社会開発調査部報告書

No. 52

MINISTRY OF TOURISM AND ANTIQUITIES
THE HASHEMITE KINGDOM OF JORDAN

JAPAN INTERNATIONAL COOPERATION AGENCY
(JICA)

THE STUDY ON THE TOURISM DEVELOPMENT PLAN IN THE HASHEMITE KINGDOM OF JORDAN

EXECUTIVE SUMMARY

FINAL REPORT

FEBRUARY 1996

NIPPON KOEI CO., LTD.
PADECO CO., LTD.
REGIONAL PLANNING INTERNATIONAL CO., LTD.

MINISTRY OF TOURISM AND ANTIQUITIES
THE HASHEMITE KINGDOM OF JORDAN

JAPAN INTERNATIONAL COOPERATION AGENCY
(JICA)

THE STUDY ON THE TOURISM DEVELOPMENT PLAN IN THE HASHEMITE KINGDOM OF JORDAN

EXECUTIVE SUMMARY

FINAL REPORT

FEBRUARY 1996

NIPPON KOEI CO., LTD.
PADECO CO., LTD.
REGIONAL PLANNING INTERNATIONAL CO., LTD.

Exchange Rate
(as of February 1996)
US 1.0 $ = 0.708 Jordan Dinar

Spelling of geographical names: cities, tourist sites, etc., in this report is based on the authorized maps issued by the Royal Jordanian Geographic Center.

PREFACE

In response to a request from the Government of the Hashemite Kingdom of Jordan the Government of Japan decided to conduct a study on the Tourism Development Plan in the Hashemite Kingdom of Jordan and entrusted the study to the Japan International Cooperation Agency (JICA).

JICA sent to Jordan a study team headed by Mr. Teruo Yoshimatsu and composed members of Nippon Koei Co., Ltd., Padeco Co., Ltd. and Regional Planning International Co., Ltd. from December 1994 to January 1996.

The team held discussions with the officials concerned of the Government of Jordan, and conducted field surveys in the study area. After the team returned to Japan, further studies were made and the present report was prepared.

I hope that this report will contribute to the promotion of the project and to the enhancement of friendly relations between our two countries.

I wish to express my sincere appreciation to the officials concerned of the Government of the Hashemite Kingdom of Jordan for their close cooperation extended to the team.

February 1996

Kimio Fujita
President
Japan International Cooperation Agency

ABSTRACT

1. Background

Jordan possesses comparative advantage in tourism resources with its abundant archaeological sites and spectacular natural scenery. Tourism has been the leading foreign exchange earner next only to remittance by expatriate Jordanians even before the Peace Accord with Israel, which has brought about a dramatic change in the framework of tourism development for Jordan. It was decided therefore to carry out a comprehensive study on tourism development for Jordan under a technical assistance by the Japan International Cooperation Agency.

2. Objectives of the Study

Objectives of the study are two-fold;

1) To formulate a national tourism development policy and strategy with the target of year 2010 (Phase I), and
2) To formulate a tourism development plan for priority area(s) with the target year of 2000 (Phase II).

3. Summary of the Study

After a careful assessment of tourism sector in Jordan under the light of modern international tourism, four principles were identified as the guidelines;

1) recognition of the importance of tourism as the prime mover of the Jordanian economy (tourism is the oil of Jordan),
2) broadening of tourism in Jordan from antiquity to culture-based (modern tourism requires this),
3) positive preservation of tourism resources (preserve and even enhance the value of resources), and
4) recognition of private and government roles (maximize complementary nature).

Strong points and weaknesses of Jordanian tourism today were evaluated and the following strategies were selected as the immediate directions of tourism development in Jordan;

1) staged development based on regional potential,
2) establishment of tourism cores and corridors,
3) new products and routes development,
4) new market development,
5) strengthening of infrastructure and services,

6) human resource development, and

7) environmental Management

International tourist demand projections were made and detailed strategy and policy formulation was carried out to realize such increase. The preparation of the Central Greater Tourism Area with Amman as its core city and the Dead Sea Resort as its minor core area was identified as the most urgent task. The Southern Greater Tourism Area with Aqaba as its core city and Petra as the minor core should be developed by the target year of 2010. Recommendations are made in the areas of tourism product development, information and service delivery, marketing, promotion, tourism industry, supporting infrastructure and services, institutional development, heritage preservation, community considerations and women's involvement, human resource development, and environmental management. For the Phase II study, the following areas were selected as the subject of study;

1) Amman,

2) Madaba / Dead Sea,

3) Balqa, and

4) Karak / Dead Sea

Six model projects were selected within the subject areas that were considered suitable for leading structural changes in tourism sector in Jordan and for at the same time receiving foreign assistance for implementation. They are;

1) Amman Downtown Tourist Zone,

2) National Museum,

3) Historic Old Salt,

4) Dead Sea Panoramic Complex,

5) Dead Sea - Madaba Parkway, and

6) Karak Tourism Development.

4. Conclusions and Recommendations

All of the six model projects are individually highly beneficial to the Jordanian economy in order to establish Jordan as the recognized tourist destination on its own. The implementation of the recommended national tourism development strategies and policies, and six model projects will firmly put Jordan on the course of continued success in tourism sector under the environment of international competition.

TABLE OF CONTENTS

Part I : National Tourism Development Strategy and Policy

EXECUTIVE SUMMARY

The Final Report consists of four separate volumes as follows:

1) Executive Summary

2) Part I: National Tourism Development Strategy and Policy

   - Volume 1: Tourism Development

3) Part I: National Tourism Development Strategy and Policy

   - Volume 2: Sectoral Development

4) Part II: Development Plans for Priority Areas

Part I : National Tourism Development Strategy and Policy

1. Introduction

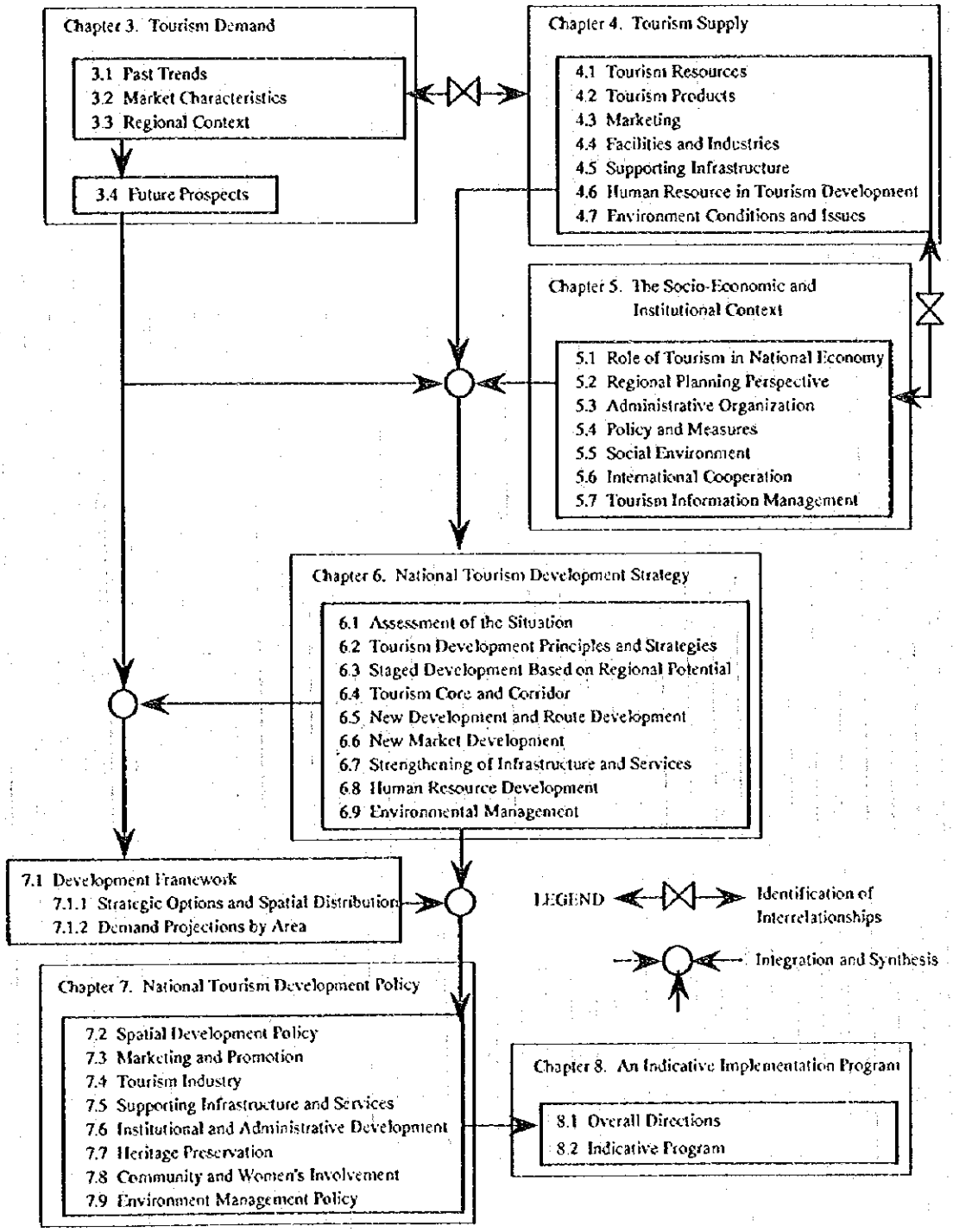
- "The Study on the Tourism Development Plan in the Hashemite Kingdom of Jordan" is being undertaken for the Government of Jordan within the general framework of technical cooperation of the Government of Japan and the Government of Jordan, the framework having been set out in the Agreement of Technical Cooperation between the two governments signed on July 16, 1985.

- The Japan International Cooperation Agency engaged a consortium of Nippon Koei, Co., Ltd., PADECO Co., Ltd. and Regional Planning International Co., Ltd. to carry out the Study and the Study Team commenced work in December 1994. The Study proceeded alternately in Jordan and in Japan for the following 12 months. This Final Report presents the results of the Study Team's Phase I work, which formulates a National Tourism Development Strategy and Policy, and Phase II work, which examined various aspects of selected tourism development projects.

2. Study Approach

- The basic approach adopted in this Study was to understand tourism in Jordan as the result of ***interaction between demand and supply under the prevailing socio-economic and institutional setting***. Importance of such a market-oriented approach can not be overemphasized as international tourism has become a highly competitive market world-wide. Figure 1 illustrates the conceptual framework of analytical procedures utilized in this study.

Figure 1 Methodology for National Tourism Development Policy Formulation



3. Tourism Demand

Demand Characteristics

- In 1994, Jordan received 3.2 million foreign visitors. However, close to 2.4 million are those from neighboring countries en route to the Gulf countries or in Jordan for work purposes or for the purpose of Haji pilgrimage. They do not require tourism faciliti The remaining 840,000 can be considered tourists.

- A dramatic change has taken place in tourism sector in Jordan. There has been a surge in tourist arrivals from non-Arab countries since 1991 and this year it is expected that ***the number of tourists from non-Arab countries have exceeded the number from the Gulf Cooperation Council Countries, first time in Jordanian history***. (See Figure 2)

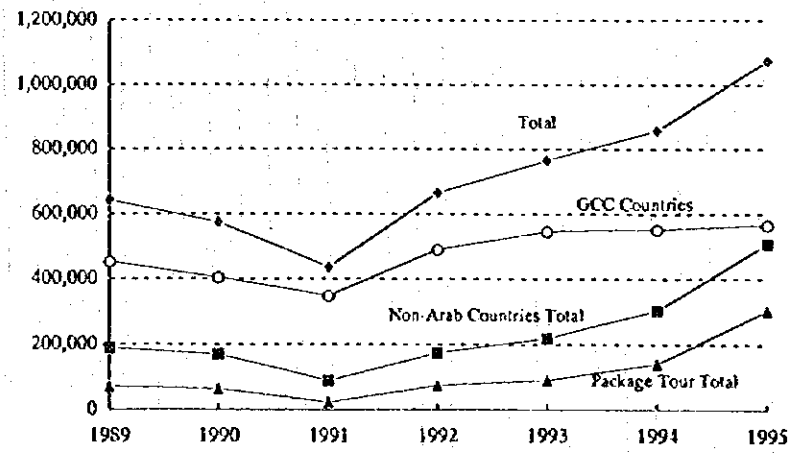
- In terms of absolute number, ***Europeans dominate the non-Arab tourist market*** although in terms of growth rate other regions are equally impressive.

- Among GCC Countries tourists less than 1% use package tours. Most of GCCC tourists are repeat visitors; many have villas or other private accommodation in Jordan.

- Israeli tourists started coming to Jordan in 1994 after the Peace Treaty. In that year 11,000 came, of which 54% were in package tours. In the first 6 months of 1995, the number of Israeli tourists already surpassed 52,000 and was growing.

- ***Package tours are the prime source of growth*** of tourist arrivals and their share in the market will grow further. Judging from experience in other destination countries of similar character in tourism development, it is inevitable that package tours will become more dominant factor in the Jordanian tourism market. (See Figure 2)

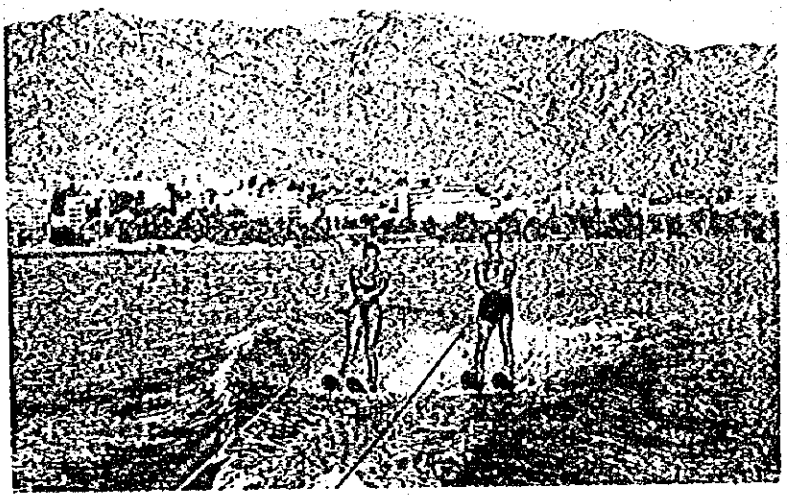
Figure 2 Trend of Tourist Arrivals, GCC Countries and Package Tour



- Interview surveys of tourists carried out for the Study Team have revealed characteristics of tourists to Jordan. Close to 50% described themselves as professional or administrative workers.

- A majority (59%) of them had foreign travel experience of more than 4 times in the past. Over 65% of those from all regions other than GCC Countries are the first comer to Jordan. Especially 86% of Europeans were first comers. On the other hand, a majority of those from Americas and GCC Countries were repeaters for business purpos It can be said that ***tourists to Jordan at present are about 80% from Europe, well experienced with foreign travel, and eager to try out a new tourism area.***

- Nearly four-fifths (78%) chose Jordan as their destination because of its history and culture. Tourist information in Jordan was given a "poor" rating by 9% and 31% gave a "fair" rating. Overwhelming 96% said hospitality of Jordanians is good; perhaps another proof of famous Jordanian hospitality. In terms of the percentage of respondents giving the "good' rating, Petra attracted 76%, Wadi Ram 57%, Jerash 64%, and Aqaba 47%.

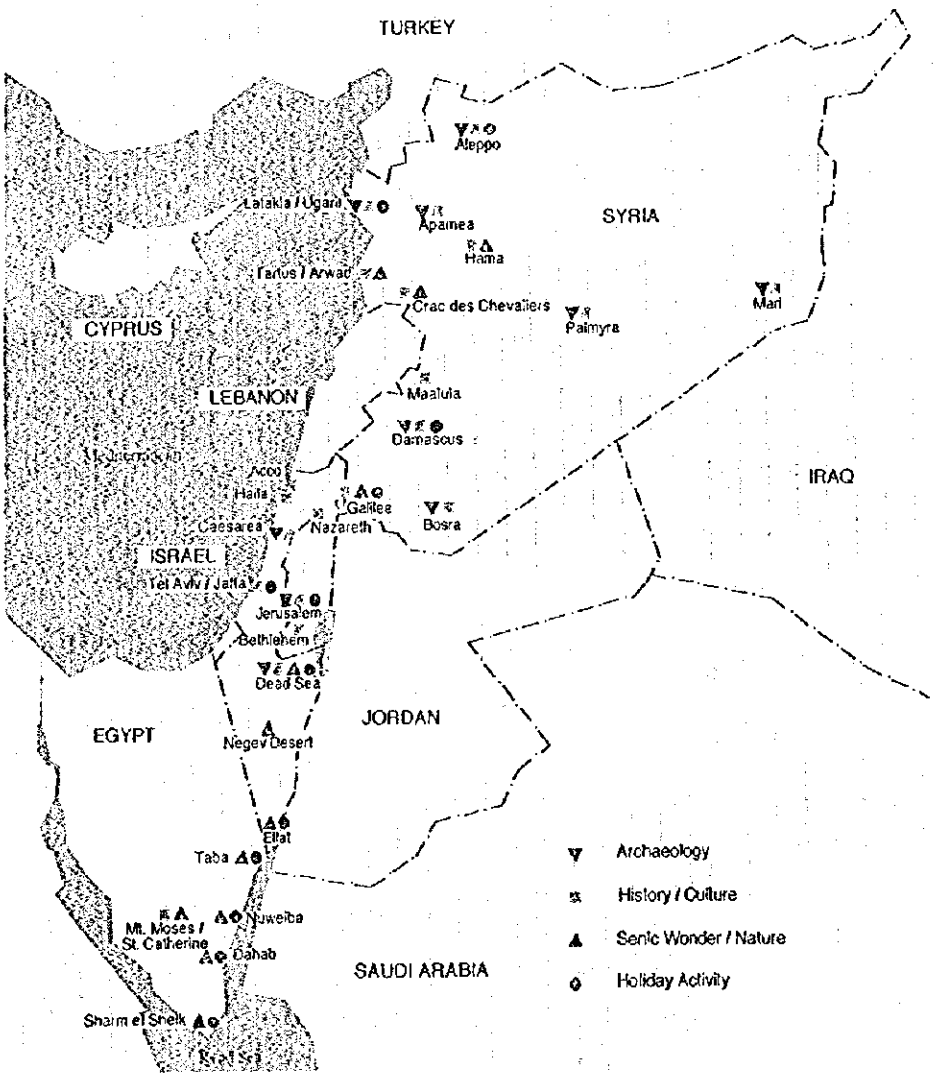


Regional Context

- Tour operators in major tourist generating countries generally package Jordan in combination with other regional tourist destinations, notably Syria, Lebanon, Egypt, or Israel. ***It is rare for Jordan to be featured alone.*** Jordan is sometimes offered as an optional extension tour on a variety of Egyptian packages for the general European tourist market.

- Table 1 examines the comparative position of Jordan with other competing destinations in the region. Figure 3 shows tourism resources in competing countries in the region.

Figure 3 Tourism Resources in Neighboring Countries



Regional Context

- Tour operators in major tourist generating countries generally package Jordan in combination with other regional tourist destinations, notably Syria, Lebanon, Egypt, or Israel. ***It is rare for Jordan to be featured alone***. Jordan is sometimes offered as an optional extension tour on a variety of Egyptian packages for the general European tourist market.

- Table 1 examines the comparative position of Jordan with other competing destinations in the region. Figure 3 shows tourism resources in competing countries in the region.

