5－7　環境配慮実施上の問題点・留意点

5－7－1　問題点

5－2環境法制度の項で述べたようにジョルダンには現在環境政策を一元的に取り扱う環境法はない。1992年地方自治環境省が作成し、年内の承認をめざしているジョルダン環境法「Jordan Environmental Act」が発効したあかつきには、それがジョルダンにおける環境基本法となり、ジョルダンの環境政策はその法律をもとに立案されることとなる。

環境関連の基本法がない現時点では、観光開発計画等開発計画に伴う環境影響評価は開発計画にかかわる各関係省庁の独自のマニュアルに沿って行われることとなる。本件にかかわる環境影響評価は観光遺跡省の指針に沿って行われるわけだが、環境遺跡省の環境部門は発足してまもなく、現在独自のＥＩＡ Formの作成は行われていない。

又、今回、計画省の環境部門に対するヒヤリングによると、環境配慮の問題は国家として最重要課題であり、計画省も環境影響評価の報告書に関してコメントを加えるという。ジョルダン国に限らず、省庁間のセクショリズムが計画の進行に障害となる例は少なからずあり、事前に十分な調整をはかる必要が生ずる可能性がある。

5－7－2　留意点

(1)　水資源

ジョルダンは水資源が限られており、その限られた条件の中で観光開発を行うことになる。いうならばあらかじめ制約を受けた条件下での開発という側面がある。この限られた水資源を人も自然も共に利用しあって生きているということに留意して、環境配慮がなされる必要がある。

(2)　遺跡の保護

ジョルダンの主要な観光資源となる遺跡は資源であると同時に人類にとっての貴重な財産でもある。観光開発の過程でこれらの文化遺産の価値が損なわれないよう、また観光資源としての利用を持続していくためにも、遺跡の保護に関しては十分な配慮が必要である。

６．本格調査への提言

６－１　調査目的と基本方針

６－１－１　調査目的

(1)　目標年次を2010年とした全国観光開発戦略の策定（フェーズⅠ）

(2)　上記観光開発戦略より選定された優先整備ゾーンの目標年次2000年とした観光開発計画の策定（フェーズⅡ）。ただし、目標年次については財政事情、財源確保のための手続き期間、事業化に要する期間等現地事情を勘案し、ジョルダン政府と協議の上、適宜設定することも可能とする。

６－１－２　基本方針

(1)　観光は現状でも、また将来の可能性としても、ジョルダン国にとり最大の外貨収入源であり、雇用創出の手段であることから、観光の経済成長への寄与という点に十分配慮するものとする。

(2)　中東和平の進展にともない、急増することが予想される観光需要による環境破壊、遺跡破壊等に的確に対処するとともに、域内各国との関連を考慮しつつ和平の果実がジョルダン国に十分に享受できるよう配慮する。

(3)　ジョルダン観光開発に対する各ドナー国の関心も急激に高まっており、今後とも各ドナー国の動きについては定期的にチェックし、常時調整の努力をすることが重要である。先方政府はこうしたドナーの活動を全て一元的に把握しておらず、これらを、総括すべき指針及び基本政策を持っていない。本調査のうちフェーズⅠの全国観光開発戦略は、これらドナーの協力内容をも包含した最上位戦略計画を作成するものであり、各ドナー、関連する省庁間の調整に配慮する。

(4)　観光は経済発展の遅れた地方部のインフラ整備を促進し、地場産業の支援・育成し、住民参加による地域開発を促進するという観点も合わせ持つ。この観点を踏まえ特にフェーズⅡの優先ゾーンの観光開発計画策定に当たっては、十分な調査と分析を行うとともに、優先ゾーンの国家経済に与える役割、その貢献度をできるだけ説得力ある形で示すものとする。

６－２　調査対象地域

６－２－１　全国観光開発戦略（フェーズⅠ）

ジョルダン国全域

６－２－２　優先整備ゾーンの観光開発計画（フェーズⅡ）

アンマンからアカバに至る王の道（King's Highway）に沿った地域を中心とし、西限を死海

及びワディアラバ、東限をデザートハイウェイとし、ワディラム及びサウジアラビア国境のムダワラを含む地域より選定するものとする。具体的な優先整備ゾーンはフェーズⅠの結果を踏まえ選定するものであるが、先方との協議の中で得た感触としては、以下の２ゾーンが考えられる。

(1) 死海東岸から、マイン及びカラクを含みタフィーラに至るゾーン

(2) ワディラム、ムダワラ、アカバをつなぐトライアングルゾーン

６－３　調査内容と実施方法

６－３－１　現状分析

(1) 関連資料・情報の収集・分析

1) 社会経済条件（社会経済指標、国家機構・予算等）

2) 域内国際関係（中東和平の動向に係る資料・情報、近隣諸国の社会経済情勢）

3) 関連開発計画（５ケ年計画、インフラ整備計画、各ドナーの観光開発計画等）

4) 土地利用計画

5) 観光政策・法制度

6) 観光産業（ホテル業、旅行業、土産物業、運輸業等）

7) 交通ネットワーク（道路、鉄道、フェリー、航空）

8) 交通インフラ

9) 観光流動（入込客数、Ｏ／Ｄ等）

10) 観光資源（自然資源、遺跡等の人文資源）

11) 社会インフラ（上下水道、廃棄物処理、電力、通信）

12) 観光施設（ホテル、レストハウス、博物館、水族館等）

13) 自然条件（気象、海象、地象）

14) 環境政策・環境現況

本件事前調査団が先方に前もって送付しておいた質問表（Ｑ／Ｎ）を用い、関連資料の入手可能性についてチェックした内容及び調査団が収集した資料を巻末付属資料に添付する。なお、関連開発計画については、本調査団が収集した資料を基に３－９節に示す通り整理したが、今後各ドナーの協力と調整しつつ本調査を進めることが極めて重要となるので、他に漏れがないかどうか十分に確認した上で、綿密に検討を行う必要がある。

(2) 現地踏査

(3) 観光ポテンシャルの評価

以下の項目について、近隣諸国との比較のもと現状の評価を行い、その問題点を抽出する。

1) 観光資源

2) 観光産業

3) 交通・社会インフラ

4) 観光施設

6－3－2　全国観光開発戦略の策定

(1) 開発目標の設定

ジョルダン国の経済成長へ寄与、地域開発の促進等の観点から観光開発が果たす役割を整理し、その開発目標を設定する。

(2) 観光需要分析

1) 市場調査

以下のセグメントに分けて調査を行う。

① ジョルダン人の国内観光

② 近隣諸国からの地域観光

③ その他外国人による国際観光（特に日本よりの観光）

2) 政治経済シナリオの設定

中東和平の進展等による近隣諸国との地域観光需要に対応するため、目標年次における近隣諸国との関係を軸にシナリオを設定する。設定に当たっては、ジョルダン国政府と十分協議するとともに、同時期に実施予定のＪＩＣＡ開発調査「アカバ港改善計画調査」との整合も図るものとする。

3) 社会経済フレームの設定

既存の上位計画、現在の社会経済動向を勘案し、社会経済指標（人口、ＧＮＰ等）の将来値（2010年及び2000年）を設定する。

4) 需要予測

市場調査で分けたセグメント毎に目標年次における観光需要を予測する。

5) 観光施設容量の分析

上記4)で予測した観光需要と既存の観光施設（特に宿泊施設）の容量との分析を行う。

(3) 全国観光開発戦略の策定

1) ゾーニング

ジョルダン全国を地域的なまとまり、観光資源の特質等を勘案し、いくつかのゾーンに分割する。

2) 交通ネットワーク

上記で設定したゾーン間及び近隣諸国との観光流動を分析し、交通ネットワーク（道路、鉄道、フェリー、航空）を設定する。

3) 観光施設計画

各ゾーン内の観光施設の規模、配置の基本計画を策定する。

4) 環境・遺跡保全計画

「6－3－1(3)観光ポテンシャルの評価」を踏まえ、自然資源の分布状況、遺跡・文化財の分布・保存状況等以下に示す項目を既存資料、ヒアリングにより把握し、環境・遺跡保全計画を策定する。

① 収集資料（5－6節に示す以下の項目）

・ 自然環境　珊瑚礁、湿地、森林等の重要な環境
　　　　　　貴重動植物の生息地
　　　　　　土壌侵食、崩壊等起こしやすい危険個所
　　　　　　重要な景観

・ 社会環境　地域住民の居住状況
　　　　　　遺跡・文化財保全又は宗教上の観点から重要な地区

② ヒアリング先　巻末添付資料（8．a．ジョルダン国内の重要な情報源）

(4) 観光振興戦略の策定

以下の3項目に分けて策定する。

1) 観光市場開発計画

市場調査で設定したセグメント毎に市場開発計画を策定する。

2) 観光産業振興計画

3) 観光情報整備計画

観光統計の整備、観光客へのインフォメーションの提供等について検討する。

(5) 開発シナリオの設定・フェージング

上記で策定した「観光開発戦略」及び「観光振興戦略」を組み合わせ、時系列的にみた開発のシナリオを設定する。

(6) 総合評価及び優先整備ゾーンの選定

経済面、社会面、環境面から総合的な評価を加え、優先整備ゾーンを選定する。ゾーン数については、2ゾーン程度とする。選定に当たっては、ジョルダン国政府と十分協議するとともに、特に選定ゾーンが国家経済に与える役割、その貢献度について可能な範囲で分析することとする。

6－3－3 優先整備ゾーンの観光開発計画の策定

(1) 開発方針の設定

(2) 開発基準の設定

自然環境及び遺跡等の許容量を勘案して、開発の基準を設定する。

(3) 社会・自然・環境条件等現地調査

必要に応じ実施する。

(4) 観光開発計画の策定

1) 土地利用計画

2) 交通ネットワーク

3) 施設計画

以下の施設について施設配置計画を策定する。

① 交通インフラ（道路、鉄道、フェリー、空港）

② 社会インフラ（上下水道、廃棄物処理、電力、通信）

③ 観光施設（ホテル、レストハウス等）

4) 観光振興計画

5) 管理・運営計画

各施設の管理・運営計画を策定する。

(5) 概算事業費積算

各施設について予備的な設計を行った上で、事業費の積算を行う。

(6) 初期環境影響評価（ＩＥＥ）

フェーズⅠで策定した環境・遺跡保全計画に基づき、必要に応じ現地調査結果を踏まえ、開発に伴う初期環境影響評価を行う。

(7) 概略経済・財務評価

(8) 実施計画の策定

(9) 総合評価及び優先プロジェクトの選定

(10) 優先プロジェクトの５ケ年アクションプログラムの策定

6－3－4 典型的なツアープログラムの提案

6－3－5 観光開発・振興のための法制度・組織体制の提案

当項目については、フェーズⅠ及びⅡの各段階で必要に応じ提案するものとするが、本項において体系的に取りまとめるものとする。特に、ジョルダン国の現行法制度の分析を含む調査・提言については十分に行うものとする。

6－4 実施スケジュール

巻末添付のスコープオブワーク（Ｓ／Ｗ）に示すスケジュールで調査を実施する。

6－5 調査団の構成

本格調査の実施に当たっては、概ね以下の分野を担務する調査団を構成する必要がある。

(1) 総括

・ 調査の実行、報告書の作成、説明及び協議に係る業務の総括

(2) 副総括／観光開発計画／観光資源評価

- 長期、短期の目標の設定
- 開発シナリオの設定
- 関連開発計画との調整
- 他団員と協力して観光資源評価の実施

(3) 地域計画／土地利用計画

- 地域開発における効果の分析
- ゾーニング、土地利用計画の策定

(4) 観光行政／法制度／組織

- 現行の観光行政、法制度等の隘路分析
- 法制度、組織体制の提案

(5) 観光振興計画

- 市場開発計画、産業振興計画の策定
- ツアープログラムの企画・提案

(6) 地域情勢・社会分析

- 中東地域の政治、経済動向の分析
- 政治経済シナリオの策定
- 観光開発に伴う社会的側面（ＷＩＤ、住民参加等）の分析

(7) 需要予測／経済・財務分析

- 市場調査の実施
- 社会・経済フレームの設定
- 観光需要分析
- 経済・財務分析の実施

(8) 交通・輸送計画

- 交通ネットワークの策定
- 交通インフラ整備、管理・運営計画の策定

(9) インフラ整備計画（上下水道）

- 上下水道に係るインフラ整備、管理・運営計画の策定

(10) インフラ整備計画（廃棄物）

- 廃棄物処理に係るインフラ整備、管理・運営計画の策定

(11) 観光施設整備計画

- 観光施設容量の分析、評価
- 観光施設整備計画の策定

(12)　観光統計・情報管理

・　観光情報整備計画の策定

(13)　遺跡保全計画

・　遺跡資源に係る観光資源評価

・　遺跡保全計画の策定

(14)　環境

・　環境保全計画の策定

・　観光開発に伴う環境配慮

6－6　調査実施の留意事項

本件調査は中東和平の進展等情勢変化に伴い、開発のポテンシャルと現実の必要がますます高まってきたジョルダン国の観光開発計画の策定を行うものであるが、次の二点において特徴的側面を持つ。

