4.2 Tourism Products

Modern tourism has introduced the concept of "tourism product" in lieu of "tourist attraction" (e.g., scenic wonders, archaeological sites, historical monuments) commonly used in the first half of the 20th century. The concept of "tourism product" covers not only traditional tourist attractions, but also a much broader range of natural, historical, and cultural attractions. It further encompasses special types of attractions and activities that are sometimes artificially created. Typical examples include theme parks, cultural events/festivals, soft adventure sports, casinos, and entertainment. Even hotels and resorts (e.g., nostalgic colonial hotels, paradors of Spain, maharaja hotels in India), means of transportation (e.g., Eurostar, the recreated Orient Express), and cuisine (e.g., gourmet tours) can motivate modern tourists to travel.

The use of the term "tourism product" therefore indicates a positive attitude toward the tourist market rather than a passive attitude that waits for tourists being drawn to the "attraction." Thus product management and development are key elements of tourism development today. In the fiercely competitive world marketplace, a thriving tourist industry at any tourist destination will not be sustainable unless it effectively manages the existing tourist products and stimulates the market with a flow of new attractions and ideas.

4.2.1 Tourism Products in Jordan

(1) Antiquity-Centered Products

The public and private sectors in Jordanian tourism are perhaps too comfortable with their niche antiquity market. They are neither aggressive enough to create a new line of products nor aware of new trends in the world tourism scene.

Archaeology is so deep-rooted in the product concept of Jordanian tourism that few doubt that there are many other areas for potential product development. The Madaba Mosaic is a worthy attempt to add a new product, yet it is basically archaeology and does not significantly diversify the product line that Jordanian tourism offers.

(2) Poor Presentation

Archaeological products in Jordan are very poorly presented and the level of facility and service provision is below the international standard. The concept of visitor facilitation is seemingly unknown not only in Jordan but also in much of the Middle East except for Israel. Thus, the facilities that are provided are generally inadequate, of poor quality, and ill-maintained.

Visitor facilitation, the provision of a suite of facilities and services to ensure the comfort of tourists and to enhance their site visit experience, is an integral part of tourist services today. It therefore plays the key role of enhancing the level of visitor experience and satisfaction. It includes the provision of the following:

- tourist information offices and general information material (e.g., maps, brochures, pamphlets) at the gateway city;
- tourist roads with appropriate directional signs leading to attractions and sites;
- visitor centers/museums (e.g., audio/visual exhibits, theatrette) and on-site information materials;
- tourist signs at each site showing directions, the name of attractions, and brief description and interpretation; and
- tourist routes and trails with amenities (e.g., footpaths, benches, shelters, kiosks).

An assessment of visitor facilities at five major tourist sites in Jordan is given in Table 4.2.1.

Secondary directional signs and free hand-out information should be provided immediately. Two visitor centers are poorly managed or under-utilized. Attraction name signs are few, if there are any at all, their design is crude, and they are poorly maintained. There are no information/interpretative signs except for a few at Umm Qays Museum and Ajlun Castle. Parking and souvenir stalls at Jerash are located on the corridor linking the Triumphal Gate now being restored and the South Gate, which thereby obstructs the view of the monuments (the South Gate and the Columns of the Forum behind it).

The existing state of visitor facilitation at four popular tourist sites in Jordan is examined against some exemplary cases in one developed country in this field in the summary photo analysis on pages 4-14 to 4-17. Jordan needs to substantially improve the visitor facilities in many areas. Archaeology-centered exhibits lack guidance on historical, cultural, social, and natural features of the site and limit the visitors' experience and satisfaction. The staff serving in the ticket booths, museums, and visitor centers are not properly trained in customer service, courtesy, or business efficiency, and they lack basic knowledge about the site. Extensive and programmed training of the tourist service staff is urgently required.

Table 4.2.1 Provision of Visitor Facilities at Selected Tourist Sites

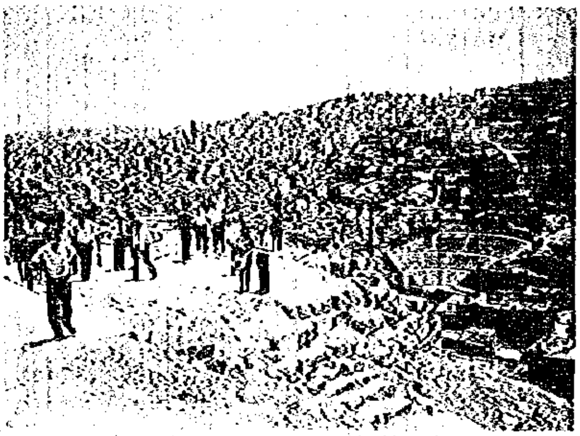
SITE	HIGH-WAY SIGN	2ND-ARY SIGN	PARK-ING	TICKET BOOTH	VISITOR CENTER	PRINTED INFOR-MATION	MUSE-UM	ON-SITE SIGN	REST-HOUSE/ RESTAU-RANT	NOTES
Amman Citadel	No	No	Yes, but only for a few saloon cars	At Museum	No	No	Yes, but archae-ology only and crowded exhibits	Yes, but name only and very poorly done	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 Ram	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

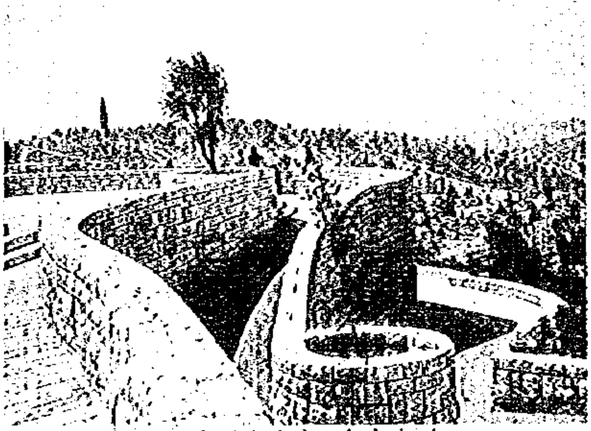
Figure 4.2.1 Comparison of Visitor Facilitation (1/4)

Examples in Jordan

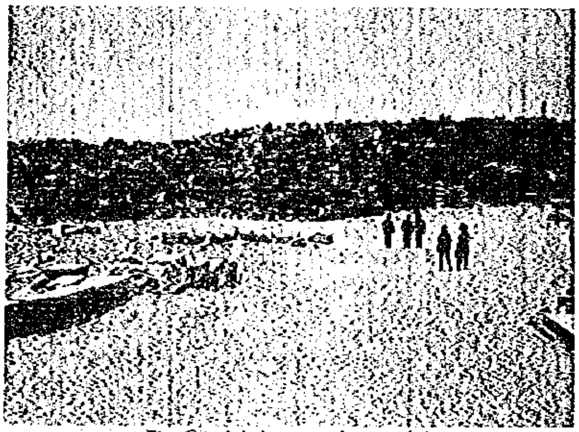
Examples in Other Countries



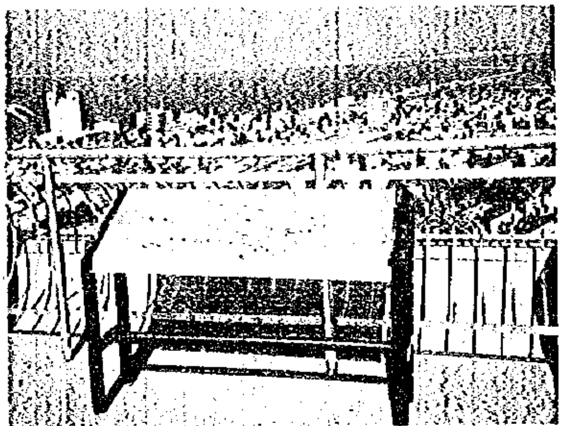
The Citadel, Amman. An ideal location for panorama lookout totally neglected. No site name or information board.



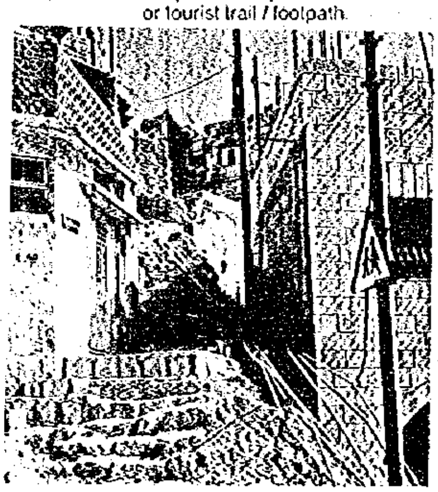
Modern and artistic design of a lookout platform, with sloped access for handi-capped visitors



The Citadel, Amman. Approach to the panorama point. No direction sign or tourist trail / footpath.



Panorama map identifying the main land-marks. Map is weather-proof, being engraved on a metal plate.

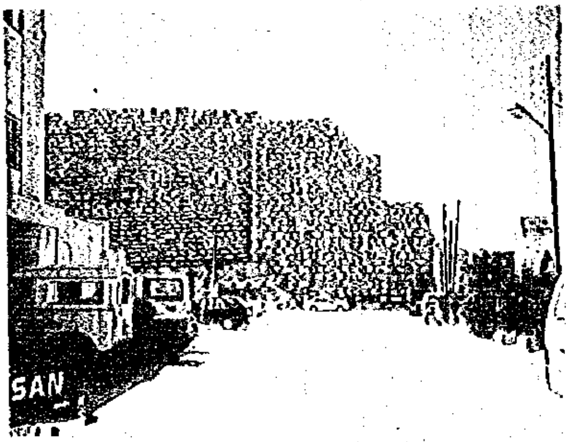


The Citadel, Amman. This stairway would make an ideal tourist trail leading down to the Amphitheater.

Trimly landscaped tourist footpath, with modern direction sign and street lights

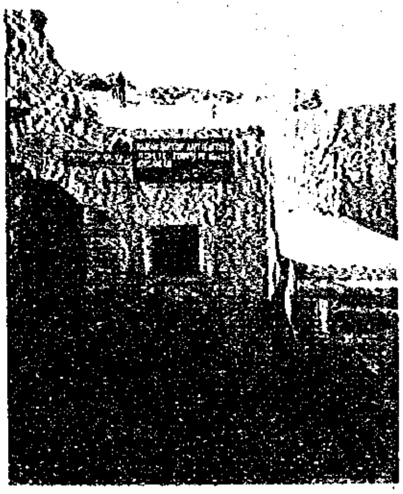
Figure 4.2.1 Comparison of Visitor Facilitation (2/4)

Examples in Jordan	Examples in Other Countries

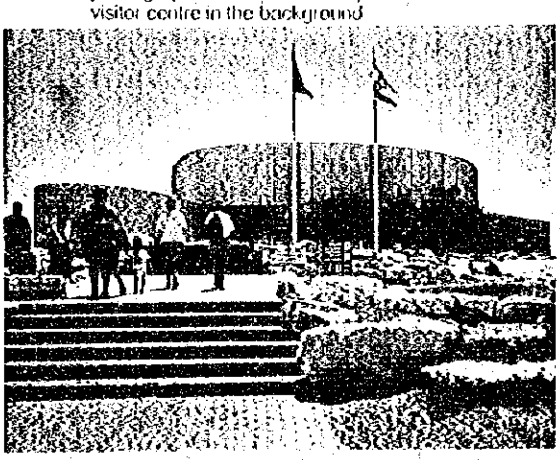


Karak Castle approach and parking.

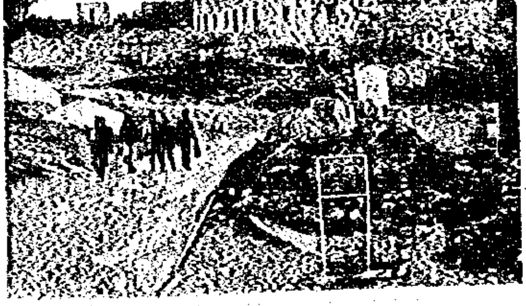
Approach to an archaeological site, with neat name and direction sign. Divided parkings (coaches and sedans) and visitor centre in the background.



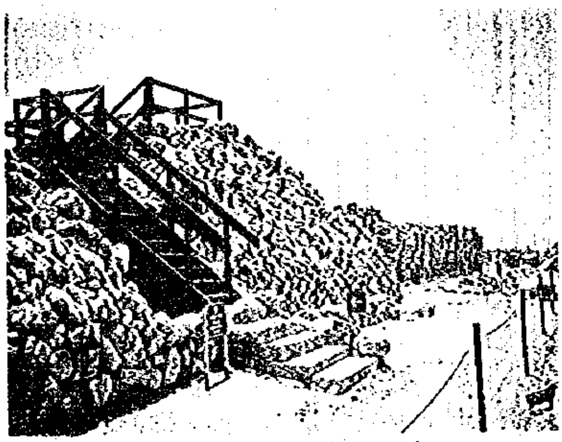
Karak Castle ticket booth



Access steps to a modern visitor centre complex, with museum, video room, observatory, restaurant and souvenir shop.



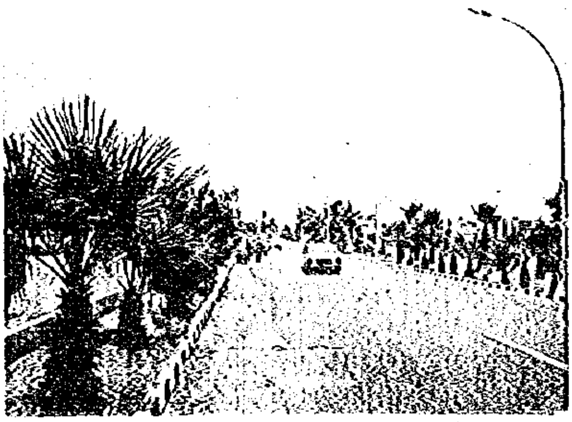
Umm Qays site entrance with a site name sign.



Elevated observation stand at an archaeological site. Neat direction signs and tourist trail with cordoned fence.

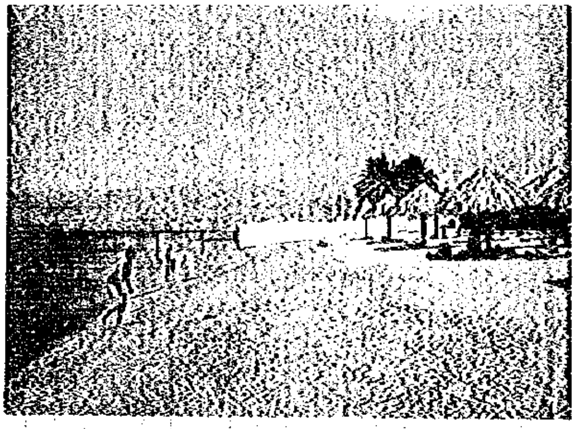
Figure 4.2.1 Comparison of Visitor Facilitation (3/4)

Examples in Jordan	Examples in Other Countries

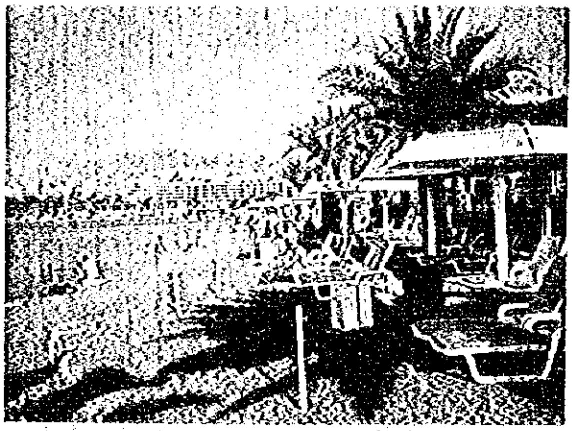


Aqaba. Approach to the centre. No tall trees and lack of maintenance.

Tall palm trees, green lawns and shrubs, and manicured walkway enhance the image of a seaside destination.



Aqaba Beachfront (Coral Beach Hotel). Beach enclosure disrupts an open beach ambience of the seaside destination.

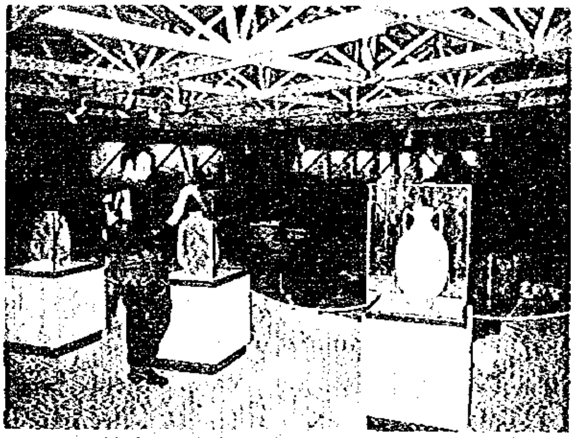


Open beachfront, with modern and colorful amenities (sunshades, beach chairs).

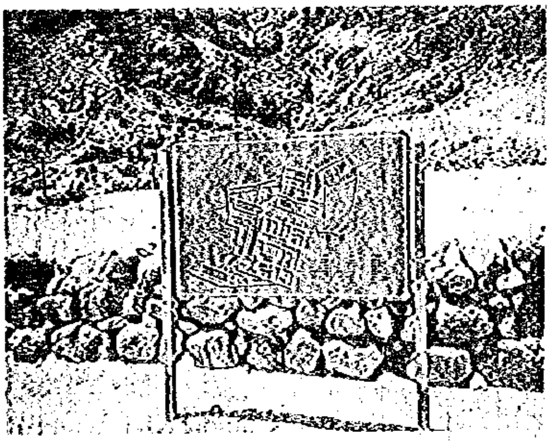
Tourist information centre complex, with internationally recognized, big "i" symbol mark for tourist information.

Figure 4.2.1 Comparison of Visitor Facilitation (4/4)

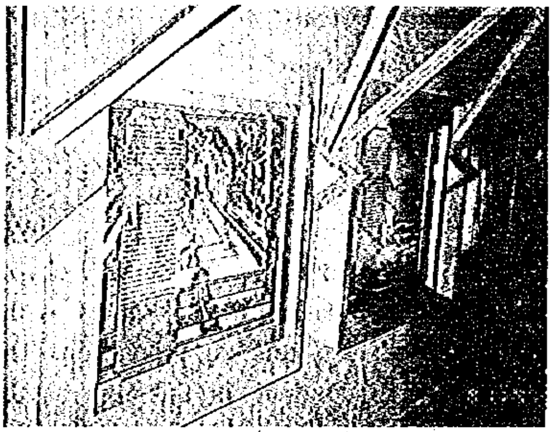
Examples in Other Countries



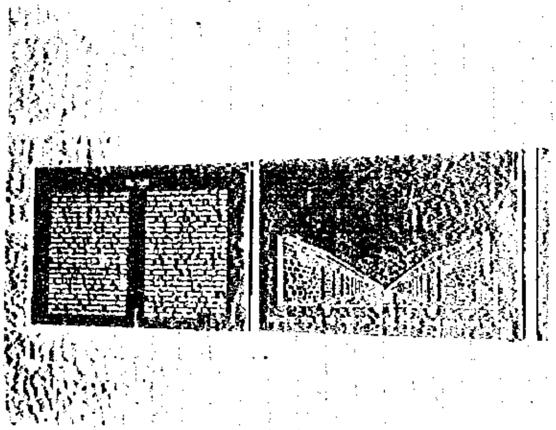
Modern technique of museum display. Note the excavation site and illustrated panels in the background.