Figure 3 Tourism Resources in Neighboring Countries

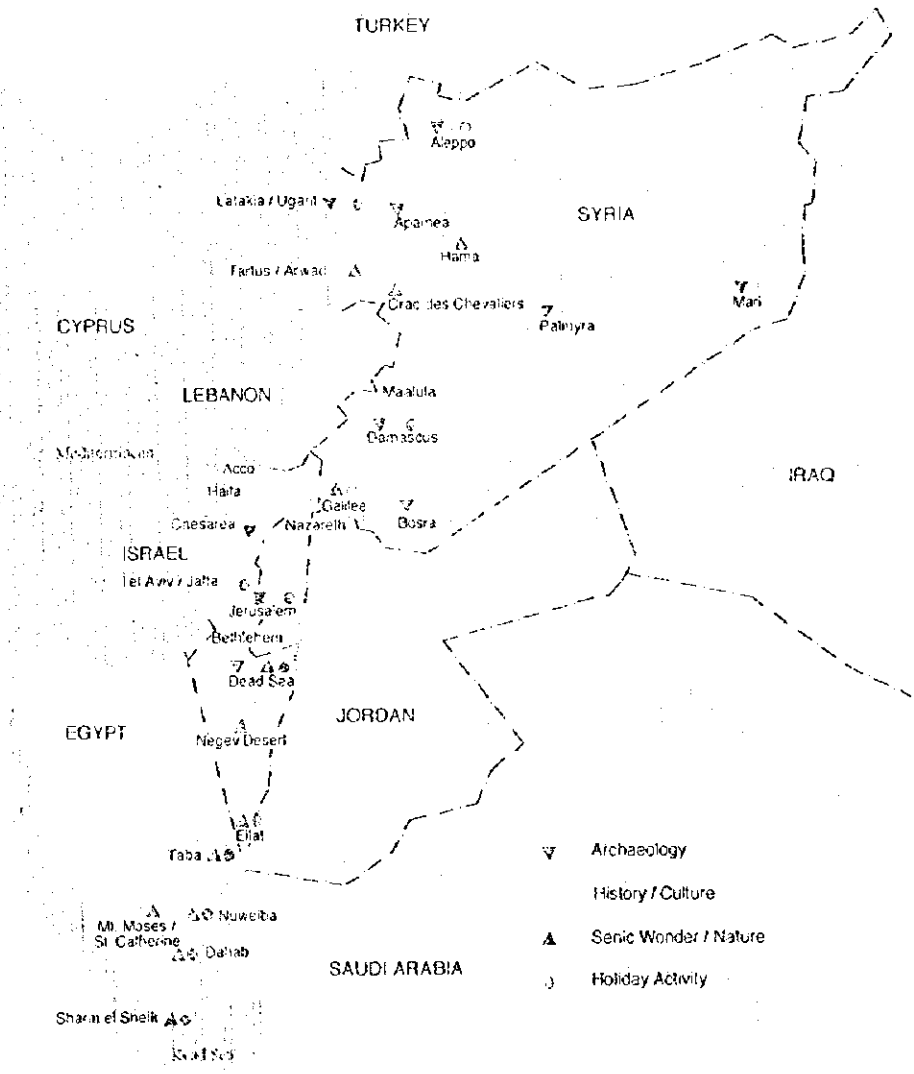


Table 1 Comparative Position of Jordan as a Tourist Destination

CRITERIA / COUNTRY	Destination Type	Recognition in World Market	Stand-alone Destination	Product Representation of Resources							
				Archaeology	History	Folklife	Culture	Natural Wonders	Beach Holiday	Health / Cure	Themed Attraction
Jordan	Culture tourism, plus small beach base	Limited for culture tourists	No	Strong	Weak	Weak	Weak	Weak	Weak	Weak	Weak
Israel	All-purpose Tourism	Established for general tourists	Yes	Fair	Strong	Fair	Fair	Fair	Strong	Strong	Strong
Egypt	All-purpose Tourism	Established for general tourists	Yes	Strong	Strong	Strong	Strong	Strong	Strong	Weak	Strong
Syria	Culture tourism, plus small beach base	Limited for culture tourists	No	Strong	Fair	Strong	Fair	Fair	Fair	Weak	Weak
Jordan after the implementation of the recommended measures	Culture plus beach and curative	Culture tourists/ General tourists	Yes / No	Strong	Fair	Fair	Fair	Fair	Fair	Fair	Fair

Source: JICA Study Team

Future Prospects

- Jordan is endowed with potential tourism resources of various kinds. However, they are not being taken advantage to their full potential. Considerable effort is needed to sustain the growth of the tourism sector in Jordan. The recent sudden increase should be considered an abnormality of released pent up-demand. Long-term growth scenarios are shown in Figure 4.

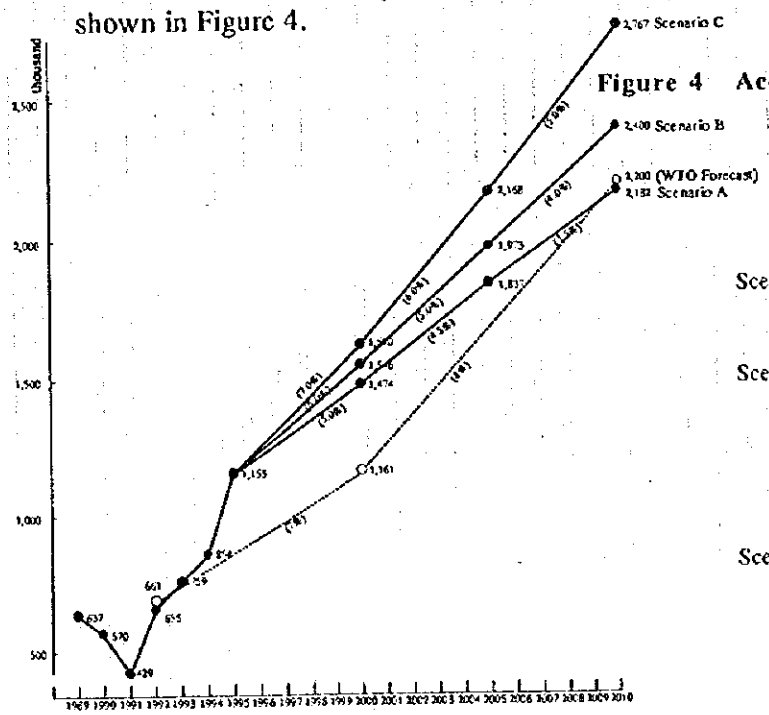


Figure 4 Accommodation Arrivals Forecast

Scenario A: Stable and continuous growth without any drastic policy changes by the Government.

Scenario B: Effective support for tourism development by the Government takes effect from 2000 and accelerates the further growth rate of tourism sector development.

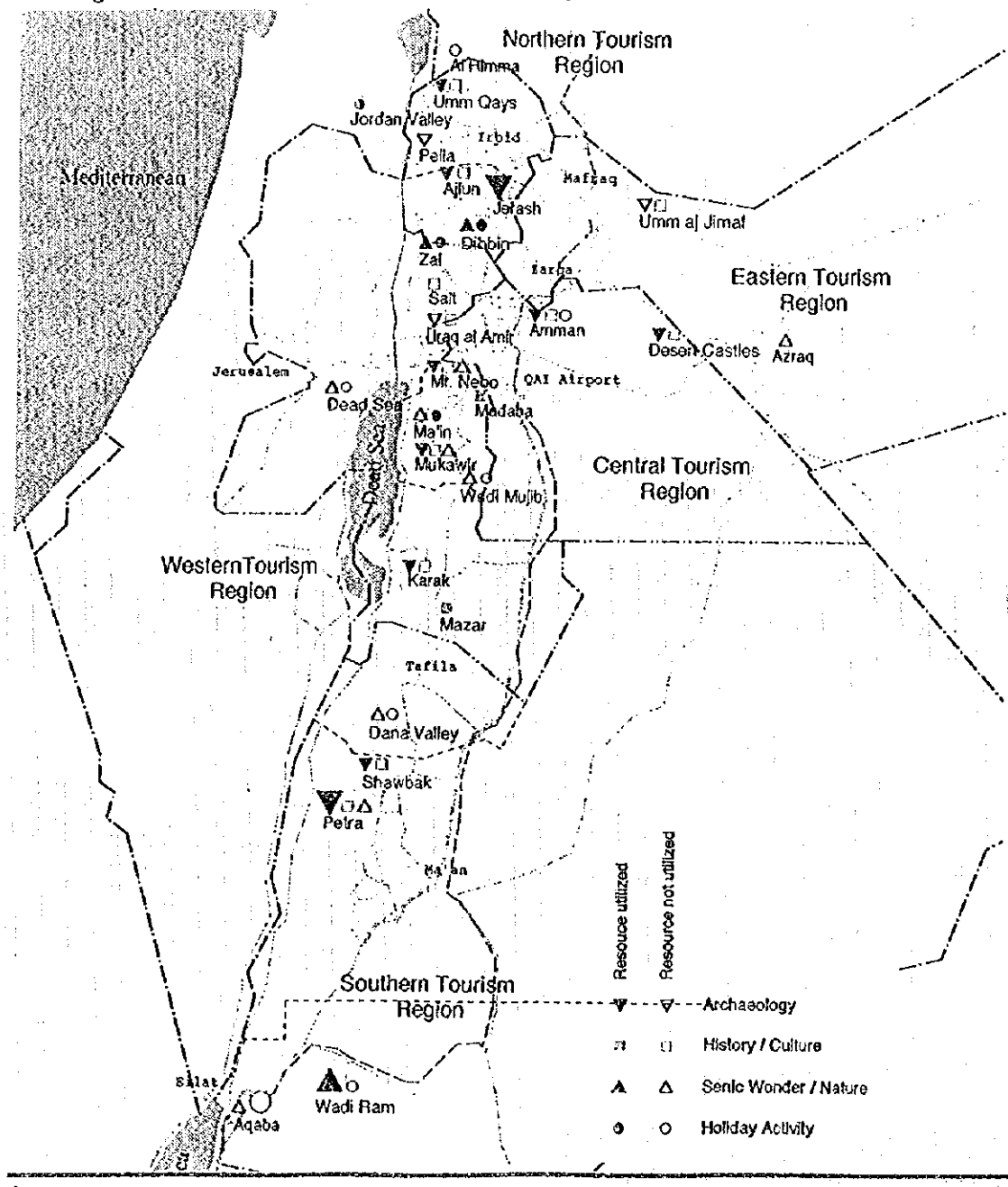
Scenario C: Continuing strong Government support and strengthening the tourism sector results in considerable growth.

4. Tourism Supply

Tourism Resources

- Jordan's major tourism resources are shown in Figure 5. For analytical purposes Jordan was divided into tourism areas as shown in the Figure.

Figure 5 Tourism Resources and Areas in Jordan

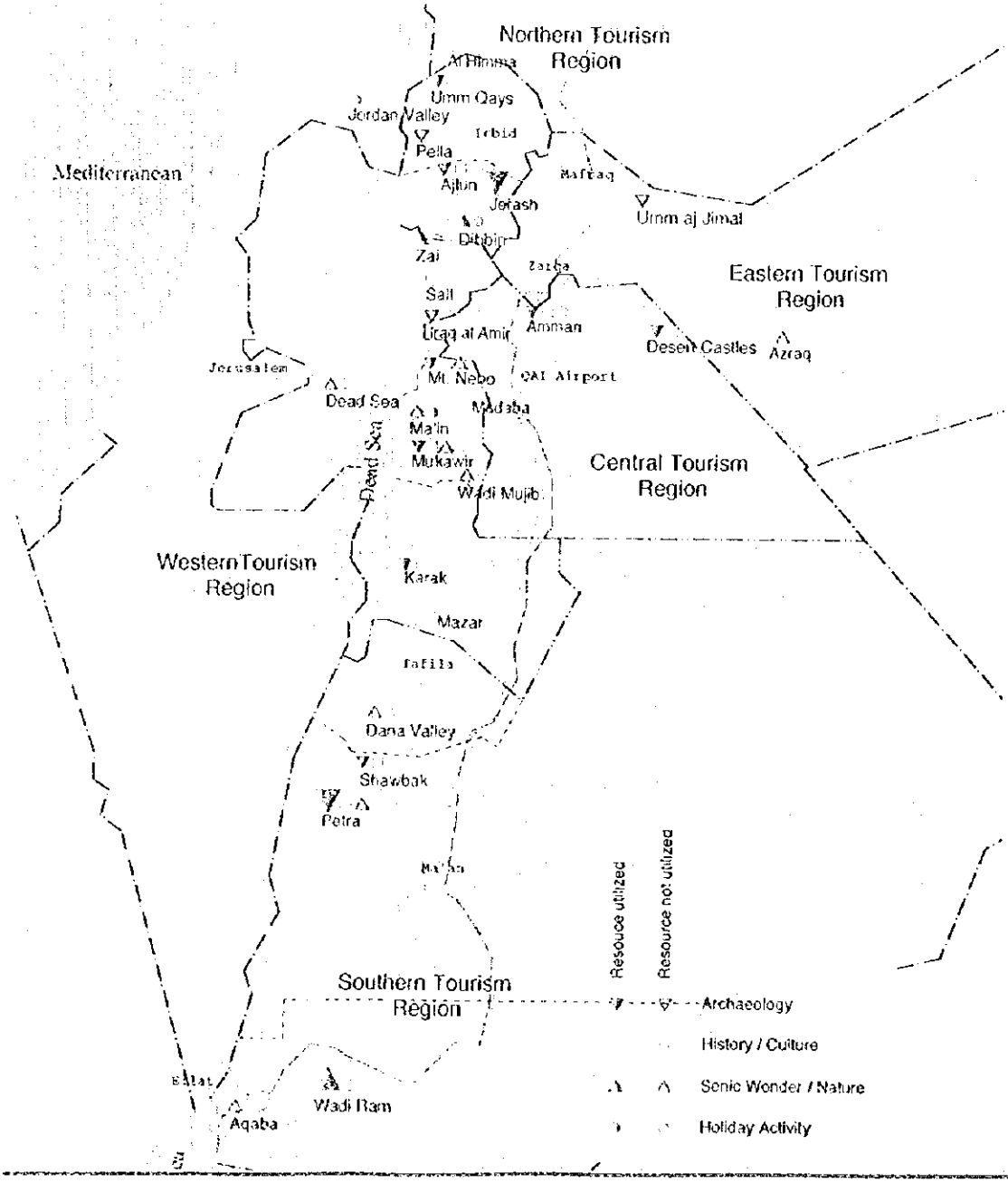


4. Tourism Supply

Tourism Resources

- Jordan's major tourism resources are shown in Figure 5. For analytical purposes Jordan was divided into tourism areas as shown in the Figure.

Figure 5 Tourism Resources and Areas in Jordan



Tourism Products

- Modern tourism has introduced the concept of ***"tourism product" in lieu of "tourist attraction"***. Attractions such as scenic wonders, archaeological sites, historical monuments, etc., can no longer be left unattended waiting for tourists to come. They must be made into a product with a variety of support services and facilities and sold to the target market.

- Tourism products in Jordan today suffer from the following:

  - ***Over emphasis on antiquities***
  - ***Poor presentation***
  - ***Below standard level of service and facility provision***

- Table 2 presents assessment of existing situation.

Table 2 Provision of Visitor Facilities at Selected Tourist Sites

SITE	HIGH-WAY SIGN	2ND-ARY SIGN	PARK-ING	TICKET BOOTH	VISITOR CENTER	PRINTED INFOR-MATION	MUSE-UM	ON-SITE SIGN	REST-HOUSE/ RESTAU-RANT	NOTES
Amman Citadel	No	No	Yes, but only for a few saloon cars	At Museum	No	No	Yes, but archae-ology only and crowded exhibits	Yes, but name only and very poorly done	No	Excellent panorama point, but no such facility
Jerash	Yes	No	Yes, but obstructs vista Arch to South Gate	Yes	Yes, but poorly managed	No	Yes, but archae-ology only	Yes, but name only and poor design	Yes	
Karak	Yes	No	Yes, but not paved	Yes	No	No	Yes, but archae-ology only, and irrel-evant to Castle	No	Yes	Visitors come to Karak for Crusader Castle, but no infor-mation on castle or history
Petra	Yes	No	Yes, but too small	Yes	Yes, but mostly empty	No	Yes, but archae-ology only	Yes, but name only and not Infor-mative	Yes	Poor utilization of Visitor Center; the appearance of the visitor center is deceptive
Wadi Rum	Yes	No	Yes, but not paved	At Rest-house	No	No	No	Yes, but very few and name only	Yes	Reckless 4-wheel driving spoils visitor experience

Source: JICA Study Team

Petra

- Petra is the jewel of the crown for Jordan. Virtually every tourist visits Petra. In 1995, the annual total may well exceed 300,000, an increase of 50% over the previous year. This is still less than half Petra's estimated carrying capacity of 2,000-2,400 per day. Jordanian tourism will continue to rely on Petra for sometime. It is ***extremely important to maintain the popularity of Petra in the world tourist market*** by all available and appropriate means.

- The above mentioned short-comings of tourism products in Jordan equally apply to Petra at present. The spectacular natural scenery, for example, is not incorporated at all in Petra as a tourism product, not to mention poor presentation and faciliti

- Recognizing the importance of Petra, many foreign donors have offered assistance for Petra. Out of a total of approximately US$ 77 million proposed to Jordan in tourism related projects, more than half goes to Petra.

- The Petra Regional Council created earlier this year is expected to implement the 1994 UNESCO Management Plan while coordinating activities of various donors. By and large, product management of Petra seems to have set on a right track.

Dead Sea and Aqaba

- At present there are one resthouse at Dead Sea, the four-star Dead Sea Hotel, on beach front, and one hotel, the four-star Ashatar Hotel in Ma'in Spa in the Dead Sea area; there are no other faciliti

- The Jordan Valley Authority prepared the master plan of ***"Tourism Development Project of East Coast of the Dead Sea"*** in December 1994, which covers a coastal belt 58 km long and 5 km wide. The plan contains ambitious projects including a theme park, a tourist village, a high-rise hotel, and a tourist lodging complex in addition to several resort town development schem Solicitation of private investments for the first phase and the planning of infrastructure provision by the public sector have started.

- ***Aqaba is endowed with the best beach frontage and diving spots*** on the Gulf of Aqaba, compared with Eilat, Israel, and Taba, Egypt, both of which share the same Gulf of Aqaba. Tourism development in ***Aqaba lags far behind Eilat.***

- The Aqaba Region Authority has recently revised its master plan for the region in the face of favorable political conditions leading to an anticipated increase in tourism. The revised plan calls for the development of major tourism faciliti The problem of ***conflict in land use with port and industrial facilities*** remains.

Other Sites and Places

- ***Wadi Ram*** has become increasingly popular for its magnificent desert scenery and towering weathered rock cliffs. Conflict with its fragile ecosystem and a Bedouin village within the area issues for which solutions can no longer be deferred.

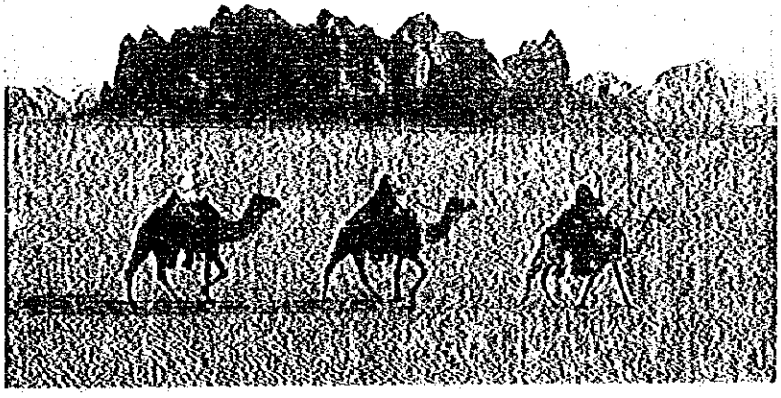
- ***Amman***, although by far the most important gateway and place of stay for international tourists and not lacking tourism resources if properly exploited, falls well short of being a modern tourism core city. This means millions of dollars in tourism receipts are unrealized by the country.