第一は、要請に至る経緯からも明らかな通り、中東和平多国間協議の場で域内の観光開発シェパード役を担う我が国の立場から、その具体的貢献の一環として形成されたものである。その関連から、ジョルダンにおける観光開発が域内各国のそれを補完し、ひいては域内の経済・社会開発の促進に寄与するものであるとの位置づけで把えられるべき側面を有する点である。

第二は、近年の急激な情勢変化を受け、ジョルダンの観光開発が有望な協力対象分野であるとの共通した認識から、世銀、ＵＳＡＩＤをはじめとする殆どの主要ドナーが積極的な協力を展開している（あるいは計画している）中で、それらの協力プロジェクトや各種開発計画を包含した最上位計画としての中・長期的視点に立った展望と戦略の策定を行うという、これまでこの種の調査では前例の少ない質的側面を有する点である。

上記から、本件調査はジョルダン国政府の期待や各ドナーをはじめ衆目の関心が集まっており、質の高い成果品が求められているといえよう。調査を実施する上で留意すべきと思われる諸点は以下のとおりである。

(1)　全国観光開発戦略の策定（フェーズＩ）

フェーズＩにおける（総合的）観光開発戦略の策定調査ではソフト面が重要なポイントとなろう。ジョルダンの観光開発に係る現実の様々な動きは統括すべき具体的指針や基本政策の確立がないまま、（各省間のセクショナリズムも伴い）必ずしも調整がとれない状況の下にあり、一元的な把握もできてないように思われる。従って、先ず入り口の整理として様々な動きや観光開発に必要な各機能・役割りといったものを分析、総括したマトリックス、フローチャートを作成する等の作業が必要となる。

行政的、政策提言の面では、説得力のある論理と経験の裏付けに加え、高度な調整手腕

が必要となろう。水問題一つをとってみても、それは既に現状の隘路でもあるのだが、将来さらに観光開発が進めば水の適正配分（権）問題はいずれかの近い将来の時点で先鋭的議論を呼ぶことになるのは自明であり、そこには国としての基本政策（決断）を必要とする。民活利用という政策方針にそった公営企業の民営化、環境規制、伝統工芸の保護と促進等々難しい課題が多々ある。世銀等ドナーをうまく活用・協調しつつ、観光大国の政策、成功事例としての開発途上国における政策や実態を示す等して関係者を説得し方向性を固めてゆく努力が肝要である。

また、既存の多くの総合開発計画（特にＪＩＣＡは過去２地域に実施している）の活用と今後の計画（ＪＩＣＡも水案件、ムタ工業団地計画等あり）との関連付けにも留意する必要があろう。

(2) 各ドナーとの調整

ジョルダンの観光開発計画に対する各ドナーの協力は1950年代から、ＵＳＡＩＤを中心に盛んに行われてきたが（３－９節参照）、これらは概して遺跡の発掘、整備を中心とする特定拠点あるいはテーマベースのものであったので計画の競合や重複の問題はあまりなかったと言える。しかしながら、近年に至り各ドナーの協力が更に加速されてきたことから、計画の中には明らかに調整を必要とするものも生じてきた。

各ドナーの協力動向を的確に把握し、競合ではなく協調の方向にとりまとめ、それらを包含した形での中・長期に至る戦略を策定し（フェーズⅠ）、具体的優先プロジェクトの計画策定を行う（フェーズⅡ）ことが本件調査に求められている。事前調査においてジョルダン国政府、ＵＳＡＩＤ及び世銀との間では基本的枠組みについての調整はできたものと思料するが（１－６節参照）、本格調査実施の過程で具体的次元でバッティングする可能性はある。重複した作業を回避し、投入労力、費用及び時間の無駄を省くことが肝要であり、そのためには世銀及びＵＳＡＩＤを中心とした各ドナーとは常時情報交換・協議を行い、また情報・資料をできるだけ相互活用してゆくことが必要である。

(3) 調査団の編成

本件調査の特性や求められる質的レベル等を総合的に勘案すれば、調査団の編成に際しては、組織単位の枠を越えてでも出来るだけ広範なソースからその任を果たし得る有能なエクスパティーズを動員、プロジェクトチームを編成するという考え方が望ましい。

特に総括、副総括及びそのアシスタント役の３名は各々の専門性に加え、ドナー間の援助調整と協調、省庁間の調整を図りつつ政策の方向性について政府内のコンセンサス形成を行う役割が求められている。また、団員数を最低限に絞り込んだことにより、幾つかの専門分野を各団員相互でカバーし合う必要もあるところ、チーム全体としてのバランスも重要になってくる。総括、副総括のアシスタント役は、英語を母国語とする外国人コンサルタントで、かつ日本以外の国（特に西欧諸国）の観光事情にも詳しい適任者が望まれる。

（参考）

① ＪＩＣＡ英国事務所を通じ調査をしたところによると、英国コンサルタント業界では、観光セクターは確立した領域であり、「観光・レジャー・スポーツ及びレクリエーション」作業部会には136社が登録、本件と類似調査実績を有する社もいくつかある。

② ローカルコンサルタントについては、観光遺跡省は登録制度がなく推薦もなかったが、調査団が公共事業・住宅省より入手した主要コンサルタントリストは参考まで付属資料に示す。なお、最近ＪＩＣＡジョルダン事務所が実施した現地委託コンサルタント業務の入札における人件費月額単価のヒヤリング結果は次のとおりである。

Senior Engineer	3,000ＪＤ
Junior Engineer	1,000ＪＤ
Technician	600ＪＤ
Work man	500ＪＤ
Draft man	600ＪＤ

(4) 優先整備ゾーンの観光開発計画の策定（フェーズⅡ）

フェーズⅠ（全国観光開発戦略）と同様に重要なのが、フェーズⅡにおいての目に見える成果につなげることのできる具体的計画作りである。プライオリティ・ゾーンの対象地域としては、昨年のプロジェクト形成調査時想定したペトラはＵＳＡＩＤ等が取り上げることが決定していることもあり、フェーズⅠの結果を踏まえ検討する必要はあるものの、現時点で得た感触としては、以下の２地域が考えられる。

(ｲ) カラク（城跡）、死海沿岸（観光客のみならず、ジョルダン国民の冬の行楽地ともなっている）、マイン（温泉）を結ぶ地域

(ﾛ) ワディ・ラム（アラビアのロレンスゆかりの場所）、アカバ（ジョルダン唯一の港）を中心とした地域（さらには、ムダワラ（サウジアラビアからの大半の入国者の通過地点）をも加える）

(5) 中東和平動向と地域観光

事前調査中の７月25日、ジョルダンとイスラエル戦争状態終結宣言（ワシントン宣言）、両国間国境２ケ所が通行可能になる等、中東和平交渉が歴史的な転換を遂げる等取り巻く情勢は変化している。本件調査もその位置付けの中で、いくつかの幅を持たせたシナリオの中で見つめる必要があろう。また、極めて狭い地域に文化や自然の異なった国々が存在しており、周辺諸国の政策等がジョルダンの自然条件や観光資源に大きな影響を及ぼす可能性があるので、周辺諸国の動向に注意する必要がある。更に中東和平における「平和の配当」をジョルダン国民全体が享受できるような観点から、ジョルダン人向けの観光開発や、隣国とのフェアーシェアーという観点にも目を向ける必要がある。

(6) 環境配慮

本件は観光開発のみならず関連産業振興策を含む地域総合開発という側面を持ち、また同時に貴重な環境保全（遺産の保護も含む）を行うことも重要である。例えば、紅海、アカバ湾、死海等ジョルダンの主要な観光地の環境保全はそのまま観光資源の保護を意味する。このことから、現地調査、資料調査を通じて環境に関する情報を収集し、既存の開発計画・環境保護政策との整合性をはかりながら自然環境と調和のとれた開発を行うために、環境配慮を十分行うことが必要である。

(7) 観光振興計画の策定

ジョルダンにおける、観光収入の重要性を考慮すると観光資源の保護、住民参加による開発とともにこれを海外に積極的にプロモートすることが重要である。プロモートの仕方についても下記のような基本的なプロモート戦略の策定、プロモーションボデーのあり方、プロモーション方法等について具体的に提言することが重要である。法律の整備、税制改正、組織の見直しまで踏み込んだ提言が必要となることも予想される。

1) 観光宣伝戦略の策定
2) 観光宣伝機関のあり方
3) 観光宣伝活動のあり方
4) 観光宣伝資料（オフィシャル・ツーリスト・マップ、オフィシャル・ツーリストガイド等）の作成
5) コンファレンス・ツーリズムの促進方策
6) 観光分野の人材育成
7) 観光土産品の開発

(8) その他

ドラフトファイナルレポート提出時に説明会（セミナー／ワークショップ）を開催し、ステアリング・コミッティーを含め関係者に対する当該計画への理解と協力を求めることが効果的であろう。また、これとは別に調査の各段階で必要と判断されれば、ドナー会合やプロモーション活動も兼ねた活動をジョルダン国政府に協力しながら行うことも良かろう。

付 属 資 料

1. 要請書（TOR）

THE HASHEMITE KINGDOM OF JORDAN

TOURISM SECTOR NOTE

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THE HASHEMITE KINGDOM OF JORDAN

TOURISM SECTOR NOTE

EXECUTIVE SUMMARY

A. Introduction

1. This Note was prepared upon request from Jordan's Minister of Plan by telex received on April 12, 1990. The Note analyses the structure, composition and development potential of tourism in Jordan. Because any post Gulf war recovery program is bound to emphasize, inter-alia, job creation and foreign exchange earning activities, tourism should have a prominent place in any future development plan. Tourism contributed about 8 percent of GDP and its net earnings of foreign exchange in 1989 ranked third after workers' remittances and foreign aid.

2. The International Development Association (IDA) financed one tourism project (Credit 639-JO) in 1976. The project's major objectives were to protect antiquities threatened by natural and human factors, provide facilities and amenities for increasing numbers of visitors, and improve the presentation and interpretative services at two sites: Jarash and Petra. The project was completed largely as originally intended.

B. Jordan's Tourism Potential

3. Jordan possesses geological, archeological, and recreational sites of sufficient interest to attract a wide range of visitors. Its mild winter climate also makes the nearby seaside ideal for vacationers during the winter months. However, in order to build on its recent success in attracting tourists, Jordan will have to invest in conservation and restoration schemes at existing archaeological sites, develop new tourist sites, and improve its touristic amenities and night entertainment.

4. In 1989, an estimated 750,000 tourists entered Jordan. Of these, about 560,000 or roughly 75 percent were visiting Jordanians who were working abroad, business travellers, and other miscellaneous categories, such as independent holiday travellers and arrivals for educational and medical treatment. These groups do not offer much potential for true tourism development. The remainder of about 190,000 or roughly 25 percent has much greater growth potential. They consist of either visitors on holiday from Saudi Arabia and other Gulf countries or tourists on organized package tours.

5. It is believed that the growth potential of the visitors from Saudi Arabia and other Gulf countries could be considerably enhanced if night entertainment comparable to that available in Cyprus or Cairo could be introduced. The fastest growing tourist segment, however, and the best candidate for further growth appears to be package tours which in the

politically stable period 1986-1989 grew at an average annual rate of 28 percent.

6. The most prominent tourist sites of Jordan are Petra, Jarash, and Aqaba. Petra is Jordan's foremost tourist attraction. With its tombs, houses and temples carved into the multi-hued sandstone cliffs which encircle and comprise the site, Petra epitomizes the "lost city" in beautiful, rugged and remote surroundings. Jarash is the best example in the Middle-East of a Roman provincial city. It is remarkably well preserved. There are many other attractions such as the desert castles built by the 7th-century Omayyed rulers, Kerak and Shobak, reminders of the Crusaders, Madaba with its fine mosaics, the Dead Sea, and Wadi Rum which offers some of the most spectacular desert scenery to be seen anywhere. At present no systematic plan exists to restore these archaeological sites and if the situation is allowed to continue, the deterioration of Petra and the desert and Crusaders forts and castles will eventually hurt Jordan's tourism potential.

7. Aqaba is Jordan's foremost beach resort area. Its balmy winter climate and its proximity to Europe makes the nearby seaside ideal for vacationers during the winter months.

8. The available hotel rooms status just before the onset of the Gulf crisis, indicated a possible over-capacity at Amman and an under-capacity at both Aqaba and Petra, especially in the higher quality range hotel. At other locations of interest to tourists, suitable hotels or rest houses are scarce.

9. Jordan is well connected to the rest of the world by air, land and sea. It has an excellent airline which operates both domestically and internationally. It also has an extensive and well maintained primary road network.

C. Policy Framework

10. Up until now, the government had invested in most of the three stars or better hotels in the country. However, it had left the management to private operators, of whom many are foreign companies of international reputation. These hotels are well run and maintained with very little official interference.

11. In this period of adjustment, it seems opportune for the Government to reconsider its policies of the past two decades. The tourism sector has matured to a point where with appropriate incentives, the private sector should be able to provide the venture capital for any future capacity expansion. The Government should concentrate on providing the main infrastructure at tourist sites, and on the restoration and development of the historical, archeological, cultural and recreational heritage. It should also consider selling its shares and interests in hotels at some feasible time in the future.