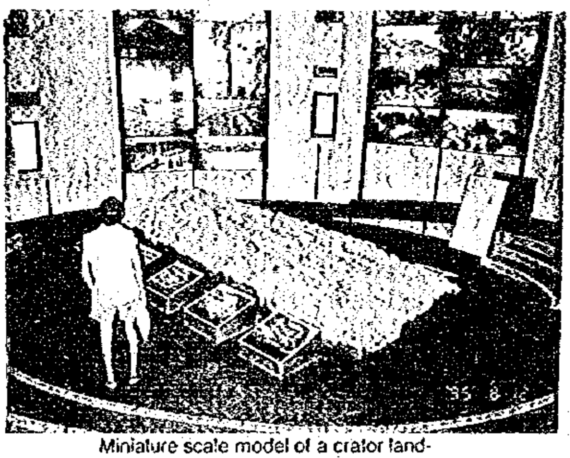
A clear and articulate map with indexes to site locations



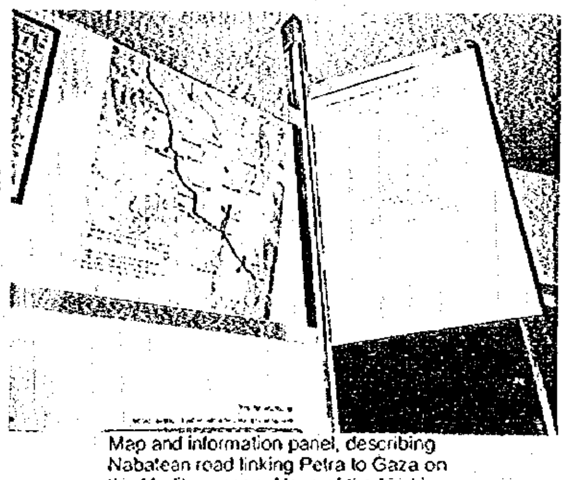
Illustrated panels to explain historical and cultural backgrounds of a site.



Interpretation of a site described in two languages, with a drawing of reconstructed vista.



Miniature scale model of a crater landscape, with picture panels. Circular steps around the model can serve as seating space for group lecture.



Map and information panel, describing Nabatean road linking Petra to Gaza on the Mediterranean. None of the kind is presently available at Petra Museum

(3) Need for New Product Development

A few imaginative entrepreneurs are, within their limits, trying to diversify Jordanian tourism products. Encouragement and supportive measures for their courageous efforts from the relevant government sectors are recommended.

Kan Zaman (including a theme restaurant, cafe, and a souvenir arcade of artisans in suburban Amman), Tayyiba Zaman (an abandoned local village restored to an attractive boutique hotel/resort in a vintage location near Petra), and Balloon over Jordan (hot ballooning in Wadi Ram and Petra) are some of the completely new line of products initiated by Jordan Tourism Investment (JTI). These products are gaining recognition and popularity in the international tourist market. JTI also plans to open another theme resort village in Petra, with various other projects under consideration for Karak and Umm Qays. Jordanians in the tourism industry should be encouraged to emulate the initiatives of the JTI.

4.2.2 Petra

(1) Petra in the National Tourism Development

a. Major Tourism Magnet

Petra represents the main focus of tourist activity in Jordan after the gateway city of Amman, in terms of visitor-days spent and accommodation. It also figures as the most prominent resource and attraction in Jordanian tourism promotion. The National Strategy and Policy indicate that it will continue in this role as the showcase product for the country. Consequently, it is indispensable that preservation efforts at Petra continue, and that it be fully prepared and presented for substantially higher visitor volume.

b. Apex of Jordan's "Golden Triangle"

Petra is the southern anchor of Jordanian tourism. As such, it can serve the function of catalyst in the emergence of Aqaba as a secondary gateway to Jordan. MOTA can develop and promote Jordan's "Golden Triangle" of attractions to include Petra, Aqaba and Wadi Ram. This vicinity is compact, and offers a broad variety of attractions of strong appeal to many segments of tourism. Conceivably, in the mid term after 2000, nonstop flights from Europe could deliver tourists directly to Aqaba (a limited number of charter flights are already in service between UK and Aqaba) on holidays that include these three areas of Jordan. Petra can help the Gulf of Aqaba, shared by four nations, to establish itself as a major international destination. It will require major infrastructure development in the Aqaba area including Wadi Ram.

(2) Present Situation

a. Tourist Arrivals

During 1994 there was a recorded total of 200,000 paid visitors (550 daily average) to Petra, of which 160,000 were registered as foreigners, about 80 per cent of the total. In 1995, the annual figure exceeded 300,000 visitors(337,221 visitors of which 294,809 were as foreigners, nearly 90 percent of the total), an increase of more than 60 per cent over last year. However, this is still under 900 visitors per day and less than half the carrying capacity of Petra, 2,000 - 2,400, as estimated by the 1994 UNESCO Plan.

This capacity was estimated on the basis of the number of concurrent tour groups at a time at the Treasury (two of 20 persons for 10 minutes) and the number of pedestrians through the Siq (120 visitors per 30 minutes). Opening of other entrances could increase the capacity by 1,180 persons per day, although as a tourism product other entrances have a significantly less value.

Over the short term, with the upcoming push for increased tourism in the region notably from Israel, it is apparent that Jordan will continue to emphasize Petra as the jewel in its crown of attractions, putting still further pressure on the area's facilities. Annual entry fee collections at Petra may exceed JD 7 million by 1997, representing a very substantial income source for the economy. As such, Petra functions as a major export for Jordanian tourism.

b. Archaeology at Petra

Numerous Jordanian and foreign universities, institutes, and NGOs have conducted research at Petra for scientific and academic purposes, and such research will continue. Some projects are now pioneering high-technology methods (e.g., infrared and ultraviolet photometry by a JICA-funded project) that may be applicable to other sites in Jordan. About half of foreign development assistance for archaeology in Jordan is focused on the Petra vicinity because the international community appreciates the outstanding value of this World Heritage Site, which contains over 2,000 listed rock-carved monuments. The international community also appreciates its focal economic role as a major tourism magnet. Most of this work is for consolidation and preservation of the monuments; presentation of them to visitors by means of explanatory exhibits and materials is virtually entirely omitted.

A major advantage to the archaeological work is that, as it continues, it discovers new monuments that will be of interest to future and returning visitors to Petra. Recent work has revealed mosaics and ancient papyrus scrolls in an ancient Byzantine church above the Colonnade Street. Within two years the site will be properly sheltered and open for public inspection, thereby representing a new attraction. Other future attractions include monumental tombs, Little Petra at Beida with its small Siq, and possible reconstruction and reuse of parts of the ancient Nabataean water system. While serving the pursuit of knowledge, archaeology is also producing more attractions for tourism at Petra, which should enable it to attract first-time and repeat visitors in growing numbers.

c. Product Presentation and Visitor Facilitation

Petra as a tourism product is currently presented simply as an archaeological site, as is common with all other tourist sites in Jordan. The new Petra Museum typifies the situation where visitors are shown the excavation finds in glassed cases with supporting archaeological descriptions, but receive no information at all on the people, history, and culture behind the archaeological monument or on the topographical features of the spectacular Siq and surrounding landscape. There are no complementary maps, drawings, or panels to assist visitors in appreciating the significance of the site as a whole (e.g., on Nabataean Kingdom, the rock-cut tombs and temples, Roman colonization). The visitor center at the entrance is not helpful in this regard, with almost the half of its entire floor space vacant with no relevant materials and information on Petra.

At the time of the Study, Petra's visitor facilitation is characterized by the lack of:

- exhibits and information at the visitor center;
- exhibits and information at the museum except for the archaeological aspect of the ruins;
- free handout maps and leaflets;
- directional signs (except a few);
- name signs of attractions (except a few);
- descriptive signs (information and interpretation);
- tourist trails, except for the two naturally trodden routes : 1)Entrance - Siq - Museum, and 2) Museum - Ed Deir; and
- exhibits and information on the historical, cultural, and natural/topographical features of Petra (e.g., the Nabataean Kingdom, Roman colonization, topographical formation of spectacular Siq).

USAID's ongoing CERM projects are expected to address some of these problems.

d. Management Situation

MOTA/DOA has responsibility for the ancient sites, being in the park proper, while for the adjacent towns of Wadi Musa, Tayyiba, and others in the area, it is the municipal governments as well as the Governorate of Ma'an that are responsible. There has recently been increasing awareness of the need for a comprehensive management framework for the park proper as well as for its area of influence or buffer zone under one body. The 1994 UNESCO study "Petra National Park Management Plan" recommends creation of an independent park authority reporting directly to the Prime Minister's office. It also recommends a broadening of the park boundary and establishment of a buffer zone to include nearby urban areas. A summary presentation of the 1994 UNESCO report is included in Appendix 1.

Construction has started on a number of hotels under license from MOTA to provide a further 900 rooms to meet existing demand. A five-star hotel is being constructed in the center of Wadi Musa and a range of hotels between Wadi Musa and Tayyiba. Existing hotels are also being extended. The hotels are being constructed without careful consideration of their impact on the environment; UNESCO considers that these developments will bring serious impacts on the archaeological site of Petra. Major issues are the negative visual impact and potential water pollution as the hotels are located in the catchment area for a line of natural springs. It is also pointed out that the developments have been carried out without Environmental Impact Assessments (EIAs).

e. Water Supply, Sewerage, and Drainage

It is estimated that the increased number of tourists, particularly those staying at hotels, will add 6-7 per cent to the water consumption of the local communities (e.g., Wadi Musa) in 2010. Excess demand by tourists will not be as large as feared by some in the communities, while shortages caused by the growing population in the communities will be much greater. Nevertheless, tourist demand is a part of the problem and proper attention is required for preventive measures and advance planning.

The problem of sewerage is more urgent. There is no waste water disposal system for used water for Wadi Musa. Some hotels that have started operation have already caused visible environmental damages, though localized. USAID has initiated a project to provide a sewerage system of a limited size in the area. Widespread installation of the Compact Enclosed Dedicated Treatment System (see Appendix B, section 4.4 of Part II for details) could be a solution.

The acceleration of the erosion process due to lack of maintenance of the ancient dam, agricultural terraces, water channels and cisterns, and uncontrolled grazing, is a serious problem that makes Petra more prone to being washed by flush water. Not only are ancient monuments exposed to damage but so also are tourists who are at risk, particularly in the narrow gorges such as the Siq. The World Bank is considering the funding of drainage improvement work.

(3) Management Imperatives

a. Required Actions

The creation earlier this year of the Petra Regional Council gives the Council Authority (1966 Law 79 on Organizing Cities, Villages and Building) the ability to plan and control land use and infrastructure development in the park's zone of influence, which includes the town of Wadi Musa and other areas. The Council must commission the preparation of a comprehensive management plan to arrest further deterioration of the ancient city and to lay out a clear strategy to equip Petra to handle larger volumes of tourists.

The work of the 1994 UNESCO Management Plan is a step in the right direction, but that alone does not constitute a comprehensive plan that addresses key issues such as:

- territorial designation (e.g., the park proper, adjacent areas, buffer zone) and the specific agencies to manage them;
- a program to develop vital visitor management techniques within the park proper so as to distribute visitor volume and minimize congestion, bottlenecks, and deterioration;
- financial autonomy for the park authority making possible adequate funding of works in the Petra region; and
- improved community relations with park workers, providers of tourist services, and village inhabitants to gain their cooperation in the planning process.

This comprehensive plan could be organized and funded in conjunction with foreign development assistance. The upcoming "Petra Priority Action Plan" is an opportunity to underline the need for a comprehensive plan and to define the contents of a terms of reference. In early 1996 the Council is expected to appoint a consultant for preparation of a plan to be completed in approximately one year.

b. Involvement of the Local Population

The human element in implementing a comprehensive park plan is crucial to the park's future. Local villager groups and tribes are to participate in the planning process, so that they will identify their future prosperity with that of the park itself. Village and tribal meetings must be held to gain local support for future reforms. The local population also needs to acquire the types of skills that the growing variety of tourism-related jobs will require (e.g., food and beverage, basic language skills maintenance, tour guiding). The growing local business community also must participate in this process. The comprehensive plan must include mechanisms to meet these needs.

4.2.3 Aqaba

(1) Aqaba's Position as a Marine Tourism Base

As a marine tourism destination and product, Aqaba shares the same Gulf of Aqaba with neighboring Eilat (Israel) and Taba (Egypt). It is therefore obliged to compete with the other two tourism bases of a similar nature located side by side. Compared to Eilat and Taba, Aqaba is endowed with the best beach frontage and diving spots. Europeans are the major international tourist market for all three bases.

Tourism development in Aqaba lags far behind Eilat notably in the areas of:

- provision of hotel accommodations suitable for upmarket clientele;
- variety of tourist attractions and their presentation;
- beach front beautification (e.g., public promenade, benches, rest area);
- tourist information and amenities;
- availability of optional activities (e.g., off-shore water activities, dining-out, entertainment); and
- urban infrastructure (e.g., the unsightly city approach with dirty trucking yards for long-distance lorries, haphazard mixture of the tourist beach/facilities and the ferry terminal/industrial ports).

The Egyptian Tourism Development Authority (TDA) has started to develop Taba as part of its ambitious Sinai Peninsula Riviera Tourism Development Plan from Sharm-el-Sheik (at the southern tip of the Peninsula), to Nuweiba and Dahab, to Taba (at the Peninsula's northern end). TDA has designated several zones, provided necessary infrastructure (new airports and road network, improvement of existing roads, sewerage, water treatment, even a desalination plant in one zone). TDA is also spearheading an effort to build a four-star hotel facility as an inducement to activate international investment.

Thus, compared to the prevailing conditions in Eilat and Taba, tourism development in Aqaba is in a backward state, lacking the appeal, the facilities, and the amenities that are needed for a thriving modern tourism industry.

(2) Aqaba Region Authority's Master Plan for Teeba

The Aqaba Region Authority has revised its land-use master plan in 1995 to develop an area of the 23 square kilometer south coast (Teeba) for resort and recreational development in three phases up to year 2020. This project would be oriented in part to domestic tourism and in part for the international market, the latter competing with Eilat and the Egyptian coastal resorts of Sharm-el-Sheik, Dahab, and Taba on the Sinai coast. As many as 2,000 hotel rooms could be developed for the foreign market, and additional capacity added to hotels, camps, and tourist villages for the domestic market. A substantial investment in infrastructure would be necessary to implement this ambitious integrated development plan. However, its implementation/materialization remains subject to the initiative of the ARA, related government agencies, and private-sector interests (both domestic and international).

There is also a major drawback in the suitability of this site for international tourism; that of its proximity to incompatible land uses, specifically the port of Aqaba, a power station and container port to the north, and the industrial area at Wadi 1 and 2 to the south. Such facilities are unattractive and usually are shielded from tourist, recreational, or residential activities. Jordanians on holiday have no choice but this coast for seaside vacationing, if they do not wish to leave the country; it is a captive market. However, the foreign tourists have a wider choice of destinations in both the Mediterranean and Red Seas; it is a highly competitive market.

The Aqaba Region Authority is well aware of the problems and solutions have been sought in the preparation of the revised master plan. The land use plan and the road network plan of the revised master plan were prepared to ensure the shielding and separation of the tourist areas from port and industrial activities, and to protect the pristine beaches of the South Coast Tourist Zone and their coral reefs, crystal clear waters, along with the unique marine biodiversity, and the unique non-humid environment of this coastal area. Some more background information and details of the revised master plan are presented in Appendix 2.

An alternative option that merits serious and immediate consideration in developing Aqaba as an international seaside tourist destination is the development of the very attractive waterfront area extending westward from the Aqaba castle across to the Israeli border zone. Several hotels already exist in this area. It lends itself well to an integrated plan to accommodate a mixture of resort, retail, recreational, and residential uses, and even possibly a complex for meetings and conventions. A well-landscaped waterfront promenade with a peace monument close to Israel could be an outstanding urban feature. Coordination with Eilat might ultimately make possible in a later phase a border crossing integrated into the waterfront park. This town waterfront should be evaluated as an alternative to the South Coast for international-standard resort development.

4.2.4 Dead Sea

The Dead Sea area has strong potential for international and domestic tourism in the future. However, today there is nothing worthy of mention in the area in terms of tourist attractions or facilities except for one resthouse; the four-star, 100-room Dead Sea Hotel in Suweimeh; and the four-star, 100-room Ashtar Hotel in Ma'in Spa. The only international tourist market served by these two hotels is a trickle of German and Arab curative holiday seekers.

No side attraction, rest area, or panorama lookout is provided along the Dead Sea drive or on the escarpment overlooking it. The tourism potential that the Dead Sea inherently possesses is therefore totally neglected at present. There is seemingly no conscious effort on the part of the public or private sectors to present and package the Dead Sea as a tourism product appealing enough to attract international visitors.

A master plan was prepared by the Jordan Valley Authority (JVA) in 1994 to develop a 290 square kilometer coastal area covering three major centers (Suweimeh - north, Zara - center, and El Mazra'a - south) in three stages up to year 2010. The proposal to develop the area in a dispersed pattern with different types of lodging facilities (e.g., hotels, spas, youth camps) is attractive (see Appendix 3 for details). However, the plan is indeed an ambitious one; the development of the area will have to virtually start from scratch. The amount of effort and investment to be spent would be considerable before it takes shape as an internationally competitive destination. It should therefore be considered as a long-term plan. To accelerate its development, some form of stimulant investment and "seed projects" will be needed on the part of Jordanian authorities (e.g., JVA, national and local government agencies), as was demonstrated by the Egyptian Government in the development of Sinai Peninsula coastal resort development (e.g., provision of new airports, roads, water and sewerage, and even a model hotel).

Present status of tourism development on the western shore of the Dead Sea is summarized as follows:

1. Major Tourist Sites featured in the international tourist itinerary.

- Massada (Remain of 2000-year-old Jewish fortress against Roman invasion) provided with: tourist cable car, visitor center (cafeteria, kiosk), tourist trails, two-language signboards, site pamphlet, tele-guide system, open-air theater and sound and light show in tourist seasons.

- Qumran (Site of Dead Sea Scrolls excavation) provided with visitor center (cafeteria, kiosk), tourist trails, three-language signboards, site pamphlet and parking
- Mizpe Shalem Kibbutz Cooperative (Production/Sales of dead Sea cosmetic products)
  provided with visitor center (cafeteria, kiosk, sales outlet of Dead Sea products), where part of the production line can be observed and a short sales promotion video is shown.

2. Tourist Rest Area
- En Gedi in green landscaped garden setting, in contrast to the barren Desert/Escarpment surrounding.
  provided with: several tourist restaurants and parking
- Various Locations
  provided with: picnic sites with basic amenities.

3. Tourist Accommodations
- En Boqeq
  provided with: 9 hotels (1,650 rooms) of 5-star to 1-star categories. 2 more hotels being planned (making total capacity of En Boqeq around 2,200 rooms).
- Various Locations
  provided with: camping sites with basic amenities.

The potential market to be targeted for Dead Sea "curative/therapeutical tourism" will be:
- Europe, notably German market, which is currently using Jordan's Dead Sea Hotel for their therapeutical holiday package.
- GCC upmarket clientele, maybe.

The Dead Sea no doubt will be an attractive picnic/holiday destination for domestic tourists as well. Jordanian are, however, much better informed about the market and its preference, so the Study would like to leave this consideration to Jordanian discretion (MOTA, JVA and private sector). In general terms for the development of a healthy domestic tourism, provision of picnic/rest area, amenity kiosk, camping site, low-budget rest house, recreational/sportive facilities, tourist/themed attractions, moderately-priced hotel will be needed (facilities quoted are listed by order of priority/importance).

4.2.5 Amman

Amman is the main gateway for international tourists visiting Jordan, and some 70 per cent of Jordan's total accommodation facilities are concentrated in the city. Amman is endowed with some archaeological sites of importance as well as potential resources for culture tourism such as museums, art, and craft galleries.

Being the capital of Jordan, Amman also has the best urban facilities and amenities in the country (e.g., restaurants, shopping outlets), which are indispensable for today's tourism.

However, in most tourist itineraries Amman is considered just as a stopover point to/from Petra, the magnet of Jordanian tourism. The present role and function of Amman in the itinerary of international visitors is rather limited due to:

- a lack of awareness among the tourism-related sectors (both public and private) of the importance of a tourist gateway/core in national tourism development;
- a lack of product packaging and modern presentation of tourism resources available in the city (the poor product concept and presentation of the Citadel is one typical case example);
- a lack of a tourist area/zone that satisfies the expectations of today's tourists;
- a lack of visitor information services and materials; and
- a lack of awareness among the tourist service providers (e.g., restaurants, craft/souvenir shops) of the purchasing power of the bulk of today's common tourists (presently they are reliant on the rich and famous of the local community and Gulf visitors).

