the quality.

Table 1: Main prefectures of eel production

Prefecture	平成 21 年	平成 20 年	平成 19 年	平成 18 年	平成 17 年	平成 16 年	平成 15 年	平成 14 年	平成 13 年	平成 12 年
	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Country wide	22404 (ton)	20,953	22,643	20,733	19,744	21,776	21,742	21,112	23,123	24,118
Shizuoka	1,833	1,632	1,704	1,426	1,633	1,880	1,840	1,961	1,998	2,590
Aichi	7,371	6,272	7,014	6,886	5,835	6,680	6,997	6,093	7,864	8,317
Miyazaki	3,725	3,498	3,725	3,137	2,829	3,215	3,330	2,853	2,485	2,836
Kagoshima	7,358	7,444	7,450	6,980	7,412	7,757	7,374	8,255	8,819	7,637

Source: Japanese Government

Despite this prominence, the quantity produced has not increased that much over time and Hamamatsu is still a net importer of eel, which keeps the industry in a very vulnerable position. It might not be a coherent argument to imply that the citizens are not consuming the same quantity of eel as before. It is necessary to analyze farming, processing and the market itself. It's a fact that if there is a shortage of supply and maintenance or increase in demand, the effect will be an increase in market prices, which is an advantage to the producers but a clear disadvantage to consumers. Therefore, what might be the causes of the stagnation shown on the above table and what effects does the stagnation have on aggregate demand and supply?

This stagnation and other relative aspects of the eel industry were the guidance for this research. Despite our interest in gathering data from the farming side, there is only one certified farming association, “Maruham Association,” that is responsible to ensure the control mechanism of the certification in Hamamatsu in collaboration with the Shizuoka Prefectural Research Institute of Fishery and the local government. Unfortunately, we were not granted access to this association, which constitutes the biggest limitation in this research. Nevertheless, our efforts were to understand the eel industry's business procedures and take lessons, as well as

identify the challenges that the market faces.

Some aspects that can be **hypothesized** to contribute to the stagnation of the eel industry are:

- Scarcity of young eels in Hamamatsu and the need to import from China, the Philippines, Korea and Taiwan. Young eels are necessary to farm and provides a good base of supply to the market.
- Cost of maintenance of eel farming during winter, as they need a certain controlled water temperature to survive and grow.
- Many epidemic diseases that are affecting the eel population like fungus, bacteria and *branchio nephritis*.
- High turbidity of water due to pollution and sedimentation.
- Dependence on imports from China and Taiwan.

These are the challenges that the local government of Hamamatsu is dealing with. The other challenge is to manage a sustainable market with an increase of 1.1 % income per year in the fishery industry, where eel is the main strategy to achieve this goal. In this research, our aim is to provide findings that will help solve the problems that the sector is facing.

1-2 Objectives

It is our **general objective** to analyze the current situation of the eel industry and to look for the challenges and possible prospects that have been drawn to improve it.

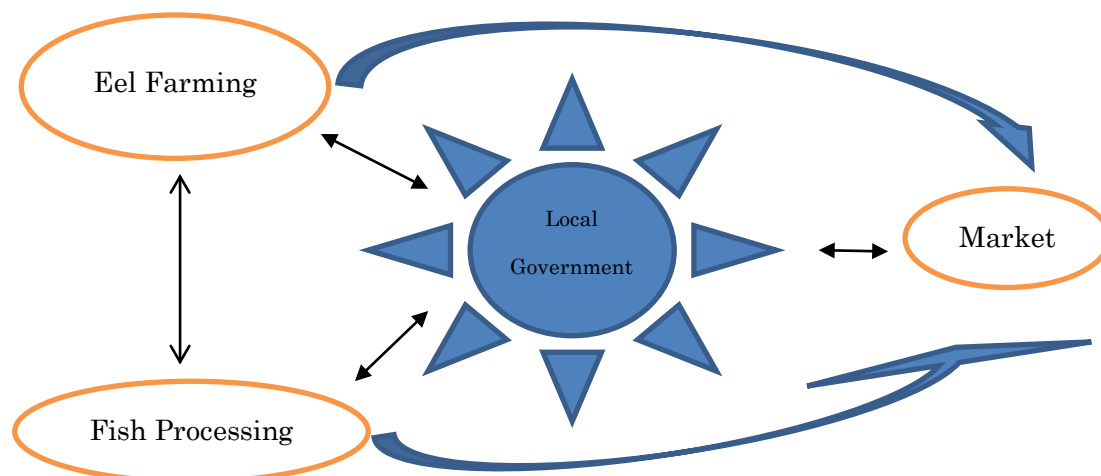
As a **specific objective**, we aim to understand and diagnose possible failures of the linkage between the farming industry, eel processing industry and market. These segments of the market, (farming industry and processing eel industry) when perfectly linked, can give an increased value added to the market and all industry in general. We also will look for the reasons why the eel industry became famous in Hamamatsu.