12. All domestic tourist transportation, including package tours, is carried out under a concession contract with one private bus operator. This monopoly is unlikely to ensure economic efficiency. This arrangement should

therefore be eliminated to allow competition and freedom of entry to other operators.

13. In the tourism sector, the Law for the encouragement of Investments attempts to direct investments to certain predetermined zones by offering varying levels of incentives. These incentives should not be necessary if there is proven demand for the investments.

14. Under Jordanian law, all water front land, on the Gulf of Aqaba and the Dead Sea are Government property which can only be leased with the proviso that on expiration of the lease all improvements including buildings erected by the lessee will automatically become the property of the Government. The relatively short-term of these leases (between 20 and 30 years) discourages equity as well as debt financing. The public nature of the water front could be preserved by simply prohibiting the sale of land within a certain distance from shore, yet allowing the sale of land beyond that point.

15. There seems to be little justification for the Government to continue setting minimum and maximum hotel room rates as at present. This practice impedes competition and imposes needless Government regulations on the private sector. A more liberal policy towards hotel rates would be more effective in promoting the development of the hotel industry.

16. In order for Jordan to realize its tourism potential, the Government needs to formulate a national tourism policy which would, inter-alia, address some of the existing constraints, redefine the intended roles of the public and private sectors in the development and operation of the tourism sector, provide for the gradual restoration of many of the sites, and ensure better coordination and more investment in the promotion of tourism at home and abroad.

D. Economic Impact of Tourism

17. Up to 1989 tourism has been one of the leading economic activities of Jordan and one which has been growing faster than most other sectors. Net foreign exchange earnings from tourism in 1989 are roughly estimated at around JD 200 million, or 9.4 percent of total, next in importance only to workers' remittances and foreign aid. Tourism has also contributed about 8 percent of GDP, and is estimated to have provided some 15,000 jobs, or 2.5 percent of the total employed work force. This is a modest share of total employment, but is one which provides a higher level of remuneration than many other sectors. Tourism is also a vigorous and growing sector of the economy.

18. The preceding factors do not capture all the benefits generated by tourism since its favorable impact is felt in many sectors of the economy. However, tourism may also have negative impacts on the economy by placing additional pressure on Jordan's scarce water and energy resources. For this reason, measures should be taken to ensure that hotels and carriers use the most energy-efficient equipment and vehicles possible and that waste materials and waste water are properly treated and recycled.

E. Proposed Regional Development

19. The Government efforts to increase the volume of tourists has been directed towards Petra, Jarash and Amman. Two other areas, with growth potential; the Aqaba South Coast and the Dead Sea, received in the past less attention. Only recently, the Aqaba Region Authority and the Jordan Valley Authority have prepared preliminary plans to develop tourism in their respective regions.

20. The proposed Aqaba South Coast tourist development consists of an area of 26 km^2 with a coast line of about 7 km. Marketing studies indicate that demand exists for the integrated development of a seaside resort. Preliminary discussion with international operators; (Marriott, Pullman) indicate their interest in the scheme.

21. The tourism potential of the area is anchored on the area's balmy winter climate, nice natural beaches and the availability of water sports. Its most outstanding feature is the existence of at least three sizable coral formations close to shore.

22. The development of the Aqaba South Coast Tourist area will necessitate upgrading and provision of basic infrastructure such as landscaping, roads, electricity, water, telecommunications, sewerage, flood protection, etc. It is expected that the on-site costs will be borne by developers. The cost of trunk infrastructure, however, will have to be borne by Government. Detailed cost estimates are not yet available.

23. The development of a tourist zone in the vicinity of the Dead Sea comprising an area south of Sweimeh, including Zara had been recommended by consultants retained by the Jordan Valley Authority.

24. The distinct advantage of the Dead Sea area is its warm winter climate, high atmospheric pressure, and the therapeutic property of some of its geothermal sources.

25. One therapeutically oriented resort with a 100-room hotel at Sweimeh has recently opened in July 1990 and reportedly secured business from tour operators ensuring a 50 percent occupancy rate. A hotel/spa complex is also already operating at Ma'in, close to the Dead Sea. It is estimated that there is potential for developing another 750 hotel rooms along the Dead Sea shores, although the success of the development, would depend on resolution of the land ownership question and the availability of infrastructure.

26. Water springs found in the area discharge a sufficient volume of water to supply the needs of the proposed developments. As in the case of the Aqaba site, the Government will have to provide basic infrastructure. Detailed cost estimates are not yet available.

THE HASHEMITE KINGDOM OF JORDAN

TOURISM SECTOR NOTE

CHAPTER I

INTRODUCTION

1.01 This Note based on the findings of a mission that visited Jordan before the Gulf crisis, to analyze the structure, composition and development potential of tourism in Jordan. Tourism is extremely sensitive to security concerns in the region. With the invasion of Kuwait on August 2, 1990 and the onset of the war on January 16, 1991, Jordan's tourism has virtually disappeared. However, with the cessation of hostilities in late February 1991, it is expected that tourism will gradually resume to its prewar levels. It should, nevertheless, be noted that at least at present for political reasons, some of the traditional visitors from the Gulf may not return immediately. Furthermore, the full potential for future tourism development depends on the elimination of the crisis's related political constraints and on the successful implementation of the country's economic adjustment programs. However, the general thrust of the Note is still relevant as well as its policy framework and proposals for tourist development schemes.

Background

1.02 Recent population estimates indicate that Jordan has a total population of some three million, growing at about 3.8 percent per year. Of this total, roughly 70 percent live in urban areas and about a third in Greater Amman. After a decade of expansion, and even before the Gulf crisis, Jordan's economic performance was rapidly deteriorating. The regional recession which began in the 1980's had resulted in the stagnation of labor emigration and remittances, and cuts in exports and aid grants. These factors had lead to severe problems in the balance of payments, fiscal deficits, external debt and foreign exchange reserves. With the onset of the Gulf crisis, Jordan's position has worsened, emigrant laborers have returned home, and exports and grants have virtually disappeared.

Importance of Tourism

1.03 In 1989, gross revenues from visitors accounted for about 18 percent of Jordan's foreign exchange earnings. As it is estimated that about 60 percent of the revenues from tourism remained in the country, tourism was the third largest source of net foreign exchange earnings after worker's remittances and foreign aid. Tourism is also estimated to have provided about 8 percent of GDP and roughly 15,000 jobs in 1989 (Chapter IV).

1.04 Since any post Gulf crisis recovery program for Jordan will have to emphasize, inter-alia, job creation and foreign exchange earning activities, it is obvious that tourism will have a place in any future Government plans to develop the economy. For quite some time now, the Government had been wanting to give tourism more importance, and in April 1990 it requested the Bank to prepare a tourism development project and to perform a study to assess the tourism sector potential including its infrastructure needs.

Bank's Prior Involvement

1.05 The only prior involvement in Jordan's tourism sector was by IDA. It consisted of a tourism project (Credit 639-JO of June 8, 1976) which aimed to protect antiquities threatened by natural and human factors, provide facilities and amenities for growing numbers of visitors and improve the presentation and interpretative services at two sites: Jarash and Petra. The project was completed in 1983 some three years later than originally envisaged. The Project Completion Report (report No. 5729) stated that the project was implemented closely as appraised...that the project would have encountered fewer problems had there been an agreed tourism policy framework. Finally, it recommended the introduction of entry fees at some of the sites, allowing hotels and restaurants to set charges to maximize return on investment, and the creation of ministerial department with adequate authority, staff and budget to manage the sites.

Report Organization

1.06 This Note is divided into five chapters. This introduction constitutes the first chapter; the second reviews Jordan's tourism potential; the third examines the policy framework; the fourth attempts to capture the economic impact of tourism; and the fifth addresses the question of new product development.

CHAPTER II

JORDAN'S TOURISH POTENTIAL

General

2.01 Jordan possesses considerable archeological sites, mainly at Jarash, Petra and Amman and to a lesser extent at Kerak and the crusaders and desert castles. Natural sites include the Dead Sea, the Gulf of Aqaba, Wadi Rum and the desert. The sites are suitable for cultural, recreational and therapeutic tourism development. Furthermore, Jordan enjoys a temperate climate and plenty of sunshine. It is centrally located in the Middle-East and has good roads, a first-rate airline, modern airports, several first-class hotels and daily air connections with Europe.

2.02 A majority of the visitors to Jordan stay in Amman. Those who wish to visit Petra, Jordan's foremost attraction, can do so overnight. Good albeit limited hotel accommodation is available near the entrance to the Petra canyon. The visit to Jarash, the site of an extensive Roman settlement is only a short distance from Amman and can be done in one day without need for hotel accommodation at the site. It is believed that discriminate development of additional infrastructure, including hotels and restaurants at other archeological sites, could change the pattern of tourism in Jordan, encourage visits to other sites, and enable tourists to spend more time in Jordan as well as outside of Amman. Details on individual sites are given in paragraphs 2.16 through 2.29.

The Composition of Non-Resident Visitors

2.03 Table 1, below, shows that of the 2.6 million non-residents who entered Jordan in 1989, some 13% came by air, 60% by land, and 27% by sea. The predominant number of arrivals by land are, migrant workers, transients and pilgrims.

Table 1: Arrivals by Means of Transport

	1985	1986	1987	1988	1989
Air	326,141	238,850	240,005	257,494	338,167
As % of Total	17.06	12.49	12.65	10.77	12.98
Land	1,157,802	1,296,249	1,246,166	1,563,571	1,555,311
As % of Total	60.55	67.79	65.66	65.39	59.70
Sea	405,964	376,940	411,707	570,102	711,528
As % of Total	21.23	19.71	21.69	23.84	27.31
Total	1,889,907	1,912,039	1,897,878	2,391,167	2,605,006

Source: Yearbook of Tourism Statistics 1988 & Department of Statistics

2.04 Annex 1 shows a breakdown of all non-resident arrivals to Jordan in the period 1985 to 1989. Unfortunately, the number of Jordanians living abroad and visiting the country was not recorded prior to 1989. In the 1985-89 period, the total number of arrivals increased from roughly 1.9 million to 2.3 million (2.6 million including Jordanians in 1989), i.e., an average annual increase of 4.9 percent.

2.05 Out of the 1989 total arrivals, some 87 percent came from Arab Middle-East countries, 4.5 percent from other Middle-East countries, 4.9 percent from Europe and 3.5 percent from other parts of the world. (See Annex 1). However, not all 2.6 million arrivals were tourists. Indeed, under generally accepted definition[1], only about 30 percent of total arrivals, or roughly 750,000 entrants may be considered as tourists[2], the remainder consisting mostly of pilgrims in transit on their way to Mecca and, to a lesser extent migrant workers entering or re-entering the country.

2.06 In 1989, for analytical purposes, tourists have been classified in five categories, (see Chart 1) roughly as follows :

a) 450,000, or 60 percent of total, came to Jordan to visit relatives; of these about 75 percent were Jordanians living abroad and the remainder predominantly nationals of other Arab countries;

b) 115,000, or 15 percent, were visitors on holiday from Saudi Arabia and other Gulf countries; they visited mostly Amman during the summer months;

c) 72,000, or 10 percent, came on package tours mainly from Europe during the winter; the bulk, about 85 percent, focussed on antiquities and ancient sites; the remainder was attracted by the climate, and the sea at Aqaba;

d) 55,000, or 7 percent, were business travellers from all parts of the world distributed around the year; and

e) 58,000, or 8 percent, were miscellaneous visitors; such as individual travellers on holiday from outside the region, and others visiting the country for educational, medical and other purposes.

1/ All arrivals except permanent residents, those in transit and migrant workers.

2/ All estimates presented in this Report have been provided by the Ministry of Tourism and Jordan's Department of Statistics on the basis of a 1988/89 Arrivals and Departures Survey.

Tourism Characteristics and Growth Potential

2.07 As may be expected, not all tourist groups have the same growth potential. For instance, the number of Jordanians and other nationals visiting their relatives or spending their holidays in Jordan is a function of the number of Jordanians living and working abroad and foreigners working in Jordan. This group's potential for increase is therefore limited. Likewise, no substantial growth is expected from the business travellers group until substantial improvements occur in the economic conditions of Jordan. The potential for increases in the number of the miscellaneous group which includes those who come to Jordan as individual travellers and for medical treatment and educational purposes is also limited.

2.08 However, it is commonly recognized that the growth potential of visitors from Saudi Arabia and other Gulf countries could be considerably enhanced if night entertainment comparable to that available in Cyprus or Cairo could be introduced.

2.09 The fastest growing tourist segment, and the best candidate for growth, appears to be package tours. It is also the group for which the most elaborate statistics have been collected. Table 2 shows that in the period 1986 to 1989 the number of package tour visitors increased from 34,200 to 71,800, i.e. an average annual growth rate of some 28.0 percent. The number of nights increased at a rate of 38.8 percent per year, and the average length of stay increased from about 4.0 to 5.1 nights.