- There are many potential tourist attractions waiting to become tourism products throughout the country, including ***Jerash, Salt, Karak, Umm Qays, Pella, Fuhays, Desert Castles, Dana Valley, Madaba, Iraq al Amir, Umm aj Jimal, Ajlun, Mt. Nebo, Wadi Mujib, and Azraq***.

Marketing

- Existing ***promotion and information materials are extremely inadequate***. They are difficult to obtain, with little or irrelevant information shown, and they are generally produced without clearly considering the functions they should fulfill.

- A ***consistent, well targeted marketing effort*** is needed rather than sporadic concentrated events.



Facilities and Industries

- About 70% of all hotel rooms are concentrated in Amman in 1993 as shown in Figure 6. Occupancy rate in 1993 was less than 50% but it must have improved significantly since. MOTA hotel classification especially in the five-star luxury category does not reflect the internationally recognized standards. A reclassification effort is underway by MOTA.

- Locations of major information facilities are shown in Figure 7. They are generally poorly equipped, both materially and in trained personnel.

- Locations of major presentation facilities are shown in Figure 8. Poor presentation and lack of marketing effort make them less appealing to tourists than desired.

- Locations of major recreation facilities are shown in Figure 9. They could be integrated in the tourism development with a conscious effort.

- Souvenir and shopping industries are still in infant stage.

- The monopoly of tourist bus services by the Jordan Express Tourist Transport Company is being gradually dismantled. The current mismatch of bus type with the increasingly smaller group size is hoped to be resolved in due course. An airport beautification plan is being drawn up.

Supporting Infrastructure

- The road network is generally adequate except for ***a few missing links, particularly those linking Dead Sea-Wadi Araba Highway and Kings Highway***. Road signs and road side facilities however need improvement.

- Water supply is a big problem for the nation as a whole. Demand from an increased number of tourists will constitute only a small fraction of water demand by the general population. Major ***policy measures such as water pricing and distribution of recycled water*** will have to be implemented in the near future.

- Waste management, sewerage, and drainage control, require site by site solutions.

Human Resource Development

- The total employment in tourism sector as shown in the government statistics stood at a little less than 8,000 in 1993; the number of jobs in the sector hardly grew since 1989. There is a small government run Hotel Training College with a student body of 435 and two universities have courses in tourism management with a combined student body of 140.

Environmental Management

- Wildlife and landscape in Jordan are fragile resourc The protection of nature, which is legally based only on the hunting law and the nature reserve designation, is ***very weak***. The new environmental law itself is not explicit about the need to protect nature as a valuable patrimony. There is no protection of the landscape resource. As a result tourism development is still detrimental to the environment, instead of being a guarantee for long term protection. Typical examples are Wadi Ram, Petra, and Dead Sea areas. Dana is however a model of efforts made for the integration of wildlife and landscape conservation with local communities development and nature tourism development.

Figure 6 Room Supply of Hotels (1994)

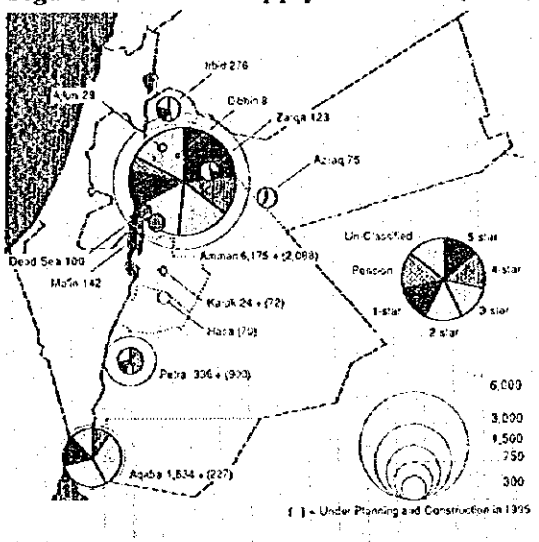


Figure 7 Major Information Facilities

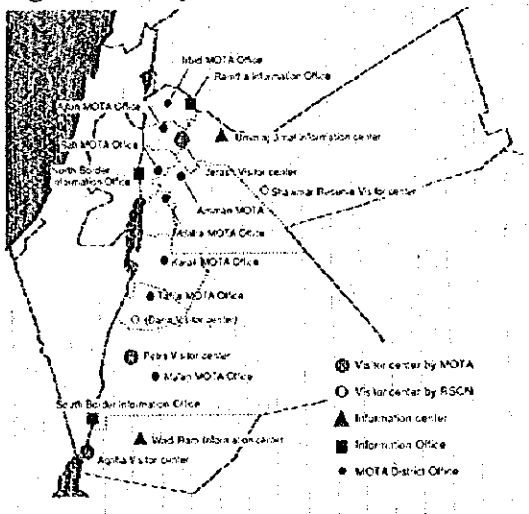


Figure 8 Major Presentation Facilities

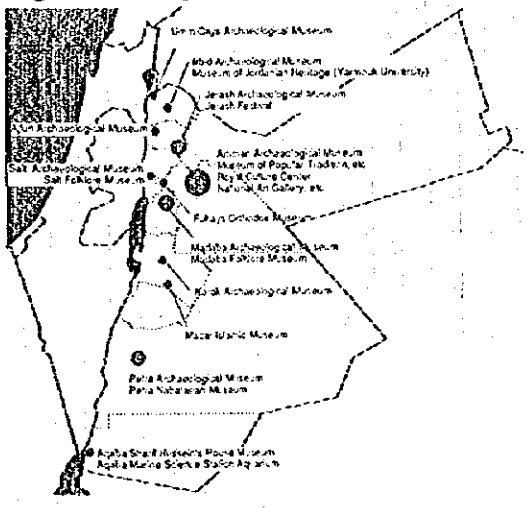
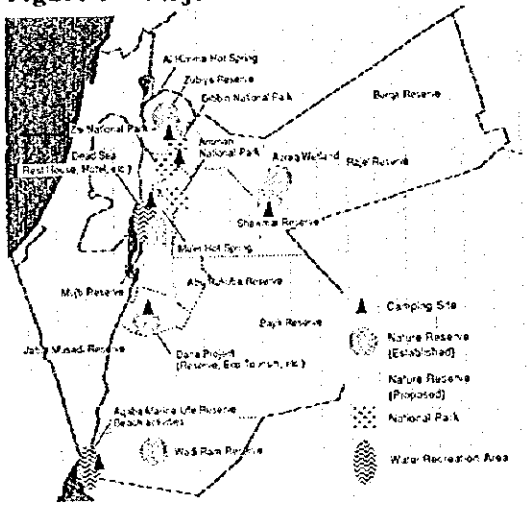


Figure 9 Major Recreation Facilities



5. The Socio-Economic and Institutional Context

Role of Tourism in National Economy

- The structure of the Jordanian economy has been such that the country's chronic trade deficit is offset by private transfer of funds mostly by expatriate Jordanians and the official transfer of funds by foreign governments. This mechanism has made ***Jordan extremely vulnerable to external conditions.***

- The total amount of foreign exchange brought in by foreign tourists in 1994 has been estimated at around US$ 663 million. This constitutes more than 50% of the total amount of merchandise exported in 1994. As an industry, ***tourism is already a premier foreign exchange earner for Jordan.***

- Considering the multiplier effect of foreign tourist spending, the effect of international tourism in Jordan has been estimated at about 490 million JD. This is ***much larger than the construction industry or the agriculture sector in 1994.***

- Although declining, the population growth rate is 2.8% per annum, which will result in a 50% increase in 13 years; also the country's young population structure, results in a labor force growth rate of 6.3% per annum. Unemployment was 17% in 1991 and will rise dramatically if the problem is not attended to with vigor. ***Tourism is an industry having a large labor absorption capacity.***

- It is therefore extremely important to let the industry grow along its desired course.

Regional Planning Perspective

- Regional development policies are not explicitly stated in the current Five Year Plan (1993-1997). However, one of the social policies is "distributing equitably the benefits of development and reducing disparities in development among groups and regions".

Administrative Organizations

- Although MOTA is the primary agency for tourism development and administration, many agencies are involved. Current organizational problems are:

  - ***Fragmented authority***
  - ***Inactive Higher Council of Tourism***
  - ***Weak policy formulation functions of MOTA***
  - ***Weak MOTA district offices***

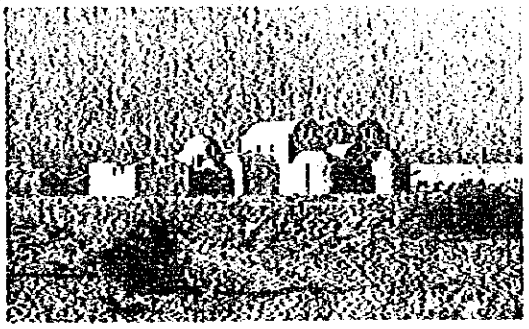
Policies and Measures

- The current Five Year Plan (1993-1997) states the following concerning tourism development:

  - Extend ***private ownership to state owned land*** for tourism
  - Transfer the ***Hotel College to MOTA***
  - ***Update classification and licensing regulations*** for hotels, restaurants, and night clubs
  - Establish chamber of tourism
  - Increase tourism awareness by:
    * undertaking ***tourism campaigns***
    * producing ***tourist maps and brochures***
    * founding a ***national museum***
    * developing ***new tourism activities***

- However, further government actions are required to cope with following problems:

  - Non-existence of ***Tourism Development Master Plan***
  - Inadequate regulation and weak measures to encourage ***private participation***
  - Weak ***cooperation*** between the government and private Sector
  - Small ***budget allocation*** for tourism development

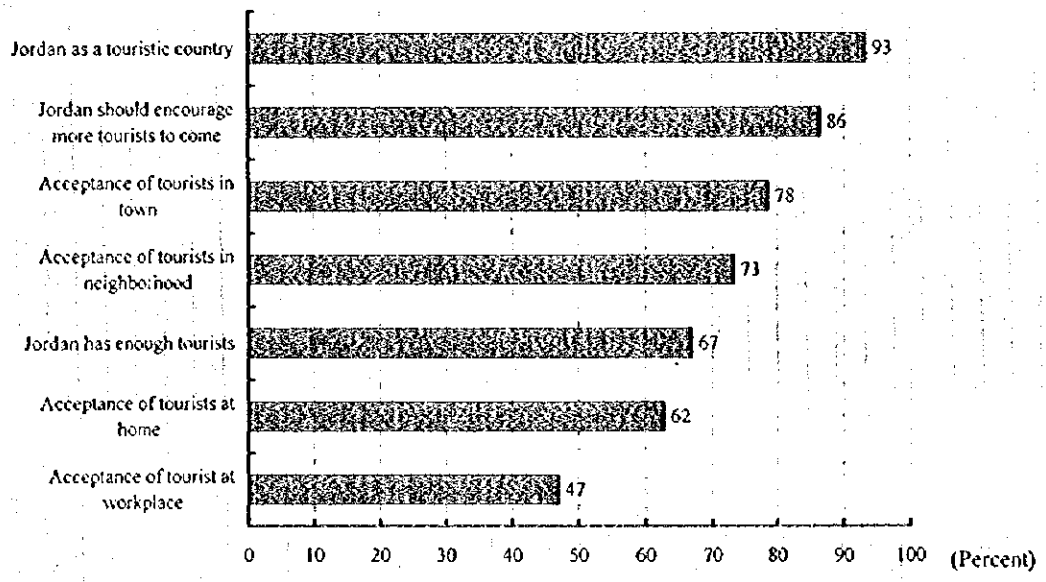


Social Environment

- A social attitude survey, probably the largest and the most comprehensive of its kind in Jordan, was carried out. Major findings are:

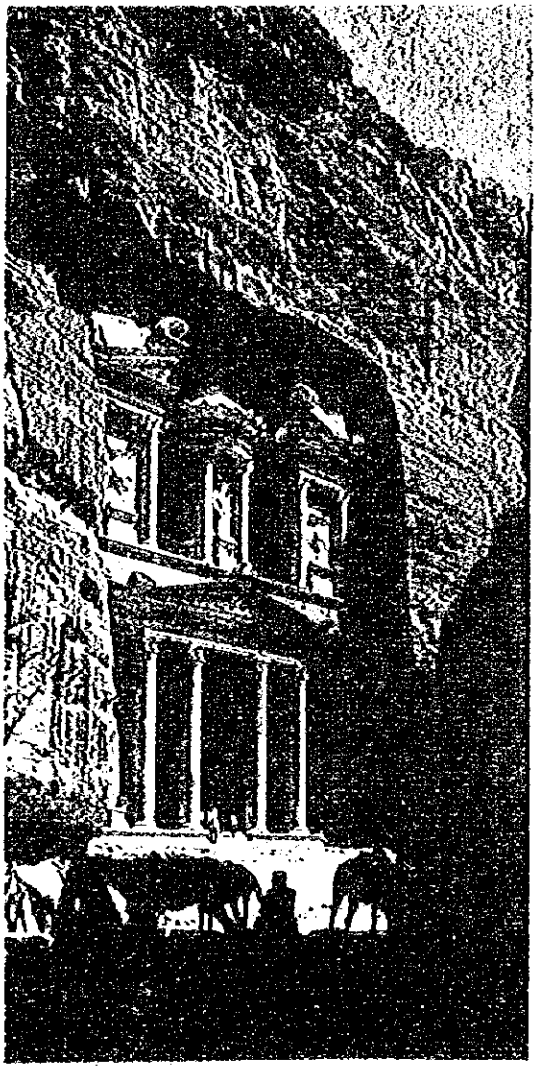
  - A concern that a cultural bias in Jordan may deter tourism development does not seem to be well founded. ***Nine out of ten favor more tourists*** coming to Jordan. (See Figure 10)
  - In terms of who receives the benefit, however, ***most think there is little benefit to themselv***
  - Expectations are higher in places with less experience with tourism.
  - ***The young are more open*** to tourism than the old, and the employed more than the unemployed.
  - As Jordan's youth becomes older positioning themselves in the center of the society, Jordan ***will become even more receptive to tourism.***

Figure 10 Acceptance of Tourism



International Cooperation

- Since the Peace Initiative, there is increasing interest from foreign donors in developing tourism in Jordan. As of mid-1995, nearly US$ 85 million worth of projects are underway or being negotiated. ***More than half of the total are projects for Petra.***



6. National Tourism Development Strategy

Assessment of the Situation

- Economically, ***tourism is the "oil" of Jordan***. The fact is well understood by people of Jordan. Nine out of ten believe Jordan should accept more tourists.

- Recent explosive growth of international tourists, particularly package tours from Europe, has led for some in the government sector to worry about the ability of Jordan to cope with such an increased number of tourists.

- ***One should not be misled by the recent influx of international tourists***. Excluding Israeli tourists, the estimated number of tourist arrivals in 1995 is not much different from the number of tourist arrivals one would expect by taking the 1989 total and the average Middle East tourist growth rate of 4 per cent per annum. Jordan must also have absorbed a significant percentage of tourists who refrained from visiting Egypt. (See Figure 11)

- The Study Team found that the tourism in Jordan to date has been too narrowly confined and not up to the competition in the world market for the purpose of ensuring continued growth. This view has been confirmed by the results of the market survey.

- Some 93 percent of tourists interviewed said they chose Jordan because of its history and culture. Virtually all of them visit Petra, a dangerous situation. ***Diversification is needed***.

- The survey results show that ***international tourists are unsatisfied with the lack of modern tourism core functions*** in Jordan. (See Figure 12)

- In order to diversify, new tourism products and new tour routes must be developed and new markets opened. However, ***the basic character of tourism in Jordan will remain centered around its rich history and culture***. The survey results suggests that a radical departure from this basic line may well be futile.

- ***Infrastructure*** needs improvement, ***human resources*** need to be developed, ***environment*** need to be better managed, and ***national heritage*** must be preserved.

- The public sector related to tourism development needs to be restructured so that the ***sector can respond to market demand in an appropriate manner***.

Figure 11 Tourist Arrivals, Jordan and Egypt

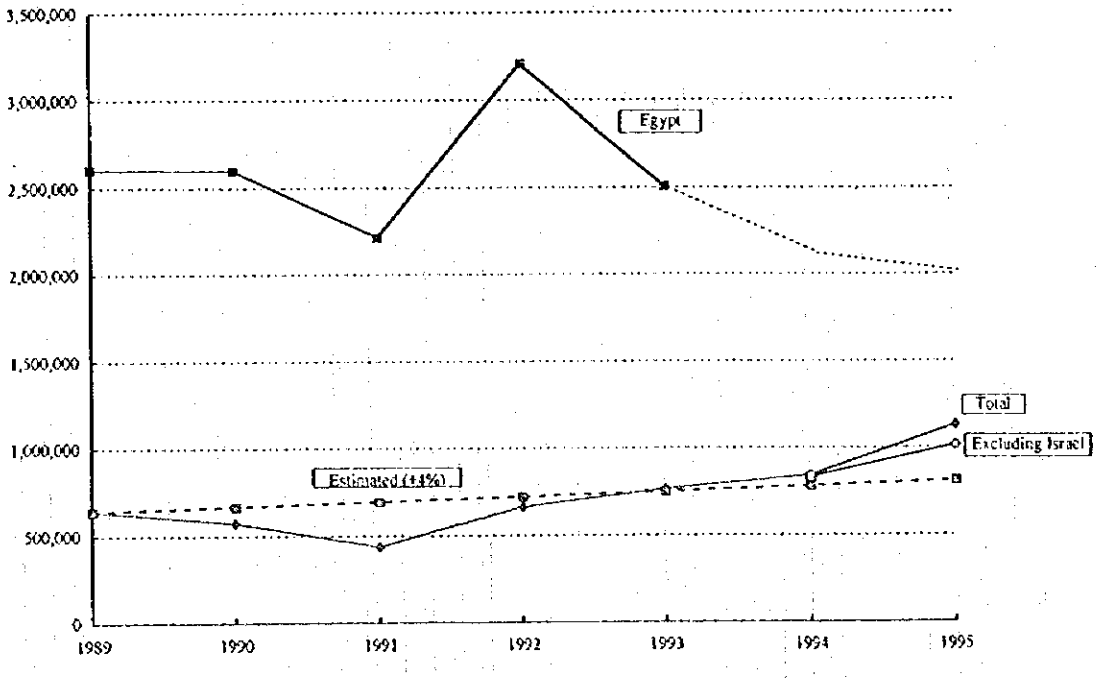
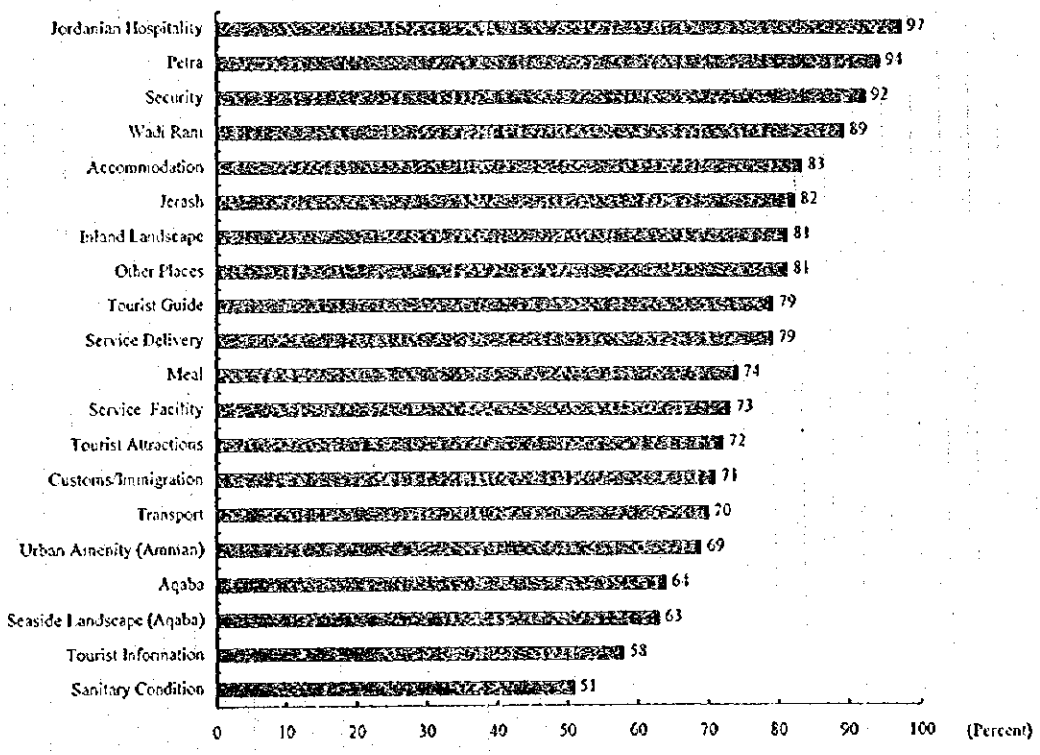


Figure 12 Percent of Tourists Who Rated "Good" for:



Tourism Development Principles and Strategies

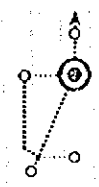
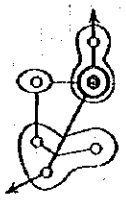
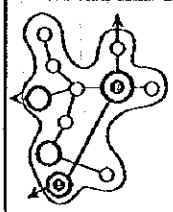
- Four principles are identified.