1-3. Research questions

- What was the strategy employed that made Hamamatsu famous in the eel industry and what are the current challenges?
- What are the reasons for the stagnant aggregate stock of eel production?
- How does the farming industry and processing industry interact with the market?

1-4. Methodology framework

The framework looks to the local government as the center of Hamamatsu's eel industry. The government plays a key role in order to harmonize policies and promote the dissemination of information throughout the industry. It is important to understand that the eel industry has an enormous spillover effect to other industries, especially tourism and services (restaurants, hotels, amusement parks, commerce, city promotion and others).

Figure 1: Methodology framework

Note: The local government includes all government institutions that promote eel policies and research in Hamamatsu.

Source: The authors

1-5. Methodology

- An interview was held with the Shizuoka Research Institute of Fishery, Hamanako Branch, aiming at collecting government data on the eel industry. We also interviewed an expert on the eel industry to understand the research, strategies and prospects of the industry and could also tackle some aspects related with the farming side of the industry.
- An interview was held with the Shunkado Group to understand the role of processing, marketing and branding of eel products.
- To collect government data on the eel industry an interview was held with an expert on fishery policies from the local government, Department of Agriculture, Forestry and Fishery, Division of Agriculture and Fishery Policy, Hamamatsu City.
- Interviews were also conducted on location, specifically with restaurants and small shops dedicated to eel products.

2. Research on eel cultivation and the role of the Shizuoka Prefectural Research Institute of Fishery

2-1. Background of eel cultivation

Unagi (Japanese for eel) has been consumed in Japan since the 17th century. Eel is rich in protein, calcium, vitamin A and E, and is said to give people stamina. For this reason, it is eaten mostly during the hottest time of the year. Eel cultivation is an important source of sustainability of eel market supply, but is also faced by several

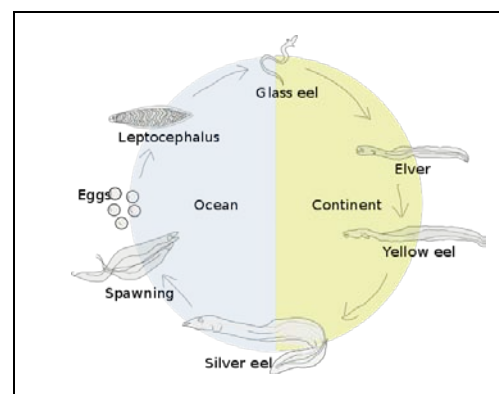
challenges, from the research of eel in its natural environment to cultural aspects. The popularity of eel farming, which started in Lake Hamana in Hamamatsu, holds a long history of over 130 years. The majority of eel, approximately 90%, are produced through aquaculture. However, eel farmers have not yet been able to complete the life cycle of eel in captivity. As a result, eel aquaculture depends entirely on young, wild-caught eels for stock, and is therefore a capture-based aquaculture industry (Halpin, 2007).