Table 2: Package Tours (arrivals, tourist nights and length of stay)
(000)

Origin	1986			1987			1988			1989		
	No. Tourists	Tourist Nights	Length Stay	No. Tourist	Tourist Nights	Length Stay	No. Tourist	Tourist Nights	Length Stay	No. Tourist	Tourist Nights	Length Stay
. Arabs	0.2	1.0	4.5	0.3	1.1	3.9	0.4	2.0	4.8	0.7	2.9	4.4
. Europeans	23.5	112.3	4.8	32.7	154.5	4.7	42.1	234.2	5.5	53.6	312.5	5.8
. North America	7.5	15.0	2.0	14.6	39.2	2.7	15.5	37.3	2.4	11.4	32.2	2.8
. Far East and Oceania	1.2	3.8	3.2	2.2	8.0	3.6	2.9	10.1	3.5	4.2	14	3.3
. Others	1.5	4.7	2.9	2.7	5.9	2.6	0.8	1.9	2.4	1.9	4.4	2.3
. Total Tours	34.2	136.7	4.0	52.5	209.8	4.0	61.9	285.1	4.5	71.9	355.8	5.1

2.10 Prospects for increasing the number of tourists visiting Jordan is encouraging given the general increase in world wide tourism, affluence and sufficient length of vacation time in Europe, and the desire of many tourists to explore new destinations other than the traditional tourism centers. With proper measures, Jordan should be able to capture a portion of the increasing world wide tourism market especially the European market.

2.11 Capturing some of this increase could be achieved by the provision of combined package tours with other Middle Eastern destinations such as Egypt, Syria and the West Bank. The success of these combined tours depends of course on the reduction of the formalities required to enter the neighboring countries and on the improvement of the political situation in the region.

2.12 At present a high share of tourist are from the smaller Northern European markets. The spending per person of this tourists are below the usual average European spending. Increasing promotion of Jordan as a tourist destination in the largest markets of Europe such as France and Germany would not only increase the absolute number of tourists but will also increase the average spending per tourist.

2.13 It is generally believed that the recent devaluation of the Dinar has increased Jordan's competitiveness in the tourism sector. However, whether visitors reach Jordan as individual travellers or as a part of package tours, expansion of tourism in the future will depend on the quality and variety of the sites that can be made properly available to the visitors, the number and quality of hotel accommodation and restaurants, and to a not negligible extent on the quality and variety of night entertainment.

2.14 Local tourism is mainly limited to beach tourism at Aqaba. Jordanians usually do not pay much attention to visit their antiquities. An increase in the number of local tourists could be achieved by better promotion and diffusing information about the antiquities sites and the historical heritage of the country. Provision of suitable rest-houses and facilities at the sites to accommodate for the local tourists is also essential.

Types of Jordanian Tourism

2.15 The natural and archaeological sites of interest to tourists (para 2.16 to 2.29) make Jordan amenable to following types of tourism:

(i) beach tourism at Aqaba (mainly jordanians and European);

(ii) traditional round country tours focussing on archaeological and natural sites (mainly European and North Americans); and

(iii) health/spa and therapeutic treatment at the Dead Sea region (mainly European).

Jordan's Sites of Major Interest to Tourists

2.16 Petra is the foremost tourist attraction of the region. From the 4th century BC to 106 AD Petra was the capital of the Nabateans. It then became an important Roman provincial town and was remodeled on Roman lines. With its tombs, houses and temples carved into the multi-hued sandstone cliffs which encircle and comprise the site, Petra epitomizes the "lost City" in beautiful, rugged and remote surroundings.

2.17 Accommodations and other services at Petra include a modern hotel of modest capacity (some 120 rooms) near the site entrance; a rest house, a restaurant, and a visitor center in the so-called Petra Basin. Horse-back transportation is provided by near-by villagers, as the narrowness of the floor of the canyon impedes the use of conventional motor vehicles. Hotel room availability is considered grossly insufficient. Recent average yearly occupancy rates have been over 70 percent. Petra is vulnerable to catastrophic floods in the rainy season. The diversion weirs built a few years ago have helped to minimize the flooding risks. The long narrow path meandering between almost straight-faced cliffs is unpaved and strewn with emerging sharp rocks which makes the visit of the site particularly dangerous to visitors who do not wear appropriate footwear. The path needs improvement in this regards.

2.18 At certain times of the year the number of visitors approaches 1,500 in a single day. The experience of the visitor deteriorates sharply as the number of visitors reaches that level. This points to the need for providing other means of transport in addition to horses to reduce bottlenecks, permit better regulation and accelerate the flow of visitors through the site. Better documentation and signalization of the main archaeological remains are also badly needed.

2.19 Jarash is situated some 50 km north of Amman. It is the best example in the Middle-East of a Roman provincial city. The site includes two theaters, an unusual oval-shaped forum, amphitheaters, temples, churches and baths. Although there are indications that the site was inhabited in Neolithic times, it was from the time of Alexander the Great (332 BC) that the city rose to prominence. It was conquered by emperor Pompeii in 63 BC and became part of the Roman province of Syria. However, it only reached its peak in the beginning of the 3rd century AD when it was given the rank of Colony under Roman rule. It is remarkably well preserved. As for Petra Jarash needs to have better documentation and signalization.

2.20 Amman, the capital of Jordan, lived for centuries on the caravan trade. It was nothing more than a little village until a colony of Circassians was resettled there in 1878. It became the center of Transjordan in the early 1920s. Today Greater Amman harbors over one million population. The most important tourist site in Amman is the Roman theater, the only remnant of the ancient Roman city of Philadelphia. The theater which has been completely restored, was cut into the side of a hill and can seat 6,000 people. In recent years, it has once again become a place of entertainment, and productions are put on at irregular intervals. Ways should be explored to better exploit the potential of this site as well as the citadel site overlooking the city's center.

2.21 A string of desert castles lies east of Amman. Most of them were built by the 7th-century Omayyed rulers from Damascus. These early Arab rulers were still bedouins at heart and their love for the desert lead them to build these pleasure palaces, where they pursued their favorite pastimes of hawking, hunting and horse racing. These castles include: Qasr al Mushatta, Qasr al Hallabat, Qasr al Azrak and Qasr al Amra. In the same eastern direction can be found the Hamaam al Sarah site, consisting of a bath-house and hunting lodge also built by the Omayyeds. Most of these castles have been neglected and through earthquakes or other calamities have fallen in ruins. They are in dire need of restoration and protection. Better access roads and visitors centers with basic amenities are also lacking.

2.22 Madaba, a small town some 30 km south of Amman, harbors some fine mosaics, including the famous 6th-century map of Palestine. Madaba is also famous for its colorful rugs. On site preservation and protection of the mosaics should be provided.

2.23 Karak is on the route of the ancient caravans that used to travel from Egypt to Syria in Biblical times and also used by the Greeks and the Romans. The greater part of Kerak lies within the walls of the old Crusader town. The Crusader king, Baldwin I of Jerusalem, had the castle built in 1132 AD. It fell to the forces of Saladin in 1188 AD. The fort has been only partially restored and is a complex of rooms and vaulted passages. It is possible to see the cisterns where water was stored, but not much else for lack of illumination. The site needs considerable restoration.

2.24 Shobak is yet another Crusader fort in the chain and, like Kerak, has a commanding position over some incredibly desolate land. The fortress, called Mons Realis, was built by Baldwin I in 1115 and suffered numerous attacks before it finally fall to Saladin in 1189. Its present form is the Mameluke restoration from the 14th century. The inside is in a very decrepit state. The entrance to a well with 375 steps is mostly covered by fallen rock. Typically, visitors are allowed to wander through the site even though it offers many possibilities of accident. This site needs substantial restoration.

2.25 Wadi Rum offers some of the most spectacular desert scenery to be seen anywhere. Unfortunately it is difficult to access by the ordinary traveller and there is no hotel or restaurant in sight. The main attraction of the area is the desert huge cliffs. Visits to the site can be by Land Rover and Camels available at the nearby bedouins settlement. Any consideration of development in or near Wadi Rum should be carefully studied to avoid environmental damages to the fragile site.

2.26 Aqaba is Jordan's foremost resort area. It is located on the Gulf of Aqaba. It has a population of roughly 55,000. The town itself has little to offer. However, its balmy winter climate with temperatures holding steadily around 25°C makes the nearby seaside ideal for vacationers during the winter months. The water is clear and warm and offers some excellent diving. The coral Reef at Aqaba is one of the finest in the world. However, the daytime temperature in the summer is high at around 35°C and above.

2.27 Aqaba has several good, albeit insufficient hotels. It also has a number of interesting restaurants offering good fish fares and Middle-East area typical dishes. A few years ago, the Aqaba Regional Authority, which has responsibility for the economic and social development of the Aqaba region, prepared a Master Plan to develop the Aqaba South Coast with a view to elicit the participation of private sector investors, developers and hotel operators (see paras. 5.03 to 5.07).

2.28 The Dead Sea is some 75 km long and from 6 to 16 km wide. Its surface elevation is about 390 meters below sea level, the lowest point on earth. It has a salt content of about 33% which makes plant and animal life impossible. Its buoyancy also makes swimming virtually impossible. There is one government-owned Rest House at Suweimeh which provides day-trippers with showers, changing rooms and an air-conditioned restaurant. There is also a newly-built spa village at Ma'in, including first class hotel accommodation, food and beverage outlets, as well as naturally hot and fresh water swimming pools. Jordan's facilities near the Dead Sea leave much to be desired compared with those of the West Bank. Considerable investment would be required to develop facilities of international standards (see paras. 5.08 to 5.12).

Hotels and Rest Houses

2.29 Annex 4 contains the detail of Jordan's hotels in Amman, Aqaba and Petra and rest houses in Petra, Kerak, Azrak and Dibbin. Year-round hotel occupancy rates indicate that there may be an over-capacity of hotels at Amman and an under-capacity in both Aqaba and Petra, especially in the higher quality range. Petra is particularly congested in both hotel and rest house with year-round occupancy rates of 72% and 56% respectively. Before promoting Petra any further, and perhaps tourism in general since Petra is the leading attraction, an increase in hotel capacity would appear necessary. There is also a need to increase hotel capacity and quality at Aqaba in order to attract the higher spending European and North American tourists.

Transportation

2.30 Jordan is well-connected by air, land and sea to the outside world. It has an excellent airline which operates both nationally and internationally, a modern airport at Amman and adequate airport at Aqaba. Its road network is extensive and fairly well maintained. All road transport, including the transport of tourists who visit with organized tours, is done under a concession contract between the Government and a private operating company. Buses depart from Amman for most parts of the country on a daily basis.

2.31 In conclusion, it appears that the available sites have sufficient appeal and are capable of further development (Chapter V). It is also clear that some investments are needed for hotel accommodations as well as for site upgrading. Preliminary development plans have been prepared for the Aqaba and Dead Sea regions (Chapter V), detailed studies should be undertaken and/or updated now in a period when it is hoped that eventually the number of tourists will be restored to at least the pre-Gulf war level.

CHAPTER III

POLICY FRAMEWORK

Tourist Industry Ownership

3.01 During the last two Development Plans (1980-85 and 1986-90) the Government, expanded its direct and indirect participation in the tourism sector. As such, in terms of hotel facilities, today the public sector directly owns more than sixty-percent of units in the "three-star" and more hotel categories. Public ownership is spread out among ministries, government agencies and financial institutions. The percentage owned by the public sector is even higher if one includes indirect ownership through state-owned banks and agencies such as the Industrial Development Bank (IDB), and the Tourism Development Corporation of the Social Security Administration.

3.02 The Government role is viewed as having been crucial in establishing a modern hotel industry in the late 1970s and early 1980s. Several four and five star hotels in Amman and Aqaba would not have been built without government intervention for lack of interest of the private sector under the then prevailing incentives. However, in the case of Amman, the current low occupancy rate (Annex 4) points to possible over-building.

3.03 Actually Government ownership does not imply that the government is running the hotels. In several cases of majority control or full ownership, such as the Intercontinental, Amra and Petra Forums, the hotels are being operated under management contracts by private concerns in accordance with commercial criteria with little or no Government involvement in day to day management. The same applies to those hotels in which the government is a minority shareholder, i.e. the Plaza, the Marriott and the Philadelphia hotels.

3.04 The tourism sector has matured to a point where with appropriate incentives the private sector should be able to provide the venture capital for any future capacity expansion. Further direct Government investment in hotels is no longer necessary. The Government should now consider divesting itself over a period of time of its direct share-holdings in those hotel enterprises. Divesture would release funds for other uses, including investments in new tourist infrastructure and the restoration and development of Jordan's historical, archeological, cultural and recreational heritage. This should not be taken as implying that Government institutions such as the Social Security Administration should sell their equity shares; parastatal organizations should be free to formulate their own policy in financial portfolio management.

Ground Transportation

3.05 As mentioned earlier, all domestic tourist transportation, including package tours has been conceded to a privately owned operator. The concession grants a legal monopoly of all tourism related land transportation in Jordan and from Jordan to neighboring countries. The concession contract is due to expire next year. This monopoly is unlikely to ensure economic efficiency and should therefore be eliminated. New arrangements should be considered to allow competition and assure the freedom of entry for private sector bus operators.