  (1) Recognition of ***the importance of tourism as the prime mover of the Jordanian economy***.
  (2) Broadening of tourism in Jordan ***from antiquity to culture-based***
  (3) ***Positive preservation*** of tourism resources
  (4) Recognition of ***private and government roles***

- Seven strategies are selected.

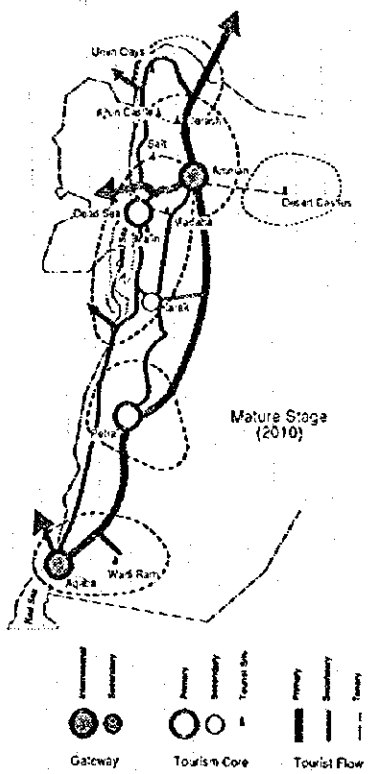
  (1) ***Staged development*** based on regional potential
  Figure 13 illustrates the staged development.
  (2) Establishment of ***tourism cores and corridors***
  Figure 14 illustrates tourism cores and corridors in the mature stage.
  (3) ***New products and routes*** development
  Table 3 presents an assessment of regional potential for new products and routes development.

Figure 13 Development Stage and Pattern

Stage	Pioneer Stage	Growth Stage	Mature Stage
Tourist Volume	Tourism in Jordan at Present		Number of Tourists Arrivals
	Past	Next Decade	Established Tourism Destination
Development Pattern Legend: Gateway Tourist Site Corridor Tourism Core			
Development Pattern Features	- isolated and small scale development - initial tourism development	- cluster development - corridor formation - diversification of tourism products	- network formation - tourism core & establishment of tourist routes
Market Strategy	- traditional market - Europe	- traditional market expansion - net market exploitation • geographic (source markets) • product-wise (soft adventure incentive, seminar)	- established traditional market - new market expansion
Target Market Segment	- archeology - religion (pilgrimage) - small seaside holidays	- culture tourism (archeology, history, culture) - soft adventure	- urban tourism folk life tourism - MICE tourism

Source: JICA Study Team

Figure 14 Tourism Cores and Tourist Flows



(4) ***New market*** development

Figure 15 illustrates an assessment of market development potential for Jordan tourism.

(5) Strengthening of ***infrastructure and services***

Transportation, water supply, sewerage, drainage, hygiene, and waste management require improvement.

(6) ***Human resource*** development

Reorganization of Hotel Training College is needed as well as private sector participation in human resource development for tourism industry.

(7) ***Environmental*** Management

Measures to increase the environmental quality of sites, promote the use of new technologies through pilot projects, generate revenues for the conservation of nature, develop public awareness, and identify and protect nature tourism potential.

Table 3 Regional Potentials for Resource Development

Region / Time-Frame	Central	North	East	West	South	Tourist Corridor	Across the Regions
Immediate	- Amman urban tourism base improvement Stage 1 (access beautification, Citadel tourist trail, one stop tourist complex) - Madaba route formation, with side attraction - National Museum part open	- Jarash, Umm Qays improvement	- Desert Castle route improvement	- Madaba tourist trail/culture park - Ma'in/Dead Sea circuit part open - "Historic Salt" completion - Ma'in /Dead Sea circuit completion - Ma'in /Dead Sea health/cure product introduced - Dead Sea Museum part open	- Aqaba beach front improvement - Karak and Wadi Rum improvement	- Kings Highway improvement (lookout/rest area, side attraction) - Desert Highway improvement (Aqaba approach)	- Visitor facilitation improvement at major sites
Medium	- Amman urban tourism base improvement Stage 2 (conference complex) - Hijaz Rail part operation (Amman/airport/ Qutrana) - National Museum completion	- Pella improvement		- Dead Sea Museum completion	- Dissi desert tourist core part open - Aqaba subconference center open - Jet Cat operation (Aqaba/Suweiba)	- Great Rift Valley Highway part open (Jordan Valley/ Dead Sea Drives)	- Sophistication of visitor facilitation at major sites
Long	- Amman urban tourism base improvement Stage 3 - Hijaz Rail/ prospective Damas operation			- Dead Sea resort core completion	- Dissi soft adventure base completion - Aqaba resort core completion	- Great Rift Valley Highway completion	- Network of cores and sites completion

Figure 15 Examination of Major Target Markets and Tourist Themes

Tourist Objects / Major Target Market		Culture				Nature				Leisure		Urban		
		Archaeology	History	Folk Life	Religion (Pilgrimage)	Scenic Wonder	Bird watch, Trek	Fish watch, Study	Soft Adventure	Aqua Holiday	Curative Holiday	Urban Relaxation	Incentive, Seminar	Urban Shopping
Europe	UK	■	■	■	◪	■	■	■	■	■	□	□	◪	□
	Germany	■	■	■	◪	■	■	■	■	□	■	□	□	□
	France	◪	◪	■	◪	◪	◪	◪	■	□	◪	□	□	□
	Italy	◪	◪	◪	◪	◪	◪	◪	■	◪	◪	□	■	◪
American		◪	◪	◪	◪	◪	◪	■	■	□	□	□	□	◪
Israel		■	■	◪	■	◪	◪	◪	◪	□	□	□	■	□
Upper Arab Region		◪	□	□	□	□	□	□	□	■	■	■	◪	■
Japan/East Asia		■	■	■	□	■	□	◪	◪	□	□	□	□	■

LEGEND: ■ High Appeal ◪ Medium Appeal □ Low Appeal

7. National Tourism Development Policy

Development Framework

- The Study Team has estimated the total accommodation requirements for each of the ten tourism areas. Table 4 shows the middle case for 2010.
- The ***total number of hotel rooms*** must increase by 850 rooms every year between 1995 and 2000.

Spatial Development Policy

- In the eventual pattern of tourism development, Jordan will be broadly divided into three Greater Tourism Zones, Northern, Central, and Southern.
- ***Amman should become a strong international gateway/tourism core*** of the Central Greater Tourism Zone. ***The Dead Sea area should become another core*** in its own right with a resort character.
- The Southern Greater Tourism Zone contains ***the golden triangle of Petra, Wadi Ram, and Aqaba***. Aqaba will serve as the country's second international gateway/tourism core and Petra a minor core.
- The Northern Greater Tourism Zone with Irbid as its center will serve a niche market.
- Spatial development pattern for 2010 is illustrated in Figure 16.

Table 4 Tourist-nights, Tourists and Room Requirement in 2010 by Scenario B

	Tourist-nights Share by Tour. Area(%)	No. of Tourist nights per year (000)	Average Length of Stay(Night)	Number of Tourists per year (000)	Average Bed Occupancy Rate(%) yearly	Average Room Occupancy (Person)-yearly	No. of Room Required in 2010	Number of Bed Required (units)
Northern Tourism Region	2.0%	168	1.0	168	45.0%	1.7	602	1,023
Irbid Tourism Area	0.8%	67	1.0	67	45.0%	1.7	241	409
Ajlun-Jerash T. A.	1.2%	101	1.0	101	45.0%	1.7	361	614
Eastern Tourism Region	0.5%	42	1.0	42	30.0%	1.7	226	384
Mafraq-Zarqa Tour. A.	0.5%	42	1.0	42	30.0%	1.7	226	384
Central Tourism Region	51.5%	4,326	3.0	1,442	60.0%	1.7	11,620	19,753
Amman	51.5%	4,326	3.0	1,442	60.0%	1.7	11,620	19,753
Western Tourism Region	11.7%	983	1.5	533	55.0%	1.8	2,788	4,989
Balqa Tourism Area	1.0%	84	1.0	84	45.0%	1.7	301	511
Madaba-Dead Sea T.A.	9.0%	756	2.0	378	55.0%	1.8	2,092	3,766
Karak-Dead Sea T.A.	1.7%	143	2.0	71	55.0%	1.8	395	711
Southern Tourism Region	34.3%	2,881	2.0	1,453	55.0%	1.8	7,686	13,824
Tafila Tourism Area	0.3%	25	1.0	25	40.0%	1.7	102	173
Petra-Shawbak T. A.	16.5%	1,386	2.0	693	60.0%	1.8	3,516	6,329
Aqaba-Wadi Ram T.A.	17.5%	1,470	2.0	735	55.0%	1.8	4,068	7,323
	100.0%	8,400			56%	1.8	22,921	39,972

Figure 16 Spatial Development in Mid / Long Term (beyond 2010)

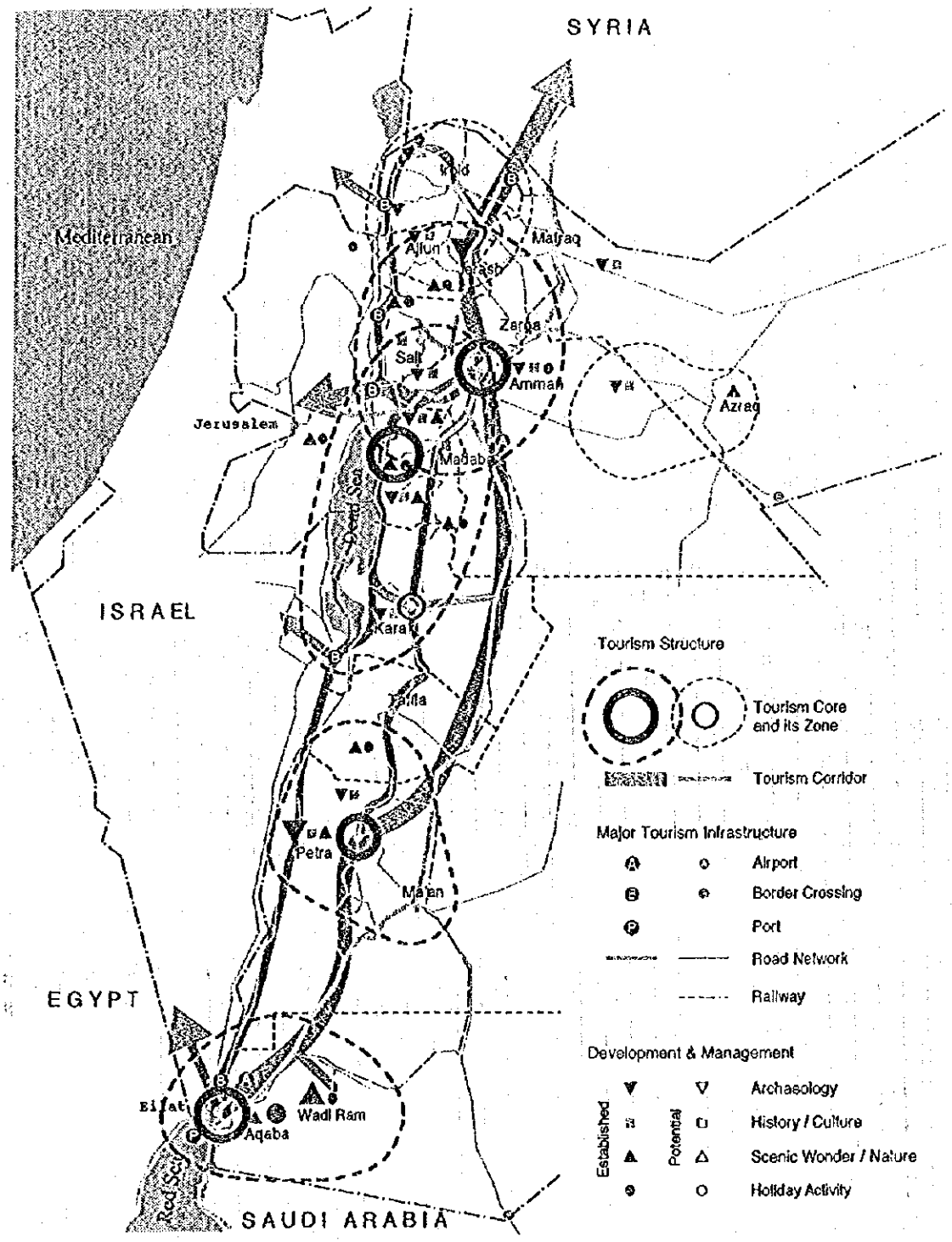
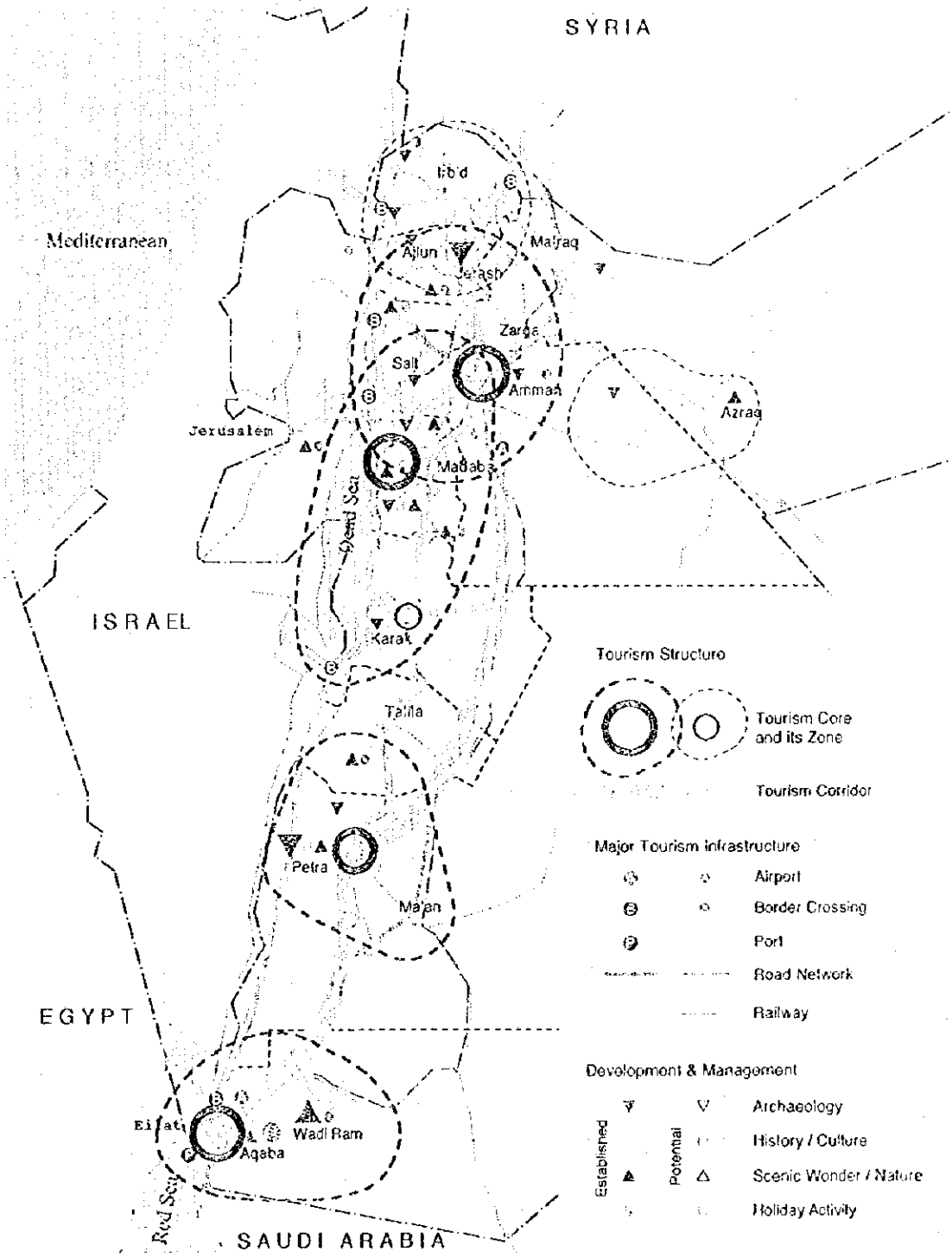


Figure 16 Spatial Development in Mid / Long Term (beyond 2010)



Product Development

- Product development should aim at:

  - upgrading existing tourist attractions and products in order to cope with the changing needs and tastes of tourists; and
  - developing new attractions and products and diversifying the product line in order to enhance the destination profile of Jordan in the world market.

- Detailed product ideas and their proposed implementation schedules are shown in Table 6 (on page 30 to 33).

Information and Service Delivery

- Information and service delivery should aim at:

  - developing ***a new range of information service systems*** in order to enhance the level of tourist experience and satisfaction; and
  - developing ***a competent service delivery system*** in order to keep up with competition in the world tourist market.

- Detailed activity ideas and their proposed implementation schedules are shown in Table 7 (on page 34 to 35).

Marketing

- Marketing should aim at:

  - consolidating ***Jordan's position as a tourist destination*** in the established tourist generating markets;
  - developing ***new and potential markets*** by monitoring and identifying changing tastes and needs of market segments; and
  - maintaining a ***competitive position*** in the world destination market by mobilizing effective promotional measures supported by attractive proposals and products.

- Detailed activity ideas and their proposed implementation schedules are shown in Table 7 (on page 34 to 35).

Promotion

- Promotion should aim at:
  - enhancing the profile and exposure of Jordan as a tourist destination in the travel trade and the general public in the tourist generating countries; and
  - motivating and persuading potential tourists to visit Jordan through an efficient mix of promotional materials.

- Detailed activity ideas and their proposed schedules are shown in Table 7 (on page 34 to 35).

Tourism Industry

- Souvenir and shopping industry development should aim at:
  - opening up a new venue of increasing tourism revenues by developing attractive and sophisticated souvenir/shopping products in order to induce tourists to spend more in Jordan; and
  - developing creative souvenir/shopping industry and related service mechanisms in order to ensure a flow of new products that stimulates purchases and quality service delivery to satisfy visitors.