Genealogically there are 19 kinds of eel worldwide, with only two in Japan: *A. Japonica* (called *Nihon Unagi*) and *A. Marmorata* (called *Ounagi*). Because *Ounagi* is not very tasty Japan doesn't cultivate it. In Europe and China, a type called *A. Anguilla* is cultivated but its cultivation is prohibited in Japan.

Figure 2: Eel Life Cycle

The eel follow the life cycle below:

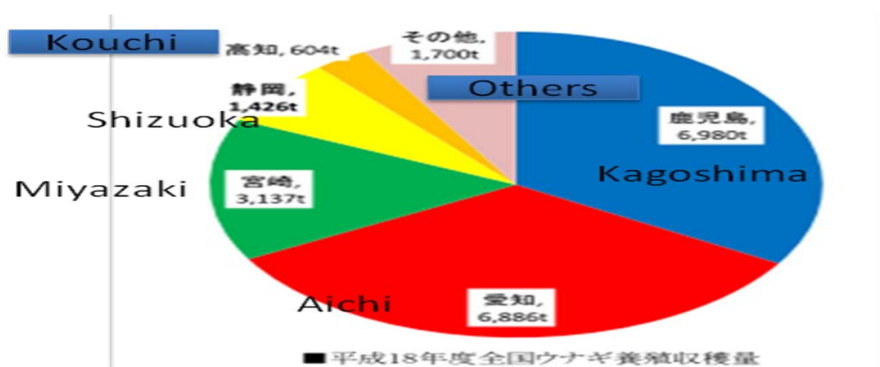
1. Eels lay eggs near Guam Island.
- ↓
2. After incubation they move to Taiwan and Japan.
- ↓
3. They grow around Japan.
- ↓
4. They go back to the South (near Guam Island)



(Source: Shizuoka Research Institute of Fishery and <http://nyfalls.com/wildlife/Wildlife-fish-eel.html>)

According to the Shizuoka Research Institute of Fishery, only the first half of eel life cycle is clearly understood by scientists. The other half (i.e. adulthood, when the eel travels back south) has not been fully understood despite the amount of research that has been carried out.

Figure 3: The amount of eel produced in Japan in 2006



Source: Shizuoka Research Institute of Fishery

Since the end of the 1980's, other prefectures such as Aichi and Miyazaki have exceeded Hamamatsu in the

production of eel. Currently Shizuoka is the fourth largest producer in Japan, with an annual production of 1800 tones. This stagnant production over time is mainly due to adherence of the farming industry in preserving the traditional ways of production. In addition, the farmers believe that an increased use of medicines, such as vaccines and antibiotics to tackle eel diseases, ends up reducing the taste of the product.

Despite these aspects, the history of eel cultivation and branding in Hamamatsu is the richest in Japan. Eel cultivation started in Hamamatsu in 1879, when Mr. Hattori Kurajiro developed cultivation methods. In 1894, Mr. Nasuda Matashichi tried to cultivate eel in Maisaka, which was a town in the Hamana District of Shizuoka Prefecture, currently part of Nishi-ku (western district) in Hamamatsu City. These are the official starting points of eel cultivation in Shizuoka and Japan. Later on eel cultivation expanded to other regions in Hamamatsu. The cultivation in Shizuoka was triggered by its favorable environment characterized by:

- Enough glass eels;
- Enough ground water used in filling the ponds;
- Availability of enough silk worms to feed the eels;
- Advanced transport infrastructure and road networks (Tokaido Railway and main highway connecting east and west).

However, Hamamatsu faces some challenges as follows:

- Due to land subsidence, the prefectural government decided to regulate the usage of groundwater. This regulation started 20 years ago and has limited the basis of business expansion in eel farming.
- The source of natural, raw fish food for eel has drastically declined. Artificial food has been used as a replacement, which in turn affects the taste and the size of production. Therefore, Hamamatsu has been losing its comparative advantage.
- It is very important to control water temperature for eel farming. The management of water temperature depends on fuel. Artificial culturing has changed from ponds to green houses, and as a consequence, has become relatively expensive to manage due to the high cost of fuel.
- The amount of medicine that producers can use against the diseases affecting eel farming is limited due to government regulations.
- The number of eel producers has declined due to pressure from imported eels. In the last 35 years, the number of eel producers has declined from 274 to 34.

