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TOURISM UNDER THE NATIONAL DEVELOPMENT PLAN IN MALAYSIA

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The tourism sector in Malaysia plays a pivotal role in fostering the country's overall economic growth and inclusivity. Such significance is evident through its incorporation into various national plans aimed at advancing human capital development and improving the socioeconomic landscape.

Development plans for tourism began with the First Malaysia Plan in 1966-1970, where the government provided incentives for hotel construction and upgrades. A more defined roadmap for tourism unfolded during the Second Malaysia Plan (1971-1975), which targeted 170,000 tourist arrivals by air and sea in 1975. This represented an average annual growth of 17%, surpassing the 13.7% recorded during the First Malaysia Plan (Economic Planning Unit, 1971).

During the Second Malaysia Plan (1971-1975), employment in the tourism sector was more than doubled from 5,200 in 1970 to 13,870 in 1974. The Bumiputera's participation in the sector also doubled, with their ownership of hotels and motels increasing from 14 in 1972 to 28 in 1975, involving a capital outlay of USD 24.6 million (Economic Planning Unit, 1976). Additionally, the number of Malay-owned travel and tour agencies rose from 42 to 115. Out of 100 licenses issued for tourism agency operation, 46 were allocated to the Bumiputera.

The tourism development, which created employment opportunities and benefited targeted groups such as Bumiputera, served the principles of the then main development plan, namely the New Economic Policy (NEP). NEP aimed to enhance the well-being of low-income households and promote economic participation across different ethnic groups, particularly the Bumiputera community (Marzuki, 2010). Subsequent plans for the tourism sector have also been continuously outlined in various development frameworks, including the New Economic Model (NEM) (2011-2020) and the Shared Prosperity Vision (SPV) 2030 (2021-2030).

The emphasis on tourism development continued in the Eleventh Malaysia Plan (2016-2020) under Strategy Paper 18C focusing on transforming the services sector into a modern, knowledge-intensive industry (Economic Planning Unit, 2015a). The plan highlighted key areas such as knowledge-intensive sectors and the creation of high-income jobs within the tourism sector. Tourism held a significant role as a high-impact project in the Eleventh Malaysia Plan under the Regional Economic Corridors Development (Economic Planning Unit, 2015b). The target was to generate RM103.9 billion of Gross National Income (GNI), bringing in approximately RM168 billion in tourist receipts and accommodating 36 million arrivals by 2020 (Performance Management & Delivery Unit, 2013; Tourism Malaysia, 2018).

Similarly, the Twelfth Malaysia Plan (2021-2025) stressed the importance of tourism as a high-potential growth industry to elevate the country along the value chain. Considering the prolonged challenge of low value-added issues, tourism emerged as a key player in enhancing productivity through higher value-added and knowledge-intensive activities (Economic Planning Unit, 2021). Considering the impacts of the COVID-19 pandemic, the targets set during the Twelfth Malaysia Plan (2021-2025) period are more conservative than

those of the Eleventh Malaysia Plan (2016-2020). Tourist receipts are expected to reach RM77 billion from 22 million international tourists in 2025 and RM120 billion from 30 million tourists by 2030 (MOTAC, 2022).

Moving forward, the National Tourism Policy (NTP) 2020-2030 represents a shift in focus, prioritising receipts from foreign tourists through extended stays and moving beyond a sole emphasis on the number of tourist arrivals. This strategic shift aligns with earlier directives outlined in the National Key Economic Areas (NKEAs) under the New Economic Model (NEM) (2011-2020) (Performance Management & Delivery Unit, 2010).

However, the Malaysian tourism sector is struggling with a lack of creativity and innovation, resulting in a perceived 'tired' and 'unattractive' ambience. To address these concerns, the Ministry of Tourism, Arts, and Culture (MOTAC) aims to enhance sustainability and augment human capital capacity across all tourism sub-sectors (MOTAC, 2020). The National Tourism Policy (NTP) 2020-2030 introduces six transformation strategies, aiming to position Malaysia among the top ten global destinations in both arrivals and receipts:

1. Transformation Strategy 1: Strengthen Governance Capacity
 - Enhancing coordination among 40 government agencies directly and indirectly involved in tourism development.
2. Transformation Strategy 2: Create Special Tourism Investment Zones (STIZs)
 - Designing STIZs through public-private partnerships to propel high-value tourism development.
3. Transformation Strategy 3: Embrace Smart Tourism
 - Intensifying the digitalization process within the sector through e-marketing and big data analytics.
4. Transformation Strategy 4: Enhance Demand Sophistication
 - Attracting high-value or high-yield tourists by positioning Malaysia as a premier ecotourism destination.
5. Transformation Strategy 5: Practice Sustainable and Responsible Tourism
 - Promoting inclusive tourism development, benefiting vulnerable groups such as women, youth, and other disadvantaged segments.
 - Aligning with United Nations Sustainable Development Goals (UNSDGs) number 8, 12, 14, and 15.
6. Transformation Strategy 6: Upskilling Human Capital
 - Promoting an attractive career path in the tourism sector.
 - Expanding the use of digital technology within the sector.
 - Supporting the progression and career path in tourism start-ups.
 - Encouraging closer collaboration between the public sector, private sector, and academia in enhancing human capital development.

Three crucial strategies, namely Transformation Strategies 2, 3, and 6, are pivotal in advancing Malaysia's tourism sector into a higher value chain. This is characterised by enhanced human capital and an attractive pay scale, moving beyond the prevailing low-skilled and low-wage structure within the sector. These strategies are set to equip the tourism sector with quality human capital and foster skilled job opportunities through higher value-added and quality investments.

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