Land Issues

3.06 Under Jordanian law, all water front land, on the Gulf of Aqaba and the Dead Sea are Government property which can only be leased with the proviso that on expiration of the lease all improvements including buildings erected by the lessee will normally become the property of the Government. The conditions of these leases are too restrictive and the terms too short, thus discouraging equity as well as debt financing. The term of the leases are usually set between 20 and 30 years, that is actually equivalent to between 15 and 25 years from the time the hotel is operational. Revisions to the conditions and terms are needed to enable developers to obtain suitable financing and to encourage their participation. As in other parts of the world the Government might still preserve the public nature of its shores by prohibiting the sale and construction on a given strip of land, say 20 or 30 meters from the water line while allowing private operators to own land further inland.

Availability of Finance

3.07 An associated problem is that neither local investment banks nor commercial banks now operating in Jordan are large enough to provide loans to even medium size hotel entrepreneurs with the exception of the Arab Bank. As a beach hotel of international standards costs around $50,000 a room without land, the capital cost of a typical 150 room establishment is well beyond the capabilities of Jordanian banks, if they are to conform to Central Bank directives of not lending more than 15 percent of their capital and reserves to any one borrower.

3.08 The feasibility of establishing a Tourism Development Fund managed by an existing financial institution and capable of borrowing from international and local markets, and able to appraise new projects and provide long term financing to private sector developers for hotel and tourism development should therefore be carefully assessed, and implemented if found feasible, within the context of the overall financial system efficiency.

Price Control

3.09 At present the Government sets minimum and maximum room rates for each hotel grade. In addition, Jordanians and citizens from Arab countries receive preferential rates. There seems to be little justification for the Government to fix prices as long as the operator is made to post rates ahead of time. Setting hotel prices impedes competition and imposes needless Government regulations on the private sector. A more liberal policy towards hotel rates is more effective in promoting the development of the hotel industry and may help increase Jordan's overall tourist revenues.

Incentives to Private Investors

3.10 The floating of the Dinar beginning in October 1988, is seen by the business community as one of the most important elements of Jordan's future competitiveness. Continuation of this policy is considered important to attract investors in a foreign exchange sensitive sector, like the tourism industry, where it is essential to induce investment decisions of long-term nature.

3.11 The revision of the Law for the Encouragement of Investments (LEI) of April 1, 1987 substantially reduced the number of qualifying criteria for investment incentives. The main feature of LEI in regard to the tourism sector is an attempt to direct investments to certain predetermined zones by varying the incentives. For instance, the Cabinet may grant exemption from all taxes normally levied on three-stars or better hotels for periods of between seven and fifteen years depending on the area where the hotel is being constructed. These incentives should not be necessary if there is proven demand, spontaneous or induced by promotion, for additional tourist development. The need for incentives should therefore be reviewed and as a minimum, the present system of awarding incentives on a case-by-case basis should be replaced with a less discretionary one of general application consistent with the general fiscal incentives and tax policies.

Promotion and Marketing

3.12 Tourism promotion outside Jordan is done by the Ministry of Tourism, the Royal Jordanian Airlines, and private travel agencies within Jordan and abroad. The promotional activities of the Royal Jordanian Airlines is virtually limited to the development of its own passenger and freight traffic. Perhaps the most accessible information for prospective visitors can be found in several travel guides published in Europe and North America. These provide abundant information on the historical, archeological, cultural and recreational attraction of Jordan. Unfortunately, these guides only reach those already contemplating a visit to the Middle-East or Jordan. Clearly they are insufficient for purposes of inducing potential tourists to select Jordan for their leisure. A more pro-active and better coordinated and targeted program is needed. Such program should be directed towards the countries where the potential of increase in tourism is the greatest.

Training

3.13 Training for hotel staff needs improvement, specifically at the mid level and managerial staff. The existing Hotel Training College does not provide practical on the job training. Language training is also inappropriate as it concentrates on listening rather than speaking. Hotel training facilities have to be expanded, and improvement of the quality of services must be introduced to make training more responsive to the local needs of the tourism industry. Furthermore, the present arrangements for training hotel personnel, is inadequate and the Government should enlist the cooperation of the major hotel operators to help make this training more practical and to ensure the employment of the graduate trainees.

Need for a National Tourism Strategy

3.14 From the above discussions, it is clear that in order to realize fully the tourism potential of the country, the Government needs to formulate a national tourism strategy which would have as an objective the development of tourism on sound economic, financial and technical basis. The strategy should aim at reducing the public involvement in the sector and at removing the financial, regulatory and fiscal constraints to private sector participation. It should inter-alia, re-examine the existing policies, redefine the intended roles of the public and private sectors in management and operation of hotels, eliminate the physical constraints inhibiting tourism development, provide for the gradual restoration of the archaeological sites, improve training of prospective tourism labor force, and ensure better coordination and more investment in the promotion of tourism at home and abroad.

Environmental concerns

3.15 Any strategy to further the development of the tourism sector has to take into consideration the environmental impact of such development. It is therefore important to adopt a two prong approach one directed towards the increase in the number of tourists and the promotion of tourist sites, while the second advocates rehabilitation and upgrading of sites, and conservation of natural resources. Environmentally sound development should not be hindered by lack of financial resources. In Jordan legislation concerning the preservation of historical and archaeological sites exist. A review of the legal mechanism to enforce such legislation is needed.

3.16 Any excessive development at Petra, Wadi rum, and at the Gulf of Aqaba (mainly because of the coral reefs) should have an environmental impact assessment to avoid any harmful effects that could result from excessive development.

CHAPTER IV

ECONOMIC IMPACT OF TOURISM

General

4.01 Tourism has been one of the leading economic activities of Jordan and one which has been growing faster than most other sectors. Tourism's contribution to the economy has been insufficiently appreciated in the past, largely due to the inadequacy of the available statistics. This is mainly because the benefits from tourism spread through many sectors. A detailed input/output analysis would be needed to pinpoint accurately its contribution. Tourism, moreover adds to the demand for a whole range of local products and services, and it accounts for a significant part of the construction industry activities. Annex 5 shows estimates of tourism earnings, its share of GDP and employment compared with other segments of the economy for 1989. These estimates are derived from a Department of Statistics' survey carried out in the period 1988-89.

Earnings from Tourism

4.02 The 1989 gross earnings from tourism, including the earnings of Royal Jordanian Airlines, are estimated at about JD 385 million or about 18 percent of Jordan's total foreign exchange earnings. No official estimate of net earnings exists. However, studies done in other countries indicate that net earnings usually range betweens 50 to 60 percent of gross earnings, the balance goes out of the country as, earnings of foreign workers, payments for the purchase of equipment and consumable goods for tourist use, fees for hotel management services, and repatriated profits. Net earnings are thus roughly estimated at around JD 200 million, i.e., next in importance only to workers' remittances and foreign aid.

Contribution to GDP

4.03 The 1989 contribution of tourism to GDP has been estimated at about eight percent. This places tourism ahead of mining and agriculture but behind manufacturing. However, in the three to four years before the Gulf crisis, Jordan' tourism sector was growing faster than any of the other sectors.

Employment

4.04 Though tourism is still quite a small employer, its share of national employment is rising fast, unlike, for example, that of agriculture. A recent ILO estimate puts the total 1988 direct employment generation by the tourist industry in Jordan narrowly defined at 7,350 jobs. Of the latter, 5,700 persons were employed in hotels, the remainder by local tour operators, travel agencies, car rentals, guides and in tourist stores. In addition, indirect employment partly dependant on foreign tourism, is generated in stores and restaurants. This employment is likely to be substantial, as a large majority of tourists (returning Jordanians and Arab tourists) do not stay in hotels, but with relatives or in their own or rented accommodation. Jobs are also created in the construction sector. Based on this broader definition of the tourism sector, probably around 15,000 jobs are dependant on tourism. Studies in other countries have shown that the ratio of indirect to direct jobs created can be as high as 3 to 1. In Jordan, the ratio is likely less.

Other Considerations

4.05 Not all benefits can be captured by the above considerations, as tourism has a favorable impact on many sectors. It also has negative impacts on the economy, particularly as it puts pressure on Jordan's scarce water and energy resources. For this reason, measures should be taken to ensure that hotels and carriers use the most energy-efficient equipment and vehicles possible and that waste materials and waste water are recycled.

CHAPTER V

PROPOSED REGIONAL DEVELOPMENT FOR TOURISM

5.01 The development of new areas for tourism in Jordan must balance Jordan's tourist resources against competition from other destinations with similar endowments, promotion must focus on those markets that can be taped effectively within a stipulated given horizon (5 to 10 years). Recently attention was directed towards two new regions with potential for tourism development: the Aqaba South Coast and the Dead Sea Coast. A new beach oriented resort in the South Coast of Aqaba could increase the number of sun and sea loving tourists, while a therapeutically oriented resort in the Zara region at the Dead Sea could tap on some of the tourists now going to the west bank of the Dead Sea for that purpose.

5.02 The development of these two new proposed region will need careful consideration during implementation. While the Ministry of Tourism (MOT) and Antiquities must obviously play the central role, it lacks sufficient implementation capabilities, especially for administering major infrastructure development and investments. MOT ought therefore, to be responsible for the general coordination of the policy framework, the strategy for tourism development, and the provision of technical assistance. Implementation of projects of the size of the Aqaba and the Dead Sea development zones would be better handled by the two semi autonomous authority; the Aqaba Regional Authority (ARA) and the Jordan Valley Authority (JVA). Both authorities through their experienced staff have the capability to coordinate and manage implementation in their respective region. Each of these new proposed developments is described in some detail below.

The Aqaba South Coast Tourist Development Area

5.03 The Aqaba South Coast tourist proposed development consists of an area of 26 km² with a coast line of about 7 km for which a master plan was completed by ARA in April 1987. Marketing studies indicate a demand for a phased integrated development of the type contemplated in the Master Plan. The Plan calls for the phased development of a seaside resort which by the year 2000 would contain 2,000 hotel-beds of international standard and provision for another 1,000 beds of lesser standard in an adjacent site off the coast, for domestic vacationers. The plan calls also for the development of an area that could eventually accommodate 1,000 holiday houses with all needed associated facilities and amenities. Annex 6, which is an excerpt from the Aqaba Region Authority's Prospectus, gives a detailed list of the proposed facilities. Some international operators have expressed interest in the scheme.

5.04 The tourism potential of the area is anchored on the area's mild winter climate, attractive natural beaches and the availability of water sports. Its most outstanding feature is the existence of at least three sizable coral formations close to shore with 60 percent live coral, capable of providing some of the best diving experience for beginners with snorkeling equipment and for experts with sophisticated scuba diving gear. Apart from their quality, these reefs are located at the northernmost point at which corals may be found and hence are the closest to Europe, the principal market for this sport.

5.05 The fact that package tour takers can land at Aqaba International Airport on direct flights from Europe gives Aqaba a competitive advantage compared to other nearby locations. Also, the development of the western shores of the Gulf of Aqaba, in Egypt which have similar quality of beaches and coral formations is an indication of the strength of the market in the Gulf of Aqaba area.

5.06 Discussions with a few tour operators who have successfully penetrated the Scandinavian market by providing charter flights to Aqaba indicated that the demand for this kind of beach tourism exists in most of the other countries of Western Europe. In fact, a tour operator and at least two other international hotel companies are already looking at South Aqaba as a location for new hotels, and have initiated preliminary negotiations with the ARA.

5.07 The development of the Aqaba South Coast Tourist area will also necessitate the provision of basic infrastructure such as landscaping, roads, electricity, water, sewerage, flood protection, and telecommunication. It is expected that the on-site costs will be borne by developers. The cost of trunk infrastructure, however, will have to be advanced by the Government. Detailed cost estimates are not yet available.

The Dead Sea Tourist Development Area

5.08 The development of a tourist zone in the vicinity of the Dead Sea comprising an area south of Sweimeh, including Zara would be an entirely new tourism product. The area surrounding the Dead Sea is one of nature's unique phenomena, and is already visited by some tourists. The distinct advantage of the Dead Sea area is its warm winter climate, high atmospheric pressure, the therapeutic property of some of its geothermal sources especially for skin diseases such as psoriasis, and for rheumatic pains. The new development would mainly cater for the therapeutic type of tourism.

5.09 The development of such facilities was recently recommended by a group of French consultants for the JVA and the MOT. The Area would need to be provided with basic infrastructure especially electricity and telecommunications.

5.10 A number of health insurance plans in Germany, Switzerland, and Austria are already reimbursing their nationals for psoriasis treatment at similar establishments on the Western Shores of the Dead Sea. Similar arrangement with Jordan should increase the demand for future development.

5.11 A private entrepreneur has already established a therapeutically oriented resort with a 100-room hotel at Sweimeh, and has reportedly secured business from German tour operators ensuring a 50% occupancy rate. A hotel/spa complex is also already operating at Ma'in, although it is not yet connected by road with the other complexes of the Dead Sea. It is estimated that there is potential for developing another 750 hotel rooms, although this would depend on the Government posture on the question of land ownership and on provision of the basic infrastructure.