It's difficult for Hamamatsu's producers to compete globally since the production of other prefectures has increased. Nonetheless, Hamamatsu's eel producers still have a competitive advantage due to their ability to grow glass eels, which are abundant around the Tenryu estuary.

2-2. The cycle of eel cultivation

The glass eel is caught from December to April and it is basically regulated by the prefectural government. Other prefectures are also using the same regulations. There are two cycles for eel cultivation:

- 1- Early selling system (short period): this is a half year cycle where the cultivation of glass eel starts on

December or early January and the production peak is from September to October to adjust with the day of *doyou no ushi* (Japanese traditional day to eat eels).

2- Full year cultivation system (long term): where the eels take longer to gain around 170~250g are introduced to the market later than the others. The eels are produced and sold throughout the year. They finish selling all eels by the end of the next season of *doyou no ushi* (one year and half). The price of eel reaches its highest peak during the *doyou no ushi* period and its second peak is during New Years Eve.

Up until the period of 1965-1975, farmers used to cultivate eels in ponds. Farmers fed the glass eels with angleworm and the young eels with raw fish. Nowadays, the farmers use indoor ponds to maintain the water temperature. They still use outdoor ponds during summer season because temperature conditions are appropriate. In the indoor ponds, the farmers control the water temperature by using piped hot water. They also use a water wheel to improve oxygen and water circulation. They prepare the eel feed by mixing fish oil, fish powder and water and use artificial feed for glass eels. The suitable water temperature for eels is around 26 to 30 degrees Celsius.

2-3. Research and certification

The Shizuoka Prefectural Research Institute of Fishery is responsible to conduct research and improve the eel conditions across Japan. According to the scientists of the Institute, parasites, viruses and unknown conditions are responsible for the declining production and death of eels in captivity. Without these challenges, 90% of the eels can survive and go to the market. Therefore, it is necessary to inject eels with hormones in order to ensure their maturity as well as to increase female production (98% of cultivated eels in captivity tend to be male). Since the number of wild glass eels is unstable and since it is necessary to develop a technology to increase the growth of the female eel population, the Research Institute mixes hormones into the feed. In the case of cultivated eels, it takes 300 days for the *leptocephalus* to become glass eels. Even after hatching only a small percentage of the *leptocephalus* survive. The wild ones take 180 days.

The Research Institute is also responsible to draw the patterns of certification of eel farming in the market. The research comprises the following aspects:

- Technology improvement to produce high quality *leptocephalus*;
- A national project on how to get good eggs from adult eels;
- Main research related to how to control water temperature;
- Research on disease control of the farming environment without medicine, since a high number of

eel farmers have a bias towards the use of medicines for disease control. The Research Institute tries to find new methods such as controlling water temperature and *bacteriophage* to reduce diseases.

The success of these research areas is the pillar to guarantee branding quality and as part of this commitment, certification takes a relevant role in protecting the market against low quality products.

Shizuoka certification follows a system for agricultural and fishery products, which aims to provide safety management in the production process and information provided by the prefectural government. They

apply GAP (Good Agricultural Practice) and HACCP (Hazard Analysis and Critical Control Point) methods. In the past, after packing the products, they used to pick up only one or two samples and check their safety and quality. Now they check the whole production process. The idea behind the HACCP is to control the process itself, rather than to conduct spot checks. The basis of GAP method consists of *Planning, Doing, Checking and Action* (PDCA cycle). The farmers are called to document everything related with their production.