If all the above shortcomings are addressed properly, Amman could become a true and indispensable tourism gateway/core for national tourism development.

Ongoing projects related to tourism resources in Amman include:

- restoration of the Citadel, Roman Theater and Nymphium with improved visitor facilitation by the CERM (MOTA and USAID);
- renovation of the old municipality building into a tourist information center by the CERM (USAID); and
- volunteer efforts for the establishment of a national museum at a site in the downtown Ras al Ain area that was recently guaranteed by the Lord Mayor of Amman.

4.2.6 Wadi Ram

Wadi Ram has been increasingly attracting international tourists, with 50,000 visitors estimated in 1994. Its spectacular desert scenery with towering cliffs of weathered rock has long been the object of scenic wonder (panorama, sunrise, sunset). In recent years, with the increasing popularity of activity tourism or "soft adventure" (e.g., desert safari, hot ballooning, hang-gliding, rock climbing), Wadi Ram is gaining popularity as an ideal site for various soft adventure activities.

Wadi Ram's initial popularity owes much to its historical association with the politico-military activities of Lawrence of Arabia during World War I, vastly popularized by the award-winning film of the same name in 1962, which is a standard stock title in any video shop the world over even today. Neighboring Egypt (Sinai Peninsula) and Israel (Negev Desert) have a similar rock valley landscape, being of the same physical geography, but Wadi Ram is best known among them solely because of its historical connections.

Wadi Ram has one resthouse cum information center, run by MOTA. Visitor accommodation is limited to the camping facilities provided adjacent to the resthouse and off-site (upon request). For a site visit in Wadi Ram, tourists have to hire a four-wheel drive vehicle and a local driver/guide, with the service monopolized by the Bedouin villagers there.

A resettled village just across the resthouse has a population of about 70 and is growing. The sight of this unattractive and dusty village side by side with the tourist resthouse is an anticlimax to visitors' expectation of Wadi Ram, with its awe-inspiring rock formation under the big blue sky. Also, monopolized service provision hardly meets modern tourist service standards; seedy half trucks in bad condition, reckless driving by young and untrained drivers with no concern at all for tourist safety and comfort, deeply gutted and dangerous sand/desert tracks. It is no exaggeration to say that visitors are too scared by the drive to admire Wadi Ram's grand scenery.

For a similar desert experience in Israel and Egypt, tourists are offered a wide variety of optional tour programs operated regularly using modern, sophisticated service equipment escorted by knowledgeable and hospitable guides/instructors. A choice is available of desert safari jeeps and sand buggies, purpose-built for tourist use with comfortable seating and with attractive decor. Guides/instructors give lectures on topographic and geological characteristics of the site as well as on the flora and fauna of the region.

4.2.7 Some Examples of Untapped Resources

(1) Salt and Fuhays

The town of Old Salt on the three hills in the Akrad Valley is considered just another local municipality to native Jordanians. Thus, but for a few NGOs, foreign donors, and private enterprises such as the "Salt Zaman" restaurant that recently opened, neither MOTA nor the tourism-related private sector has conceived this area as having sufficient potential for development of a new tourism product.

If properly developed, managed and promoted, "Historic Old Salt" could be an ideal product to attract a new segment of tourists on the culture tourism circuit, thus significantly broadening Jordan's product line from one based only on archaeology. The benefit of "Historic Old Salt" is two fold: one is the direct benefit that tourism will bring to the Salt economy and community, while the other is that Salt products will widen options of tours from Amman because of its proximity (30 km or only a half-hour drive), thus consolidating the gateway attraction of Amman.

There are many successful examples of the similar old historic town rejuvenation projects all over the world, resulting in local economic revitalization and creation of a new tourist attraction. "Old Jaffa" Israel is a showcase example, which turned a century-old derelict fortress compound into a prime tourist attraction and artists' colony.

The privately funded Salt Development Corporation (SDC) formulated an Action Plan in 1990 to preserve and revitalize the unique historic center of Old Salt, with funding from USAID. Through the same foreign assistance source, part of the Old Suq in Salt City has been renovated, though its rather modern execution leaves much to be desired. The Salt Handicraft Center (ceramic, tile work, and weaving), opened with the assistance of Italian funds, has operated successfully with the cooperation of the Queen Noor Foundation and SDC.

In Fuhays, a small town between Amman and Salt, a noteworthy attempt is being made by a local entrepreneur in cooperation with local residents to revitalize the community by restoring and renovating old stone houses into attractive art and craft galleries, shops, and restaurants. This entrepreneur's lone effort will be rewarded if Fuhays is incorporated as part of the Salt optional circuit.

(2) Wadi Mujib

The majority of tourists from Amman will use the Kings' Highway to Petra at least once and drive through Wadi Mujib or Wadi Hasa. The spectacular scenery of the wadis (i.e., watercourse channels that are dry except during periods of rainfall) is very impressive, tempting visitors to spend sometime there to admire the wonder of this work of nature. However, wadi landscape is so common a sight to Jordanians that its attraction and potential as a tourism resource has escaped attention.

In Wadi Mujib at present, there is no panorama lookout or observation point so designated, but only a dirt parking space on the northern escarpment (Madaba side). There is no sign or information board identifying or explaining topographic characteristics of the canyon formation. No sunshade, toilets, or rest facilities are provided.

In Israel, in contrast, the Ramon Crater Canyon in the Negev Desert (a comparable natural tourism resource to Wadi Mujib) is provided with a modern visitor center with an observatory, museum and rest facilities. The museum has a miniature scale model of the canyon, explanatory panels, and even an auditorium where a short video program is presented at regular intervals to facilitate the understanding of the canyon's topography and geology. It is featured as one of the key attractions en route from Jerusalem/Tel Aviv through the Desert to Eilat and is attracting hundreds of thousands of domestic and international visitors every year.

4.3 Marketing

4.3.1 Promotion Materials

(1) Inventory of the Existing Promotion and Information Materials

The inventory of the existing promotion and information materials is shown in Table 4.3.1.

Table 4.3.1 Inventory of the Existing Promotion and Information Materials

Title	Category	Size / Format	No. of Pages	Language	Produced by
a) Jordan	Promotion	A4 Full-color	26	English French Japanese	MOTA
b) Jordan	Promotion	19 x 21 cm Full-color	8	English French Japanese	MOTA
c) Faces and Places in Time 9 Titles: Amman Jerash Decapolis Desert Castles Mosaics Dead Sea Petra Wadi Ram Aqaba	Promotion	1 sheet Two-folds 10 x 23 cm Full-color	4	English French Japanese	MOTA
d) Jordan -Legend -History -Hospitality	Promotion	30 x 29.5 cm Full-color Designed catalogue of high quality and taste	30	English	JTB
e) Jordan	Promotion/ On Site	1-sheet Four-folds 10 x 21 cm Full-color	5	English	JTB

(2) Assessment of the Existing Materials

The Category a) material is of a passable design format, but it is heavy because of the glossy paper, which increases the postage cost for both local and international distribution.

The Category b) material is useful being compact in size and light in weight.

The Category c) materials are typical examples of resource wastage for the following reasons:

- their size and format are meant as on-site information material, but their content is of a general promotional nature and does not provide any practical information, rendering the materials useless for tourist use;
- the use of the same cover page with an eye-catching title of "JORDAN - Faces and Places in Time" is designed to be dramatic and to provide an attractive presentational format for the set of nine pamphlets. However, tourists cannot identify the contents without unfolding a pamphlet twice (while the cover page shows a photo of the relevant city or site, but the first-time visitor cannot be expected to identify these);
- the map of Jordan on the last page is too small for practical use; and
- the cost of postage is high if a whole set of nine titles is mailed for promotional purposes.

The Category d) materials are an exquisite production of international standard. While these would be ideal materials for ceremonial occasions or travel trade shows and would no doubt impress recipients, when resource allocation and priority in the production of necessary materials are taken into account, these would be the very last material to be produced, only after several other materials of higher priority have been provided in quantity. Their non-standard size and bulkiness require higher freight charges even if shipped in bulk for overseas trade shows; also, recipients undoubtedly find the materials difficult to carry.

The Category e) material is compact in size and neat in design. Of all the existing materials, this is the best presented. However, it is a half-way product between promotional use (front side) and gateway tourist information use (reverse side). The information, text, and photographs on the front side are well done, but the gateway tourist information on the reverse side leaves much room for improvement. The map of Jordan is too large, with little practical information to help tourists. Smaller maps of Amman, Petra, and Jerash could have been usefully included, while reducing the size of national map.

4.3.2 Visitor Information

(1) At the Gateway (Amman)

Although QAI Airport has tourist information booths in its arrival foyer, which may meet the immediate needs of arriving tourists (e.g., city transfer, on-the-spot hotel booking), there is no tourist information office in Amman city center. One widely distributed tourist guidebook (Lonely Planet: "Jordan & Syria," 1993 edition) writes:

There's no tourist office in Amman. The Ministry of Tourism has a few glossy brochures (sometimes). Unless you want a few free wall posters, it's not really worth the efforts (to visit).

Although this comment may be justified, it does not help to promote a good perception of overall tourist facilities in Jordan.

An easy access, user-friendly tourist information office is a standard feature in most tourist destination gateways today. It is usually stocked with free handouts (e.g., maps and pamphlets) and serviced by well-informed staff.

(2) On Site

There are only a very few visitor information centers in Jordan (Petra and Jerash). They are generally under-utilized and under-equipped, as discussed in section 4.2.1 (2) on Tourism Products in Jordan, Poor Presentation, and shown in Table 4.2.1 (Provision of Visitor Facilities at Selected Tourist Sites).

Free hand-out maps of the tourist sites/areas are not available. The tourist maps of Jordan, major cities (Amman, Aqaba), and sites (e.g., Jerash, Karak, Petra, Wadi Ram) can be purchased but they vary in size and are generally inconveniently large (in the case of Amman - 69 x 97 cm); they are not easily handled. The information they contain and the cartography are below the international standard.

The museums at tourist sites are all archaeological, except for the two at the Amphitheater in Amman. Their excavation finds are displayed in glass cases, with little attempt made at providing supporting information (e.g., maps, drawings, panels on the history, people and culture behind those archaeological finds) to assist visitors in appreciating the significance of the site as a whole.

This situation is typified by the newly opened Petra Museum, where visitors can find no information on the Nabataean Kingdom, Roman colonization, stone-cut temples and monasteries, or the topographic formation of the spectacular Siq. Visitors coming to Karak to admire the Crusader Castle find in its Museum only the exhibits of the Gertrude Bell archaeological excavation conducted in the late 19th century, which is totally irrelevant to the Castle. Not even one sign is posted to direct the visitors to the various features of the Castle.

4.3.3 Marketing

A common mistake made by many tourist destinations short of resources (i.e., funds and expertise) is to organize a grand representation to one or two well-established international trade fair/show and fail to follow it up with frequent and regular sales calls by smaller teams later. The effect of a one-shot extravaganza is usually short-lived.

Jordanian overseas promotion is no exception to this common mistake. A lack of concerted and consistent efforts by MOTA, the tourism industry, and its national air carrier (Royal Jordanian) to hard-sell Jordan hamper Jordan from establishing a clear-cut destination image in the major European markets, engulfed by the massive promotional efforts deployed by many other competitive destinations.

The Jordan Tourism Board, created just before the outbreak of the Gulf War crisis, but dormant since due to the unfavorable political/financial situations, was revitalized recently with the appointment of executive staff. However, their effectiveness in consolidating overseas promotional activities remains to be seen.

4.4 Facilities and Industries

4.4.1 Tourism Facilities

Tourism facilities include Primary Facilities which directly serve tourists and Secondary Facilities which indirectly serve tourists while also serving the local population (Tables 4.4.1 and 4.4.2).

Table 4.4.1 Classification of Tourism Facilities in Jordan (Primary Facilities)

Facilities	Examples
Accommodation	Hotels, Pensions, Rest Houses, Camping Sites
Information	Tourist Information Centers, Visitor Centers
Presentation	Museums, Theaters, Observation Facilities, Aquariums
Recreation	Out-Door Sports Fields, Golf Courses, Swimming Pools, Marinas, Diving Centers, Hot Springs
Crafts & Shopping	Markets (Suq), Handicraft Centers
Restaurants	Restaurants, Coffee Shops
Amenities	Public Toilets, Rest Areas

Source: JICA Study Team

Table 4.4.2 Classification of Tourism Facilities (Secondary Facilities)

Facilities	Examples
Conference	Convention Centers, Conference Halls, Fair Grounds
Training	Tourism and Hotelier Colleges, Handicraft Schools
Transportation	Airports, Railway Stations, Bus Terminals
Communication	Public Telephones
Environment	Monitoring Stations, Solid Waste Disposal Facilities
Safety & Health	Police Stations, Fire Stations, Clinics, Hospitals
Others	Banks, Foreign Currency Exchange, Outlets

Source: JICA Study Team

(1) Accommodation Facilities

The existing accommodation facilities in Jordan include 131 classified hotels with 7,358 rooms, and 127 unclassified hotels with 1,605 rooms (MOTA 1994). In addition, there are a limited number of camping sites throughout the country.

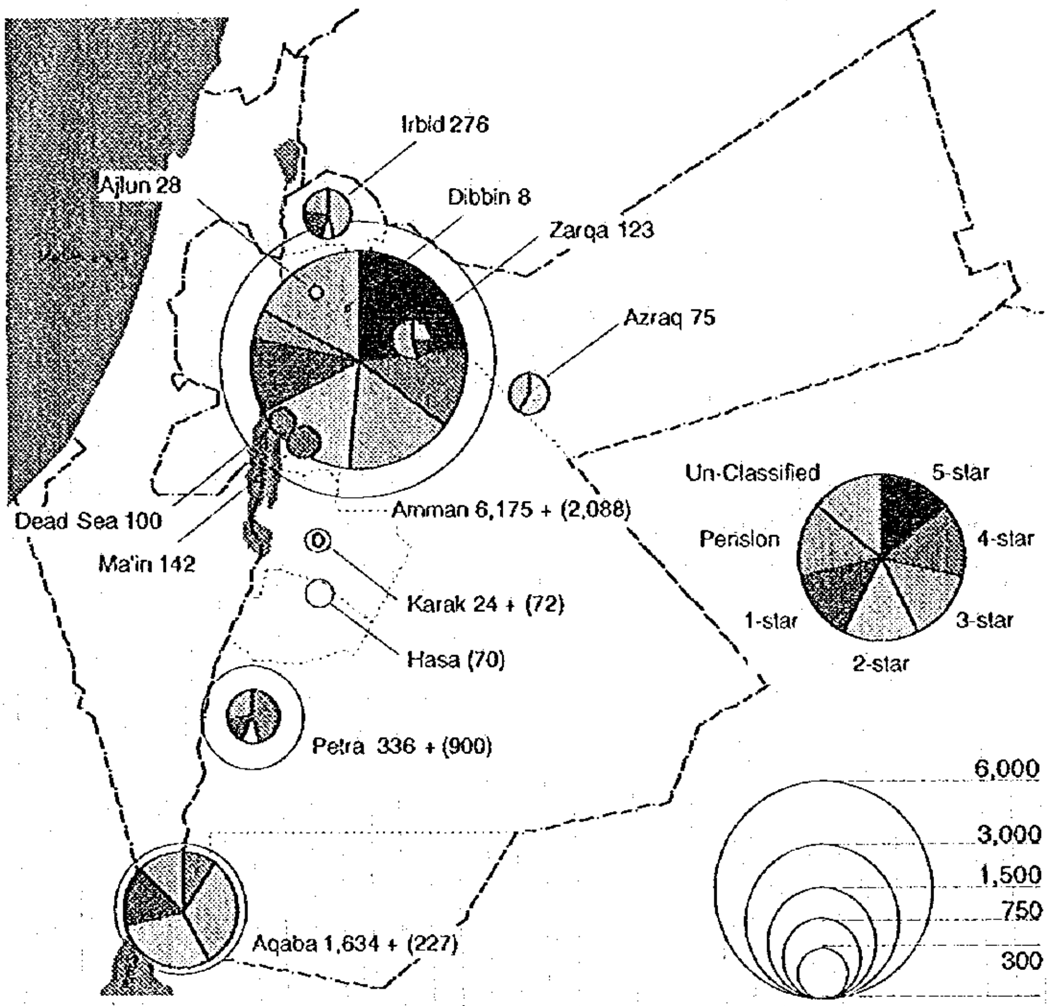
The accommodation facilities in Jordan are established by both the public and private sectors. The governmental company shares major deluxe hotels with private sector. Governmental rest houses are established and some of them are operated by the Tourism Investment Department (TID) of the Social Security Corporation (SSC). The private sector has begun to provide a wide range of accommodation services.

a. Hotels

The distribution of the room supply according to the classification of hotels (1994) is shown in Figure 4.4.1. About 70% of all rooms are concentrated in Amman. At the most famous tourism site, Petra, several hotels with a total of about 900 rooms are under construction in 1995.

Details of the existing hotel accommodation are shown in Table 4.4.3. This table indicates low occupancy rates except for pensions. Pensions and unclassified hotels are small in size and most customers are businessmen. Therefore, it is apparent that Jordan has had more hotel rooms than demand in the past.

Figure 4.4.1 Room Supply of Hotels by Classification (1994)



Source: MOTA

( ) = Under Planning and Construction in 1995

Table 4.4.3 Hotels in Jordan (by classification)

	Hotels		Rooms		Average rooms		Occupancy (%)	
	93	94	93	94	93	94	93	94
5-star Hotel	5	6	1,457	1,462	291.40	243.67	48.43	55.86
4-star Hotel	10	6	1,517	1,182	151.70	197.00	53.14	59.45
3-star Hotel	23	23	1,815	1,715	78.91	74.57	45.66	48.80
2-star Hotel	40	43	1,316	1,770	32.90	41.16	43.48	43.46
1-star Hotel	48	49	1,052	1,093	21.92	22.31	41.43	45.02
Pension	2	2	28	28	14.00	14.00	93.75	93.78
Total	128	129	7,185	7,250	56.13	56.20	46.97	50.26
Unclassified	127	133	1,605	1,631	12.64	12.26	56.12	-

Source: MOTA

However, in the latter half of 1994, one 5-star hotel in Amman is reported to be achieving monthly occupancy in excess of 70%. This increase may be a result of the peace treaty with Israel.

Details of the hotels, according to location are shown in Table 4.4.4. This table indicates that the annual room occupancy rate is high at Petra and low in other areas.

Table 4.4.4 Hotels in Jordan (by location)

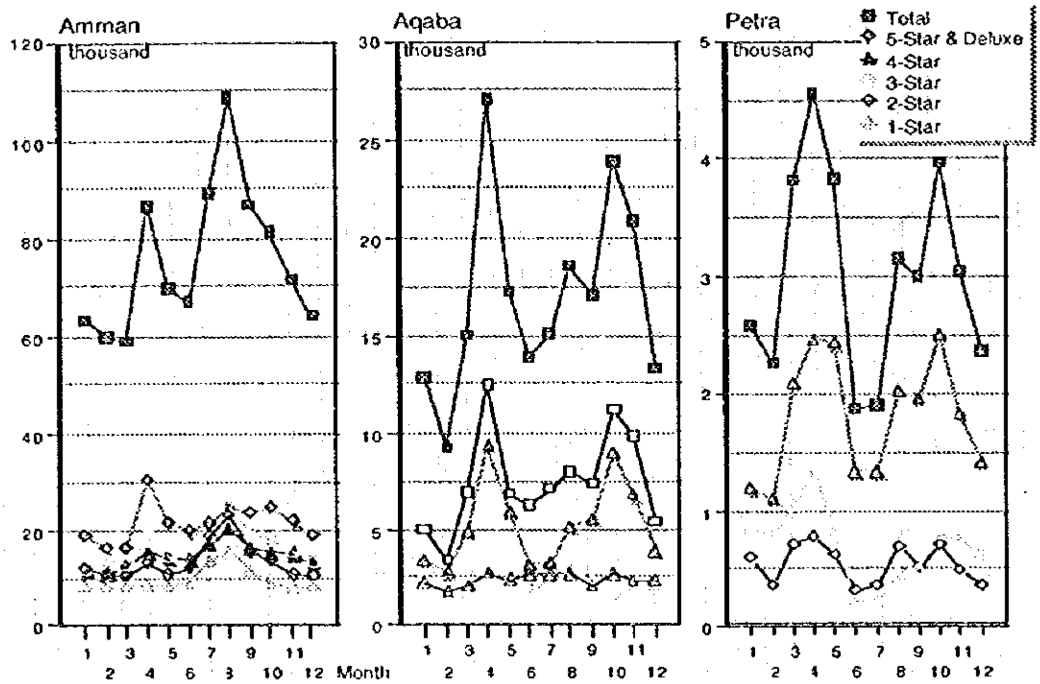
Location	Classified Hotels						Unclassified Hotels			
	Hotels		Rooms		Occupancy		Hotels		Rooms	
	93	94	93	94	93	94	93	94	93	94
Amman	83	84	5,054	5,062	49.16	53.41	90	91	1,083	-
Irbid	8	6	219	200	43.77	36.32	5	4	67	-
Petra	4	4	163	210	61.01	61.86	4	6	90	-
Aqaba	24	26	1,356	1,413	41.46	45.74	9	9	213	-
Other	9	9	393	365	33.73	25.06	19	23	152	-
Total	128	129	7,185	7,250	46.97	50.26	127	133	1,605	-

Source: MOTA

The seasonal variability of tourist stays at Amman, Aqaba and Petra is shown in Figure 4.4.2. These figures indicate remarkable differences by season and that the peak varies between locations. This situation may reflect the difference in climate.