5.12 Concerning the provision of basic infrastructure, it appears that the water springs found in the area discharge a sufficient volume of water to supply the needs of the proposed developments. The water from these springs, however, need to be collected and treated; also water reservoirs need to be built to regularize flow and pressure. The treated waste water could be used to maintain the landscaping vegetation cover. The availability of this independent source of water in the tourist zone will mean that no additional demands on the scarce water resources of the Jordan Valley will be needed. Access roads, electricity and telecommunication facilities also need to be provided. Detailed cost estimates are not yet available.

Financial and Employment Impact of Proposed New Development

5.13 A rough order of magnitude of the financial and employment impact from additional investment in tourism at the two new development areas is presented in Annex 7.

Future steps

5.14 A detailed feasibility study of the sector is needed. The study should include an analysis of the impact of tourism on the macroeconomic conditions of the country, tourism trends and prospects, marketability studies, and possibilities of capturing larger shares of international tourists. The study should also include an assessment of the policy measures to encourage the further development of the sector and stimulate private sector participation and investments.

5.15 For the two specific sites at South Aqaba and the Dead sea region, the study should include master plans and preliminary engineering documents accompanied by costs estimates for the development of both the infrastructure and the superstructure including the hotel development proposals, calculation of the economic and financial returns on the investment, and proposals for promotion and marketability.

ANNEX 1

THE HASHEMITE KINGDOM OF JORDAN
TOURISM SECTOR NOTE

INTERNATIONAL NON RESIDENT ARRIVALS BY NUMBER AND COUNTRY OF ORIGIN
(in 000)

	1985	1986	1987	1988	1989	1989 (as percent)
A – ARAB COUNTRIES						
Saudi Arabia and Gulf Countries						
Saudi Arabia	286.27	240.41	283.16	388.60	364.63	
Kuwait	21.04	18.52	21.89	30.07	29.61	
Bahrain	2.93	3.23	5.54	12.93	14.75	
Qatar	2.25	3.32	3.23	3.05	2.99	
U.A.E.	N.A	2.59	3.47	4.44	4.94	
Omman		3.01	3.63	4.07	4.35	
Sub total	313.191	271.674	320.927	443.155	421.551	
Egypt	717.45	765.23	603.47	765.05	789.41	
Jordan	N.A	N.A	N.A	N.A	320.66	
Other Arab Countries						
Syria	325.21	338.07	464.50	641.27	569.77	
Lebanon	45.56	54.74	54.17	53.33	55.99	
Iraq	71.51	62.73	63.17	42.96	42.13	
Sudan				33.74	22.01	
Yemen				11.41	11.35	
Others	74.55	64.15	81.05	37.96	54.27	
Sub total	519.24	557.72	663.00	825.63	755.53	
SUBTOTAL ARAB COUNTRIES	1549.69	1604.62	1587.40	2054.89	2257.21	67%
B – NON ARAB MIDDLE EAST AND SOUTH ASIA						
Turkey	111.23	92.50	80.00	96.30	97.95	
Pakistan	4.45	4.43	3.11	3.33	4.78	
India	6.73	7.01	6.15	6.09	6.07	
Sri Lanka	7.64	7.36	7.15	9.162	6.85	
Cyprus	0.90	0.62	0.51	0.69	0.55	
Others	1.85	0.64	0.76	0.78	0.90	
SUB TOTAL NON ARAB MIDDLE EAST AND SOUTH ASIA	132.80	112.80	97.69	116.33	117.11	4%
D – NORTH AND SOUTH AMERI						
U.S.A.	54.63	31.14	42.09	42.13	40.81	
Canada	3.29	3.26	2.93	3.32	4.22	
Mexico	0.67	0.25	0.27	0.13	0.35	
Argentina	0.85	0.93	0.71	0.63	0.32	
Brazil	1.46	1.44	0.10	0.17	0.91	
Others			1.14	1.05	1.02	
SUBTOTAL N. & S. AMERICA	60.85	37.10	47.24	47.59	48.26	2%

ANNEX 1

THE HASHEMITE KINGDOM OF JORDAN
TOURISM SECTOR NOTE
INTERNATIONAL NON RESIDENT ARRIVALS BY NUMBER AND COUNTRY OF ORIGIN

	1985	1986	1987	1988	1989	1989
			(in 000)			(as percent)
A – ARAB COUNTRIES						
Saudi Arabia and Gulf Countries						
Saudi Arabia	236.27	240.41	233.18	333.60	354.23	
Kuwait	21.04	13.52	21.89	30.07	29.51	
Bahrain	2.93	3.23	5.54	12.93	14.75	
Qatar	2.95	3.32	3.23	3.05	2.99	
U.A.E.	N.A	2.59	3.47	4.44	4.94	
Omman		3.01	3.53	4.07	4.35	
Sub total	313.191	271.574	320.227	443.165	421.551	
Egypt	717.46	765.23	603.47	736.05	759.41	
Jordan	N.A	N.A	N.A	N.A	320.55	
Other Arab Countries						
Syria	325.21	325.07	464.60	641.27	584.77	
Lebanon	46.56	54.74	54.17	53.33	55.99	
Iraq	71.61	62.73	63.17	42.96	42.13	
Sudan				33.74	22.01	
Yemen				11.41	11.35	
Others	74.86	64.13	31.09	37.93	54.27	
Sub total	519.24	567.72	663.00	825.63	755.53	
SUBTOTAL ARAB COUNTRIES	1549.39	1604.62	1587.40	2054.83	2257.21	87%
B – NON ARAB MIDDLE EAST AND SOUTH ASIA						
Turkey	111.23	92.50	80.00	98.30	97.95	
Pakistan	4.45	4.43	3.11	3.33	4.78	
India	6.73	7.01	6.15	6.09	5.07	
Sri Lanka	7.64	7.38	7.16	9.192	6.86	
Cyprus	0.90	0.52	0.51	0.89	0.55	
Others	1.86	0.84	0.75	0.76	0.30	
SUB TOTAL NON ARAB MIDDLE EAST AND SOUTH ASIA	132.60	112.80	97.59	116.33	117.11	4%
D – NORTH AND SOUTH AMERI						
U.S.A.	54.68	31.14	42.09	42.16	40.31	
Canada	3.20	3.23	2.93	3.32	4.22	
Mexico	0.67	0.25	0.27	0.13	0.33	
Argentina	0.85	0.93	0.71	0.63	0.32	
Brazil	1.46	1.44	0.10	0.17	0.31	
Others			1.14	1.06	1.62	
SUBTOTAL N. & S. AMERICA	60.85	37.10	47.24	47.59	43.25	2%

ANNEX 1
(cont.)

	1985	1986	1987	1988	1989	1989
			(in 000)			(as percent
C - EUROPE						
Germany	24.03	19.14	19.25	20.12	21.33	
U.K.	22.13	19.33	18.25	18.13	19.42	
France	15.55	11.33	10.87	12.41	15.81	
Italy	11.56	8.30	13.90	11.78	20.25	
Finland			2.33	9.53	9.36	
Austria	2.53	2.31	2.93	5.53	8.53	
Spain	4.45	3.23	5.79	4.33	5.37	
Sweden	2.54	2.35	3.52	3.51	3.39	
Netherland	3.10	3.00	3.15	3.13	3.55	
Yougoslavia	3.35	3.55	2.87	2.55	3.14	
Belguim	2.70	2.53	2.56	2.51	2.57	
Switzerland	2.78	2.13	2.08	2.41	2.53	
Greece	2.59	1.35	1.43	1.95	1.85	
U.S.S.R.	1.24	1.53	1.42	1.57	2.93	
Denmark	1.56	2.23	1.74	1.23	1.13	
Others	8.56	6.83	7.57	6.73	5.01	
SUBTOTAL EUROPE	109.54	90.34	99.63	107.99	127.15	5%
E - OTHER PARTS WORLD						
Australia	3.34	2.79	4.20	4.22	5.40	
New-Zealand	0.77	0.77	0.94	1.45	1.59	
Japan	4.50	3.83	4.05	3.30	3.92	
Hong Kong					1.06	
Phillipines	9.16	15.01	13.31	13.98	9.83	
Thailand				16.14	11.77	
Singapore					1.11	
Indonesia	1.21	1.72	1.47		1.70	
African Countries					1.05	
United Nations					4.17	
Others	17.71	25.48	25.32	10.43	3.79	
SUBTOTAL OTHER PARTS	35.69	49.61	49.80	50.01	45.30	2%
TOTAL ARRIVALS	1889.86	1894.46	1881.95	2376.67	2605.02	100%

Source: Department of Statistics Office Amman

THE HASHEMITE KINGDOM OF JORDAN
TOURISM SECTOR NOTE
PACKAGE TOURS

(in 000 for numbers and tourist nights and in units for length of stay)

	1985			1987			1988			1989		
	Number	Tourist Nights	Length of Stay	Number	Tourist Nights	Length of Stay	Number	Tourist Nights	Length of Stay	Number	Tourist Nights	Length of Stay
A. Arab Countries	0.2	1.0	4.5	0.3	1.1	3.9	0.4	2.0	4.8	0.7	2.9	4.4
B. Europe												
Italy	2.4	9.3	3.9	5.5	23.7	4.3	5.4	30.1	5.5	11.9	64.1	5.4
Finland							9.0	53.5	5.9	8.4	57.2	7.1
France	4.9	18.3	3.7	4.5	20.7	4.5	5.3	27.3	5.2	7.8	41.2	5.3
Germany	6.5	40.5	6.2	7.9	33.3	5.0	8.1	43.3	5.3	7.7	44.7	5.8
UK	2.9	16.7	5.8	3.2	18.3	5.7	3.9	22.5	5.7	4.7	29.3	6.2
Austria							2.3	14.5	6.2	4.5	32.5	7.3
Spain	1.2	3.5	2.9	3.0	8.5	2.9	1.7	6.1	3.7	2.1	7.9	3.8
Belgium							1.2	5.4	4.5	0.8	3.5	4.5
USSR & Eastern Europe							0.8	4.4	5.5	1.2	6.2	5.2
Netherlands							0.8	5.4	6.8	0.5	3.8	7.2
Yugoslavia							0.6	1.5	2.7	0.4	1.0	2.2
Denmark							0.3	1.2	4.1	0.2	1.2	5.8
Other European	5.7	24.1	4.2	8.5	41.1	4.8	0.9	3.8	4.1	1.0	3.8	4.3
Total Europeans	23.5	112.3	4.8	32.7	154.8	4.7	40.3	237.7	5.7	52.2	305.5	5.9
C. North & South America												
USA	7.5	15.0	2.0	14.6	39.2	2.7	15.1	38.3	2.4	10.9	30.4	2.8
Canada							0.4	1.5	3.4	0.6	1.8	4.0
Other Americans	0.6	2.1	3.5	0.6	1.7	3.0	0.2	0.6	3.0	0.5	1.5	3.3
Total Americans	8.1	17.1	2.1	15.2	40.9	2.7	15.8	38.4	2.4	11.8	33.7	2.9
D. Far East and Oceania												
Japan	0.6	1.3	2.9	0.8	2.5	3.1	0.9	2.9	3.3	1.3	4.3	3.3
HongKong							0.6	1.3	2.3	1.0	1.2	1.2
Australia	0.6	2.1	3.4	1.4	5.3	3.8	1.1	4.3	4.0	1.5	6.2	4.2
New-Zealand							0.3	1.5	4.8	0.5	2.2	4.2
Total Far East And Oceania	1.2	3.8	3.2	2.2	8.0	3.6	2.9	10.1	3.5	4.2	14.0	3.3
E. Others	1.0	2.6	2.5	2.1	5.2	2.5	0.6	1.3	2.2	1.4	2.9	2.0
GRAND TOTAL	34.2	136.3	4.0	52.5	202.3	4.0	59.9	279.5	4.7	70.3	360.0	5.1

Source: National Report No.133 & MOT Statistical Section

THE HASHEMITE KINGDOM OF JORDAN

TOURISM SECTOR NOTE:

HOTELS AND REST HOUSES

Hotel Location	Number Hotels	Number Rooms	Number Beds	Room Occupancy Rate	Bed Occupancy Rate
HOTELS					
A– Amman					
5 Stars Deluxe	3	946	1439	46	35
5 Stars	2	510	830	33	32
4 Stars	3	653	1259	54	49
1–3 Stars	47	1907	1224	45	30
Sub Total	55	4031	4232	45	37
B– Aqaba					
4 and 3 Stars	7	682	1420	64	62
Less than 3 Stars	11	255	505	43	40
Sub Total	18	937	1925	58	56
C– Petra	1	119	254	72	63
TOTAL	56	4150	5146	53	55
REST HOUSES					
Petra	1	37	100	56	50
Karak	3	23	57	42	39
Azraq	1	23	46	27	22
Dibbin	1	14	35	12	12
TOTAL	6	97	239	39	36

Source: Ministry of Tourism

ANNEX 5

THE HASHEMITE KINGDOM OF JORDAN
TOURISM SECTOR NOTE

TOURISM EARNINGS, CONTRIBUTION TO GDP AND EMPLOYMENT (1989)

A. Balance of Payment Contribution	(JD million)	as percent of Jordan's Foreign exchange earnings
Earnings from Tourism	(JD million)	
Gross	385	18.1
Net	200	9.4
Workers remittance	358	15.9
Foreign Aid	354	15.7
All Goods exports	534	25.2
B. Contribution to GDP	**(JD million)**	**percent of total**
Tourism	181	8.0
Mining	58	7.0
Manufacturing	282	12.5
Agriculture	134	6.0
C. Government Tax Receipts	**(JD million)**	**percent of total**
Tourism	2.5	0.7
D. Employment	**No. Jobs**	**percent of total**
Tourism	15000	2.5
Agriculture	42000	7.0
Industry	64000	10.7

Notes to Table 3:

a. The 1989 earnings from tourism are estimated at 290 J.D. million in travel receipts (against the Central Bank figure of J.D. 315 million) plus 50 percent of receipts outside Jordan of national carriers for international transport (mostly Royal Jordanian); the balance is transit and other travel which is not to and from Jordan.

b. The net earnings for 1989 of the tourist sector is taken as 50 percent of travel receipts plus 30 percent of transportation receipts for taking non-residents to and from Jordan. Only a small part of this appears in the national accounts directly (the 1988 value added of hotels was put at J.D. 15.4 million, some of it for domestic tourists plus part of the J.D. 16.3 million added value is in restaurants and cafes). Other major elements appear in retail trade (tourist purchase), transport (local tours and car rentals), real estate services (rentals to non-residents, and construction property built in Jordan by non-residents for holiday in the country).

c. For tourism contribution to GDP, it is assumed that the ratio of added value to gross output for the sector as a whole is identical to that of hotels, restaurants and cafes combined.

d. Number of jobs is for direct employment only.