There are management manuals that are used in the process of certification in order to maintain the production and manufacturing environment. If one passes the standards tests, the Governor of Shizuoka Prefecture gives the certification. These standards are very strict. Farmers prefer to join the association in order to benefit from the collective experience on the existing patterns of production and because the local government only recognizes the Maruhama Association in the certification process. Among all fishery products, only eel has received certification so far. The term of validity of the certification is three years and the Research Institute conducts regular inspections within these three years, to check if the documentation and training have been done. Currently, the number that has received the certification is 43 (27 in the agriculture sector, 15 in the stockbreeding sector and 1 in the fishery sector of the Maruhama Association).

Certification standards consist of 45 items, and though they are not relevant to explain in detail in this paper, they can be divided into two main parts:

A - The standard for checking the safety of production process

1. The standard for risk management (33 items). The Research Institute developed manuals with Maruhama Association for issues like:
 - a) Management of cultivating environment (water use, water quality, waste management);
 - b) Management of introduction of *leptocephalus*;
 - c) Management of cultivating process (how to cultivate, treat diseases);
 - d) Recording, keeping and checking the production history;
 - e) Checking residual fishery chemicals;
 - f) Management of shipping.
2. Standard of checking and action:
 - a) Inside examination done twice a year;
 - b) Inside training to review the rules and defects on examination by the research institute.

B - Standard for managing information released to customers

Created by the Shizuoka Prefectural Government, this information can be checked in the Maruhama Association homepage and Shizuoka Prefecture homepage. It consists of the standards for providing information, for example the registration in a special homepage for digital certification and management if requested, or just providing free information and standards for communication, for example the management of inquiry and claims.

The certification aims to develop a structure of safe products, providing safety to customers, improving the producers' awareness of safety and improvement of management such as standardized and unified production, a new production method with a PDCA cycle.

All of these aspects combined make an important core of strength for eel production in Hamamatsu and an essential characteristic for eel branding, from the production or farming to the processing and markets. The recognition by consumers of the role of all stakeholders in preserving the quality of Hamamatsu's eel is the key for the success of the marketing strategy blueprinted by Hamamatsu's government.

3. Eel processing industry: The case of Maruhama Association and Shunkado Group

3-1. Maruhama Association

The fish processing industry is widespread and comprises various types of products that offers a higher market value addition. Creativity is one of the requirements to operate in this widespread, but generally very competitive industry. In Hamamatsu, the eel produced by Maruhama Association (founded in 1949) is sold to shops directly managed by the Association, but it is also processed and sold to different stores and clients around Japan with a special home delivery service provided through the internet (see Maruhama's homepage). They also provide a service called traceability, which is a combination of mechanisms that can reveal the history of the product dating back to production. For example, in the Association's roasted eel production, a bar code is attached to the goods, by which you can trace who raised the eel and the manufacturing process. To provide a good, safe and secure eel, the Association has been committed to traceability since May 2003.

Maruhama Association's marketing on the internet claims to have reliable processing factories and high hygienic standards, together with the uniqueness of the Lake Hamana environment. Eel fishery in Lake Hamana is 100% locally produced fish. Seed is cultivated in the Tenryu River and Lake Hamana. The creativity of the Maruhama Association goes to the point of having eel products that require only the oven in order to cook them. This is significant because generally people don't have eel preparation skills. Therefore, one can easily enjoy the product at his/her home. Despite these advantages, eel is still a luxury, as the prices vary from 4,900 JPY for 3 pieces, to 12,500 JPY for 10 pieces, a price to appreciate the unique taste and the hard work of eel cultivation and processing.

3-2. Shunkado Group

Shunkado Group was founded by Mr. Yamazaki Yoshizo in 1889 when he opened his first shop selling "*Sweet Natto*," a type of sweet beans. In 1949 he established Shunkado and from 1961 started to manufacture their main product, Unagi Pie. Unagi Pie has traditionally represented the city and visitors buy them as

Hamamatsu's souvenirs. They also sell different types of cakes but Unagi Pie is their specialty. Even though the pie is made using eel powder (made from eel bones), the product does not have any taste or smell of eel. The company employs 431 workers and has a large sales network using directly owned shops and others souvenir shops at parking areas, airports, train stations, supermarkets and hotels.