A measure often adopted by resort hotels throughout the world is to reduce room rates significantly during the low demand season. This could induce domestic tourists to utilize such facilities and compensate for the slack by international tourists. Such encouragement of domestic tourists has additional merit. In the initial stage of tourism development that is internationally competitive, a perception among local citizens may arise that views tourism services being provided exclusive to foreigners. In fact local citizens take increasingly prominent portion of customers of such facilities and services as their affluence grows. In the initial stage there is often the risk of evoking such resentment among local citizens. The encouragement of domestic tourists is useful in dispelling such negative reaction.

Figure 4.4.2 Seasonal Variability of Occupied Rooms by Month



MOTA hotel classification especially in the five-star Lux category does not reflect the internationally recognized standard that has been much upgraded in recent years. The international standard would classify most of the five-star Lux hotels in Amman as four-and-a-half star at best. Some of these five-star lux hotels have faulty elevators, antiquated televisions, leaking in-room refrigerators, and other problems. One Amman hotel advertises in the *Jordan Times* that it is the only hotel with all rooms provided with hand-set remote-controlled televisions, which has been a standard fixture in many three- to four-star and all five-star hotels world-wide for many years.

British Airways Holidays rates Forte Grand as five-star (five-star Lux by MOTA), Petra Forum and Aqaba Gulf as 3.5-star (four-star by MOTA); Air France Jet Tours rate Forte Grand as five-star (not Lux); Japan Travel Bureau LOOK Tours (Jordan/Egypt circuit) rate both Inter-Continental (five-star Lux by MOTA) and Petra Forum as first class, while mentioning the Cairo Ramses Hilton as a deluxe hotel.

The MOTA Standard for Hotel Classification in 1994 (the classification is being reviewed by the MOTA in 1995) is shown in Table 4.4.5. However, a problem is that the hotels are not actually constructed according to this standard, or international norm.

Table 4.4.5 Jordan Hotel Standards (Extract)

Criteria	5-star	4-star	3-star	2-star	1-star
Min. Land Area per 100 rooms (sq. m)	2,000	1,500	1,300	1,100	1,000
Number of Conference Rooms	2	2	1	1	--
Max. Distance between Room & Fire Staircase	30	30	30	–	–
Min. Number of Rooms	100	70	45	30	16
Min. Area of Double Room (excluding Bathroom sq. m)	18	16	14	12	11
Min. Area of Double Room (including Bathroom sq. m)	25.2	21.2	–	–	--
Min. Ceiling Height of Room (m)	2.5	2.5	2.5	2.5	2.5
Min. Width of Corridor (m) (with One Side Rooms)	1.5	1.3	1.2	1.2	1.1
Min. Width of Corridor (m) (with Both Side Rooms)	1.8	1.8	1.6	1.4	1.3
Min. Width of Daily Use Stair (m)	2.0	2.0	1.5	1.5	1.3
Min. No. of Elevators per 100 rooms	2	2	1	1	–

Source: MOTA

Table 4.4.6 shows a comparison of hotels in the Region surveyed by the JICA Study Team. Actually, hotels in Jordan are not so behind in figures compared to those in the Region. However, compared to recently constructed hotels in the world (c.f. examples of Japan), most of hotels in the Region have already become small.

Recent trends of hotel room size have much improved (see Table 4.4.7). So hotels to be constructed in the future in Jordan must follow this to compete with the world hotel market. For existing hotels, continuous upgrading effort is essential. For example, hotels in Jerusalem and Damascus have been recently renovated and their facilities and amenities have reached the first class level. The role of MOTA must be to encourage these efforts by adequate means.

Table 4.4.6 Comparison of Deluxe Hotels

Country	Location	Hotel Name	Rooms	Typical Room Size (sq.m)	Remark
Jordan	Amman	Inter-Continental	352	32 (4.35 x 7.0)	
	Dead Sea	Dead Sea Spa Hotel	100	24 (3.6 x 6.7)	
	Petra	Petra Forum Hotel	146	21 (3.6 x 6.0)	
	Petra	Tayyiba Zaman	95	33 (5.5 x 6.0)	old village style
	Aqaba	Aqaba Gulf Hotel	154	25 (3.45 x 7.1)	
Israel	Jerusalem	Laromme Hotel	294	23 (3.6 x 7.2)	newly renovated
	Eilat	Holiday Inn	266	25 (3.5 x 7.5)	new
Egypt	Cairo	Ramses Hilton	836	34 (4.0 x 9.3)	
	Sharm El-Sheik	Fayrouz Hilton Village	150	28 (3.75 x 7.85)	
	Nuweiba	Coral Hilton Resort	200	28 (3.9 x 7.4)	
Syria	Damascus	Cham Palace	400	26 (3.45 x 7.5)	newly renovated
	Palmyra	Cham Palace Palmyra	250	26 (3.45 x 7.5)	
	Aleppo	Chahba Cham Palace	250	30 (3.3 x 9.9)	
Japan	Tokyo	Inter-Continental	339	36 (4.0 x 9.0)	open '95
	Tokyo	Keio Plaza Inter-Conti.	1,500	24 (3.6 x 6.6)	open '71
	Osaka	Hayatt Regency Osaka	495	40 (4.2 x 8.55)	open '94

Source: JICA Study Team

Table 4.4.7 Recent Hotel Room Size Trends

	Living Area (sq.m)	Bathroom (sq.m)	Total (sq.m)	Remark
Budget	16 (3.5 x 4.5)	2.3 (1.5 x 1.5)	22 (3.5 x 6.2)	
Moderate	20 (3.6 x 5.5)	3.4 (1.5 x 2.3)	28 (3.6 x 6.6)	
First Class	24 (4.1 x 5.8)	4.4 (1.7 x 2.6)	36 (4.1 x 8.6)	
Luxury	28 (4.5 x 6.2)	6.6 (2.3 x 2.8)	41 (4.5 x 9.0)	separate shower room in Asia and America

Source: JICA Study Team

b. Other Types of Accommodation

Camping sites are located close to recreation sites (see Figure 4.4.5). These services require careful management if the environment is not to be adversely affected.

Unusual locations having an attractive appearance and atmosphere are beginning to be developed for hotel accommodation by creative private developers. These locations are designed to attract foreign tourists and to enhance tourism products.

(2) Information Facilities

The distribution of tourist information facilities in Jordan, including the regional offices of MOTA, is shown in Figure 4.4.3. Suitable materials to be distributed at information facilities are described in section 7.3.2.

a. Tourist Information Centers

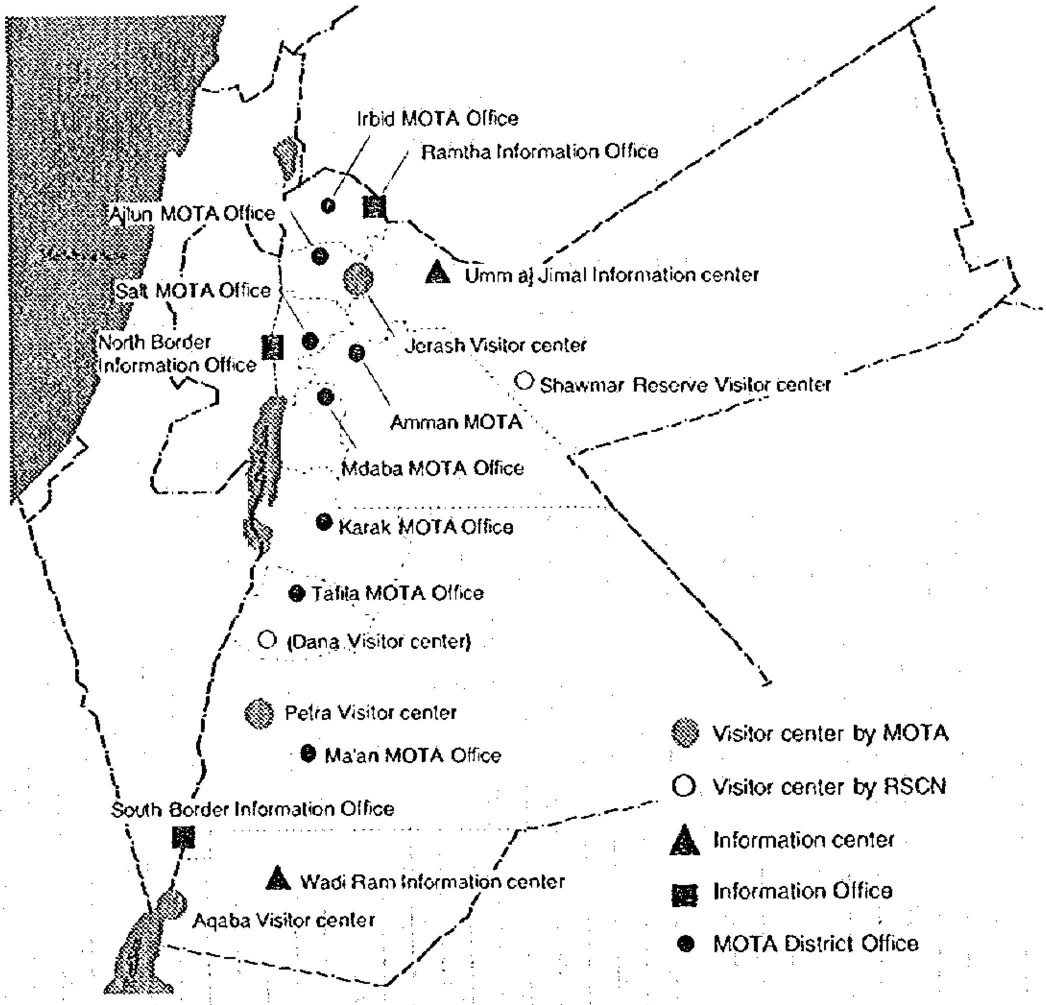
Tourist Information Centers, locations where tourists can obtain general tourism information, should be easily accessible and recognizable, and located in places at the points of entry into Jordan: the capital city of Amman, the international airport, the border offices, and major tourist sites.

Jordan has no adequate Tourist Information Center at the major gateway, Amman. Tourist Information Centers are required both in the downtown area, as a part of revitalization of the old city center, and another in the new commercial center (West Amman).

b. Visitor Centers

Visitor Centers should welcome the tourists and give them information about the site at the entrance to major attractions. In the interest of convenience and functionality, auxiliary services can also be housed: e.g., police station, emergency care facilities, environment monitoring station, research center, telephone booths, souvenir shop, exhibition hall, foreign exchange counter. Visitor Centers in Jordan lack basic interpretative material and technology rather than infrastructure.

Figure 4.4.3 Major Information Facilities



Source: MOTA

(3) Presentation Facilities

The distribution of major presentation facilities is shown in Figure 4.4.4.

a. Museums

The majority of museums in Jordan display archaeological or folklore artifacts. Most museums only display objects, without proper presentation, and lack basic visitor facilities: i.e., reception, cloak room, library, seminar room, and museum shop. Improvement is essential to meet the expectations of visitors. The Museum of Jordanian Heritage at the Yarmouk University provides the best presentation in Jordan, however, the museum is not for tourists and does not provide adequate visitor facilities.

Surrounding countries have more famous and better-equipped museums as shown in Table 4.4.8. Internationally recognizable museums are necessary especially in Amman, to compete with other countries in the region.

Table 4.4.8 Major Museums in the Region

Country	Location	Museum	Major Exhibition Items
Israel	Jerusalem	Israel Museum	Archaeology (Dead Sea Scroll)
	Tel Aviv	Historical Museum	History
Egypt	Cairo	National Museum	Archaeology
Syria	Damascus	National Museum	Archaeology, Fine Arts
	Aleppo	National Museum	Archaeology
	Palmyra	National Museum	Excavated articles of Palmyra

Source: JICA Study Team

The conversion of a heritage building into a museum is useful both to attract tourists and to maintain the heritage. This kind of useful conservation example can be found all over the world.

b. Aquarium

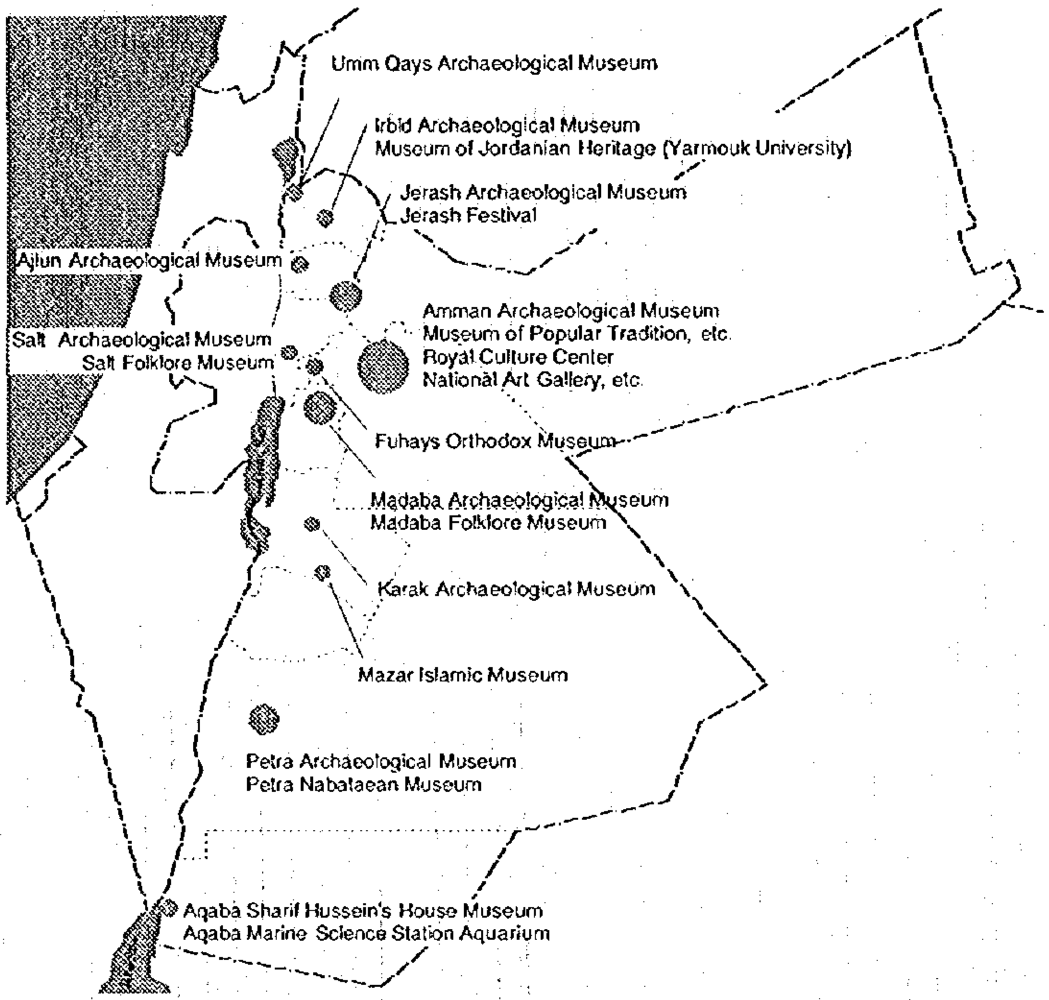
The Aqaba Marine Science Station Aquarium is an important educational and research site of the marine life of the Red Sea. However the existing aquarium is small and below international standards. Improvement is needed to create a more appealing tourist attraction and educational resources for the public.

On the Israeli side at Eilat, there is an international level aquarium with an under water observation tower. In addition some tourism submarines are available to enable one to appreciate the beautiful of the under water world more easily.

c. Theaters

Traditional culture, music, dance and art are also important tourism resources. The annual Festival takes place at Jerash each summer. However, permanent places to show Jordanian folklore culture are required to satisfy foreign tourists expectations.

Figure 4.4.4 Major Presentation Facilities



Source: MOTA / JICA Study Team

(3) Recreation Facilities

The distribution of major recreation facilities is shown in Figure 4.4.5.

a. Outdoor Sports Fields

Major outdoor sports activities available for tourists in Jordan are trekking and horse riding, apart from water activities. One 9-hole golf course is located adjacent to Amman National Park. Existing facilities are not sufficient to attract tourists. Improved facilities are recommended to be developed in accordance with the increase of tourists' market.

b. Marine and Water Recreation Facilities

Marine recreation activities are available at Aqaba beach: water skiing, snorkeling, diving, glass boating, etc. However, beach facilities and amenities are poorer than those in Sinai, Egypt, and Israel.

At the Dead Sea, which is actually a salt lake, a special "Floating Experience" can be enjoyed (i.e., high concentration of salt enable one to float without effort). However, few other activities are available. New water events or sports might be introduced.

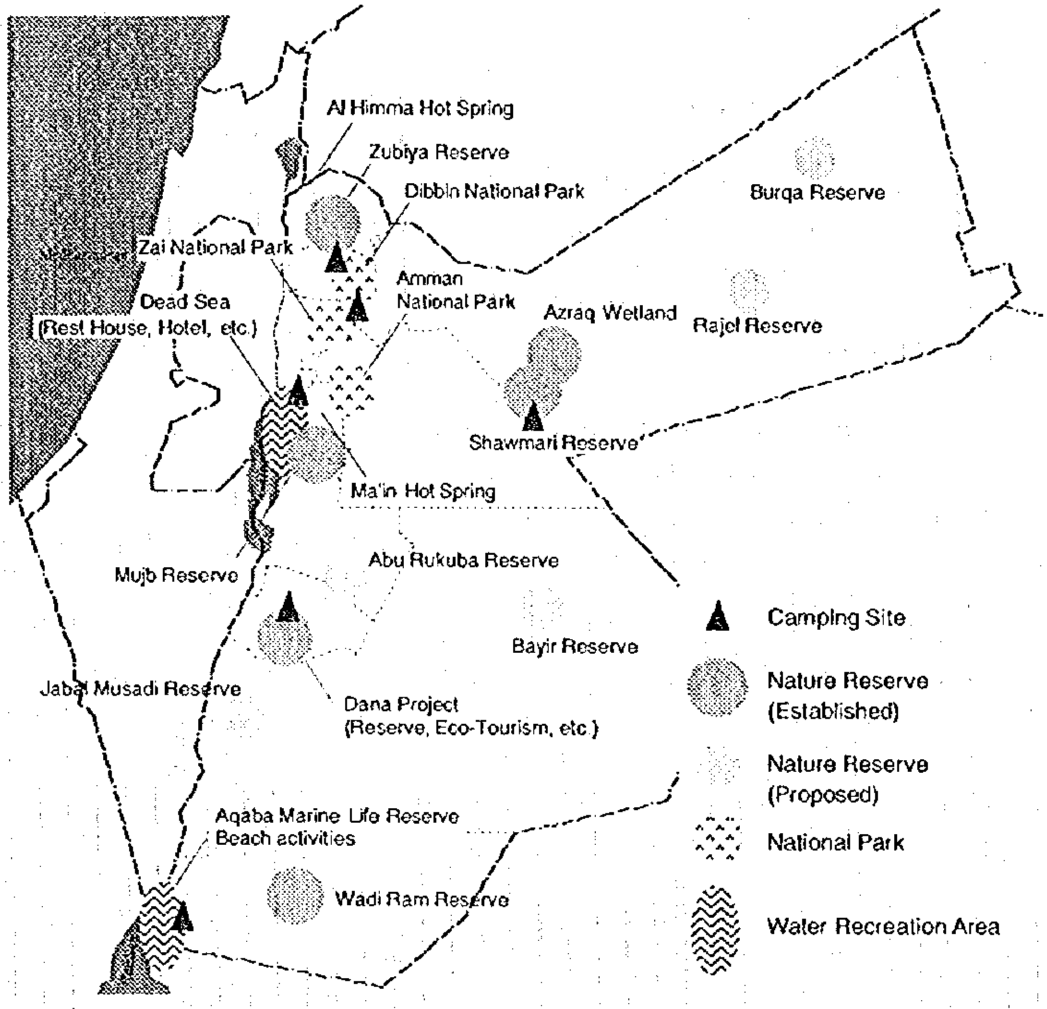
c. Marinas

The Aqaba Royal Yacht Club, which contains a club house, shops, workshops for boats, boat launching facilities and 2 basins for 150 boats, is the only marina in Jordan. Sailing is not popular yet in Jordan.

d. Hot Springs

There are several hot springs in Jordan. At Ma'in, the hot springs are channeled into a resort complex: hotel, chalet, swimming pool, medical care facilities, etc. This type of development is ideal for the recreation of domestic and regional tourists. Careful developments in consideration of the results of marketing surveys could also promote more tourist stays in Jordan.