- Detailed activity ideas and their proposed schedules are shown in Table 7 (on page 34 to 35).

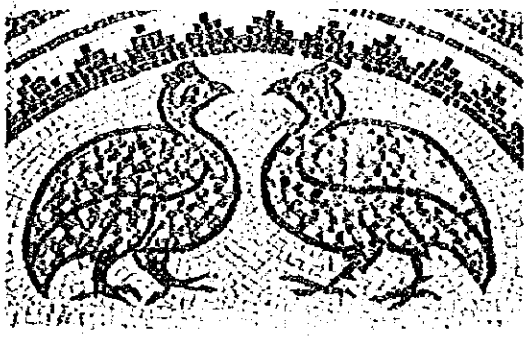
Supporting Infrastructure and Services

- All ***transport systems*** including road transport, railways, water transport, and air transport should be improved to adequately support the growth of tourism in Jordan. In the long run, the country's north-south tourist movements should be carried by three major highways. Missing east-west links should be provided. Restoration of the historic Hijaz railway deserves serious consideration. Project ideas including water transport and air transport are presented in Table 8 (on page 34 to 35) together with their proposed implementation schedul

- ***Water supply*** will be short of satisfying demand around year 2000 if no action is taken. The key to solving this problem is to use recycled water. The distribution of various kinds of water among competing sectors will have to be changed. The effect of tourism, however, will remain minimal. In tourism development projects in rural areas, the Environmental Impact Assessment should include an adequate analysis of water demand and supply and an implementation plan. A similar treatment of the subject should be done for ***sewerage and drainage.***

- ***Food hygiene and waste management*** should be given high priority. Administration should be strengthened and most appropriate solutions should be applied depending on the location and the type of the subject facility.

- ***Tourism information systems*** are proposed for MOTA in addition to the on-going computerized information systems being installed in MOTA. The systems are intended to provide management information for MOTA and tourist information for general public.



Institutional and Administrative Development

- The ***national government should authorize a national tourism development master plan***, which should be drafted by MOTA.

- It is recommended for ***MOTA to create the Policy Department, to strengthen the Project Department, and to improve the functions of District Offic*** The proposed re-organization of MOTA is shown in Figure 17.

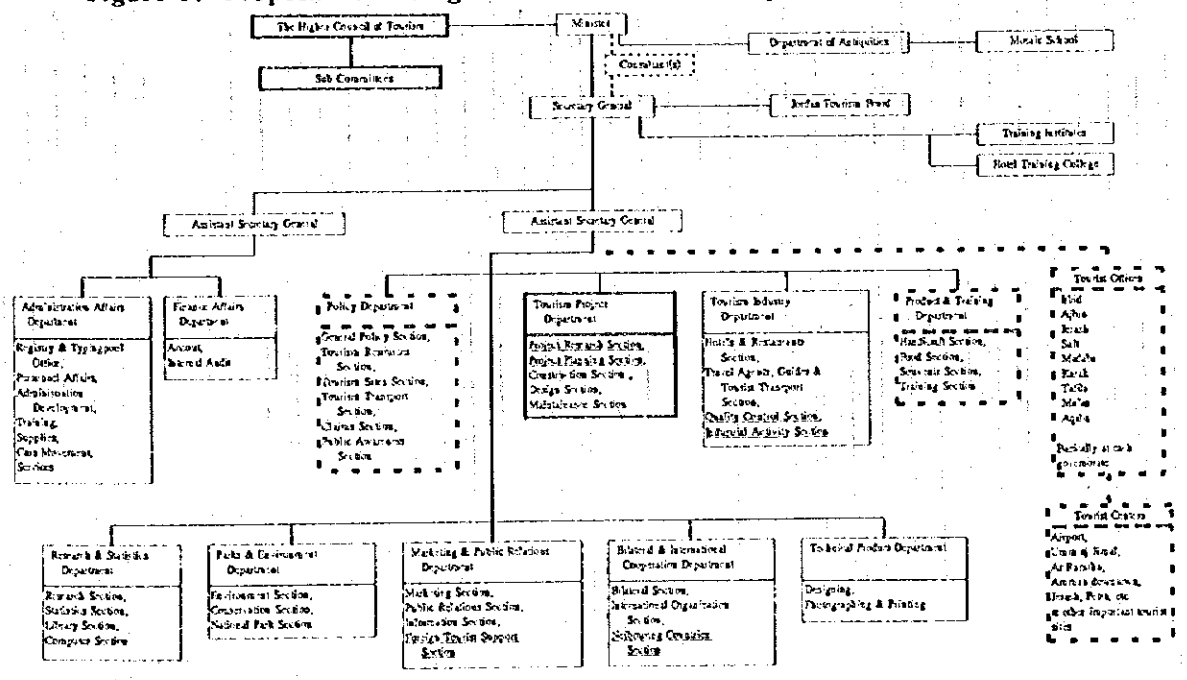
- It is recommended to ***re-organize the Higher Council of Tourism, which should be chaired by the Prime Minister***. The proposed Policy Department of MOTA is recommended to work as the secretariat for the Council.

- It is recommended that ***budget allocation to MOTA*** be commensurate with the importance of the tourism sector. Subsidies to municipalities for the implementation of tourism related project should be considered.

- ***Control over hotel standards and restaurant menu*** are recommended to be ***abolished***.

- ***"Two step loan"*** utilizing concession soft loan provided by donor agency is recommended to be applied to private sector tourism projects.

Figure 17 Proposal for Reorganization of the Ministry of Tourism and Antiquities



Heritage Preservation

- ***Department of Antiquities should be strengthened*** by giving it a right to utilize some portion of revenue from antiquities, separating the role of museum development, and improving site management.

- The development and management of national parks are best done by a coherent national agency. An organization tentatively called ***the Royal Parks Service*** is recommended to be created.

- Similarly, the creation of a ***Royal Museums Institute*** is recommended for the development and management of museums in Jordan.

- Jordan's old urban areas found in Amman, Salt, Madaba, Karak and Irbid as well as in some villages constitute a valuable resource for urban tourism which has flourished in all nations with major tourism industri Jordan must prepare itself to manage its ***architectural heritage, which has considerable cultural and commercial value.***

- Measures protecting tourism resources from potential earthquakes should be determined and implemented.

Community Considerations and Women's Involvement

- MOTA should carry out campaigns to ***raise the consciousness of the population to the risks and opportunities offered*** by growing international tourism. Different tools or channels can be used to reach different groups.

- ***Dialogue with local communities*** where tourism projects are planned is necessary so that MOTA can eliminate any unrealistic expectations or fears, and devise measures to involve the local population in the most productive way. Precautions are essential with respect to the employment of women depending on the degree of conservatism in the subject area.

Human Resource Development

- The Hotel Training College should be recognized to meet the needs of the tourism industry.
- The souvenir industry should be promoted through industrial extension services to the local artisans including women in the rural areas with audio-visual teaching units.
- The Department of Archaeology of Jordan University and Yarmouk University should be strengthened to produce quality professionals for museum operation and management.

Environment Management

- Priority actions are:

  - ***protection and conservation of natural areas***
  - ***restoration and integrated management of existing sites***
  - ***wildlife and social surveys***
  - ***technical and financial assistance to environmental NGOs***
  - ***environmental education***

- Priority areas and the degree of urgency are presented in Table 5.

Table 5 Priorities for Areas of Natural Interest

	Sensitive	Critical	Highly critical
Dead Sea with (South) Escarpment		x	
Wadi Araba	x		
Southern Highlands (with Dana, Petra)	x		
Hisma (with Wadi Ram)		x	
Burq / Badia	x		
Azraq oasis			x
Gulf of Aqaba		x	

8. An Indicative Implementation Program

- An indicative implementation program of comprehensive tourism development for Jordan is presented in Table 6 through 9.

Table 6 Indicative Implementation Program (Tourism Product Development)

	2000
Petra	- Tourist Facilitation • Improvement of visitor circulation route (USAID) • Improvement/beautification of the entrance (USAID) • Upgrading of tourism-related facilities (accommodation, amenities) (UNESCO) - Excavation/Conservation • Stone preservation (conservation of facade) (GTZ) • Restoration of mural paintings (cleaning, protection, conservation) (UNESCO) • Improvement of archaeological resources (restoration, preservation, excavation) (USAID) • Conservation of flora, vegetation and wildlife (RSCN) • Environmental management (USAID) - Management • Preparation of Study/Work Plan to protect the site (EU) • Establishment of park management organization (UNESCO) • Comprehensive service delivery and marketing approach (USAID) • Development of human resources and tourism education (UNESCO) • Establishment of hotel training school (MOTA) • Database compilation by ultra-violet photogrammetry (JICA) - Support Infrastructure • Flood control and drainage water management of Petra/ Wadi Musa basin (WB)
Amman	**- Strengthening of Amman gateway tourism base (Stage-1)** **• Upgrading of Amman urban tourism base** **+ Beautification of tourist access roads** **+ Creation of tourist trails** **+ Posting of tourist signs/information boards** **+ Creation of tourist information centre** **+ Creation of national museum (Stage 1)** • Construction of additional hotel rooms • Creation of an international tourist complex (e.g., world trade center, convention hall) • Development of Amman International Tourism Center (World Trade Center, Convention Hall) • Improvement of archaeological sites (Citadel, Amphitheatre, Museums) (USAID) **- Upgrading of tourism products in Amman Zone** **• Creation/introduction of Historic Old Salt** **• Introduction of regular package tours to Jerash and Madaba** **• Creation of side attractions en route to Jerash, Madaba, Salt and Dead Sea** **• Introduction of:** **Amman-Madaba-Ma'in-Dead Sea tour circuit** **Amman-Salt-Jordan Valley-Dead Sea tour circuit** • Partial regular tourist operation of Hijaz Railways Amman-Airport-Qatrana

2010	Beyond 2010
• Development of handicraft (UNESCO)	• Ditto
• Conservation of Nabatean hydrological work (UNESCO)	
• Promotion and development of the sites (EU) • Establishment of park infrastructure and personnel (UNESCO)	• Ditto
• Development of Wadi Musa Community (UNESCO) • Upgrading of the hotel training school in Wadi Musa (MOTA)	• Ditto
• Improvement of Wadi Musa Town infrastructure	• Upgrading of infrastructure in Petra/Wadi Musa
- Ditto (Stage-2)	- Ditto (Stage-3)
• Construction of additional hotel rooms in Amman	
	- Ditto
- Improvement of the existing products and develop new ones • Development of Pella archaeological site	
• Development of Ma'in/Dead Sea curative products	
	• Regular tourist train operation of Hijaz Railway to Syrian border with prospective continuation to Damascus

Table 6 Indicative Implementation Program (Tourism Product Development)

	2000
Dead Sea	- **Creation of Dead Sea Panoramic Complex** • **Panorama lookout** • **Visitor centre/museum** • **Resthouse/hotel spa** - **Creation of new product** • **Cable car linking Dead Sea-Panorama complex-Ma'in** - **Opening of new tourist road** • **Madaba-Ma'in-Dead Sea parkway** - Beach beautification - Development of Lot Cave archaeological site - Dead Sea Coast infrastructure development (EIB) - Dead Sea Coast curative resort development - Dead Sea Coast hotels development
Aqaba	- Improvement Aqaba tourism base (Stage-1) • Beachfront beautification • Separation of tourist/industrial traffic • Upgrading of visitor facilitation - Development of 3000 hotel rooms - Formulation of Aqaba Region comprehensive plan (EU) - Formulation of environment management action Plan (WB)
Others	
a. Jerash	- Restoration of Nympheum (Italy) - Renewal of Jerash urban centre (Italy) - Archaeological excavation (NGO/Poland) - Restoration of Odeon (NGO/France)
b. Karak	- **Upgrading of Karak products** • **Creation of visitor centre/Crusader museum** • **Introduction of tourist trails** • **Creation of tourist street/zone** • **Creation of panorama lookouts** • Tourist signposting at the Castle (UK) • Architectural Survey (UK) • Consolidation of Castle rampart (USAID)
c. Madaba	- Provision of mosaic shelter (USAID) - Provision of bus terminal (USAID) - Conservation of mosaic (USAID) - Establishment of training program and strengthen the staff
d. Wadi Mujib	- Provision of basic rest facilities (toilets, kiosk, sunshade, signs and information) - Development of nature discovery trails

Note
WB : World Bank
EU : European Union
UNESCO : United Nations Educational Scientific and Cultural Organization
JICA : Japan International Cooperation Agency (Japan)
GTZ : Gesellschaft fuer Technische Zusammenarbeit (Germany)
USAID : United States Agency for International Development (USA)
RSCN : Royal Society for the Conservation of Nature (Jordan)
MOTA : Ministry of Tourism and Antiquities (Jordan)

(Continued)

2010	Beyond 2010
- Ditto	• Side attractions en route • Parking facilities and rest areas along the corridor
- Introduction of new tourist circuits	- Development of Great Rift Valley Corridor
- Dead Sea as one of the major tourist core - Completion of East Coast Development Project	
- Ditto (Stage-2) • Development of infrastructure in the south coast of Aqaba (EIB) • Introduction of new high speed regular boat service Aqaba - Nuweiba • Completion of Aqaba Marine Park (USAID) - Development of additional 3000 hotel rooms - Development of 36 hole golf course	- Ditto (Stage-3) - Completion of Dissi soft-adventure tourist base
- Ditto - Archaeological excavation (NGO)	
- Establishment of Karak as a regional tourism base	- Ditto
• Ditto	
- Ditto	

Table 7 Indicative Implementation Program (Tourism Marketing)

	2000
Information and Service Delivery	- Provision of gateway information • Production of information materials • Distribution at Tourist Information Centers • Sign posting • Staff training - Provision of on-site information • Production of information materials • Provision of information materials in Visitor Centers, Museums and Resthouses • Sign posting with interpretation • Staff training
Marketing	- Production of sales tools specially geared to travel trade and organizers - Production of motivational materials aimed at general public - Strengthening segmented approach towards the markets • Strengthening of approach towards the European and American markets • Cultivation of up-market, intra-regional Arab and Israeli markets • Expansion of the Asian market through programmed and segmented approaches - Cultivation of niche markets for activity holidays - Cultivation of seminar, conference and incentive markets by regional and European markets
Promotional	- Participation in travel trade shows and fairs in major source markets - Strengthening of repeat after-sales calls to follow up the initial contact - Keeping buyers posted up-dated information and products - Organizing of familiarization tours for buyers and media - Close liaison with RJ to heighten the profile and exposure of Jordan in major source markets - Exploitation of new avenues for promoting Jordan in major source markets
Tourism Industries	- Creation of attractive souvenirs - Establishment of production systems and marketing opportunities - Upgrading of quality and design of the souvenirs - Create sophisticated souvenir shops in major tourism cores

Table 8 Indicative Implementation Program (Supporting Infrastructure)

	2000
Supporting Infrastructure and Services	
Transport - Air Transport	- Beautification of Amman airport - Introduction of new wide body and long range aircraft - Increase in the number of flight to / from Amman - Improvement of tourist flights
- Road Transport	**- Completion of Dead Sea - Madaba Parkway** **- Development of tour circuit road network** **- Multi functional transport terminals** - Installation of road signs for tourists - Introduction of toll roads
- Railway	- Improvement of track and rail, Amman - Qatrana
Water Supply and Sewerage Hygiene	- Development of water recycle use system - Introduction of compact dedicated system
Solid Waste	- Establishment of waste collection and dumping system - Education of people to keep environment clean
Miscellaneous	- Development of computerized tourism information system (USAID)

2010	Beyond 2010
- Strengthening the provision of gateway information	- Ditto
- Strengthening the provision of on-site information	- Ditto
- Production of purpose-edited sales tools geared to travel trade and organizers	- Ditto
- Production of theme motivational materials aimed at general public	- Ditto
• Consolidation of Jordan's tourism position in European and American markets through business partnership of tourism	• Ditto
• Intensive approaches to selected new and emerging markets such as Australia, South and Central Asia and Eastern Europe	• Ditto
- Enhancement of products profile for niche markets with diversified products of culture arts, events, sports and meetings	- Ditto
- Development of the Urban and MICE market	- Ditto
- Organizing of joint sales mission to potential and emerging markets	- Ditto
- Organizing of purpose made/theme sales mission to SIT and niche markets in the established source market with attractive products and proposals	- Ditto
- Organizing of promotional seminar/workshop for buyers in major source markets	- Ditto
- Opening of own tourist promotion office in major source markets	- Ditto
- Upgrading of the souvenirs industry and products	- Ditto - Ditto - Ditto - Ditto

2010	Beyond 2010
- Expansion of Amman airport terminal building	
- Improvement of Aqaba Airport	- Development of Aqaba - Eilat Airport
- Development of more connecting roads between Dead Sea and Kings Highway	- Ditto
	- Upgrade of track between Amman-Syrian border
- Ditto	- Ditto
- Ditto	- Ditto
- Strengthening of the information network - Establishment of tourist information services	- Ditto

Table 9 Indicative Implementation Program (Institutional Strengthening)

	2000
Institutional Strengthening	
Administration and Organization	- Formulation of authorized Tourism Development Master Plan - Reorganization of MOTA • Strengthening policy making and project implementation functions • Centralizing tourism development administration and strengthen the coordinating function • Strengthening direct tourist services - Reorganizing and activation of the Higher Council of Tourism • chairmanship and membership revision • secretariat to be created in MOTA • establishment of sub committees • increase the frequency of meeting • strengthen responsibilities - Financing tourism development and tourism promotion • allocation of budget to be increased • finance to local project to be made possible • giving priority to tourism related infrastructure development - Deregulation • hotel standards and restaurant control regulations to be liberalized - Establishment of financing systems for private sector projects • establishment of soft loan • increase of barrow portion
Human Resources	- Transfer of Hotel Training College to MOTA • Strengthening of teaching staff • Improvement of training program - Encouragement of private sector to participate in training - Establishment of appropriate training systems
Heritage Preservation	- Strengthening of DOA - Designation of unexcavated national heritage area - Start of active preservation of heritage
Community Considerations and Women's Involvement	- Promotion of local cultural elements such as music, dance, art and festivals - Cultivation of community awareness channels by country-wide campaigns - Cultivation of community awareness • Dialog between MOTA and local communities and other civil organizations
Environmental Management	- Adoption of MOTA's EIA guidelines by GEC, EIA of tourism projects - Participation and membership of MOTA in the High Council of the Environmental Protection - Designation of natural conservation areas. Wadi Rum is top priority. - Ecological rehabilitation of existing tourism sites - Environmental education - Integrated tourism development plan for existing site, environment with nature, culture and archeology

2010	Beyond 2010
- Enhancement of the Hotel Training College and training systems	- Establishment of training systems for hotel and tourism management
- Increase in the number of trainees	- Ditto
- Provision of attractive incentives for employers	- Ditto
- Establishment of National Park system - Establishment of National Institute for Heritage Conservation	
- Ditto	- Ditto
- Cultivation of community awareness channels by regional level campaigns	- Ditto
- Cultivation of community awareness by regional level campaigns about women involvement to tourism	- Ditto
- Identification of nature tourism potential	
- Wildlife surveys - Upgrading of current wildlife and nature conservation/ protection system - Guidelines for development of ecotourism	- Nature tourism development

Part II : Development Plans for Priority Zones

1. Introduction

- The Final Report Part II presents the results of the Study Team's Phase II work from early July through December 1995.

2. Priority Tourism Development Areas

- In order to identify those areas requiring priority attention to meet the objectives of the study the ***following criteria were used to evaluate*** each of the tourism areas. The criteria concentrate on the potential future situation rather than the present one. Emphasis was placed on the short term potential reflecting the staged development strategy identified in Phase I of the study.