The Unagi Pie factory in Hamamatsu, founded in 2005, offers tours where the customers can acquire knowledge about the processing phases and the history of the company. The company invests in product diversity that offers retail sizes and quantities to allow different prices that can fit anyone's budget. Due to the fragility of the products, the company canceled delivery services through the internet. However, Shunkado Group has a strong retail business since they are able to provide products at easily affordable prices.

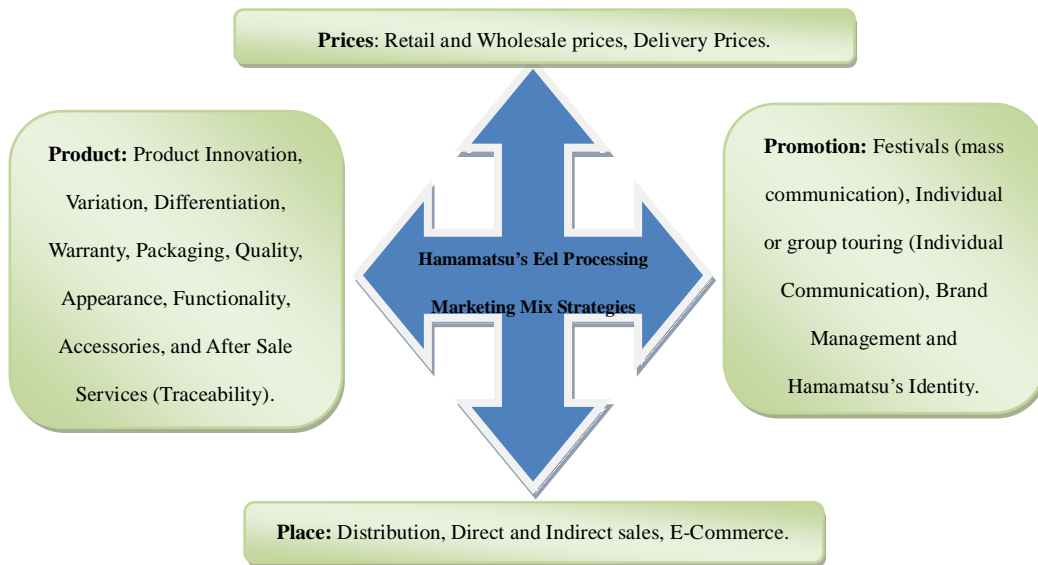
Despite their selling success in Japan, the company has no plan to access international markets.

3-3. Marketing analyses

The processing side of the eel industry in Hamamatsu is one of the key players for branding promotion, as they care in the most visible way about the symbols of Hamamatsu. It is possible to find the signs of creativity and a strong marketing mix such as:

- 1- **“Product”** decisions, such as what to offer, the brand and merchandising;
- 2- The **“Price”** that the client should pay for the product;
- 3- Where the product is **“Placed”**;
- 4- The **“Promotion”** and communication decisions.

During the research, no apparent signs of direct marketing cooperation between Shunkado Group and Maruhama Association were found, though they use the same markets and they equally benefit from the government's promotion initiatives. We suggest that the processing side should find products in other sectors that can increase the consumer's interests and alternatives. For example, a combination of eel products with beverages, increasing information in other languages as Hamamatsu is also a tourism spot, a joint venture program for touring eel factories and more attention to the price strategies (retail and wholesale), as we realized that it is the weakest side of the four P's (marketing mix).

Figure 4: Marketing mix analysis of Hamamatsu's processing industry

Source: Authors

4. Government policy towards the eel industry in Hamamatsu

Eel producers in Hamamatsu only use local resources. This unique characteristic creates a difference with producers from other prefectures. However, it does pose some disadvantages, for example it reduces Hamamatsu's competitiveness.