ANNEX 5

THE HASHEMITE KINGDOM OF JORDAN
TOURISM SECTOR NOTE

AQABA SOUTH COAST DEVELOPMENT

Development	Principal Land Use	Site Area	Main Features
Public Beach 1	Recreation	4.3 ha	Shaded beach, pools, park, cafe, diving pontoons, parking.
Hotel	Tourist Accommodation	1.0 ha	70 beds in 35 rooms 40m² room, reception, coffee shop, swimming pool, information centre, parking.
Marina -	Recreation	12.6 ha	Temporarily - Public beach, beach shades, parking. Ultimately - 150 berth marina, lighthouse, chandlery, dinghy park, parking.
International Tourist Camp	Recreation/ Accommodation	40.0 ha	Shaded beach, pools, sports area, cafes, chalets, parking.
Qaboos Village	Holiday homes	54.0 ha	425 chalets on plots of 450 and 600m² plots, sports facilities.
Reserve	Recreation	2.0 ha	Entertainment or recreational facility.
Water Park	Recreation	7.0 ha	Leisure pool, water flumes and slides, viewing and refreshment areas, parking.
National Youth Camp	Recreation	7.5 ha	Dormitory accommodation, canteens, indoor and outdoor sports facilities.
Public Beach 2	Recreation	5.7 ha	Shaded beach, pools, sports areas, cafes, diving pontoons, parking.
Sea Centre	Recreation	1.0 ha	Underwater observatory, aquarium, refreshment facilities parking.
Coral Reserve 2	Nature Reserve	6.0 ha (Beach)	No development on beach - buoys trail markers in sea.
South Coast Centre	Commercial/Public Services	1.5 ha	Petrol/Service station, supermarket shops, coffee house, police post, clinic, admin. centre.
Public Beach 3	Recreation	5.0 ha	Shaded beach, pools, sports areas, cafes, diving pontoons, parking.
International Hotel Group 1	Tourist Accommodation	20.0 ha	Port Hotel 500 beds in 250 rooms Tourist Villages, 500 beds in 125-250 chalets with full support facilities.
South Coast Park	Recreation	34.0 ha	18 hole golfcourse, clubhouse, horse and camel riding centre and stables.
Park Villas	Holiday Homes	51.0 ha	300 (approx) luxury villas of 200m² on plots of about 1000m².
Garden Beach (Public Beach 4)	Recreation	22.0 ha	Beach shaded by palms, pools and sports areas, cafes, diving pontoons, parking.
Reserve	Accommodation	12.0 ha	Tourist villages up to 1000 beds with full support facilities or 200 luxury villas.
International Hotel Group 2	Tourist Accommodation	33.0 ha	Tourist Villages up to 1000 beds in 250-500 chalets with full support facilities.
Visa Restaurant Complex	Recreation	1.8 ha	1-3 restaurants/night-club totalling 300 seats, garden, parking.

ANNEX 5
Contd.

Coral Reserve 3	Nature Reserve	5.0 ha (Beach)	No development on beach - buoys and trail markers in sea.
Royal Diving Centre and Village	Recreation/ Tourist Accommodation	2.5 ha 5.8 ha	Diving Centre on beach, 100 chalets canteen and sports facilities in wadi.
Beach Club and Village	Recreation/ Tourist Accommodation	6.4ha 15.0 ha	Club house and sports facilities on beach, 12 clusters of 25 studios and apartments 720 beds (max) in wadi.

THE HASHEMITE KINGDOM OF JORDAN:
TOURISM SECTOR NOTE

IMPACT OF HOTEL DEVELOPMENT IN AQABA AND THE DEAD SEA
(All financial figures are in $US million at 1990 prices)

	Aqaba	Dead Sea
A - Cost		
Number of new rooms	1,500	750
Number of new beds	3,000	1,500
Construction capital costs	90	52.5
Infrastructure cost	18.0	10.5
Total cost	108.0	63.0
B - Revenues		
Number of visitors (p.a.)	64,500	20,500
Visitor nights at full development(p.a.)	551,300	237,500
Hotel revenue (p.a.)	43.5	25.8
Other tourist spending (p.a.)	23.9	9.4
Gross foreign exchange receipts (p.a.)	67.4	35.2
Net foreign exchange receipts (p.a.)	42.2	22.5
Government tax revenue (p.a.)	3.9	2.3
Utility charges (p.a.)	1.5	1.0
C - Employment		
No. of hotel jobs created	1,500.0	1,000.0
No. of Other jobs created	1,350.0	900.0

Main assumptions

Capital cost: 60,000 per room in Aqaba, $70,000 at the Dead Sea (including cost of medical facilities).

Visitor nights: At Aqaba, 60 percent room occupancy rate after 5 years operation, and 70 percent rate at the Dead Sea. Double occupancy factors of 1.8 and 1.5 per room and average stay of 7 and 14 nights, respectively.

Hotel revenues: Room rates $US 55 ($US 30 a guest) at Aqaba and $US 65 (43 a guest) at the Dead Sea. Treatment receipts at Dead Sea $ 2.7 million (p.a.). Food and drink $ 23 per guest night at Aqaba, $22 at Dead Sea. Including service and Government tax.

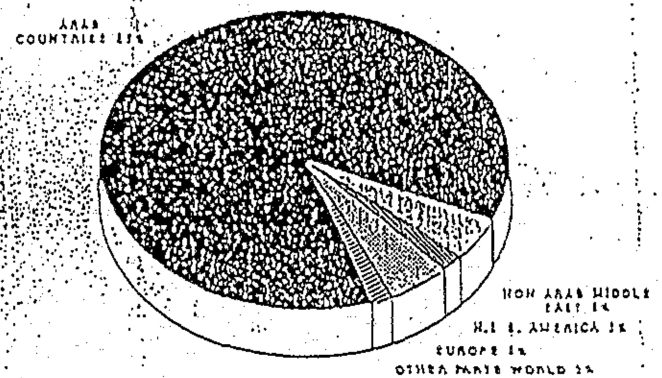
Other spending Aqaba in Jordan: Shopping, tours, renting of boats and equipment 55 percent of hotel revenues at and 35 percent at the Dead Sea (proportions are lower than those suggested by the 1988/89 Arrival and Departure Survey for present European visitors to Jordan).

Net foreign capital exchange receipts: 70 percent of gross receipts less financing cost of interest on 50 percent of costs (assumed foreign component).

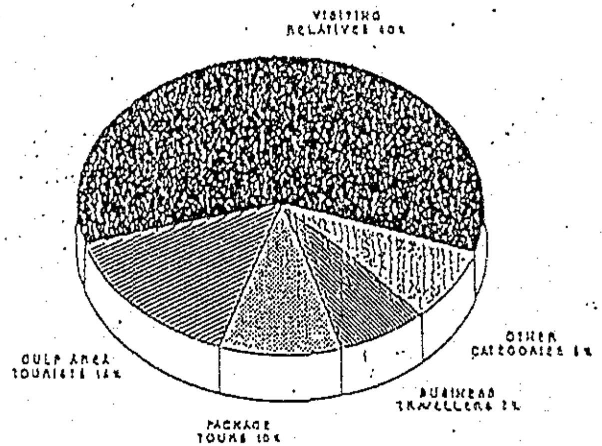
Tax revenue: Predominantly sales tax.

Utility charges: 4.5 percent of hotel revenues excluding service charges and tax.

TOURIST ARRIVALS BY REGION



TOURIST ARRIVALS BY CATEGORY



2．対処方針案

ジョルダン国観光開発計画調査（事前調査（S／W協議））対処方針案

項　　目	対 処 方 針	備　　考
1．事前調査の目的	次の通り整理し、説明する。 ①先方政府の要請背景、内容及び意向の確認 ②本格調査の実施方針及びS／Wの協議 ③先方受け入れ体制の確認 ・先方政府の実施すべき事項 ・先方カウンターパート機関 ・調整等を目的とする委員会（Steering Committee ）の必要性の有無 ・その他 ④本格調査に必要な事項の確認	MOTA（観光・遺跡省）と考えられる。
2．要請内容及び意向の確認		
(1)全般	当方の本件調査に関する考え方を説明する。合意事項については、先方と事前調査団とがS／W，ミニッツに署名し、確認する。	
(2)協力の内容及び範囲	1.調査の目的 (1) 2010年におけるジョルダン国全国観光開発戦略の策定 (2) 上記観光開発戦略より選定された優先整備ゾーンの観光開発計画の策定（目標年次2000年） 2.日本側は、本調査の期間中、調査に参画するジョルダン側カウンターパートに対し、現地調査業務を通じ、技術移転を行う。	・目標年次については、暫定的な（案）。3(3)に示すとおり、検討を要する。

項　目	対処方針	備　考
3．本格調査の実施方針及びS／W内容の協議	あらじめ作成したS／W案をもとに説明、協議し、合意の後、双方の代表者が署名する。	・署名者 ①日本側：調査団長 ②相手側：ＭＯＴＡ次官クラス
(1)本格調査の目的	ジョルダン国の全国観光開発戦略（目標年次2010年）を策定するとともに、優先整備ゾーンの観光開発計画（目標年次2000年）を策定する。	・2(2)参照。
(2)本格調査の対象地域	<S／Wにおいて以下の通り記載する> 主として、アンマンからアカバに至る王の道（King's Highway）に沿った地域を対象とする。 <M／Mにおいて具体的に記載する> ・全国観光開発戦略 　ジョルダン国全国 ・優先整備ゾーンの観光開発計画 　ジョルダン国中・南部地域より選定	(代替案) 死海周辺 ペトラ周辺 アカバ周辺 より２ゾーン程度
(3)目標年次	ジョルダン側と協議の上、各計画毎に以下の年次を目途として設定する。 ①全国観光開発戦略　2010年 ②優先整備ゾーンの観光開発計画　2000年	・2(2)参照。 ・経済・社会開発計画等との整合性の確認（S/W）
(4)本格調査の内容と項目	<フェーズ　Ｉ> １．現状分析 (1)関連資料・情報の収集・分析 (2)現地踏査 (3)観光ポテンシャルの評価（観光資源、観光施設、観光産業、インフラ等） ２．全国観光開発戦略の策定 (1)開発目標の設定 (2)観光需要分析 ①市場調査（国内及び国外） ②社会経済フレームの設定 ③需要予測（2000年及び2010年） ④観光施設容量の分析	・データの有無の確認 ・必要に応じ、各項目について、調査の具体的内容を M/Mに記載する。

項　目	対 処 方 針	備　考
	(3) 全国観光開発戦略の策定 ①ゾーニング ②交通ネットワーク ③観光施設計画 ④環境・遺跡保全計画 (4) 観光振興戦略の策定 ①観光市場開発計画 ②観光産業振興計画 ③観光情報整備計画 (5) 開発シナリオの設定・フェージング (6) 総合評価及び優先整備ゾーンの選定 <フェーズ II> 3．優先整備ゾーンの観光開発計画の策定 (1) 開発方針の設定 (2) 開発基準の設定 (3) 社会・自然・環境条件等現地調査（必要に応じ） (4) 優先整備ゾーンの観光開発計画の策定 ①土地利用計画 ②交通ネットワーク ③施設計画（交通ｲﾝﾌﾗ、社会ｲﾝﾌﾗ、観光施設） ④観光振興計画 ⑤管理・運営計画 (5) 概算事業費積算 (6) ＩＥＥ (7) 概略経済・財務評価 (8) 実行計画 (9) 総合評価及び優先ﾌﾟﾛｼﾞｪｸﾄの選定 (10) 優先ﾌﾟﾛｼﾞｪｸﾄの５か年ｱｸｼｮﾝﾌﾟﾛｸﾞﾗﾑの策定 4．典型的なツアープログラムの提案 5．観光開発・振興のための法制度・組織体制の提案	・環境配慮については、本格調査でＩＥＥを実施する項目及び程度等について検討する。(M/M)