Figure 4.4.5 Major Recreation Facilities



Source: JICA Study Team

(5) Restaurants and Amenities

a. Restaurants

Restaurants throughout Jordan are generally considered adequate. However, for a tourist gateway city like Amman, tourists expect to find a variety of "theme" restaurants (such as typical Jordanian cuisine served in a traditional environment along with folk music, songs and dancing). Such restaurants not only diversify the available choice of menus but also create tourist attractions. They present a new opportunity for valued-added tourist revenue. Amman has no such restaurants apart from Kan Zaman, located 15 km outside of the city on the way to QAI Airport, where Jordanian cuisine is served in a tastefully restored Ottoman stable with a variety of shops, and arts and crafts studios.

At some tourism sites, (e.g., Umm Qays and Jerash) the governmental rest houses are rented to the private sector to provide visitor facilities. This kind of cooperation is preferable because the government is able to provide a good location, and the private sector has the necessary operational expertise to provide good service.

b. Amenities

Amenities includes the provision of rest areas, public toilets, rubbish bins, telephone booths, etc. The lack of appropriate amenities is a major tourist complaint.

(6) Other Supporting Facilities

a. Convention and Congress facilities

Considering the progress of peace talks in this region and the increase of economic activities, Jordan will surely have more opportunities to hold conferences and conventions in Amman and Aqaba. However only the 5-star and 4-star hotels in Amman, and one 4-star hotel in Aqaba have banquet halls. The largest banquet hall has a capacity of 1,300 persons, with translation equipment.

A trade fair ground is presently located in a suburb of Amman.

4.4.2 Souvenir and Shopping Industries

Souvenirs and shopping are very important to the modern tourist and a significant contributor to foreign exchange earnings.

Jordan's gateway city Amman has a number of specialty shops and souvenir kiosks, but they are scattered throughout the urban area. Amman does not have modern shopping mall as may be found in many other tourist gateways. Malls enable tourists to choose from brand-name goods or typical souvenir items such as handicrafts of local artisans including weaving, embroidery, and silver jewelry in an atmosphere that stimulates their appetite for souvenir hunting and/or shopping. Amman now has a few modern supermarkets with souvenir sections on the second floors, but they are quite small in scale and very different from the mega-malls found in many established tourist destination gateways.

There are three NGO-funded boutiques (Bani Hamida and Jordan River Design both by Save the Children Fund and Liwan by Queen Noor Al-Hussein Foundation), all offering weaving, embroidery, and the like of very high quality and taste. Several other specialty boutiques (such as Jordan Handicraft Center and Silsal) also cater to tourists. However, most of these are located in the Amman urban sprawl and away from major hotels/tourist centers.

NGO boutiques generally seem content with being a "worthy cause." Most customers of these boutiques are traditionally the rich and famous of resident Jordanians, visiting Arab high society types and the diplomatic corps. Typically they rely on one purchase amounting to several thousand dollars by one Gulf visitor and ignore the volume of purchases accrued by common tourists. Accordingly, they do not have an aggressive approach to the tourist market nor do they seem to be adept in marketing (except for the Liwan).

4.4.3 Supporting Services

(1) Transport

a. Tourist Buses

On major tourist routes, Jordan Express Tourist Transport Co. (JETT) until recently had monopolized the tourist coach operation, with a fleet of 130 large coaches (46-52 seats) and 20 mini coaches (15 seats). JETT plans to add 40 medium-size coaches (30 seats) to cope with an increasing number of medium-sized tour groups.

Criticism from the major source market tour operators (UK, France, Japan) towards JETT services relate to:

- high tariffs compared to those in neighboring destinations (such as Egypt);
- inflexible operations; and
- the shortage of medium/mini-size coaches, which results in the chartering of large coaches, which in turn needlessly increases the cost for the tour operators.

The Tourism Transport Bylaw no. 7 for 1995 became effective on April 1, 1995 and five other tourist transport companies in addition to JETT have been licensed.

b. City Buses

Amman has a reasonable network of public bus services, which can serve budget-conscious tourists. Some bus services use the internationally recognized Arabic numerals (i.e., 1,2,3), but the majority use numbers written in the Arabic language. No buses have their destinations or routes written in the Roman/Latin alphabet, and there are no bus route maps available to help tourists.

(2) Airport and Its Access

In general the first and one of the most lasting impressions of a tourist destination is often formed at the main gateway, the airport. Modern QAI Airport is regularly maintained, cleaned, and equipped with standard passenger facilities, such as banks, a visitor information booth, airport buses, taxis, and rent-a-cars.

However, dim lighting of the terminal interior dampens the tourist impression. No sense of arrival is felt by visitors in and around the airport to enhance the image of Jordan as a tourist destination. There is only one small miniature of El Kahzneh erected on the right-hand and isolated corner of the customs area for Arrival Terminal 2 - for non-RJ international flights. In addition, the airport approach from the Desert Highway Junction is without much vegetation except for the last 100 m, which has been planted mainly with palm trees. This scene gives the tourist an impression of a barren land.

The image of a destination country for arriving tourists is greatly influenced by the visual landscaping and vegetation along the access road to the city center. No conscious effort has been made for the section of Desert Highway from QAIA Junction to the City Center.

(3) Immigration and Customs

Officers in charge of customs and baggage security checks (both for arrival and departure) are neither uniformed nor issued with a visible ID tag. This is not only confusing to bona fide tourists (as well as businessmen arriving for the first time), who cannot recognize them as officers, but also makes the tourists feel quite uneasy. It should be remembered that the world tourist market generally considers Middle Eastern countries as insecure destinations. This situation, which does not help enhance the destination image of Jordan, could easily be rectified by issuing uniforms and ID tags to be worn by the officers at all times while on duty, Implementation of this simple requirement would substantially improve tourists' first impression of Jordan and alleviate feelings of unease.

(4) Roads Linking Tourist Sites and Road Signs

The roads linking tourist sites are generally adequate, except for the hilly and winding Aqaba/Ma'an section of the Desert Highway, which is scheduled for expansion to four lanes. Roads that are often used by tourists, such as part of the

Kings Highway (Wadi Mujib, Wadi Hasa) and the roads linking Madaba and Mt. Nebo/Ma'in Spa, may need to have their windy alignments straightened. However care should be taken not to destroy their essential character.

Newly introduced tourist road signs (direction signs in the standardized sizes and pictographs in brown-color base format) erected along the main highways conform to the international standard. However, the absence of secondary direction signs after entering the destination area even obliges native Jordanian drivers to ask passers-by for more detailed directions (e.g. Amman, Karak, Irbid, Salt).

(5) Tourist Police

Tourist Police are visible at tourist sites such as Petra (in blue uniform with tourist police insignia armband) and Mt. Nebo (in normal police uniform without insignia armband in normal police van without Tourist Police identification). Visibility and identification are very important in 1) giving a sense of security to the tourists and 2) preventing thefts. Tourist Police are indistinguishable from normal police officers in Amman except at the Amphitheater, and the Tourist Police Office or Headquarters is not identifiable by tourists.

4.5 Supporting Infrastructure

4.5.1 Transport

The road network in Jordan including existing links and those to be constructed in the near future is basically adequate to accommodate increased future tourist flows. However, provision of certain missing links and road-side facilities is required to develop tourism. The introduction of a cost-recovery mechanism in road network development is an issue currently being examined by planners. Road-side facilities such as road signs and rest areas are still grossly inadequate for international tourists.

The road transport industry is currently in a process of deregulation. The types and levels of services provided leave much to be desired and the administrative system of road transport requires reorganization towards a more market-responsive structure.

Railway transport is of little relevance to tourism in Jordan at present, with the notable exception of the infrequent and occasional tourist train services of the Hijaz Railway, which provides a short train ride with a steam locomotive from Amman station to a station near the international airport.

Water transport in Aqaba is primarily for migrant Egyptian workers who work in Saudi Arabia and is not relevant for international tourism.

The Aqaba airport is served by regular domestic flights and occasional chartered flights from the United Kingdom. It is not a major international gateway airport at present.

A detailed examination of the existing situation and issues in transport as well as recommended strategies for transport development as related to tourism development, directly or indirectly, is presented in a separate volume, Part I, Volume 2 (Chapter 3).

4.5.2 Water Supply, Sewerage and Drainage

The current level of water consumption in Jordan is about 900 million cubic meters (MCM) per year, of which 75 per cent is for irrigation, 21 per cent for domestic consumption, and 4 per cent for industry. These consumption levels are largely a result of limits on the supply (900 MCM per year), of which 56 per cent is from ground water sources, 40 per cent from surface water, and 4 per cent from treated water. Demand is only just being met at present and, even if all internal potential sources are exploited, these will only be sufficient to meet demand until the year 2002. Any increase in demand after that, whether by the national population or by tourists, will not be met under the present circumstances.

However, tourists account for only a small proportion of total water consumption demand. Even considering their greater per capita demand and projected increased numbers, they will account for less than 1.25 per cent of total water consumption; however, in Aqaba-Wadi Rum in the Southern Tourism Region, tourists will account for close to 9 per cent of total consumption. In any case, the issue of water supply was found not to be particularly related to tourism development; rather, it must be dealt with as a national issue involving all sectors, including reconsideration of distribution among sectors.

In most parts of Jordan, virtually no sewerage facilities exist and some localized problems are apparent. In particular, in some of the tourist areas (e.g., Petra), untreated waste water can be seen by tourists, damaging their site impression and enjoyment. Also, the drainage of flood water is a problem in some places (again, e.g., Petra).

Details of water supply, sewerage and drainage issues are presented in a separate volume, Part I, Volume 2, Chapter 4.

4.5.3 Hygiene and Waste Management

The Ministry of Health (MOH) carries out regular inspections of food-serving establishments to ensure license compliance and existing standards. The MOH prefers to advise and persuade although it is empowered to enforce. There is much to be desired as to the cooperation it receives from the MMRAE.

Waste is a factor in tourism development as it is generated by tourism but more importantly, as its visual impact largely affects the level of enjoyment of the sites being visited. The sector of waste management in Jordan, however, is more under-regulated than other environmental sectors. There are no guidelines or advice on recommended practices. Numerous institutions are involved in waste management but there is little coordination among the individual organizations. Most have had their responsibilities thrust on them without the resources to implement the necessary activities. Because of a lack of resources, most effort is concentrated in the collection and disposal of domestic waste to the detriment of that which is generated at tourist sites.

Details of the examination of existing problems and issues in hygiene and waste management are presented in a separate volume, Part I, Volume 2, Chapter 5.

4.6 Human Resource in Tourism Development

(1) Employment by Tourism

Hospitality is the key element in developing the tourism industry. Therefore, human resources should be considered highest in importance among the tourism resources of the Kingdom including the historical, cultural and natural attractions. Jordanian hospitality is demonstrated in the whole process of tourist activities of a visitor by various levels and types of profession.

The following are examples of the facilities where visitors will be received and serviced by respective representatives of organizations and industries: airport counters of the Royal Jordanian Airline in the countries where the visitors originate, the border check points, the airports and seaport, local transportation, hotels, restaurants, shops, banks, money exchangers, travel agents and attraction sites. Many people are involved, and it is difficult to single out the number of people engaged in the tourism industry in broad terms.

Under these circumstances, there is no single reliable source of statistical data on the total employment level of the tourism sector. Table 4.7.1 shows an employment structure of the Jordanian economy. The tourism industry is included in the broad category of commerce, which covers trade (wholesale and retail), hotels and restaurants, and its share of employment was 10.5% in 1992.

Table 4.6.1 Employment Structure by Industrial Activities

Activity	1990	%	1991	%	1992	%	1994	%
Agriculture	38,266	7.3	40,848	7.4	44,400	7.4	54,995	6.4
Mining/Manufacturing	53,468	10.2	56,856	10.3	61,800	10.3	91,086	10.6
Utilities	6,815	1.3	7,176	1.3	6,600	1.1	6,015	0.7
Construction	51,895	9.9	54,096	9.8	60,000	10.0	60,151	7.0
Commerce	52,944	10.1	56,856	10.3	63,000	10.5	129,754	15.1
Transport/Telecom.	44,557	8.5	48,576	8.8	52,200	8.7	57,573	6.7
Banking/Insurance	16,774	3.2	17,664	3.2	19,800	3.3	24,920	2.9
Public/Services	259,978	49.5	269,928	48.9	292,200	48.7	434,800	50.6
Total	524,197	100.0	552,000	100.0	600,000	100.0	859,300	100.0

Source: MOP

The statistical data available at MOTA cover seven subsectors as shown in Table 4.6.2, which indicates relatively slow growth of employment over the 11 years from 1983-1994 with the total employment at 8,172 in 1994.

Table 4.6.2 Employment of the Tourism Sector

Activity	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
Classified hotels	4548	4512	4520	4502	4697	5382	5782	5814	5880	5999	4663	4828
Unclassified hotels	338	333	317	305	324	315	220	360	374	399	444	462
Travel agencies	898	954	1057	1038	946	940	955	995	1059	1264	1365	1478
Rent-a-car companies	126	138	140	150	154	157	170	168	170	200	250	400
Tourists shops	148	156	159	156	159	153	170	212	212	220	250	300
Tourists guides	83	85	107	84	94	124	144	111	157	192	240	317
Camel/horse guides	227	236	261	259	268	284	360	377	391	386	385	387
Total	6368	6414	6561	6494	6642	7335	7801	8037	8243	8660	7853	8172

Source: MOTA

According to the above statistics, hotels provide nearly 65% of total employment in the tourism sector. There has been very little growth in employment in both classified and unclassified hotels with a total growth rate of only 0.5 percent per annum (p.p.a) and 2.9 p.p.a respectively over the 11 years. By comparison, the numbers employed in other subsectors have increased substantially. The number employed as tourist guides has increased by 13.0 p.p.a, in the rent-a-car service by 11.1 p.p.a, camel & horse guide tour by 5.0 p.p.a, in tourist shops by 6.6 p.p.a and in travel agencies by 4.6 p.p.a.

During this period the number of hotel rooms increased but this was not matched by a similar increase in employment. In fact there was a sudden drop in the number of workers between 1992 and 1993 which may perhaps be attributable to the departure of Iraqis and other non-Jordanians who had worked in the Gulf countries before the Gulf War and stayed in Jordan while in transit to their home countries.

It is estimated that the total number employed in tourism is approximately 15,000 to 20,000 people. This range was calculated as a multiple of the number employed in hotels, which is the single largest tourism employer.

(2) Policies and Institutions for Human Resources Development of the Tourism Sector

a. Policies

Under the current National Plan (1993-1997), one of the key policies for the tourism sector is the transfer of management of the Hotel Training College from the Ministry of Education (MOE) and Ministry of Higher Education (MOHE) to MOTA. This transfer should enable greater flexibility to respond to the changing manpower needs of the private sector and is considered to be a significant decision.

b. Institutions

At present there are two governmental organizations responsible for manpower development. The first is the above-mentioned MOE and MOHE whose curricula are traditionally based on institutional training. The second is the Ministry of Labor (MOL) whose curricula for apprenticeship focuses on the job training.

Hotel Training College

The Hotel Training College is located in Jebel Amman and was established in 1981 with technical assistance from UNDP and the International Labor Organization (ILO) with financing by the World Bank. There is a hotel attached to the school with 55 rooms for on the job training. It is now under separate management to avoid the complexities of inter ministerial coordination. There are 11 teaching staffs, 7 trainers and 128 students of college level and 307 students of high school level (grades 11 and 12). Apparently about 95% of the students are employed by hotels, restaurants and hospitals after receiving training.

The curricula include Islamic, Arabic, English, French, Palestinian, civil defense, industrial security, food chemistry and nutrition, general hygiene, hotel accounting, food production and preparation, food and beverage service, accommodation (reception and management), and sports education. Branch schools are located in Irbid, Jerash, Ma'an, Amman, Zarqa and Aqaba. Each of these has around 30 students with a total of 33 teaching staff.

The College is planned to be operated in an autonomous way by an institution through greater participation and involvement of private sector and internationally recognized organization.

Universities

Two universities have courses on food and beverage, accommodation and management. The first one has a teaching staff of 4 and 40 students and the other has a teaching staff of 3 for 100 students.

Vocational Training Corporation

The Vocational Training Corporation (VTC) which is part of Ministry of Labor (MOL) was established in 1976 to train skilled workers, craftsman, semi-skilled workers, and to upgrade employed workers and to train instructor and supervisory staffs. VTC offers short courses of less than one week, apprenticeships of 3-12 months and industrial extension services. There are 562 teachers. Since 1982 VTC has established a network of training centers and institutes throughout the country, and it has links with about 3,600 employers who cooperate in implementing the training programs.

In 1993 VTC provided training to 677 job seekers in the hotel trade which includes food production and services, bakeries, house keeping and reception. VTC also provides such courses as cloth flower making, ceramic flower making, knitting and sewing mainly to female workers. These skills could form the basis for manufacturing souvenir products.

(3) Current Problems and Issues

The role of the public sector in manpower development in the Kingdom will remain important. However, it will be difficult to provide appropriate quality training service to meet the need of the industries with the current pay and working conditions for teaching staffs. The transfer of management of the Hotel Training College with wider participation by the private sector will enable it to become more market oriented.

4.7 Environmental Conditions and Issues

(1) Existing Conditions and Issues

Environment as regards to the tourism sector includes the following aspects:

- Type of tourism resource (diversity, patrimony, landscape);
- Constraint on tourism development (carrying capacity; water, soil);
- Quality requirements for receiving visitors (living environment; amenities).

Sources of environmental impacts of tourism projects are siting and design of facilities, volumes of tourists, and corresponding road traffic volumes. Induced sources are garbage deposits, crowds, use of resources, contact with local population, and behavior of tourists. Main types of effects on the natural and social environment are resource scarcity, degradation of the landscape and environmental media, loss of wildlife, growth of nearby communities, social change and social conflicts (increasing gap between the rich and the poor), change in the life style and cultural values of local people, and moral corruption for social or economic reasons. Environmental issues at the main tourism sites are summarized in Table 4.7.1.

A review of the environment problems at each natural area of Jordan is summarized in Table 4.8.2. The description of the natural areas presented in this table is available in Volume 2, Chapter 6.