  - foreign exchange earning capability
  - market expansion and diversification potential
  - least public investment
  - local employment generation
  - environmental capacity
  - attractiveness to international funding agencies
  - attractiveness to the private sector
  - distance from the gateway

- Figure 18 shows the evaluation results.

Figure 18 Evaluation of Tourism Areas

Tourism Region		Northern		Eastern	Central	Western			Southern		
Tourism Area / Evaluation Criteria	(Weight)	Irbid	Ajlun-Jerash	Zarqa-Mafraq	Amman	Balqa	Madaba-Dead Sea	Karak-Dead Sea	Tafila	Petra-Shawbak	Aqaba-Wadi Rum
Foreign Exchanger Earning	(10)	Medium	High	Low	High	Medium	Medium	Medium	Low	High	High
Market Expansion and Diversification Potential	(5)	Medium	Medium	Low	High	High	High	High	Medium	High	High
Least Public Investment	(3)	Low	Medium	Low	Low	Medium	Medium	Medium	Low	Medium	Low
Local employment Generation	(4)	Medium	Medium	Low	High	High	Medium	High	Low	High	Medium
Environmental Capacity	(6)	Medium	Medium	Low	High	Medium	Medium	Medium	Medium	Medium	Low
Attractiveness to International Funding Agencies	(3)	Low	High	Medium	High	High	High	High	Medium	High	High
Attractiveness to the Private Sector	(5)	Medium	Medium	Low	High	Medium	High	Medium	Low	High	High
Distance from the Gateway	(3)	Medium	High	Low	High	High	High	High	Low	Medium	Low
Overall Score		105	149	45	183	147	149	143	67	171	139
Priority Rating		7	2	9	1	4	2	5	8	N/A	6

LEGEND: High 5 Medium 3 Low 1

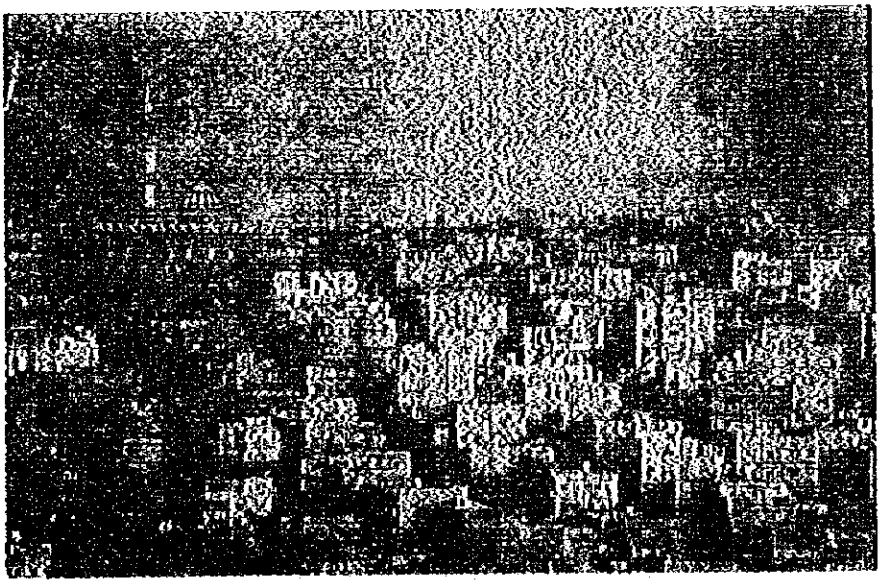
- Petra overshadows all other areas in terms of importance in Jordanian tourism. Its importance is readily recognized by the international community and over half of all tourism related foreign assistance goes to projects for Petra. Implementation of the UNESCO plan will do much to put the site on a firm footing which should enable the development of its tourism potential in an appropriate manner. Petra therefore has been excluded from consideration as the subject of Phase II work.

- The Jerash area is located within those areas to be excluded from the subject of Phase II according to the initial agreement between the Government of Jordan and the Government of Japan.

- The areas selected for further study in Phase II of this Study are therefore as follows:

  Central Region : ***Amman***
  Western Region: ***Madaba/Dead Sea***
  Balqa
  Karak/Dead Sea

- The somewhat low score shown in Figure 18 does not imply low priority in the long run. It is simply means that a concentrated effort to create a strong international tourism core in Jordan is called for as an immediate work.



3. Selection of Possible Projects

- A fair number of projects and project groups (32 in all) were identified that can be implemented by the government, by public-private joint efforts, and by the private sector. Figure 19 shows the locations of the projects.

- ***Six model projects*** were selected for detailed study, which are intended not only to become the basis of subsequent implementation, but also as a model for tourism development project planning. Figure 20 illustrates relationships among principles, strategies and the selected model projects. Suitability as the recipient of foreign assistance was also taken into consideration in the selection process.

Figure 20 Tourism Development Principles, Strategies and the Model Projects

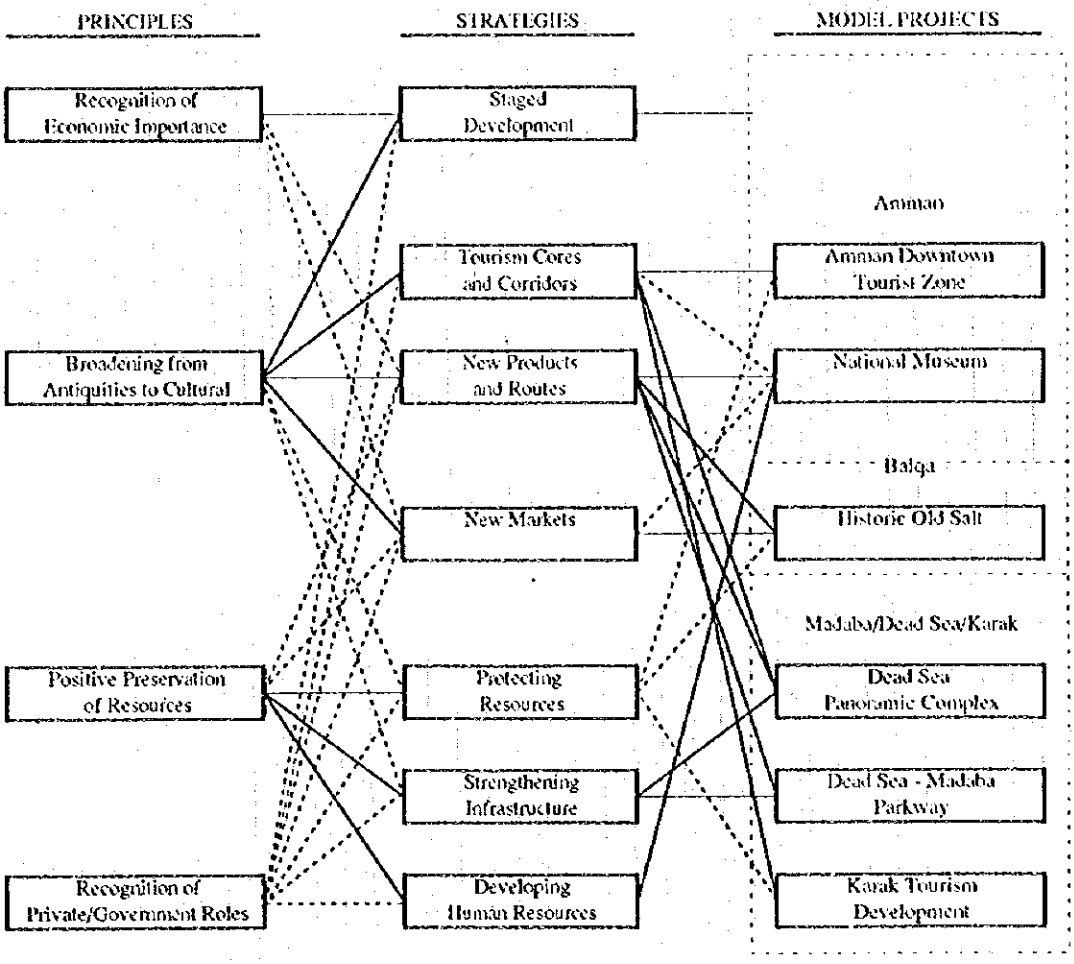
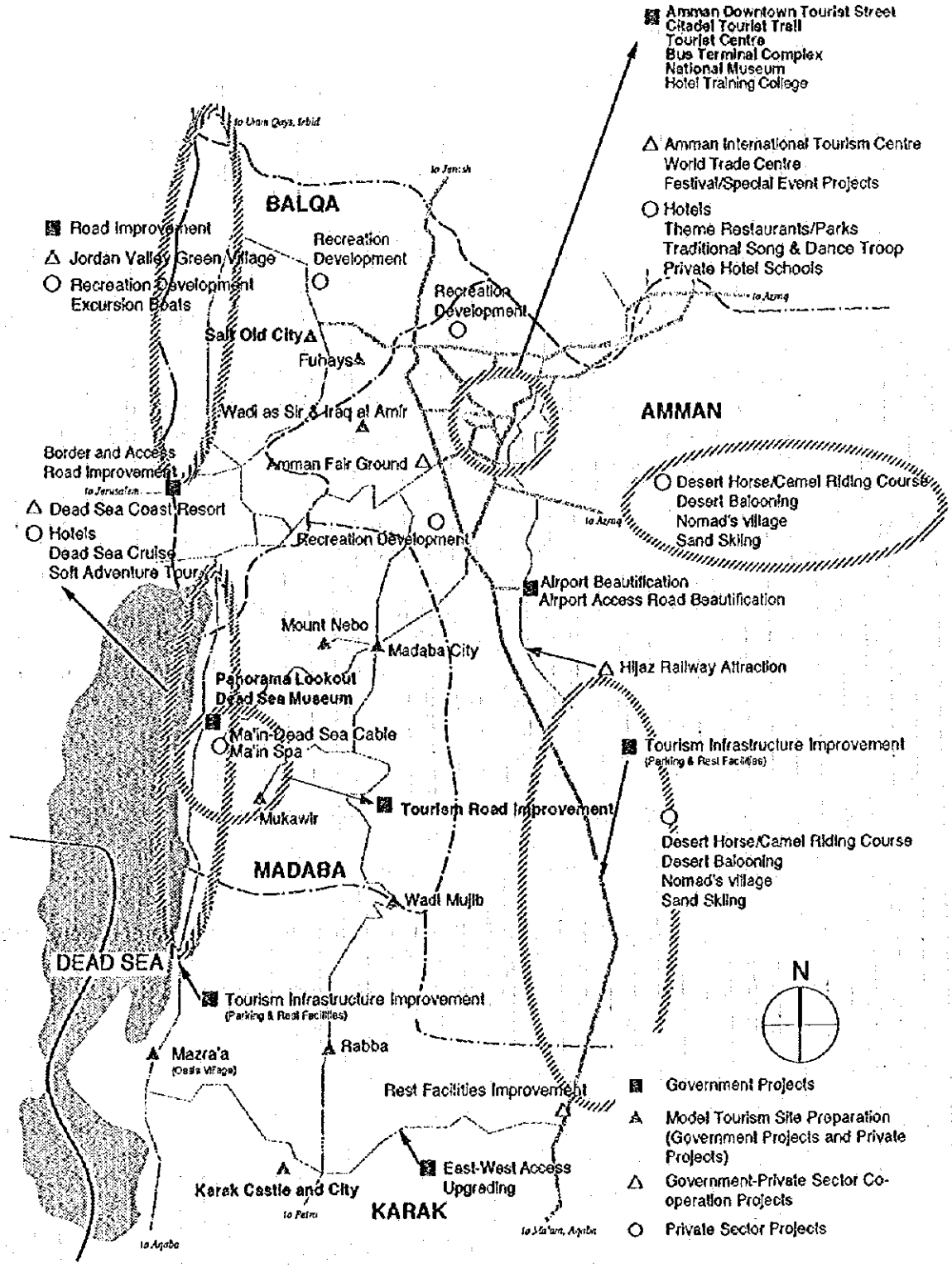


Figure 19 Possible Projects in the Selected Areas



4. Plans of Model Projects

Amman Downtown Tourist Zone

Concept: To make Amman Jordan's true international Tourism Core

USAID has been assisting the improvement of the Citadel area which lies above the project area. The project nicely complements this on-going work.

Components:
a. Creation of a Tourist Street (Downtown) ($2.3 million)
b. Introduction of Tourist Trails (Citadel to Roman Theater/Downtown) ($2.5 million)
c. Renovation of Old Municipality Building as a tourist center including Amman Municipal Museum ($2.3 million)
d. Creation of a Terminal Complex ($12.7 million)
e. Creation of a Modern Tourist Information Center ($0.7 million)
f. Training of selected tourism service managers and workers. ($0.3 million)
Note: Figures in parenthesis are indicative costs.

Infrastructure:	Transport -	Parking improvement plan and traffic engineering measures are needed.
	Water Supply -	Tourists will have little effect.
	Sewerage -	Piping improvements needed.
	Drainage -	Drainage culvert improvements needed.
	Waste Management -	Improvement desired such as concealment of containers, attractive litter bins, etc.

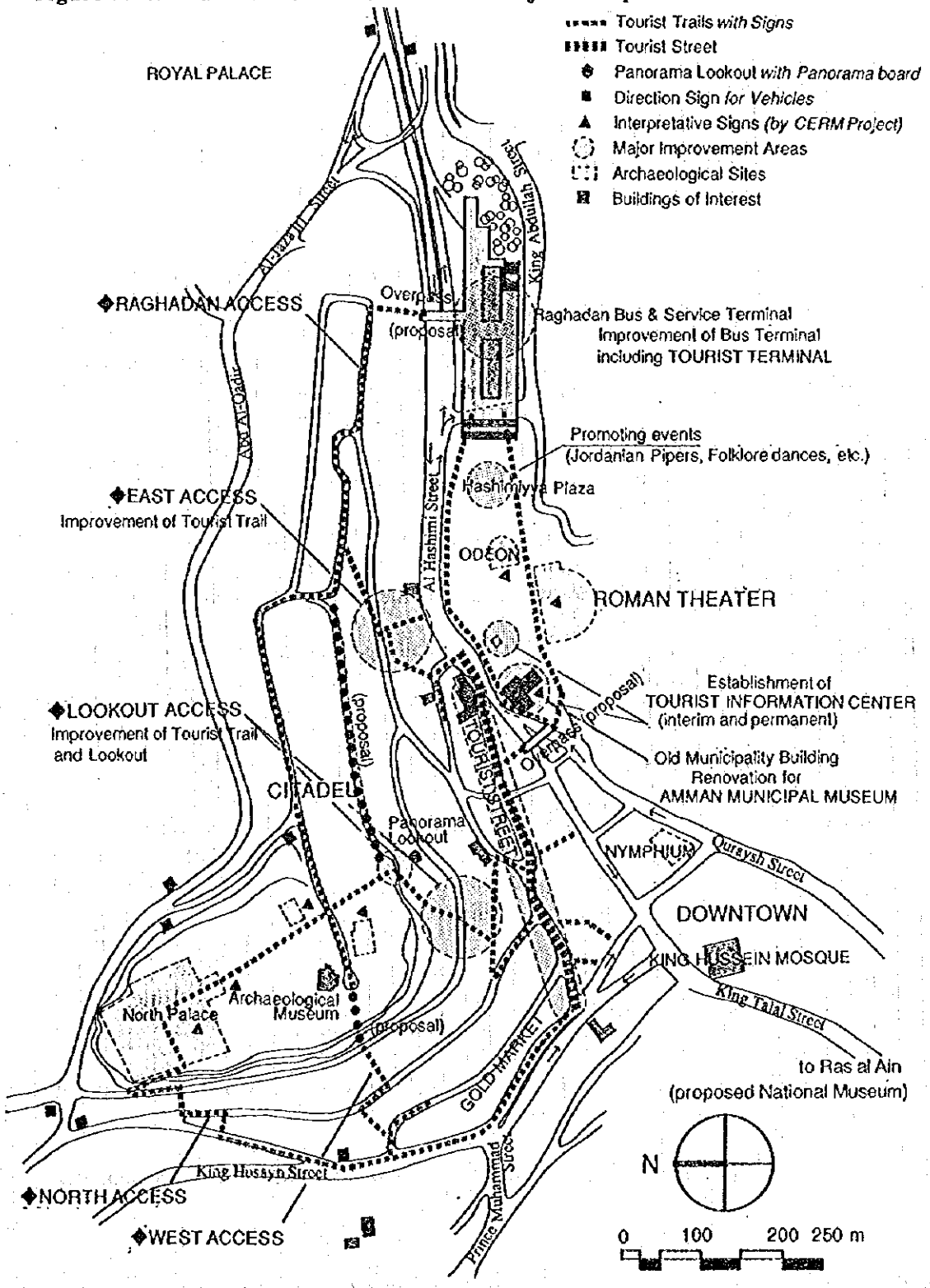
Environment: IEE has been made. No need for EIA.

Institutional: Heritage Conservation -This project will stimulate initiativ
Community Impact - Some displacement of low income group.
No specific effect of the project on the welfare of women.

Implementation: Amman Municipality with MOTA coordinating, for most components.

Economic Evaluation: EIRR (Economic Internal Rate of Return) is calculated at 20.16 %.

Figure 21 Amman Downtown Tourist Zone Project Components



National Museum

Concept: The first true national museum of Jordan within the planned Civic Center in the central Amman

This project is to realize the intention of the National Museum Committee. Once approved, a detailed plan for kinds and ways of exhibition should begin by the Committee before the building design. An institute for the purpose is recommended to be established.

Components: a. Museum Building consists of following facilities of international standard:

- Visitor Services — cloak room, museum shop, cafeteria , etc.
- Exhibition Halls — permanent, temporary & special, outdoor
- Logistic Support — unpacking, storage, studio, workshop, etc.
- Research offices — library, seminar room, etc.
- Administration — offices, security, etc.
- Auxiliary Services — circulation, mechanical, etc.

b. Training of curators and other museum personnel.

A total floor area of 6,670 square meters is tentatively assumed. The preliminary cost estimate is US$ 14.5 million. Details will be studied in the subsequent stage of this Study incorporating all prior work done by the National Museum Committee.

Infrastructure: Transport - Traffic circulation plan is needed.
Water Supply, Sewerage, Drainage - Not critical but improvement in connected systems desired.
Waste Management - A small scale incinerator desirable.

Environment: IEE has been carried out, showing potential problems as regard to the siting of the project. Sensitive issues are landscape and floods. EIA must be performed for such issues, but is of limited significance if not integrated in an EIA of the master plan for the Ras al Ain site.

Institutional: Heritage Conservation - The project can play a catalytic role.
Community Impact - The project will accelerate the gentrification process of the surrounding areas.

Implementation: The existing Jordan National Museum Committee can designate the implementing agency.

Economic Evaluation: EIRR (Economic Internal Rate of Return) is calculated at 53.32 %.