4-1. Basic political activities focusing on eel industry

4-1-1. The basic plan for fishery promotion in Hamamatsu (since 2009)

Part of Hamamatsu mayor's manifesto focuses on strengthening the fishery industry as one of the top performing industries of Hamamatsu City. This manifesto includes aspects like branding strategies, school lunch promotions and the use of the mascot of Hamamatsu City, which is called *Unagi Inu*.

The government established four working groups to support the policies of the fishery industry, namely: inshore fishery; lake surface fishery; fish cultivation; and fishery in Tenryu River and inner lake. Each group has set the issues that need to be solved and members of each working group include three eel producers, two executives of the fishery association and the Research Institute of Shizuoka Prefecture.

4-1-2. Preservation of the eel industry

The government's main concern is regarding the eel farming sector, as the processing of the fish is not very significant because most of the products are sent to stores raw and fresh. According to the interview, it was found that the government has a good relationship with Maruhama Association in the process of production and

certification. The Association represents the fishermen since the government does not deal with individual producers. Lake Hamana eels are mainly processed by the fishery association. According to the interview, it would be preferable to expand the processing sector, which would result in an increase in the supply of products.

4-1-3. Government support

In order to solve the current problems facing eel farming, Hamamatsu City has established political plans to help producers and their businesses. Hamamatsu City is the main coordinator for the negotiation between producers and the Shizuoka Prefectural Government on issues like water usage regulation and eel medicine distribution. There are several projects that demonstrate the government's policies to accommodate issues that hinder the development of eel production of Hamamatsu, such as:

- Support for the negotiation of loosening the groundwater usage limitation;
- Support for promoting fishery medicine use;
- Financial support system.

Finance is also a major problem in eel farming. The local government does not provide financial support to individuals, leaving this for finance associations or other organizations. Hamamatsu City has two ways to respond to financial needs:

1. When borrowing money from the bank or getting financial help from the local government to improve or modernize their facilities, the local government supports by supplying a certain amount of the loan interest.
2. Government support can be given through the farmer's association for the enhancement of factory infrastructure and facilities. The city government provides financial support to establish new businesses by introducing new facilities based on HACCP and GAP methods.

4-1-4. Increasing popularity of Hamamatsu eel

The local government of Hamamatsu aims to increase consumption of products from Hamamatsu fisheries and also to promote the image of Hamamatsu as the city of eel. For this purpose, they have set promotional festivals and have introduced eel as a part of school and hospital lunches. They are also trying to develop eel as the 6th industry, capitalizing on the benefits of a strong linkage from production sectors, processing and marketing, as well as creating strong backward and forward industries cooperating with other sectors. For example, they are trying to develop a new network with the agriculture sector by arranging for the sale of fishery products directly in shops that usually deal with only agricultural products.

The government is also promoting Hamamatsu's eels in other prefectures. They participate in various expositions and festivals in other cities. Some opinions coming from the general public are helping to rethink policies to increase Hamamatsu's eel popularity for example, increasing seasons for eel consumption to not only the habitual summer and fall seasons, but also during winter and spring.

5. Comments and suggestions

Hamamatsu's position in the marketing of eel is unique due to its approach in doing business. Most of the achievements of Hamamatsu's branding were due to its strong preservation of traditional methods for eel cultivation and a closed market to external competition through the certification process. The city of Hamamatsu has several attractions. The automobile industry, with its long history is one of them but they also have the uniqueness of being the eel custodian of Japan. At Hamamatsu's main train station, you can see *Mr. Unagi Inu*, a statue that is believed to bring happiness to the citizens, as well as promoting the products. He is described as the Vice Mayor of the city. The first impression that the visitors receive is that they cannot return without trying eel dishes and experiencing the eel industry.