Table 4.7.1 Environmental Issues in Relation with Main Tourism Sites

	Actual conditions, existing pressures and change in local society (social issues)	Effects on the environment and landscape	Present institutional status, and existing projects
Dana	Old villages, historical remains, forested land and deep wadi constitute a big landscape potential; Dana village and its land use are under rehabilitation; number of visitors to Dana village and to camp site is still reduced	There are no effects of the local settlements on the nature reserve; the effect of tourism is actually positive because it is well integrated in to the wildlife conservation purpose; actual negative effects could be: 1) social economic gap between villagers and visitors; 2) limited possibility of economic expansion in the future for villagers; 2 limits: land and sustainable use of local resources	Reserve management plan, including local community development, and wildlife protection; wildlife surveys are on-going
Wadi Ram Dissi	Increasing number of visitors (more than 30.000 in 1993); rapid growth of the village (800 persons. 130 cars); major problems will be waste and water sanitation related; In Dissi village, fossil aquifer is pumped for irrigation	1) Effects of increased frequentation of desert by tourists: loss of vegetative cover; loss of wildlife species; spreading of litter; graffiti on rocks; surface scarring by vehicles, which are all degrading landscape value; 2) Effects of growth settlement: direct encroachment on desert; disorganization of Bedouins communities; leakage of engine oil affecting soil; overuse of fuel wood; overgrazing; illegal hunting	The area is included in the Environmental Action Plan for the Gulf of Aqaba; Project of transboundary biosphere reserve was proposed, but has been abandoned; The area is considered for natural reserve or national park
Azraq	Over-pumping of ground water for Amman water supply has resulted in environmental disaster; the oasis is now under rehabilitation of its natural conditions; Azraq city has no sanitation facility	The area has been affected by successive steps: loss of unique species in the 1960s, complete drying of wetland in 1993, return to wetland conditions in 1994/95; Degraded conditions of the oasis has certainly degraded the attractiveness of this site for tourism	The Azraq oasis is classified as Ramsar site; the Azraq Project works on the integrated rehabilitation and management of the site, since 1994; rehabilitation is made by artificial recharge of water in the wetland, and cleaning of the natural water sources; results are encouraging, although they might be largely related to favorable climate conditions
Petra area	Growth of Wadi Musa population and increased number of visitors; this exerts pressures on sanitation capacities; natural conditions of the area are already degraded due to the loss of vegetation, and loss of big mammals	Impact is actually concentrated in the Petra sanctuary, due to high concentration of people (noise, dust, degradation of walls), and in Wadi Musa (non organized growth, degradation of landscape; land use pressure)	Petra is classified as World Cultural heritage, and is being to be integrated in a natural national park; Management Plan (UNESCO) under way; Petra National Trust

	Actual conditions, existing pressures and change in local society (social issues)	Effects on the environment and landscape	Present institutional status, and existing projects
Dead Sea area	This area is with very few settlements; Shore line of the Dead Sea is generally well preserved; however, Dead Sea level is decreasing due to regional water withdrawal; human pressure is very high on holiday time, due to domestic tourism; The geographical situation of the Dead Sea (-400m) makes it very sensitive to water contamination; Biological diversity is low	Decreasing of the Dead Sea level could affect the ground water balance; Tourism activity is of picnic type, having as main impact spreading of litter; encroachment of tourism facilities is still limited	There are several projects for the development of the rift valley and the Dead Sea; Jordan Valley Authority is in charge of water related issues; JVA has carried out a master plan for tourism development of the eastern coast, which resulted in the implementation of 2 projects
Gulf of Aqaba	Coastal zone is limited to 26 km line in Gulf of Aqaba, shared by city settlements, industry, shipping, and tourism activity. There is increasing pressure on water and waste sanitation issues; Coral reef habitat is unique because of the exceptional number of corals, and the diversity of marine wildlife	Coral reef habitat has not been affected until now; however, there are an increasing number of conflicting activities, which constitute a potential risk of environmental degradation; Tourism has induced shore line encroachment, spreading of litter on beach, direct degradation of corals; future sustainability of water resources use is doubtful	Gulf of Aqaba's environment has received increased attention; Master Plan for Development of Tourism; Environmental Action Plan; project of national marine park, including marine nature reserves; planning and permitting agency is ARA

Source: MOTA, Department of Environment, RSCN, ARA, Azraq Project

Table 4.7.2 Environmental Trends and Issues in Relation with Natural Areas

	Environmental quality and problems	Existing tourism sites, and development plans/projects	Tourism trends in future	Expected general impacts
Jordan valley (Upper Ghor)	water pollution due to intensive irrigated agriculture; wildlife still surviving along Jordan river	none	Increase of domestic tourism and rural tourism	litter, degradation of landscape, traffic jam and other traffic related nuisances; loss of wildlife species which are confined to the river habitat
Dead Sea basin	Ecology affected by water use of tributaries; Settlements in north and road on east have increased pressure; water quality is sensitive due to topography below sea level	Dead Sea shore is still almost free of tourism facilities; Ma'in spa in the Zarqa Ma'in tributary; Severe pressure of picnickers after opening of new road because non organized	Sharp increase in domestic and international mass tourism; JVA tourism development plan; in 1995, 4 new hotels have been authorized in north east part of Dead Sea shore	Wastewater, solid waste, litter, heavy traffic, degradation of water quality; water resources scarcity; risk of landscape degradation is very high with development of tourism facilities
Wadi Araba	Marginal land newly opened to people; overgrazing and illegal hunting by Bedouins, and opening of roads are threatening a rich heritage of wildlife; Wadi Araba is a necessary pathway between Israel and Jordan's habitats for important species	RSCN plans a gazelle rehabilitation center, to be converted into a visitors center in the future, as a western entrance to the Dana reserve; this reserve could be extended to Wadi Araba	risk of illegal hunters	wildlife is very sensitive because of the open landscape; without conservation measures, main effect will be loss of wildlife; degradation of landscape by litter
Northern escarpment	Cultivated land and pasture; wildlife seems to be relatively important	Umm Qays Pella	Moderate increase of visitors to the existing archaeological sites	major on local villages society, with however positive aspects; traffic; litter; water resources scarcity
Southern escarpment	Escarpment along the Dead Sea with outstanding landscape; rich wildlife, specially in Wadi Mujib reserve; "wadi" with permanent water are the core of this natural heritage	Ma'in Mukawir	Sharp increase of visitors, including picnickers and international tourism	Wastewater, solid waste, litter, heavy traffic, traffic related nuisances; degradation of water quality; water resources scarcity; risk of landscape degradation; landslide risk is high
Irbid Madaba	This area includes reserves (Zubiya) and parks (Dibbin) in forest habitats; but urban environment and cropland are dominant features	Amman Madaba	Sharp increase of visitors	social impact on local communities; pressure on water resources availability, however, large beneficial effects can be expected
Ajlun Highlands	Wildlife; cropland and pasture	Jerash Dibbin forest Zai forest	Increase of visitors	litter, traffic related nuisances

	Environmental quality and problems	Existing tourism sites, and development plans/projects	Tourism trends in future	Expected general impacts
Karak plateau	Cropland; old settlements; Wadi Mujib reserve on the border of this area	Karak	Sharp increase of visitors	litter; capacity of environmental infrastructure; tourist behavior is a source of problems for acceptability by local people; but positive effects expected
Southern Highlands	Outstanding scenery with old settlements and historical heritage; desertification of villages, overgrazing and hunting by Bedouins; tourism pressure on land	Shawbak Petra Dana	Sharp increase of visitors	Petra reception capacity is already crowded; uncontrolled land use, scarcity of resources; capacity of treatment; social change; traffic related nuisances
Northern steppe	cropland and pasture	none	none	none
Southern steppe	cropland and pasture	none	none	none
Burqu Hammada / Beida Plateau	Overgrazing is the major problem	none, but project of biosphere reserve; Beida development project	Limited increase	Could be beneficial for development of the desert
Azraq oasis	Wildlife, and important passage of migrating waterfowl; Ramsar site; ecological disaster due to over-pumping of water for Amman supply; actually under rehabilitation	Azraq oasis desert castles	Moderate increase of visitors	Impact will be positive since tourism development is interlinked with rehabilitation of the site
Bayir Hammada	Arid desert with Bedouins pastoralism	none	none	none
Hisma	Landscape and wildlife value; illegal hunting; loss of wildlife species; litter; graffiti; surface scaring by vehicles; growth of village and social change; litter; degradation of landscape	Wadi Ram	sharp increase of visitors	Severe new pressure on already degraded area, leading to loss of the tourism resource if no action is taken; scarcity of water resources
Gulf of Aqaba	Landscape value; high diversity and endemism of marine wildlife; conflicting uses of land; high pressure on marine life	Aqaba	sharp increase of visitors	Pressure on marine environment, water resources, and landscape; increased risks of environmental degradation

Source: JICA Study Team

(2) Environmental Protection

a. Protection of Wildlife by Legislation

All mammals and birds are protected in Jordan by the hunting law as established under Agricultural Law No. 20, 1973. According to this hunting law, hunting is prohibited in the area east of the Hijaz Railway, with the exception of the Azraq area. The hunting committee consistently updates a list of species that can be hunted in certain places, within certain periods, and with a defined quota. The hunting committee is headed by the MOA, and includes MOTA as one of the members. There are 4 inspectors to control the application of hunting rules. Since the staff of nature reserves is involved in hunting control as well, the total staff, country wide, would be around 40 persons.

b. Protection of Wildlife by the Establishment of Nature Reserves

Nature reserves (listed in Table 4.8.3) are established and managed by RSCN, with the following general objectives:

- Protection / restoration of flora and fauna and their habitat;
- Protection of endangered species;
- Reintroduction of locally extinct species;
- Raising public awareness of wildlife conservation;
- Promotion of tourism and improving socio-economic conditions.

Table 4.7.3 List of Established and Proposed Reserves in Jordan

Established reserves	Proposed reserves	Reserves with international protection status
Azraq Oasis (Zarqa, 1,255 ha); Zubiya (Irbid, 1,300 ha); Shawmari (Zarqa, 34,200 ha - also grazing reserve) Wadi Mujib (Amman, Karak, 21,200 ha) Wadi Dana - Finan (Ma'an, Tafila, 15,000 ha)	Hisma Basin (or Wadi Ram); Burqu (95,000 ha) Bayir (44,000 ha) Wadi Rajil (86,000 ha) Jarba (40,000 ha) Abu Rukbah (41,000 ha) Jebel Masada (46,000 ha) Jafer	Azraq oasis (Zarqa, 7,372 ha - Ramsar site) Burq (proposed for Biosphere Reserve)

Source: RSCN

c. Concept of Nature Reserves in Jordan

The concept of nature conservation in Jordan has basically involved fencing and strict prohibition of any activities within the enclosed area. The reserve may be a set of small pieces of land, as in Shawmari reserve. This strict protection approach is changing now toward a more integrated approach of conservation, including social development (Dana reserve), and opening to tourism under conditions (Dana, Shawmari, Wadi Mujib, planned Burq reserve). A nature reserve is established by declaration by the Prime Minister, providing that RSCN is the protection and management agency, on behalf of the Forestry Department, Ministry of Agriculture (MOA). The Forestry Department is the land owner. One exception is the Dana reserve, where property has been transferred from the Forestry Department to the RSCN. Since there is no specific law for the protection of nature reserves, protection rules are derived from sectoral laws, particularly agricultural laws. In the case of Dana, protection rules are those enforced by RSCN. Nature reserves and RSCN are described in Volume 2, Chapter 6.

d. Protection of Natural Resources

Grazing reserves and national parks are parts of the natural resources protection system. Their objectives are not protection of wildlife itself but protection of natural resources for use by people. Grazing reserves (22 sites) provide fodder resources for cattle. National parks (3 sites, 25,100 ha) provide leisure resources, and do not correspond to the international definition of the concept of national park. However, both grazing reserves and national parks have a landscape value. Dibbin Forest and Zai National Parks have been both established by cooperation between the Forestry Department and Department of Tourism. The Amman National Park, which is managed by the Greater Amman Municipality, includes a golf course. Two national parks are being established. These are designed to comply with the national park concept as recommended by RSCN.

Planned National Parks are the following:

- Petra National Park, managed by MOTA, and including the Petra world heritage site (Petra Trust Fund): The management plan is now being implemented;
- Washi Fall and Falluz Forest, which are managed by the Forestry Department; and
- A further national park is planned for Wadi Rani, but planning has not yet been carried out.

PART I (VOLUME 1)

NATIONAL TOURISM DEVELOPMENT STRATEGY AND POLICY

(TOURISM DEVELOPMENT)

Chapter 5.

The Socio-Economic and Institutional Context

Chapter 5. The Socio-Economic and Institutional Context

5.1 Role of Tourism in the National Economy

The tourism industry in Jordan is important in two ways: as a major foreign exchange earner and as a sector generating a livelihood for its citizens.

Jordan has been and is likely to continue to be a country with a significant net merchandise trade deficit. Table 5.1.1 shows Jordan's international balance-of-payments position in recent years. In 1993, merchandise trade resulted in a deficit of US $1.9 billion or US$ 485 per capita, while per capita GDP in 1993 was US$ 1,130.

The relatively small size of the domestic market deters the diversification of manufactured products. Except for phosphate and potash, exportable natural resources of significance are almost non-existent. The scarcity of arable land requires Jordan to be a net food importer. A chronic trade deficit is therefore inevitable for Jordan for sometime to come.

The structure of the Jordanian economy has been such that the chronic trade deficit is offset by private funds transfers by mostly expatriate Jordanians and official transfers by foreign governments (see Table 5.1.1). This mechanism, however, has made Jordan extremely vulnerable to external conditions over which it has little control. The Government in recent years therefore has tried to establish alternative sources of foreign exchange earning. Tourism has been designated as one of the most promising of these sources.

Table 5.1.1 Balance of Payment

(in million US$)

	1988	1989	1990	1991	1992	1993
Merchandise export fob	1,007.4	1,109.4	1,063.8	1,129.5	1,218.9	1,246.3
Merchandise imports fob	-2,418.7	-1,882.5	-2,300.7	-2,302.2	-2,998.7	-3,145.2
Trade balance	**-1,411.3**	**-773.1**	**-1,236.9**	**-1,172.7**	**-1,779.7**	**-1,898.8**
Exports of services	1,420.6	1,239.2	1,447.2	1,351.2	1,449.2	1,573.8
Imports of services	-1,340.5	-1,063.3	-1,267.9	-1,122.5	-1,324.7	-1,347.2
Inflows of IPD (1)	40.6	39.0	67.3	114.3	112.4	99.0
Outflows of IPD (1)	-354.8	-235.6	-281.8	-447.7	-390.0	-250.2
Net private transfers	799.8	565.4	457.4	408.1	781.3	997.1
Net official transfers	551.7	613.2	587.6	475.7	386.3	356.6
Current-account balance	**-293.7**	**384.9**	**-227.1**	**-393.5**	**-765.2**	**-469.7**
Direct investment	23.8	-18.1	69.1	-25.6	44.1	19.5
Other capital	350.4	97.6	503.6	2,122.9	952.2	-699.3
Capital account balance	**374.2**	**79.5**	**572.7**	**2,097.3**	**996.3**	**-679.8**
Errors and omissions	123.4	0.3	75.4	321.4	160.9	777.6
Overall balance	**203.9**	**464.7**	**421.0**	**2,025.2**	**392.0**	**-372.0**
Financing						
(- indicates inflow)						
Flow of reserves	-203.9	-464.7	-421.0	-2,025.2	-392.0	372.0
Reserve assets	-175.2	-512.0	-411.5	-2,025.2	-413.1	402.9
Use of IMF credit & loans	-28.7	47.2	-9.5	0.0	21.1	-31.0
Liabilities constituting						
foreign authorities' reserves	0.0	0.0	0.0	0.0	0.0	0.0
Memorandum Items:						
Total change in reserve assets						
(- indicates increase of which:)	-5.9	432.3	-629.6	-1,403.8	-391.9	-628.8
reevaluations	169.3	79.7	-218.1	621.4	21.1	-1,031.7

(1) Interest, profit and dividends

Source: Central Bank of Jordan. Monthly Statistical Bulletins

According to estimates prepared by MOTA, total tourist receipts in 1994 amounted to 443 million JD, equivalent to US$ 633 million (see Table 5.1.2).

Table 5.1.2 Tourist Receipts

(in million JD)

Year	1981	1982	1983	1984	1985	1986	1987	1988
Amount	181	184	183	173	204	186	196	231

Year	1989	1990	1991	1992	1993	1994	1995
Amount	315	340	216	314	390	406	225

Source: Central Bank/MOTA * Preliminary: 1995 for the 6 months

Table 5.1.3 lists export earnings in 1993. It is apparent tourist receipts in Jordan in 1994 were more than half of the total merchandise export amount and well exceeded the top export item ("Chemicals"). Therefore, as an industry, tourism is already the leading foreign-exchange earner for Jordan by a big margin.

Table 5.1.3 Foreign Trade of Jordan

(in million US$)

	1991	1992	1993	1994
Foodstuffs	126.4	135.4	202.1	130.5
Phosphates	180.8	180.2	141.2	143.7
Potash	142.1	126.9	124.1	132.5
Chemicals	260.1	289.7	282.1	375.5
Manufactured goods	93.1	98.6	117.4	123.0
Machinery/trans. eq.	10.9	17.4	34.4	56.4
Miscellaneous manufact.	39.1	60.3	75.4	57.9
Total including others	879.3	932.4	997.5	1,136.1

Source: Central Bank of Jordan

It has been shown that the amount of foreign exchange brought in by international tourists in 1994 was about US$ 630 million. This money is spent in several steps; for example, out of this revenue a hotel operator pays its employees and its suppliers and subcontractors, which in turn pay their employees and their suppliers, and so on. Thus the money brought in by tourists generate several steps of economic activities, with associated values added in each step; this is known as the multiplier effect. The total values added to the economy is therefore some factor of the original amount. This multiplier factor generally ranges from 1.0 to 3.0 in the case of the tourism industry depending on the industry's structure. In Kenya, the multiplier for the tourism industry was estimated at 1.57 in 1967, 1.58 in 1971, and 1.81 in 1976.

To obtain the net gain to the Jordanian economy, any outflow of foreign exchange from the tourism industry must be subtracted. USAID made a spot examination for the purpose and came up with the following results:

Estimated Total receipt by a Five Star Hotel in 1992	($14,100,000)	100%
Food Import		0.8%
Management Fee for the Foreign Management Company	(17% of total payment)	15.3%

The subject hotel was the enterprise with the highest foreign component in its operating cost structure. The net value added to the economy by the tourist receipts would be in the order of 85%.

It should be noted that the above amount brought in by international tourists is not the value added in the tourism industry. The value of input to the tourism industry must be subtracted from the total to arrive at the value added in the industry. The Central Bank of Jordan uses 60% as the percentage of net value added in the tourism industry. The above study by USAID suggested a much higher portion attributable to the industry.

In Jordan with rather underdeveloped tourism service industries, the associated multiplier would be much less at the moment. If a multiplier of 1.5 is used, the size of tourism related activities in terms of domestic value added should be in the order of 350 million JD or bigger than the construction industry or the agricultural sector (See Table 2.1.1 in Part I, Volume 2).

In any case, since the tourist receipt as indicated above is the net addition to the national economy in the form of foreign exchange, and the amount paid out to foreign suppliers related to tourism activities is relatively small, the net effect on the economy by international tourism should be in the order of 490 million JD or 15% of GDP in 1993.

It has been shown that the tourism sector is already the top foreign-exchange earner and one of the top generators of national wealth in the Jordanian economy. It is therefore extremely important to let the industry grow in its desired course.

5.2 Regional Planning Perspective

Regional planning approach was first undertaken for development of the Jordan Valley in the 1970s which focused on development of agriculture, water resources and communities. The Jordan Valley Authority was created as the unified implementation agency for assuring efficient and integrated development of the Valley. The Master Development Study of Amman-Balqa-Madaba Region was then conducted in 1979 aiming to achieve balanced development among the sectors and areas in Greater Amman. USAID assisted with these two studies.