Figure 22 National Museum Image Rendering

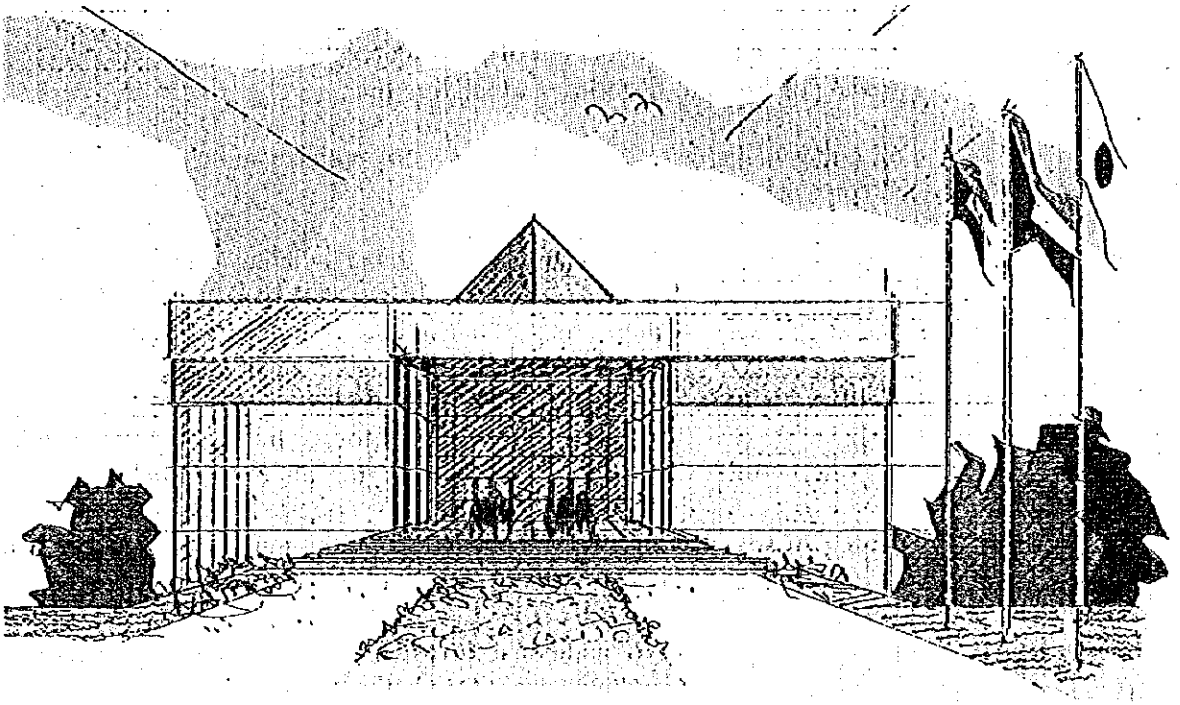


Figure 23 National Museum Location Map

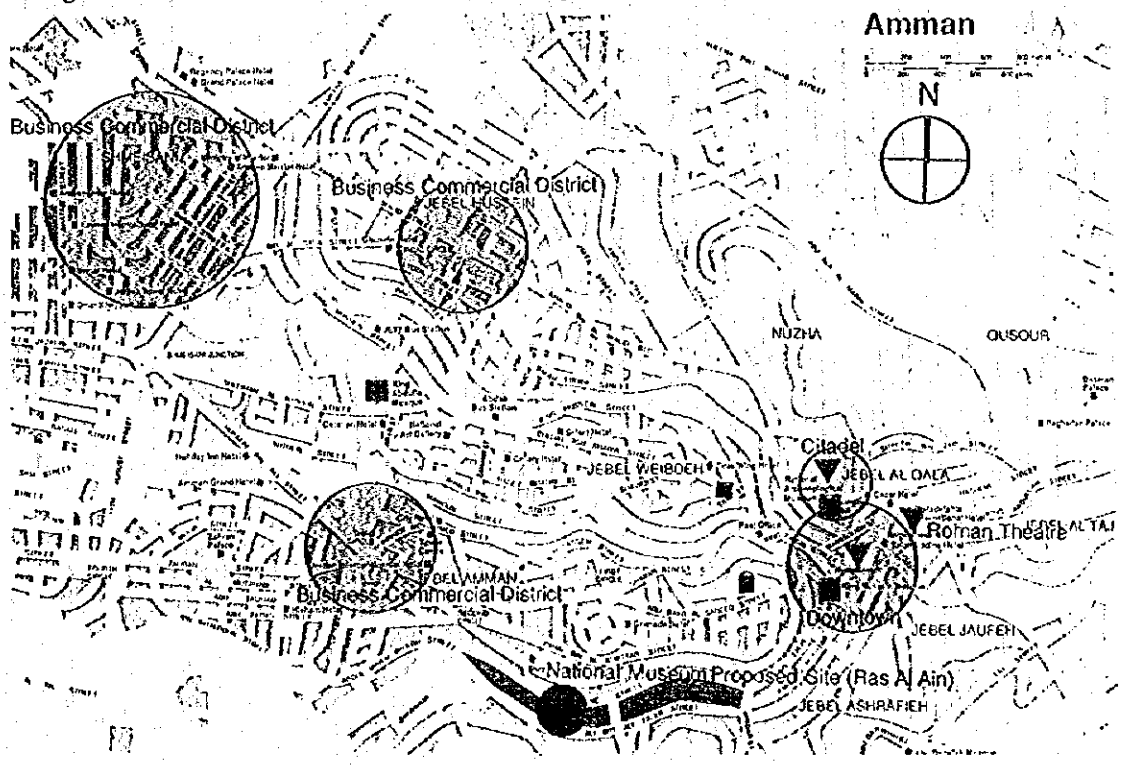


Figure 22 National Museum Image Rendering

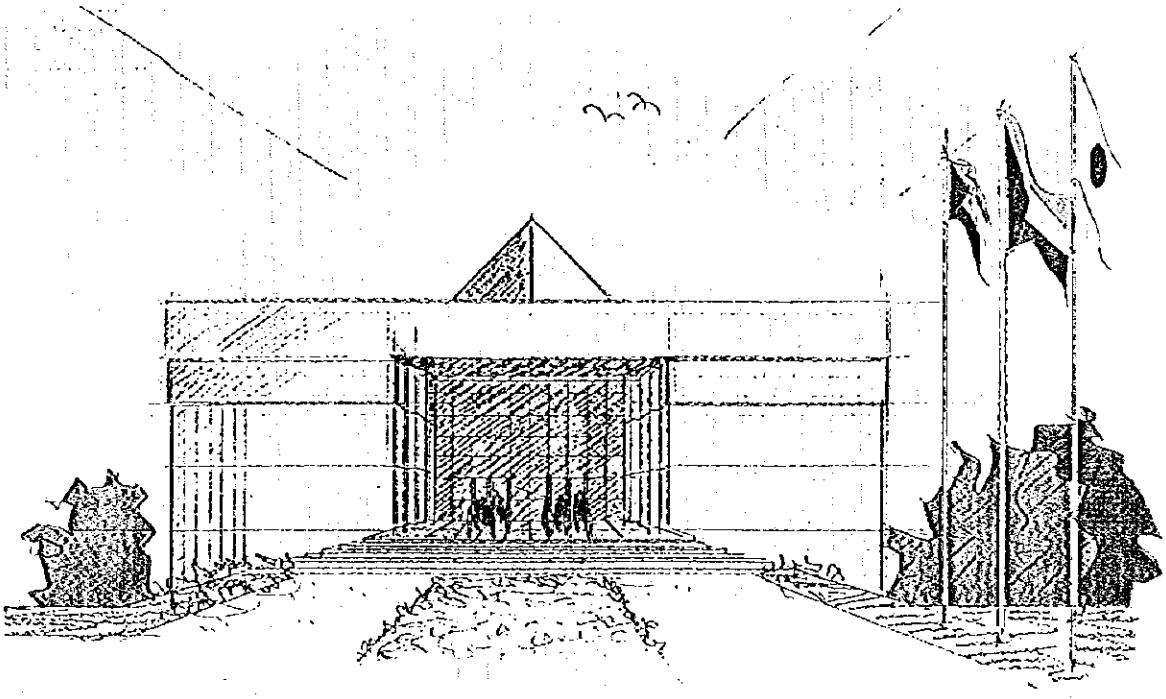
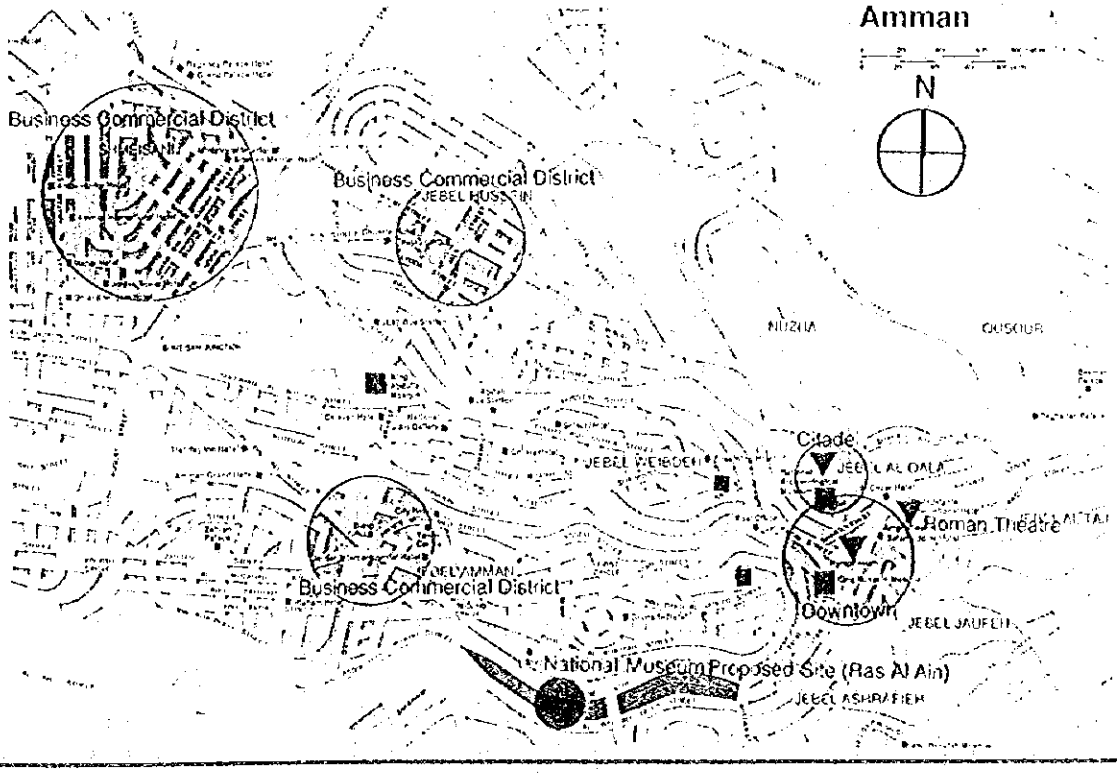


Figure 23 National Museum Location Map



Historic Old Salt

Concept: Creating a new tourism product out of the resources thus far neglected - a product of cultural, historical and folklore line.

The on-going Italian assisted handicraft school project can be integrated in the overall concept of this project.

Components:
- a. Visitor Center - Renovation of Abu Jaber building into one including visitor center, Historic Old Salt Museum, handicraft shop, tourist amenities, and existing shops. ($ 2.3 million)
- b. Beautification of Public Spaces and Sign Posting - Improvement of model tourist trails and tourist nodes, providing sign boards for all tourist trails, and rest faciliti ($ 5 million)
- c. Training of selected managers and workers in the tourism industry in Salt. ($ 0.3 million)

Infrastructure:
- Transport - No additional investment needed but designation of parking spaces for visiting vehicl
- Water Supply, Sewerage, and Drainage - No particular problems
- Waste Management - Improvements similar to the Amman Downtown Tourism Zone project is recommended.

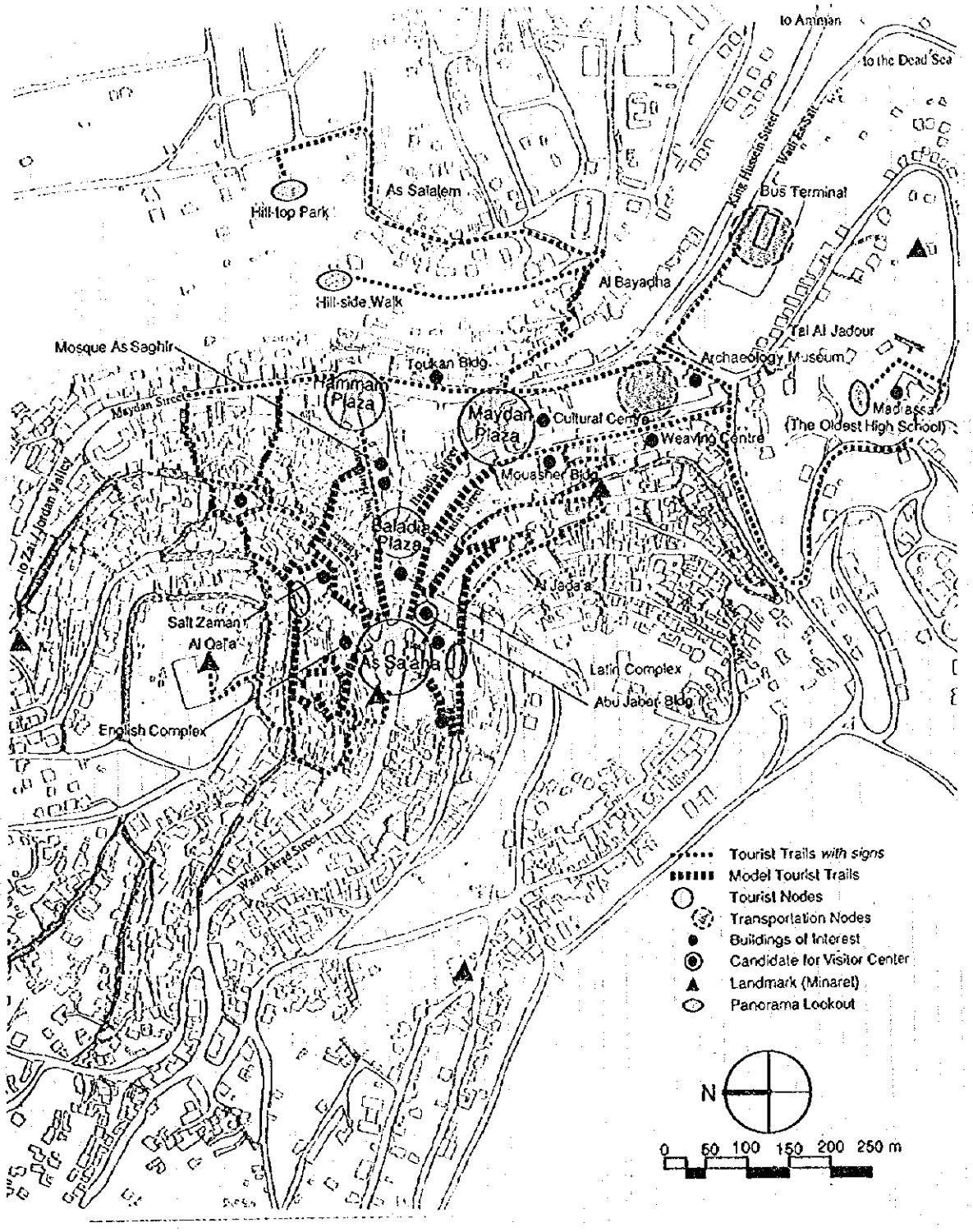
Environment: IEE has been made. No need for EIA.

Institutional:
- Heritage Conservation - Municipal ordinance for appearance should be strengthened. The Salt Development Corporation may assist the municipality in monitoring designs and execution of restoration and improvements.
- Community Considerations - The project will have a major effect on the community.

Implementation: Under the overall coordination by MOTA, the Municipality and the Salt Development Corporation will carry out the project.

Economic Evaluation: EIRR (Economic Internal Rate of Return) is calculated at 17.07 %.

Figure 24 Historic Old Salt Project Components



Dead Sea Panoramic Complex

Concept: Providing the basic attraction and amenities thus far lacking in Dead Sea, thus enhancing the appeal and attractiveness of Dead Sea and broadening tour route options.

A master plan for the east coast of the Dead Sea has been prepared by the Jordan Valley Authority. This project will provide additional value to the implementation of the Dead Sea master plan.

Components:
a. Panorama Lookout/Rest House - rest house with a panorama spa ($ 9.6 million)
b. Dead Sea Museum - exhibition space with a virtual reality movie theater ($ 2.1 million)
c. Cable Car Access - as a mid station from Zara (Dead Sea Coast) to Ma'in Spa ($ 6 million)
d. Infrastructure - Water supply and waste water treatment ($ 1.7 million)
e. Training of managers and workers of services to be provided.

Note: Figures in parentheses show indicative costs.

Infrastructure:
Transport - Good access to Dead Sea-Madaba Parkway
Water Supply, Sewerage, and Drainage - Water to be conveyed from the Zarqa Ma'in River. A closed sewerage system is proposed.
Waste Management - A closed self-contained disposal system is proposed.

Environment: IEE has been prepared, showing potential problems as regard to the scenery resource, exposure to landslide, and conservation of the natural conditions of Wadi Zarqa Ma'in. Suitable siting of the cable car is one major issue. Good integration of picnickers is also essential. A trails and pathways project is proposed. EIA is required.

Institutional:
Heritage Conservation - The Museum could contribute greatly on this subject.
Community Impact - Little except seasonal Bedouin settlements

Implementation: MOTA would have a primary responsibility in defining and managing this project and various forms of government-private cooperation schemes including BOT are conceivable, in addition to outright government implementation.

Economic Evaluation: EIRR (Economic Internal Rate of Return) is calculated at 22.79 %.