Photo 1: Mr. Unagi Inu



(Source: Authors)

The lesson here is on the work that the government and partners do to promote this image. To sell a product one has to market and brand it in order to provoke unique sensations for the consumer, even if one can find the same sort of product elsewhere. This experience can be benchmarked by developing countries, where there are a lot of small products with comparative advantage. However, because the institutions that are responsible to promote them are not aware of the potential benefits of linking a city or a village with a local product, the research and development of these products are not being promoted. It is important to promote this self-discovered initiative in order to develop and attract investments in emergent markets (Todaro, 2009:184).

Although the government is thinking about new ways to increase eel demand, they have failed to increase eel supply. The supply problem is not isolated to Shizuoka, but is a national and international issue. Consequently, we realized that eel products, especially dishes in restaurants, are among the most expensive products. In the two specialized eel restaurants chosen randomly in the center of Hamamatsu, the average price of an eel set (generally rice, five pieces of eel, soup and fruit) was 2,666 Japanese Yen (JPY) and 2,300 JPY respectively. The most expensive set was 3,400 JPY and the cheapest 1,950 JPY for the first restaurant and 2,950 JPY and 1,600 JPY for the second.

Photo 2: Eel set



(Source: Authors)

According to one owner and manager of the restaurant, the biggest challenge they face is the supply of the eel. They have to purchase a large amount of eels and freeze them for some time. This reduces the quality of the product. Another challenge is regarding experts to prepare the eel. It takes years to develop skills to prepare eels. These factors combine to influence the price, although they are able to keep their business profits stable over time.

Two things that might help solve this problem are events that promote eel preparation and publishing a

Hamamatsu cookbook. The creation of a fishery culinary school run by a local restaurant might also boost the private sector's interest in increasing their investment for this industry and the public's consumption of fish products in general, seeing that one reason for the drop in fish consumption is that it is seen as expensive and troublesome to prepare. This would also increase the the number of people who know how to prepare eel.

While the image of traditional eel production “Made in Hamamatsu” promotes the brand, it also has a bad connotation in regards to consumers' price. We suggest a hybrid approach on supply of eel, where the preparation method of eel is also included in the branding and not only the origin of the fish. Note that while glass eels are imported, cultivated by the farmers and then referred to as domestic products in other prefectures, only resources that are local and traceable by certification methods are referred to as Hamamatsu's eels. Imported glass eels should gain Hamamatsu's branding if they are prepared according to Hamamatsu's standards. Moreover, we noticed that the consumers are not 100% aware of the origin of eels that are consumed. The distinction should appear on the menu because of the possibility that glass eels from other regions are being consumed instead of Hamamatsu eels.

6. Conclusion

When we decided to carry out this research, we were very curious about the strategies that make Hamamatsu's eels famous in Japan, especially since Shizuoka Prefecture is not the largest producer of eels in Japan. We found several keys to the success of Hamamatsu's projected image as the City of Eel. Among these are the strong use of the historical tradition of eel and the recognition by the local and nonlocal people of the historical methods of the production. In addition, the efforts by the local government to promote this image, i.e. using public places to promote eel branding and recognizing eel as the official symbol and attraction of the city also play a key role.

On the other hand, the reasons for stagnant eel production are due mainly to the trade off created by maintaining the traditional ways of producing eels and the lack of openness to new markets (accepting the eels from other regions). Because of these, Hamamatsu is not the main producer of eels in Japan but has the national recognition of the role of custodian. The challenge is how to keep this responsibility while at the same time, lead the production in Japan.

The interaction of the farming and processing industries to the market is positive and it has some lessons that can be adopted by developing countries. The main lesson is how the role of public institutions can make a difference for private business by supporting promotion initiatives and providing research and development that would otherwise be too expensive for private institutions. The other factor is how the private sector can make a profit by using the opportunities that the market gives. The correct interpretation of marketing strategies may bring an increased added value to local products.

The competitiveness of Hamamatsu's eel industry is still weak because it depends on its own production, while other prefectures have access to imported glass eels. This also limits Hamamatsu's producers from tackling

international markets. However, since national markets can bring profits to the business, internationalization of the market is not imperative. But it is important not to avoid opportunities of international business if conditions are created.

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