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Microeconomics of Competitiveness

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Jordan Tourism Cluster

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1. EXECUTIVE SUMMARY

This analysis explores the microeconomic competitiveness of Jordan and its tourism cluster. Although Jordan tries to remain politically neutral, the country is vulnerable to the political instability of its neighborhood. Despite a modestly growing GDP, Jordan ranks well on the Global Competitiveness Index, a puzzle this analysis explores. Human development indicators show improvement, and the government has ambitious goals and investments for health and education. Nevertheless, unemployment is high, poverty continues, a youth bulge poses risks, and FDI could be more productive. Human capital, access to finance for SMEs, unsophisticated demand, and infrastructure for transportation, energy, and telecommunications are among the various limitations to Jordan's growth.

Although regional tourism is growing, tourism in Jordan is slow relative to its peers. Since 2004, the Ministry of Tourism and Antiquities has been leading a national tourism strategy, which targets high-end tourists and promotes eco-tourism, adventure tourism, health tourism, leisure and wellness tourism, religious tourism, and volunteer tourism. Despite efforts from both the private and public stakeholders in the tourism cluster, this analysis identified a number of risks and areas of improvement.

This analysis reviews past and current policy initiatives and presents data that indicates resulting impact. Based on a literature review, data analysis, and a number of individuals with key players in relevant ministries and the tourism sector, the analysis concludes with recommendations of both short and long-term actions for both the public and private sector stakeholders to improve Jordan and its tourism sector's growth and competitiveness. For example, to improve the competitive national environment, Jordan should offer scholarships and management training to alleviate the discrepancy between the skills of adult population and the qualifications required for available jobs, improve access of SMEs to financing, and channel FDI investments to productive investment. On the cluster level, Jordan should provide extra security around tourist attractions and promote an image of a safe country, manage conflict between tour companies and local communities afraid of cultural degradation, and improve the educational offerings for students of tourism.

2. ABOUT JORDAN

2.1. GEOGRAPHY AND DEMOGRAPHICS

Bordered by Syria (to the North), Iraq (to the Northeast), Israel and the West Bank (to the West), Saudi Arabia (to both East and South), the Hashemite Kingdom of Jordan (Jordan) is home to 6.2M people, including individuals of Palestinian (47%), Jordanian (30%), and Iraqi (14%) origin. Arabic is Jordan's official language, though many people also know English, and increasing numbers speak French. Jordan's climate is mostly desert, with primary bodies of water limited to the Dead Sea, Jordan River, and Gulf of Aqaba.¹ Jordan is 45,495 square miles in size, slightly smaller than Indiana, with an urban population over 78%.²

2.2. POLITICS

In 1946, Jordan declared its independence from Britain. A constitutional monarchy³ and legal system that is based on Islamic law and French code govern Jordan's twelve provinces. The Government of Jordan (GoJ) legalized political parties in 1992, which number more than thirty. Nevertheless, political parties have little influence on the political process, and King Abdullah II remains watchful of public resentment at opaque policymaking. The Jordanians hold a long-standing and positive relationship with their kings, and smooth transitions between them have contributed to the country's internal political stability. In 1948, 1967, and 1973, Jordan engaged in a number of wars with Israel that culminated into the 1994 Israeli-Jordanian Peace Treaty. With its pro-Western orientation, Jordan seeks nonalignment with regional conflict as much as possible.⁴ Although Jordan maintains internal political stability, the country is vulnerable to external, regional political instability, which for instance, spilled over into Jordan during the 2005 terrorist bombings (EIU 2009).

1 Jordan shares the Gulf of Aqaba with Israel, Saudi Arabia, and Egypt.

2 CIA World Fact Book, "Jordan" <https://www.cia.gov/library/publications/the-world-factbook/geos/mg.html>, accessed March 2009.