Similar studies were carried out for the Northern Jordan (Irbid Region) in 1980 and for the Southern Region of Karak-Tafila in 1987 with the assistance of JICA; they aimed to deter and reverse the trend of migration into Amman. Also, the Aqaba Region Development Study was performed a year before the Karak-Tafila region study with the assistance of the GTZ, which led to the creation of the Aqaba Region Authority for implementation. These five studies covered the whole of the East Bank and provided a long-term perspective of each region.

The Ministry of Municipal, Rural Affairs and Environment (MMRAE) created a Regional Planning Department in the late 1970s and worked jointly with the then National Planning Council (present Ministry of Planning) which was responsible for preparation of the so-called Five Year Plan. After completion of the plans for the Karak-Tafila and Aqaba region, the department was restructured to the Environment Department. Now, the Ministry of Planning maintains responsible persons for coordination of multi sectoral development issues by region.

Though regional development policies are not clearly stated in the current Five Year Plan (1993-1997), one of the social policies states the importance of "distributing equitably the benefits of development and reducing disparities in development among groups and regions." This policy is expressed in the investment program projects in education, health, sanitation, communications, and water supply.

Spatial definitions of regions vary according to the specific purpose of each study. Regarding its physical features, the country is divided from west to east into three zone belts, namely the Rift Valley, the highland plateau and the desert. The highland plateau constitutes the central urban axis running from Irbid in the north to Aqaba in the south and is further divided into four areas by three steep wadis. Wadi Zarqa is the boundary between the northern and central areas, and Wadi Mujib is the boundary between the central and upper south areas. Wadi Hasa is the boundary between the upper south and lower south areas.

In dealing with the basic statistical data, consideration for the administrative division is also important as well as the historical, cultural, social and economic features. As a result, the aforementioned 5 regions were identified for discussion in this study.

5.3 Administrative Organizations

(1) General Outline of the Government of Jordan

The organization chart of the government administration is shown in Figure 5.3.1. The central government consists of the Prime Minister's Office and 26 ministries as well as 26 central departments and 38 public corporations. Among them, MOTA is, of course, the main government organization involved in tourism. An organization chart of MOTA is presented in Figure 5.3.2.

Because tourism is influenced by various natural and social conditions, most ministries have at least some relationship with tourism. For example, roads, tap water and sewerage construction by the Ministry of Public Works and Housing are important factors in tourism development; immigration procedures and maintenance of security by the Ministry of Interior, and hygienic administration by the Ministry of Health are closely related to the attraction of foreign visitors. Of course, these fields are not primarily administrated only with respect to tourism. Thus in Jordan, as in most countries, many administrative functions that relate to tourism are undertaken not intentionally with respect to tourism, but rather with respect to each office's basic organizational missions.

It is therefore important for Jordan, where tourism is becoming an increasingly significant industry, to take action to coordinate government activities by tourism-related administrative functions and thereby cross over the borders that separate ministries.

(2) Ministry of Tourism and Antiquities (MOTA)

The Ministry of Tourism and Antiquities (MOTA) contains two sections: one for Tourism and other for Antiquities, each of which operates under a separate director. (see Figure 5.3.1 about the DOA)

The role of MOTA is to encourage and develop tourism and to boost revenues in order to increase its contribution to the national economy. According to the Tourism Law of 1988, the duties, tasks and responsibilities of MOTA are to carry out the following in cooperation and coordination with other organizations:

Figure 5.3.1 Government Administration Chart of Jordan

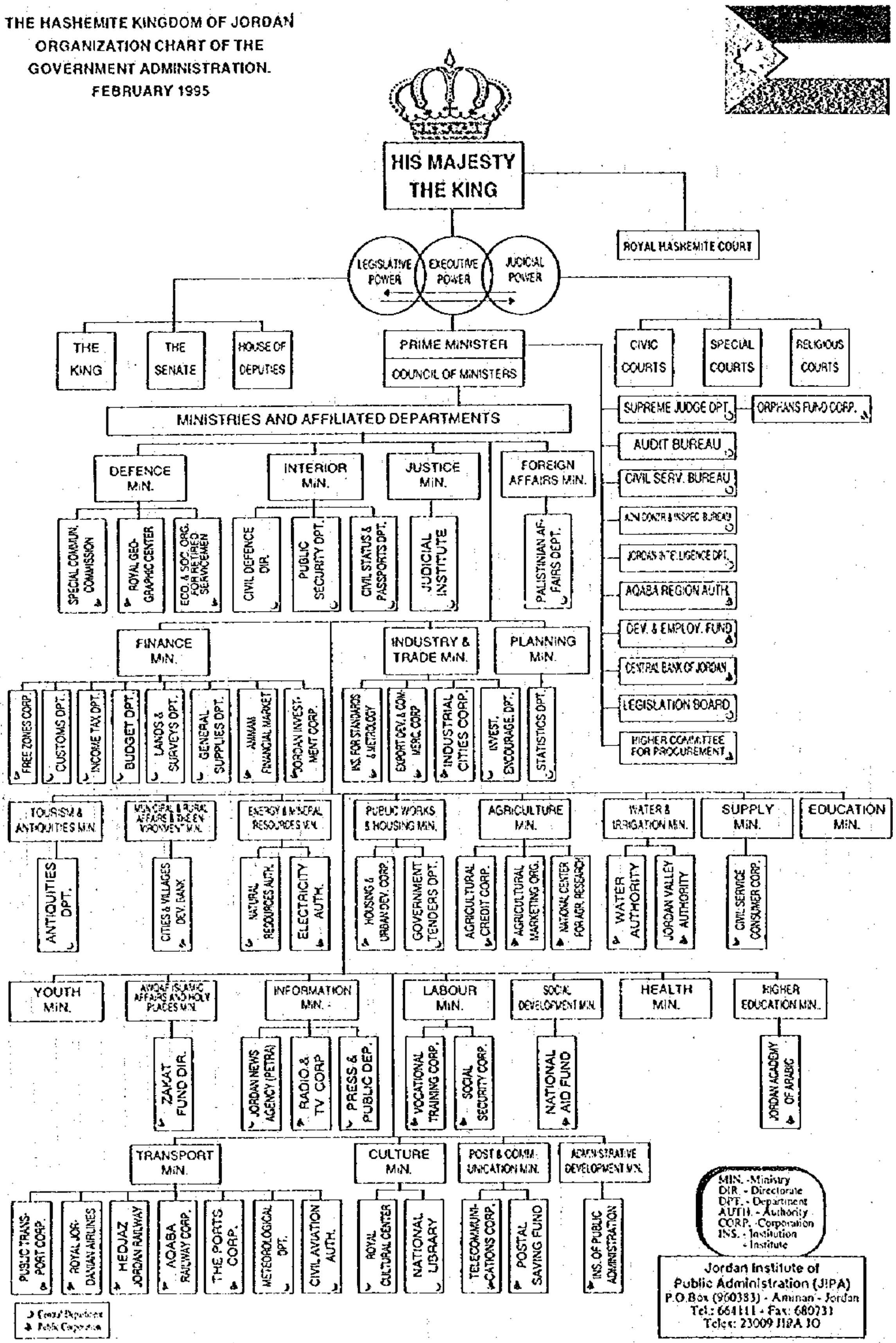
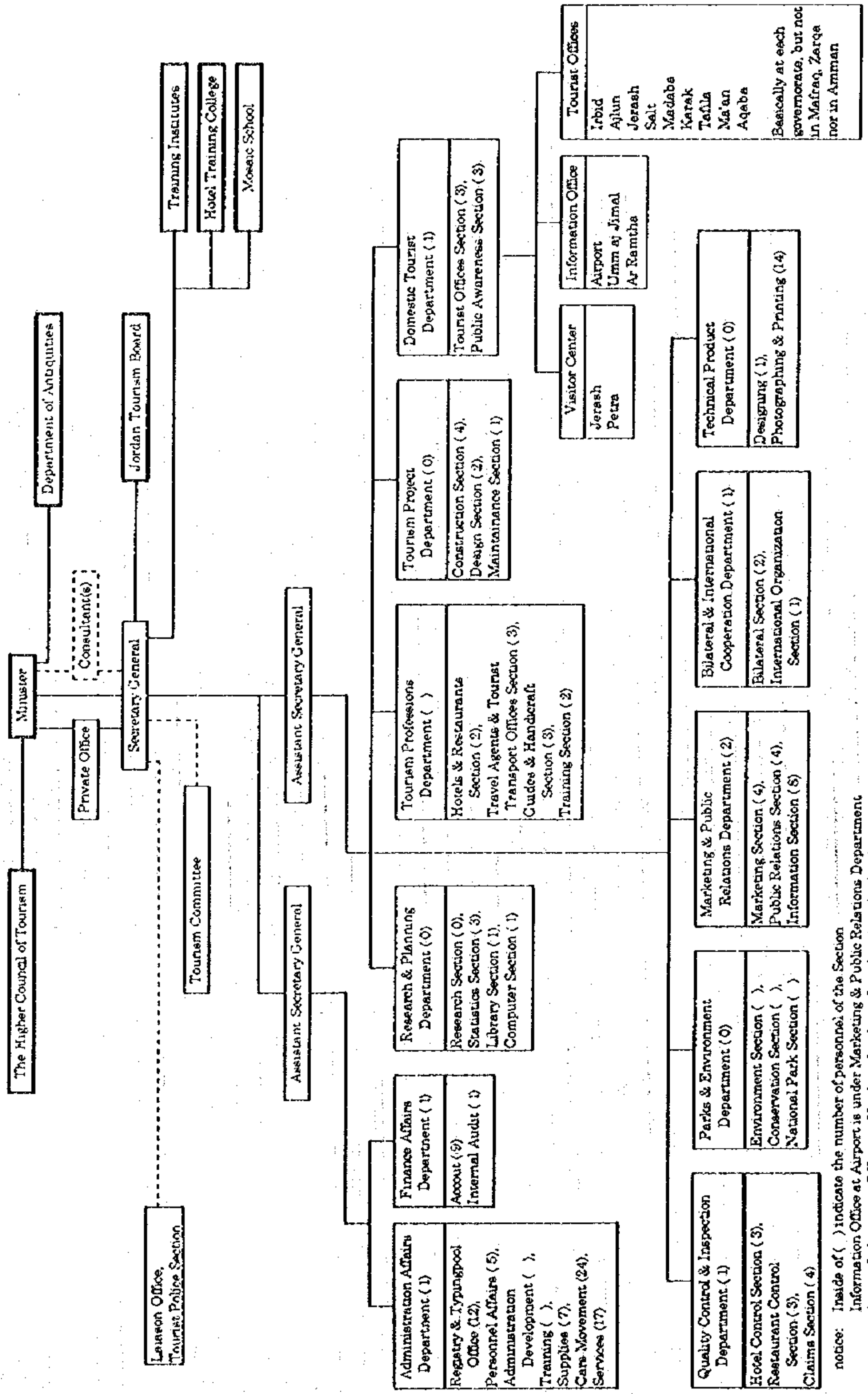


Figure 5.3.2 Present Organization Chart of the Ministry of Tourism and Antiquities



notice: Inside of ( ) indicate the number of personnel of the Section.
Information Office at Airport is under Marketing & Public Relations Department.
2 more Information Offices at Northern border to Israel and Aqaba border are under consideration, one more Visitor Center at Aqaba is under consideration.

- preservation and development of tourist sites designated by the Ministers Council;
- licensing and classifying tourist professions;
- enhancing tourist related procedures;
- marketing and promoting tourism;
- encouraging, organizing and sponsoring inner tourism and tourism-related investment;
- improving and encouraging the labor force and the required technical capabilities to raise the performance of the tourism industry;
- preparing studies and specialized research for the development and growth of tourism;
- the establishment of colleges and institutes concerning tourism.

(3) Higher Council of Tourism and Tourism Committee

a. Higher Council of Tourism

The Tourism Law of 1988 stipulates the establishment of the Higher Council of Tourism. It is headed by the Minister of Tourism and Antiquities and includes the following participating members:
- the Minister of Interior;
- the Minister of Trade and Industry;
- the Minister of Finance;
- the Minister of Health;
- the Minister of Planning;
- the Minister of Culture;
- Head of Royal Jordanian Airlines;
- Head of Aqaba Region Authority;
- General Director of Social Security Corporation;
- the General Secretary of the Ministry of Tourism and Antiquities; and
- three experienced members from the private tourism sector.

The Council is responsible for the following tasks:
- Stating the general policy of tourism in the Kingdom and supervising its implementation;
- Proposals for laws and regulations relating to tourism;
- Proposals for making tourist agreements with the international tourist organizations, societies and countries;
- Establishing tourist and hotel training centers and setting up programs and instructions for their operations;
- Setting up bases for licensing of tourist occupations;
- Monitoring prices and charges of tourist services and adjusting them whenever

necessary;
- Setting guidelines necessary for the marketing and promoting of tourism; and
- Any other tourism related tasks the Minister decides to take before the Council.

In spite of the description of the law, the council has held few meetings in the past. However, in 1995, the council was reactivated and held 3 meetings. It is planned to call for its meetings four times a year.

b. Tourism Committee

In addition to the Higher Council, a tourism committee is stipulated by the Tourism Law of 1988. It is chaired by the Secretary General of MOTA and includes the following participating members:
- a representative from the Ministry of Interior;
- a representative from the Ministry of Supplies;
- a representative from the Ministry of Health;
- a member of the Ministry of Tourism and Antiquities as a member and a reporter; and
- two persons representing the tourism professions assigned by the Minister of Tourism and Antiquities.

The Committee gives its advice to the Minister on the following matters:
- licensing and classification of tourist professions;
- reviewing professional contravention committed by tourist professions and proposing resolutions and procedures that must be taken against them; and
- any other matters presented by the Minister related to tourism for study.

(4) Jordan Tourism Board (JTB)

The Jordan Tourism Board was established under the approval of the Prime Minister's Office in 1990. The following are the main objectives of the JTB:
- To provide an umbrella organization for the participation and cooperation of the Ministry of Tourism, the airlines and the tourism entities in order to promote international and domestic tourism and maximize its returns, and to instill tourism awareness and highlight Jordan's image, heritage and tourism potential and its recent achievements;
- To undertake tourism marketing, the necessary promotional tasks for various tourism sites, and to finance and prepare tourism statistics and marketing studies;
- To participate and organize international tourism exhibitions and seminars;
- To provide the necessary financial resources to implement tourism marketing and promotion campaigns in cooperation with the tourism sector as ratified by the Board;
- To suggest the implementation of projects that aim at improving and developing

tourism sites and the participation in programs to train tourism manpower;

- To produce promotional tools and carry out their sale and distribution; and
- To consider any other issues relating to the development of tourism and the implementation of the tourism strategy, and any other issues proposed by the Ministry of Tourism to the Board for feedback.

The Board has 11 members on its executive council and draws its membership from the array of tourism enterprises serving the sector. The executive council draws all its members except one from the private sector.

The Board is financed jointly by MOTA, members of the Board, contribution in kind from Royal Jordanian Airlines, proceeds from the sale of promotional materials, assistance extended by international donor agencies and other sources approved by the Cabinet.

(5) Tourism-Related Public Corporations

a. Regional Administrative Authorities

Jordan Valley Authority (JVA)

The Jordan Valley Authority was established by the Jordan Valley Development Law (Law No. 19 of 1988) under the control of the Ministry of Water and Irrigation. JVA is responsible for developing and conserving water resources in the Jordan Rift Valley up to an altitude 300m above sea level and for the development of villages, housing, regional planning, the road network, tourism development, etc. within that area.

The Authority is composed of the Minister of Water and Irrigation, the Board of Directors, the Secretary General, and executive staff and administrative units. The Board members include the secretaries and managers of the Ministry of Planning; Ministry of Agriculture; Ministry of Municipal, Rural Affairs and Environment; Ministry of Industry and Trade; Department of Lands and Surveys; and the Budget Department. MOTA is not a permanent member.

In 1994 JVA prepared a regional tourism development plan for the east coast area of the Dead Sea, which envisaged a 3,200 room project in Suweimeh Sector and a 5,400 room project in Zara Sector at the north end of the Dead Sea (see Volume 2, section 2.2.4).

Aqaba Region Authority (ARA)

The Aqaba Region Authority is also a central government authority under the Prime Minister's Office. ARA is responsible for the development of the Aqaba Region including port development and tourism development of the coastal area of Aqaba Gulf.

ARA has prepared a regional tourism development plan for the natural sea coast remaining between Container Harbor and Industrial Harbor in the Gulf of Aqaba. The plan includes 8 five-star hotels, 3 four-star hotels and golf courses. The Authority is going to develop the infrastructure (water, electricity, communications, sewerage, main roads) and is going to offer land on a lease basis (maximum 30 years) to the private sector for development (see Volume 2, section 2.2.5).

b. Jordan Investment Corporation (JIC)

Jordan Investment Corporation (JIC) is playing a role as a co-investor of industrial projects from the government side. JIC is a public corporation established by the Jordan Investment Corporation Law under the control of the Ministry of Finance. JIC has invested in some tourism-related projects, such as hotels and tourist transport companies.

Usually, JIC prepares the project by itself and welcomes private co-investors in implementing the project. Sometimes, however, JIC invests in the projects directly at the request of private companies and government ministries.

Because of recent government initiatives in privatizing the government-owned companies, JIC is accordingly going to reduce the holding share by selling on the market. For example, JIC previously held 87% of the shares of the Jordan Tourism and Hotel Company, which is the holding company of Inter-Continental Hotel, but after partial implementation of the privatization drive, its holdings are currently down to 30%, the bulk having been sold on the market.

c. Social Security Corporation (SSC)

The Social Security Corporation was established by the Social Security Law (Law No. 30 of 1978) under the control of the Ministry of Labor. It is chiefly responsible for insurance and pensions. The Tourism Investment Department of the Corporation owns the Amra Forum Hotel, the Petra Forum Hotel and the Aqaba Hotel, 6 rest houses and 23 tourism-related facilities throughout the country.

d. Royal Jordanian Airlines (RJ)

RJ is a national company, with 100% state ownership. It employs about 5,000 people and owns 14 aircraft. Its route network extends from Jakarta in the east to Chicago in the west. A 1988 agreement with MOTA to pool resources in promoting inbound tourism signaled the need for coordination and cooperation in the sector. It was also agreed that RJ's overseas bureaus would act as representatives of MOTA as well. The agreement has also identified the contribution of each party in the implementation of tourism promotion activities and campaigns.

(6) Other Tourism-Related Organizations

a. Industrial Development Bank (IDB)

The Industrial Development Bank (IDB) is playing a role in financing projects in industrial sectors that the government has chosen to promote. Although IDB was established by the Industrial Development Bank Law, it is not a government organization. IDB is partly owned by both the government and the private sector. It counts among its board members including several government ministers.

IDB currently charges an interest rate of 11% for new investments, 11.5% for management-related investment/expenditure, and 9% for investments in small-scale companies and handicrafts. The term of repayment is usually about 7 or 8 years. IDB may finance up to 50% of total project costs, but investors must raise the remaining 50% from their own capital, not by borrowing from a commercial bank.

b. Tourist Transport Companies

Tourist transport companies are the ones operating buses for charter services and for some tourist related schedule services. Jordan Express Tourist Transport Company (JETT) had played an important role in this field as the only one company until 1994. However, as Tourist Transport Bylaw no. 7 for 1995 became effective on April 1, 1995, until now 5 other tourist transport companies have been licensed.

(7) Problems of Administrative Organization

a. Fragmented Administrative System for Tourism Development

It was found that one of the causes of problems in tourism development is a lack of coordination in the administrative system.

For example, ARA and JVA have their own independent tourism development plans in their territories, as mentioned in section 5.3.5. Although both plans seem to aim at independent resort development, it is hard to imagine that either of these projects can stand alone given Jordan's current tourism conditions. Neither organization, however, seems to examine in any detail the relationship of its regional resort development plan to tourism development in the country as a whole, and neither discusses its plans with the Higher Council. Consider, for example that a newspaper article about JVA's project pointed out that a participant in a JVA meeting designed to provide information to the private sector said that he could not understand why the project was undertaken by JVA rather than MOTA. The lack of transparency and clarity in administration may even negatively affect the will to cooperate in the private sector. It is therefore necessary to re-evaluate these projects in light of national tourism development, and to clarify the appropriate division of labor needed to accomplish them.