項　　目	対処方針	備　　考
(5)調査期間	着手からF／R提出まで１６ヶ月程度	
(6)報告書	①インセプションレポート（３０部） ・本格調査開始時 ・調査実施方針、スケジュール等を記載 ②プログレスレポート（１）（３０部） ・調査開始後４ヵ月以内 ・現地調査結果概要 ③インテリムレポート（３０部） ・調査開始後８ヵ月以内 ・全国観光開発戦略の概要 ④プログレスレポート（２）（３０部） ・調査開始後10ヵ月以内 ・現地調査結果概要 ⑤ドラフトファイナルレポート（３０部） ・調査開始後13ヵ月以内 ・全ての結果 ⑥ファイナルレポート（５０部） ・⑤に対するコメント受領後２ヵ月以内	
(7)本格調査に必要な確認事項	①調査の対象地域、範囲（組織等）、精度、計画期間等 ②計画対象地域の現状と進行中・計画プロジェクトの現状 ③５か年計画等での予算措置の現状 ④５か年計画等、国家計画その他関連プロジェクト等の計画との関係 ⑤各国及び国際機関の援助動向 ⑥中東和平多国間協議観光ＷＳの動向 ⑦中東地域観光への取り組み ⑧優先整備ゾーン及びプロジェクトについての意向 ⑨住民参加型の観光開発方式の可能性 ⑩本格調査の実施時期、完了時期 ⑪既存資料入手、存在状況の確認 ⑫環境関連事項（法律、規則、実施済の環境保全対策例、その他）	主として質問表で対応

項　　目	対処方針	備　考
4．先方受け入れ体制の確認		
(1) 先方の実施すべき事項	S／W案をもとに協議する。	
(2) 先方カウターパート機関	①カウンターパート機関の確認 ②関連機関の協力体制の確認 ③調整等を目的とする委員会の設置の有無とその役割の確認（Steering committee）	(M/M)
(3) 請訓事項	①Undertaking の内容に係る事項については、必要に応じて請訓する。 ②調査内容については、著しい変更のあった場合は必要に応じ請訓する。	
5．議事録等	①C／P研修、セミナーの開催については要請の伝達に留める。（M／M記載は可とする） ②S／W及び調査の実施に関する協議内容を議事録としてとりまとめ、双方の代表者が署名し確認する。 ③事業実施段階における資金調達に関しては、調査団の権限範囲外である旨伝えるが、制度等について可能な範囲で説明する。	
6．報告書	別途作成する目次案にしたがって、各担当者が作成する。	
7．今後の予定	事前調査終了後すみやかに本格調査実施の準備に着手し、本年度中に本格調査を開始する。	

3. Scope of Work

SCOPE OF WORK

FOR

THE STUDY

ON

THE TOURISM DEVELOPMENT PLAN

IN

THE HASHEMITE KINGDOM OF JORDAN

AGREED UPON BETWEEN

MINISTRY OF TOURISM AND ANTIQUITIES

AND

JAPAN INTERNATIONAL COOPERATION AGENCY

AMMAN, July 26th, 1994

Dr.Safwan Toukan

Secretary General
Ministry of Planning

Mr. Kenji Iwaguchi
Leader
Preparatory Study Team
Japan International
Cooperation Agency

Dr.Ghassan Mufleh

Secretary General
Ministry of Tourism and Antiquities

I. INTRODUCTION

In response to the request of the Government of the Hashemite Kingdom of Jordan (hereinafter referred to as "the Government of Jordan"), the Government of Japan decided to conduct the Study on the Tourism Development Plan in the Hashemite Kingdom of Jordan (hereinafter referred to as "the Study") in accordance with the Agreement of Technical Cooperation between the Government of Japan and the Government of Jordan signed on July 16, 1985.

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

The present document sets forth the Scope of Work with regard to the Study.

II. OBJECTIVES OF THE STUDY

The objectives of the Study are :

1. To formulate national tourism development policy and strategy with the target year 2010; and

2. To formulate tourism development plan for priority zone(s) with the target year 2000.

III. STUDY AREA

The Study shall mainly cover the area from Amman to Aquba along the King's Highway.

IV. SCOPE OF THE STUDY

In order to achieve the objectives mentioned above, the Study shall cover the following items;

‹Phase I›

1. Data collection and analysis

(1) Collection and review of available data and information, reports and plans relevant to the Study

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(2) Survey and evaluation of the present conditions and the problems of tourism resources, facilities, industries, infrastructure and other related issues

(3) Evaluation and identification of tourism development potential and constraints

2. *Formulation of national tourism development policy and strategy*

(1) Setting up of natioanl tourism development policy

(2) Tourism demand forecast and analysis
① market survey
② setting up of a socio-economic framework
③ tourism demand forecast
④ capacity analysis of tourism facilities

(3) Formulation of national tourism development strategy
① zoning
② transport network plan
③ tourism facilities plan
④ preservation plan of natural environment and antiquities

(4) Formulation of tourism promotion strategy
① marketing plan
② tourism industry promotion plan
③ tourism information plan

(5) Formulation of development scenario and phasing

(6) Overall evaluation and selection of priority zone(s)

‹Phase II›

3. Formulation of tourism development plan for priority zone(s)

(1) Setting up of tourism development policy

(2) Setting up of criteria related to tourism development

(3) Conducting field surveys on social, natural and environmental conditions and others, if necessary

(4) Formulation of tourism development plan for priority zone(s).

① land use plan
② traffic network plan
③ infrastructure and tourism facilities plan
④ tourism promotion plan
⑤ management and operation plan

(5) Preliminary cost estimation

(6) Initial environmental examination

(7) Preliminary economic and financial evaluation

(8) Preparation of implementation program

(9) Overall evaluation and selection of priority projects

(10) Formulation of five-year action program for priority projects

4. Proposal for typical tour programs

5. Recommendation of tourism policy, rules and regulations, and organizations for the tourism development and promotion

V. STUDY SCHEDULE

The Study will be conducted in accordance with the attached tentative schedule.

VI. REPORTS

JICA shall prepare the following reports in English and submit them to the Government of Jordan.

1. Inception Report
   Thirty (30) copies
   At the commencement of the Study

2. Progress Report (1)
   Thirty (30) copies
   Within four (4) months after the commencement of the Study

3. Interim Report
Thirty (30) copies
Within eight (8) months after the commencement of the Study

4. Progress Report (2)
Thirty (30) copies
Within ten (10) months after the commencement of the Study

5. Draft Final Report
Thirty (30) copies
Within thirteen (13) months after the commencement of the Study.

The written comments on the Draft Final Report from the Government of Jordan shall be delivered to JICA within one (1) month after submission of the report.

6. Final Report
Fifty (50) Copies
Within two (2) months after the receipt of the written comments on the Draft Final Report from the Government of Jordan.

Ⅶ. UNDERTAKING OF THE GOVERNMENT OF JORDAN

1. The Government of Jordan shall accord privileges, exemptions, and other benefits to the Japanese study team (hereinafter referred to as "the Team"), in accordance with the Agreement of Technical Cooperation between the Government of Japan and the Government of Jordan.

2. To facilitate smooth conduct of the Study, the Government of Jordan shall take necessary measures ;

(1) to secure the safety of the Team in Jordan,

(2) to permit the members of the Team to enter, leave and sojourn in Jordan for the duration of their assignment therein, and exempt them from foreign registration requirements and consular fees,

(3) to exempt the members of the Team from taxes, duties and other charges on equipment, machinery, vehicles and other materials brought into Jordan for the conduct of the Study,

(4) to exempt the members of the Team from income tax and charges of any kind imposed on or in connection with any emoluments or allowances paid to the

members of the Team for their services in connection with the implementation of the Study,

(5) To provide necessary facilities to the Team for remittance as well as utilization of the funds introduced into Jordan from Japan in connection with the implementation of the Study,

(6) to secure permission for entry into private properties or restricted areas for the implementation of the Study,

(7) to secure permission for the Team to take all data and documents (including photographs) related to the Study out of Jordan to Japan,

(8) to provide medical services as needed. Its expenses will be chargeable on members of the Team.

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

4. Ministry of Tourism and Antiquities (hereinafter referred to as "MOTA") shall act as a counterpart agency to the Team and also as coordinating body in relation with other governmental and non-governmental organizations concerned for the smooth implementation of the Study.

5. MOTA shall, at its own expense, provide the Team with the following, in cooperation with other organizations concerned :

(1) available data and information related to the Study,
(2) counterpart personnel
(3) suitable office space with necessary office equipment in Amman,
(4) credentials or identification cards.

VII. UNDERTAKING OF JICA

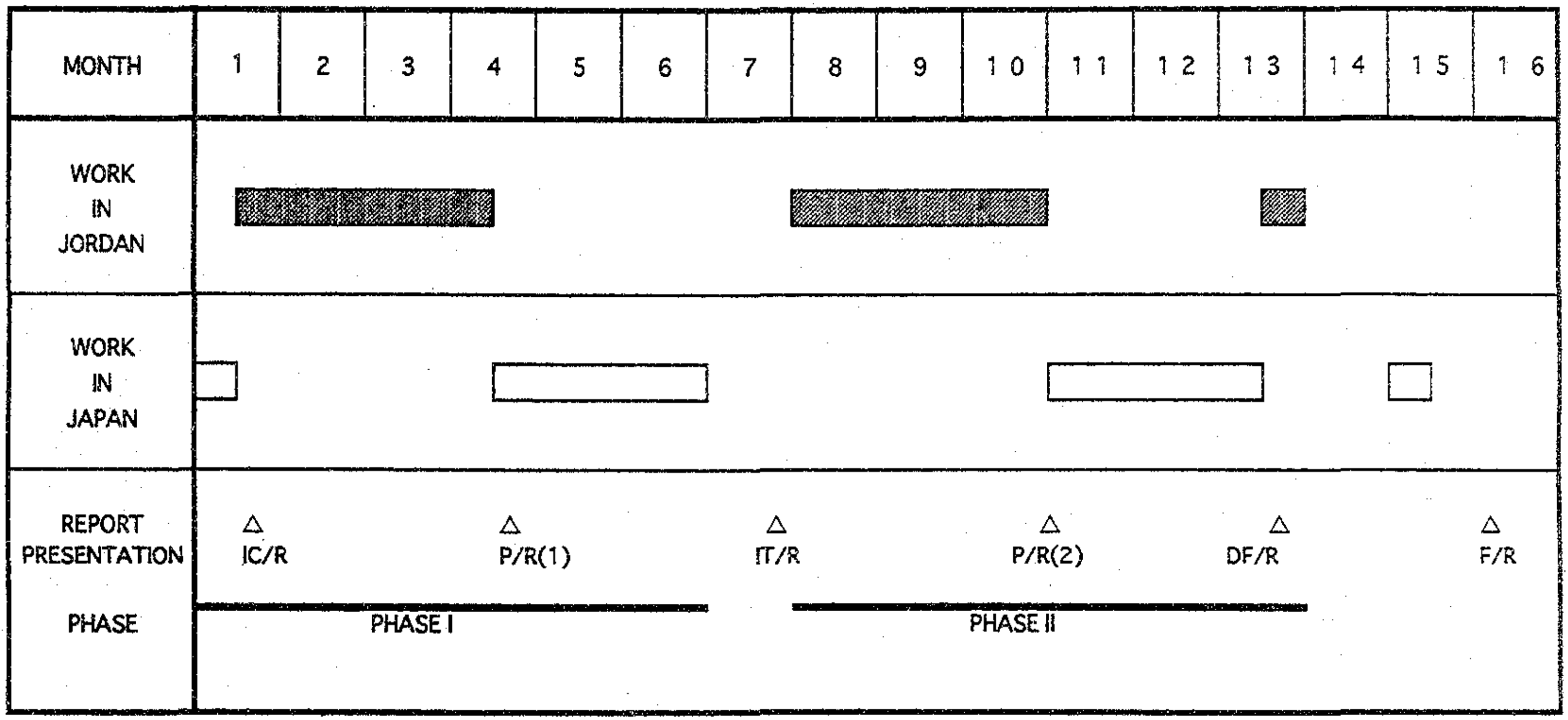
For the implementation of the Study, JICA shall take the following measures :

1. to dispatch, at its own expense, study teams to Jordan,
2. to pursue technology transfer to the Jordanian counterpart personnel in the course of the Study.

IX. OTHERS

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

TENTATIVE SCHEDULE



IC/R: INCEPTION REPORT
P/R: PROGRESS REPORT
IT/R: INTERIM REPORT
DF/R: DRAFT FINAL REPORT
F/R: FINAL REPORT