Figure 25 Dead Sea Panoramic Complex Block Plan

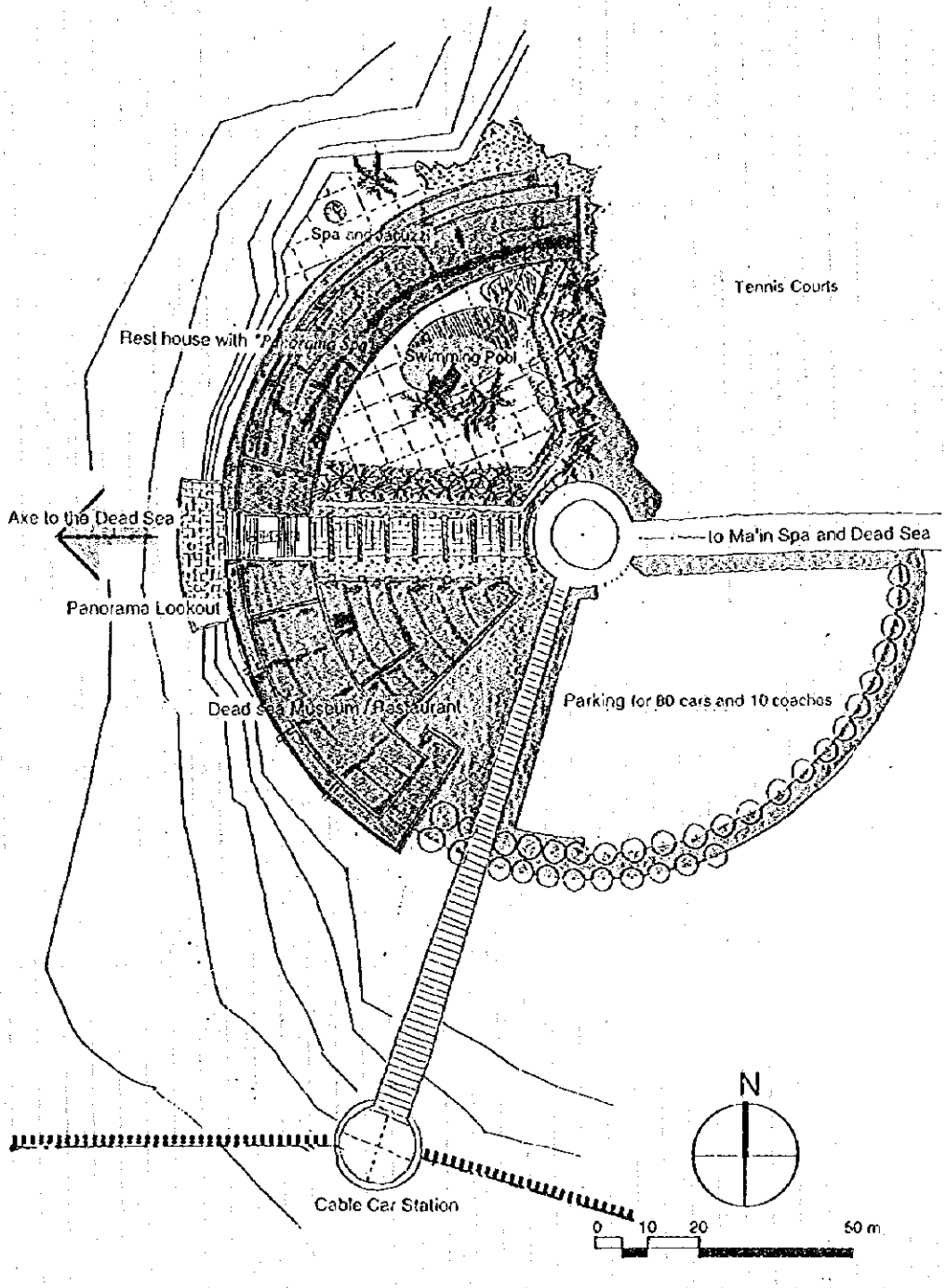
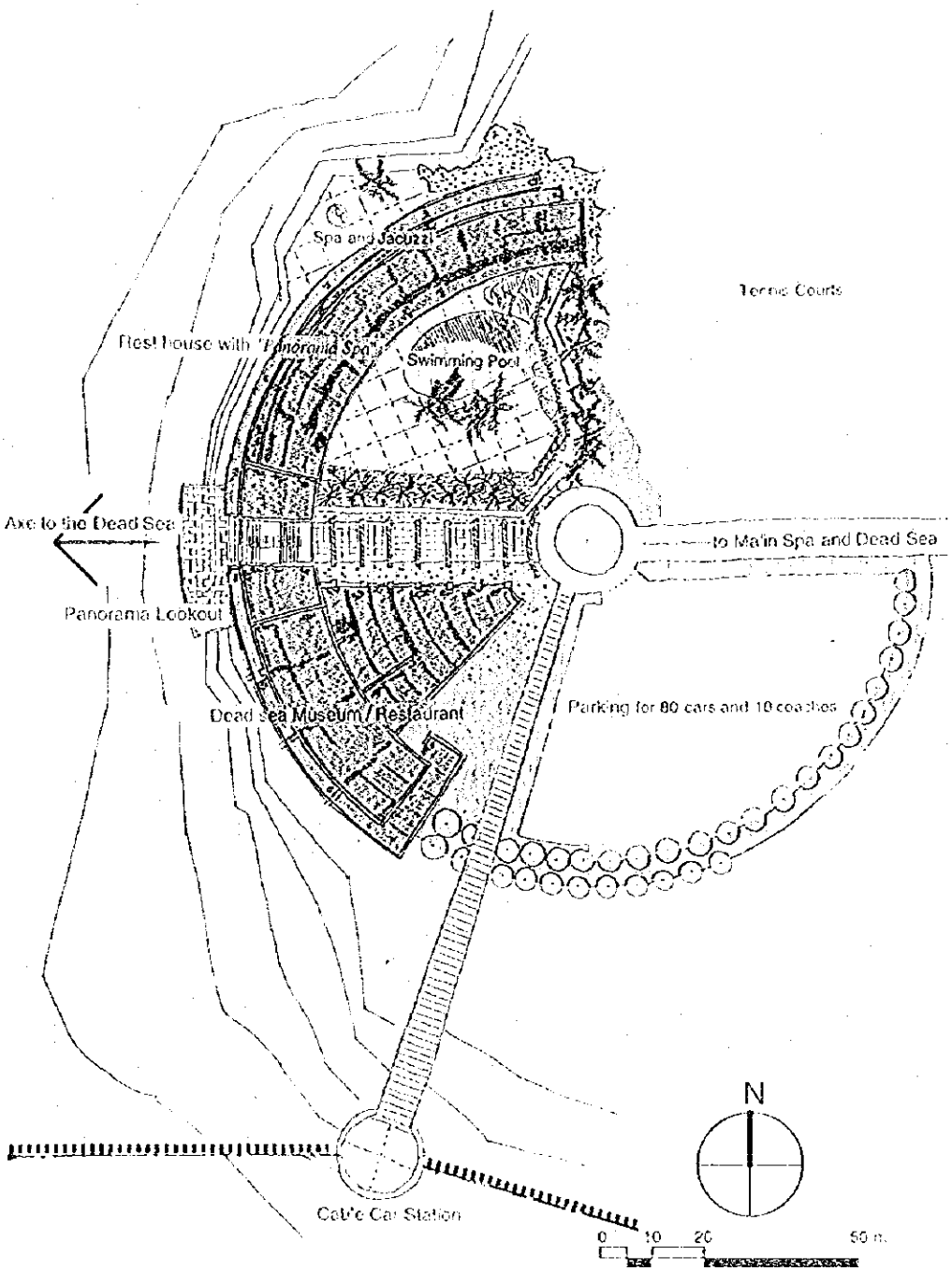


Figure 25 Dead Sea Panoramic Complex Block Plan



Dead Sea-Madaba Parkway

Concept: Providing a missing link between the Dead Sea coast and the Kings' Highway corridor, thus making a circuitous tour route possible.

The Dead Sea East Coast Development Plan by the Jordan Valley Authority assumes that some East-West connecting roads will be made. This project will realize one of these roads assumed in the JVA's plan.

Component: Three routes were identified:

Dead Sea-Ma'in,
Ma'in-Mukawir, and
Mukawir-Dead Sea.

The first route was found to be the most urgent.
Four alignments were compared and the most appropriate one was selected.

Specifications:		
	Length	13.0 km
	Max. gradient	10.0%
	Pavement	roadway 3.6 m x 2
		shoulder 3.0 m x 2
	Indicative cost	$ 7.5 million

Infrastructure: Waste Management - a litter collection and disposal team is recommended.

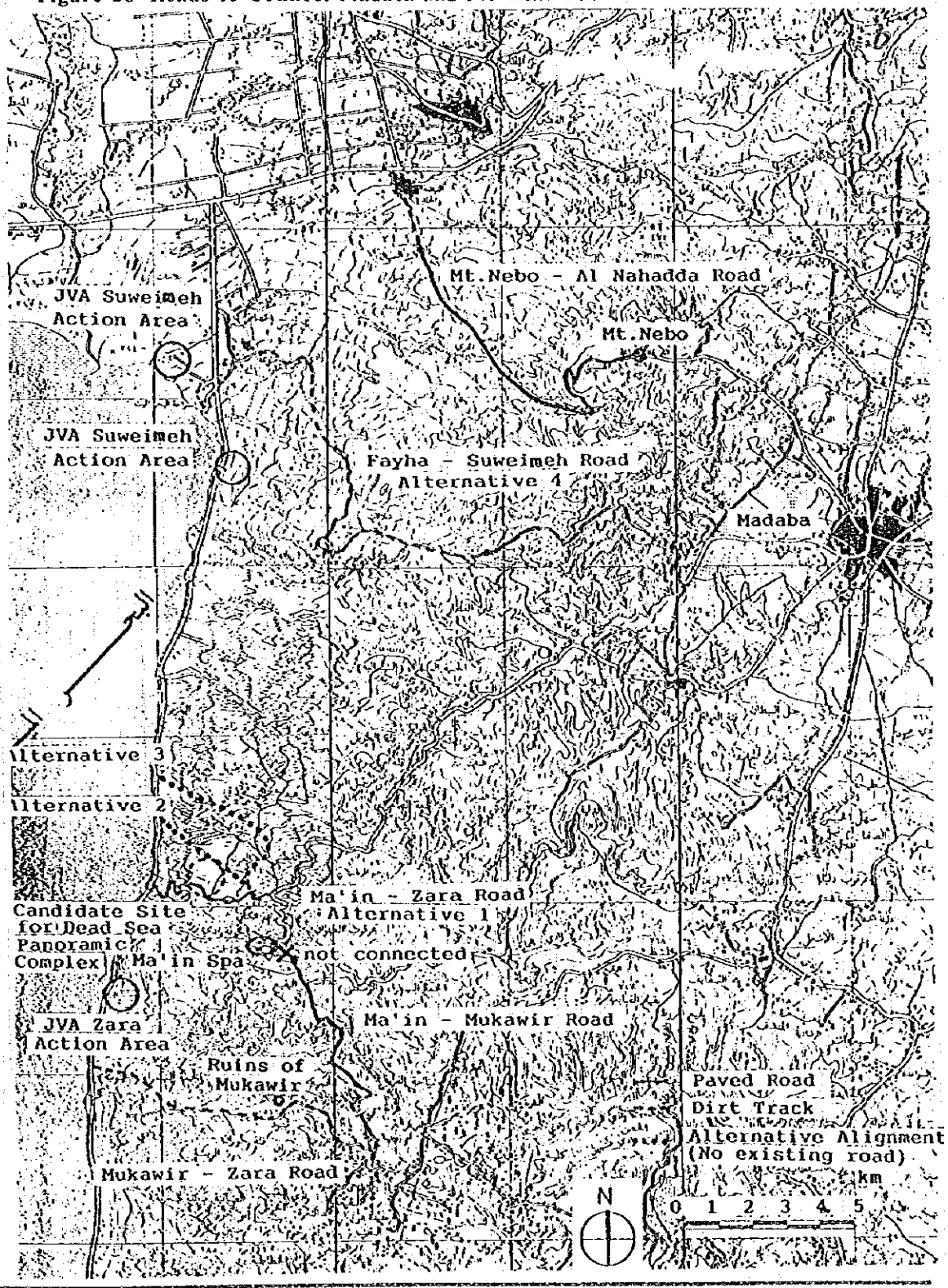
Environment: IEE has been carried out, showing no major effect on the environment.

Institutional: Heritage Conservation- Interpretive panels are recommended.
Community Impact - the area is unpopulated.

Implementation: Ministry of Public Works and Housing in coordination with Jordan Valley Authority is recommended to be the responsible agency for implementation.

Economic Evaluation: EIRR (Economic Internal Rate of Return) is calculated at 23.00 %.

Figure 26 Roads to Connect Madaba and the Dead Sea



Karak Tourism Development

Concept: Providing the basic attraction and amenities thus far lacking in Karak, thus increasing the appeal and attractiveness.

The UK government is about to launch a project to provide signboards in the castle and the city. The USAID CERM Project is planning to carry out maintenance work on Castle and city outer walls. Both projects will complement this project.

Components:

a. Improvement of Castle Presentation - Provision of tourist pathways and establishment of exhibits on Crusaders. ($ 2.4 million)

b. Creation of a Tourist Street - Convert the path from the Castle through Al Malik Husayn Street, the Statue of Salahdin to the New Municipality into a stone paved tourist street. ($ 2.4 million)

c. Visitor Center - Restoration of old municipality building to house a visitor center, a handicraft center, and a restaurant. ($ 0.35 million)

d. Establishment of Castle Observation Points - Establish a couple of lookout place with a good view of the Castle with street furniture and interpretive sign boards. ($ 0.45 million)

e. Training of managers and workers in tourism administration and service industry. ($ 0.3 million)

Infrastructure:

Transport - Parking for tourist buses and cars to be provided.

Water Supply, Sewerage, and Drainage - No serious obstacles exists.

Waste Management - Additional equipment and man-power are needed.

Environment: IEE has been made. No need for EIA.

Institutional:

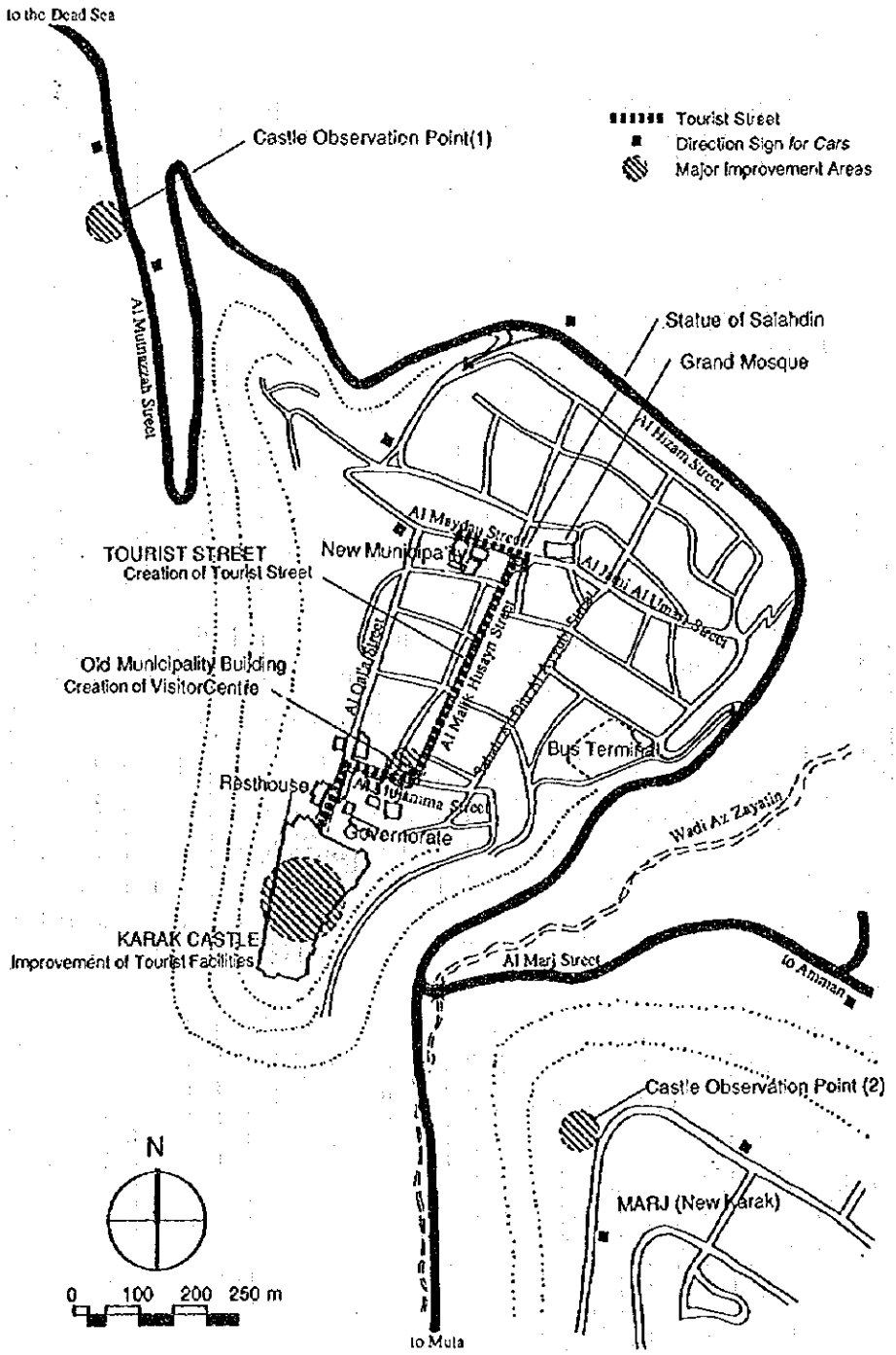
Heritage Conservation - To be carried out under DOA.

Community Impact - Town meetings on the project are recommended.

Implementation: MOTA should take the leading role with DOA and the Municipality to carry out specific work.

Economic Evaluation: EIRR (Economic Internal Rate of Return) is calculated at 23.46 %.

Figure 27 Karak Tourism Development Project Components



5. Five Year Action Plan

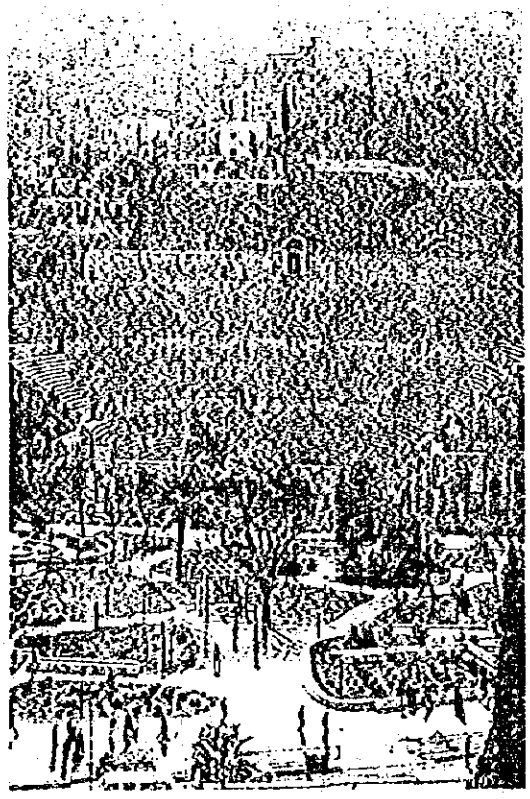
Overall Evaluation

- It is highly desirable therefore to implement all of the six projects at the same time so that overall effect would become much more than the simple sum of the six. From the view point of efficiency and effectiveness, these six projects should be treated as one package, i.e. a sectoral project for creating a tourism core and corridor in the priority areas in Jordan.

- The combined projects at estimated total financial cost of US$ 76 million would yield at least an economic internal rate of return of 27%, calculated against streams of costs and benefits as the simple sum of individual projects. Actual combined effect can be expected to be much higher.

Five Year Action Plan

- Figure 28 shows a schedule of a five year action plan for the implementation of the six projects.



- In order to initiate these projects for implementation, institutional arrangements as well as financial arrangement will have to be made.

- It is recommended that a project office be established under MOTA, which will ensure a close coordination among various concerned agencies as presented in sections describing each project in Chapter 4.

Figure 28 Five Year Action Plan

Amman Downtown Tourist Zone	96	97	98	99	2000	US$ million
a. Tourist Street						2.3
b. Tourist Trails				District Office	Museum	2.5
c. Municipal Museum						2.3
d. Tourist Bus Terminal						12.7
e. Information Centre	Interim				Permanent	0.7
f. Training				Overseas	Domestic	0.3
Cost in US$ million	0.9	1.8	8.8	7.8	1.5	20.8

National Museum	96	97	98	99	2000	US$ million
a. Building construction						10.0
(F.F.E)						3.5
b. Human Resources				Training	Training	1.0
Cost in US$ million		0.4	0.5	4.8	8.8	14.5

Historic Old Salt	96	97	98	99	2000	US$ million
a. Visitor Centre						2.3
b. Tourist Trails				Model Trails		5.0
				Nodes		
					Panorama	
c. Training				Overseas	Domestic	0.3
Cost in US$ million	0.2	0.6	4.1	2.6	0.1	7.6

Dead Sea Panoramic Complex	96	97	98	99	2000	US$ million
a. Rest House (with Panorama Spa)						9.6
b. Dead Sea Museum						2.1
c. Cable Car						6.0
d. Infrastructure						1.7
Cost in US$ million	0.5	0.7	6.7	11.5		19.4

Madaba - Dead Sea Parkway	96	97	98	99	2000	US$ million
a. Planning and Design						0.9
b. Road Construction						6.0
c. Landscape and Supporting Facilities						0.6
Cost in US$ million	0.2	0.2	0.2	4.2	2.7	7.5

Karak Tourism Development	96	97	98	99	2000	US$ million
a. Castle						2.4
b. Tourist Street						2.4
c. Visitor Centre						0.35
d. Observation Points						0.45
e. Training			Overseas	Domestic		0.3
Cost in US$ million	0.3	2.1	3.4	0.1		5.9

Cost Grand Total in US$ million	2.1	5.8	23.7	31.0	13.1	75.7

B/D D/D Implementation

JICA