Investment by JIC and financing by IDB are carried out by their own decisions based on the general national policies. Although their independence as independent organizations is to be respected, it is essential that they understand about basic directions and outlines of yearly plans in the tourism field.

b. Further Reactivation of the Higher Council

The Higher Council of Tourism can be the body for coordinating the tourism-related activities of various government organizations. But it has held few meetings in the past. Because more coordinated administration is required for the development of tourism as a national economy-boosting sector, the importance of the Council is greater than ever. In this sense, recent MOTA efforts to reactivate the Council should be admired. However, further action should be taken to strengthen the responsibilities and administration of the Council.

c. MOTA's Weak Policy Functions

MOTA is the center for tourism administration, including both policy making and its implementation in the fields of tourism development and promotion. Because the MOTA is also responsible for regulation of licensing in the sector, however, only a few officials actually involved in the creation of policy at the Private Office, and a few are engaged in project implementation at the Project Department. MOTA's current status is therefore insufficient for the tasks it needs to fulfill.

As mentioned earlier, many other government organizations are also involved in tourism development. MOTA should therefore be endowed with the authority redundant to coordinate effectively with all the other relevant organizations in order to ensure that tourism development proceeds more smoothly.

It is clear that reorganization of MOTA is necessary if Jordan is to enjoy further tourism development. Reorganization should be designed to strengthen the policy making and project implementation functions of the department, and to take leadership in government by coordinating various government organizations and private companies in MOTA-directed policies. This reorganization effort should include formulation of specifications that will clarify the roles and responsibilities of departments within MOTA.

d. Weak MOTA District Offices

District offices of MOTA, named Tourist Offices, are located principally in capital cities of each Governorate. More than 100 officials work at these offices across the country. In some cases, the offices are located adjacent to tourist sites or tourist facilities, making it easy for tourists to visit. But these offices are not recognized as offices for direct tourist services, such as giving information and helping with necessary arrangements. They are just expected to gather information about their districts. Thus these offices are usually closed by 3 o'clock in the afternoon. Information Offices at the airport and the borders and Visitor Centers at tourist sites currently provide direct tourist services. But the number of Information Offices and Visitor Centers is very small and some of them are not in good condition.

In the early stages of tourism development, government direct service to tourists is very important. The Tourist Offices should be reorganized to play a role in direct tourist services. In addition, these offices should be partly responsible for development measures in each district.

5.4 Policies and Measures

Tourism policies and measures are taken based on various laws and bylaws. Among them, the Tourism Law of 1988, its Bylaws play the central function of governmental measures on tourism. However, many of bylaws concerning Tourism Law of 1988 are old (older than the law itself). These bylaws should be reexamined to meet present demand.

(1) Present Tourism Policy

a. The National Socio-Economic Development Plan

The underlying objective of the current National Socio-Economic Development Plan is to bring about economic growth by encouraging financial stability, developing an appropriate investment environment, and reducing the national deficit. The government aims to achieve this by giving a greater role to the private sector in the areas of investment, direct production and employment. The Plan stresses the importance of the Tourism Sector and classifies it under the investment field.

The following tourism policies are incorporated in the Plan:

- extending private ownership to state-owned lands for the purpose of establishing tourist projects;
- transferring the management of the Hotel College from the Ministry of Education to the Ministry of Tourism and Antiquities, and involving the private sector in the operation and management of this College;
- updating tourist regulations by enacting a uniform hotel and restaurant law and a nightclub law on licensing and classification;
- establishing a chamber of tourism to represent the views of the principal organizations; and
- increasing awareness of tourism by:
  - undertaking tourism campaigns and awareness-building programs;
  - producing tourist maps and brochures for sale;
  - founding a national museum, developing existing museums; and
  - developing new tourism activities e.g. folklore troupes, seminars, exhibitions and tourism weeks;

b. Present Policy of MOTA

After the current 5-Year-Plan was drawn up, the tourism environment changed dramatically with the progress of the Middle East Peace talks. MOTA has proposed the following tourism policies in order to meet the new situation:

- privatization of government interests in tourism services and other related assets;
- modernizing the control of tourist facilities by introducing regulations or licensing and hotel classifications;
- tourism investment incentives to the private sector;
- controlling mass tourism;
- preserving natural and archaeological sites;
- developing a clear legal framework to support and facilitate tourism;
- seeking the views of the private sector in formulation of relevant regulations, laws and by-laws, standards and codes of conduct;
- developing an adequate institutional framework for the environmental management of all archaeological sites, tourism attractions and nature reserves; and
- giving priority to cultural/religious tourism.

(2) Budget of MOTA

The government budget of Jordan is shown in Table 5.4.1. The amount of budget in 1993 was 1,623 million JD, which is about 45% of GDP (3,596 million JD) in the same year.

The budget of MOTA (excluding DOA) is shown in Table 5.4.2. The budget in

1995 is 6,559 thousand JD, which is 4 times as much as that of 1993 (1,425 thousand JD) and 1994 (1,512 thousand JD). Personnel and general administration expenditures constitute most of budget, leaving little for development and promotion until 1994. The higher 1995 level is due to an increase of development and promotion budget financed by foreign donors.

The total budget of MOTA and DOA in 1995 is 6,250 thousand JD (reestimated base) and will be increased to 7,300 thousand JD in 1996. The capital expense in 1995 is 3,220 thousand JD and will be increased to 5,500 thousand JD in 1996.

(3) Government Regulation of Tourism Industry

a. Hotel Construction

Hotel operations are licensed by MOTA. MOTA classifies hotels by 6 categories from 5-star to 1-star and pension, and license control is administrated according to the classification.

b. Restaurant

Restaurants are licensed by MOTA, who controls the start of operations and prices. Menus at the restaurant are illegal without a signature of MOTA.

c. Guide Interpreters

Guide interpreters are licensed by MOTA. But very few guide interpreters are available for foreign languages other than English.

Table 5.4.1 National Budget of Jordan

(unit:THOUSAND JD)

	1988	1989	1990	1991	1992	1993
TOTAL REVENUE	721,293	855,478	938,209	1,112,000	1,358,700	1,368,300
LOAN REPAID	21,518	28,352	29,859	58,000	52,400	50,000
EXTERNAL ASSISTANCE	155,428	261,724	164,282	225,200	137,400	142,000
DOMESTIC REVENUES	544,347	565,402	744,068	828,800	1,168,900	1,176,300
TOTAL EXPENDITURE (net)	925,856	992,578	1,032,638	1,099,600	1,177,700	1,341,900
(gross)	1,054,001	1,102,318	1,120,065	1,234,300	1,348,700	1,623,100
CAPITAL (net)	256,302	242,905	191,263	195,600	248,200	292,700
(gross)	384,447	352,645	278,690	330,300	419,200	573,900
RECURRING	669,554	749,673	841,375	904,000	929,500	1,049,200
MILITATY	257,326	251,520	254,677	269,700	272,800	299,600
CIVIL	412,228	498,153	586,698	634,300	656,700	749,600
PREFINANCING DEFICIT	-204,563	-137,100	-94,429	12,400	181,000	26,400
POSTFINANCING DEFICIT	-100,161	-18,773	49,732	216,700	338,400	0
LOANS TOTAL (net)	104,402	118,327	144,161	204,300	157,400	-26,400
(gross)	232,547	228,067	231,588	339,000	328,400	254,800
DOMESTIC FINANCING (net)	115,320	22,319	14,425	-7,100	-51,200	-35,700
Domestic Repayment	19,699	21,534	19,216	9,400	51,200	47,700
Internal Loans	135,019	43,853	33,641	2,300	0	12,000
EXTERNAL FINANCING (net)	-10,918	96,008	129,736	211,400	208,600	9,300
External Repayment	108,446	88,206	68,211	125,300	119,800	233,500
External Loans	97,528	184,214	197,947	336,700	328,400	242,800

Source: Department of Statistics

Table 5.4.2 Budget of The Ministry of Tourism and Antiquities

(unit:JD)

	1988 reestimated	1989 reestimated	1990 actual	1991 actual	1992 actual	1993 reestimated	1994 reestimated	1995 estimated
ALL TOTAL	735,000	699,000	648,710	684,898	1,057,095	1,425,018	1,512,000	6,559,285
CURRENT EXPENSES TOTAL	613,000	605,000	554,330	587,049	632,533	903,000	857,000	3,342,285
Salaries, Wages and Raises	289,400	311,500	315,750	331,492	361,538	409,000	469,000	713,760
Employment Expenses (goods & services)	255,000	222,500	173,430	171,082	187,971	396,000	327,000	2,113,280
mainly for marketing & promotion	146,000	86,000	62,390	71,951	73,073	236,000	150,000	1,822,000
others	109,000	136,500	111,040	99,131	114,898	160,000	177,000	291,280
Transformational Expenses	68,600	71,000	65,150	83,728	81,313	98,000	61,000	455,045
Other Expenses (not usual)	0	0	0	747	1,711	0	0	60,200
CAPITAL EXPENSES TOTAL	122,000	94,000	94,380	97,849	424,562	522,018	655,000	3,217,000
Cars, Machinery & Equipments	0	0	0	0	13,750	0	50,000	0
Ordinary Construction Works	122,000	94,000	94,380	75,565	410,518	522,018	605,000	450,000
CERM	0	0	0	0	0	0	0	1,367,000
PSSP (Private Sector Services Project)	0	0	0	0	0	0	0	1,400,000
Other Expenses	0	0	0	22,284	294	0	0	0

Source: MOTA

d. Other Tourism Services

According to the Tourism Law of 1988, all tourism professions defined by the law are licensed. Tourism professions are defined as follows:
- tourist and traveling offices and companies;
- specialized tourist transport;
- hotels, pensions, motels, tourist companies;
- tour guide services;
- the production and trading of antiquities, Holy Land products, crafts, and traditional and popular industries;
- tourist-class restaurants and rest houses, and amusement and entertainment tourist cities; and
- any other activity which the Higher Council of Tourism considers it to be a tourist profession and declares in the official gazette.

e. Tourism Associations

According to the Tourism Law of 1988, every tourism enterprise must be a member of one of these associations. It is a necessary condition for getting a license. Some regulations are enforced through these associations.

(4) Taxes and Fees

Tourism services are taxed as follows based on the Law of an Extra Tax. Tourists are charged certain taxes when they pay for the following these services.
- Hotel: 10% of room rate
- Restaurant: 10%
- Travel Agencies: 5%

Tourists are required to pay for admission at most tourist sites. Typical prices for foreign visitors are as follows.
- Petra: 20 JD
- Ma'in Spa: 1.1 JD
- Wadi Ram: 1 JD
- Dead Sea Rest House:
- Jerash: 2 JD
- Amman Roman Theater: free to enter the theater but charged for the museums
- Amman Citadel: free to enter the remains of Citadel but charged for the archaeological museum

(5) Promotion of Private Participation and Foreign Capital Investment

a. Investment Promotion

The government has placed emphasis on the promotion of private investment. The Law to Encourage Investment of 1995 was enacted to accelerate the pace of private investment, and picks industry, agriculture, hotels, hospitals, and maritime and railway transport as favored fields for investment promotion; it prescribes exemption from income tax, social services tax, and duties and fees concerning the importing of equipment, machines, tools, furniture, and furnishings. Each region of Jordan is subdivided into three types of development regions (A, B, and C) according to the degree of economic development. In addition, the degree of tax reduction for income and social services tax varies by region of each project area, in each aspect of those industrial sectors designated for investment promotion by the law. Other target investment sectors can be added by the decision of the Ministers' Council.

In addition, Arab and non-Arab foreign investors are treated like Jordanian investors under the law. Before enacting this law, The Law on Regulating Arab and Foreign Investments of 1992 and The Law of Investment Encouragement of 1987 were the effective laws. According to these law, Arab investors were not treated like Jordanian investors, but joint ventures with Jordanian investors in limited sectors were permitted to non-Arab investors. Tax exemptions were also insufficient.

The Higher Investment Board is set up by the 1995 law. The responsibilities of the board are to approve the national strategy for investment, to approve the investment policies and to endorse regulations related to investment. The board is chaired by the Prime Minister and 13 members, including the Minister of Tourism and Antiquities.

Investment Promotion Corporation was also established based on the law. The duties of the Corporation are:

- building up confidence in the investment climate, identifying the investment opportunities, encouraging investment in them and marketing them;
- simplifying registration and licensing procedures, licensing the investment projects, following up the existing ones and giving them the implementation priority;
- creating an investment window to facilitate the issuance of licenses for investment projects, and getting the approval of the different parties according to the status of valid legislation and laws;

- offering necessary advice and providing information and data to the investors and issuing the concerned manuals; and
- setting up programs for promoting investments and attracting investors.

b. Joint Venture

Government investment to joint venture projects with private investors is undertaken by JIC (see 5.3 (5)).

c. Financing

Accommodation of long-term loans related to government measures are supplied by IDB (see section 5.3 (6)). Most commercial banks find it difficult to extend long-term loans because of shortages of funds.

(6) Problems of Tourism Policy and Measures

a. Necessity of Tourism Development Master Plan

The process of tourism development covers a wide range of economic activities, involving not only physical developments such as infrastructure (transport, water supply, etc.) and superstructure (hotels), but also software such as CIQ (Customs, Immigration and Quarantine) services, laws and ordinances, marketing systems and training of employees. Tourism development should, therefore, be regarded as a form of comprehensive national development. The process inevitably requires considerable investment of human, material and monetary resources in various fields and in various ways. Concerted action across a variety of sectors is essential.

Therefore, a nationwide master plan for tourism development is required in order to devise an overall strategy and to prioritize projects. Local projects will have a point of reference and may be adjusted and developed in accordance with the national policy. In addition, it is essential that the national government provides the physical and administrative framework to support the master plan.

Our reference to the master plan is not meant to advocate the preparation of a completely new master plan. We would like to stress the importance of the existence of an authorized master plan as guidelines. The main purpose of authorizing such a master plan is to steer various effort of tourism development by many stakeholders in private as well as public sectors in a concerted way rather than allowing conflicting and wasteful activities. In that sense, the master plan should be a directional one, not a detailed business plan. This report can be a basis for such a national master plan.

b. Promotion of Private Participation

The tourism development policy of the government aims at boosting the national economy by promoting the tourism industry. Government measures are thus to guide and support the economic development of private tourism enterprises. In order to realize this goal, the government regulation of private activities should be minimized so that the efforts of private companies are enhanced in a free economy. At the same time, the government should take effective measures to enhance the participation of the private sector in the tourism field.

(i) Deregulation of Licensing

As explained in section 5.4 (3), most tourism industries are licensed by the government. It therefore seems very difficult to abolish licensing because all professions are required to obtain licenses in Jordan. Even so, license control procedures should be examined.

Regulations based on licenses have to have clear administrative purposes and they ought to achieve these purposes, if they are to be justified. In some cases, attainment of the administrative purpose may not be possible by any regulatory measures, but better situations can be expected under free competition. In this view, present regulations should be re-examined and necessary amendments should be made.

For example, the Jordanian hotel standards, which do not reflect international standards, should be re-examined, based on the understanding that this standard should not be that for safety, but rather that for amenity. Government evaluation by the hotel standard is so limited that it can be used only as one of many other reference items by tourists and travel agents when they choose a hotel. The number of stars given to the hotel should be visible to the public by requiring the hotel owner to display its stars at the reception counter or on the front outside wall (e.g., Paris), because the standard is meaningful only when tourists can identify and use it for their reference. In addition, the price ranges of permitted room charges should be re-examined. Currently prices seem out of step with the standard. Even if price controls are supposed to guarantee low prices, they are currently ineffective, since room charges in Jordan seem high, at least in comparison to the quality of the hotels. It would be better to leave the price to the market.

Another example of wasteful regulation is that of the menu of the restaurants. This regulation spoils the incentive to improve service by creating new products.

Restaurant owners should have the freedom to create new menus and to change them frequently, according to the needs of customers. This sort of free competition will promote better quality, and move diverse menus.

Of course, abolishing unnecessary licensing in tourism fields should be examined as the market economy develops in Jordan. It should be recognized that license control is costly in terms of both money and manpower, and is an additional and perhaps unnecessary government burden. The final goal is to gradually reduce the burden by minimizing the regulation and to use manpower and finance in more productive ways.

(ii) Deregulation for Foreign Capital Participation

The Investment Encouragement Law of 1995 applies the conditions to foreign investors as it does to Jordanian investors, and it is expected that the law will produce good results.

(iii) Tax and Financial Measures

There are some tax exemption measures for hotels based on the Investment Encouragement Law of 1995, but these measures are applicable only to hotels. Some other tourism-related facilities should be added as tax exemption measure beneficiaries through the decision of the Ministers' Council.

Finance by IDB seems to be quite inadequate for the promotion of private investment in the tourism field. Conditions should be softened in terms of interest rates, repayment terms, etc.

(iv) Privatization of Government Holding Companies

Privatization of government holding companies is gradually proceeding with the direction of government policy. This is quite evident in the tourism field. More progress is expected.

(v) Other Problems

There are other obstacles preventing investments. The following items should be addressed.

- The period of land tenure is 30 years at most.
- Depreciation is not applicable to hotel buildings, etc.

c. Government and Private Cooperation

Although Jordan has good potential as a tourist destination, it is still at an early stage in its tourism development. Even with recent measures for improvement of the investment environment, it is not yet believed to be a very desirable country for private tourism investment that seeks short-term returns. As a result, it is not appropriate to believe that tourism investment is purely the concern of the private sector nor to believe necessary infrastructure for tourism development will be provided by private investors. The government, therefore, should positively undertake tourism development as well as encourage private investment. Tourism development is only attained when both government and private industry invest together in a coordinated manner.

The role of the government is to clarify the target and direction of tourism development and to develop related infrastructure and public tourist facilities such as historic sites and museums, in coordination with private investment. This is, in other words, to bear part of the risk of tourism development, and thereby the government's investment will serve as a form of security for private investors.

Private tourism enterprises are matters of concern not only to the companies involved, but also to the nation as a whole, since tourism can be extremely beneficial to the national economy. Private tourism professionals need to recognize the fact that the image of Jordan held by foreign visitors is determined by the level of services of the private companies. As a result, private marketing activities ought to be designed to help improve the image of the whole country, and firms should see their role not only in protection of their own immediate benefits but also in upgrading Jordan's overall image.

The government should therefore help private efforts to improve services, as well as generate opportunities for further learning about upgraded services. Government and private industry should work in close cooperation, and the Higher Council can be instrumental in fostering an open exchange of opinions.

d. Budget Allocation for Tourism Development

Although the budget of MOTA increased to 6.6 million JD in 1995 from 1.5 million JD in 1994, the amount of budget is still not sufficient. A small-scale museum being proposed at Amman or Salt is estimated to cost about 1.3 million JD (US$ 2 million). MOTA is not given enough financial power to develop even such a small facility. It is apparent that inadequate budget is one of the major obstacles of tourism development.

The government of Jordan should recognize that it is earning impressive revenues from tourism, such as from taxes on hotel room occupancies, on restaurants, and from entrance fees for tourist sites. Bearing in mind these sources of revenue, we can calculate that the government might be able to earn an additional 20 million JD in annual tax revenue from room charges on hotels and about 3 million JD in annual entrance fees at Petra (see Table 5.4.3). Considering that there are several other taxes and fees, the current budget for MOTA—lower than 7 million JD—seems far too small.

The Jordanian Government ought to acknowledge that the country will not see tourism-led growth with this kind of low budget allocation.

Table 5.4.3 Calculation of Tax Income from Hotel and Entrance Fee at Petra

Hotel			
Method 1	tourist receipts (1994, Central Bank/MOTA)		406.4 million JD
	share of room charge in tourist receipts	estimated 50%	
	total amount of room charge		about 200 million JD
	tax rate	10%	
	tax revenue		about 20 million JD
Method 2	tourist nights of package tour (1994, MOTA)	626 thousand	
	package tour rate	16.7%	
	total tourist nights	3.6 million	
	average room charge	estimated 50 JD	
	total room charge		about 180 million JD
	tax rate	10%	
	tax revenue		about 18 million JD
Petra	number of foreign visitors (non Arab)	162,763	
	entrance fee	20 JD	
	total entrance fee revenue		about 3 million JD