3 Jordan has a king and parliament.

4 Jordan offers humanitarian aid to Palestinian people.

2.3. ECONOMICS

Jordan's economy has enjoyed macroeconomic stability since the 1990s and is export oriented. Jordan has signed a number of agreements (with the United States and Europe) that has increased trade, including joining the WTO in 2000. Exports include clothing, fertilizers, potash, phosphates, vegetables, and pharmaceuticals to the United States (22.4%), Iraq (12.9%), India (8.3%), UAE (7.8%), Saudi Arabia (7.5%), and Syria (4.9%). Yet, as the global economic crisis reduces demand for exports from the United States, in the short-term, Jordan might have to shift its reliance to an already fast-rising demand for exports from Iraq. In 2007, Jordan's imports of crude oil, machinery, transport equipment, iron, and cereals came from Saudi Arabia (21%), China (9.7%), Germany (7.5%), United States (7.5%), and Egypt (4.4%).⁵

While the country has maintained a real GDP growth rate of approximately 6%, the government deficit has grown, measuring 17.5% of GDP in 2007. The largest economic sectors in 2007 were financial services, real estate, and business services (22% of GDP) and manufacturing (20% of GDP). Agriculture only contributes 3.4% of GDP. Jordan's sources of revenue include taxes (21% of GDP), remittances (21%), and foreign aid (3%). The Central Bank's accounting for foreign aid, however, is not comprehensive. Jordan's largest donor, USAID, for instance gave US\$488M in 2004, which would not have been reflected in the reported figure for foreign aid (Central Bank of Jordan 2007).

On the expenditure side, 5% of GDP is spent on the defense, 4.9% on education, and 7% on refugees.⁶ In 2008, Jordan's cumulative domestic investment measured 34.1% of GDP. In 2006, Jordan carried US\$7.3M of outstanding external public debt. While most was owed to foreign

⁵ CIA World Fact Book, "Jordan" <https://www.cia.gov/library/publications/the-world-factbook/geos/mg.html>, accessed March 2009.

⁶ Refugees are 1.8M Palestinian and 0.5M from Iraq.

governments,⁷ Jordan also borrows from the European Investment Bank, IMF, World Bank, Islamic Development Bank, and the Arab Fund for Economic and Social Development. Jordan's total public debt was 58.3% of GDP in 2008. The Jordanian dinar is pegged to the US dollar (0.709), and the country has managed to control inflation, projecting a decrease from 14.9% (2008) to 4.7% in 2009 (Central Bank of Jordan 2007).

Since 2000, GDP per capita has been steadily increasing.⁸ However, real GDP growth has been slowing down in the last five years. Jordan's steady and high unemployment rate, officially recorded at 12.6% in 2008 (unofficially reported at 30%) is also concerning.⁹ Each year, 40,000 additional Jordanians enter into the labor market, which already counts 194,000 unemployed persons. In 2001, Jordan updated the Vocational Training Corporation Law to support the growing unemployment and also launched the Jordan Education Initiative Project in 2003. The 2008 employed labor force was 1.615M people, who worked in agriculture (2.7%), industry (20%), and services (77.4%).

2.4. SOCIAL INDICATORS

Jordan has made human development a national priority and can be proud of its achievement of ranking ninth out of 19 (mostly wealthier) Arab countries for its HDI value. Jordan's orientation towards women contributes to its strong HDI ranking. One example of gradual improvement in women's rights is the 20% of seats in all municipal councils that are reserved by quota for women since 2003.¹⁰ The Government also set an ambitious goal of 100% health insurance coverage by 2012 (EIU 2009). Although Jordan's relative human development indicators ranking is strong,¹¹ a number of issues threaten social stability.

7 Japan, Germany, France, UK, and US

8 PPP dollars in 2008 reached \$5,000

9 CIA World Fact Book, "Jordan" <https://www.cia.gov/library/publications/the-world-factbook/geos/mg.html>, accessed March 2009.

10 CIA World Fact Book, "Jordan" <https://www.cia.gov/library/publications/the-world-factbook/geos/mg.html>, accessed March 2009.

11 Human Development Index (HDI) of 0.77 out of scale of 0-1

Despite some human development strengths, Jordan faces a number of risks including one related to a regional youth bulge. With 38% of its population under 14 years old and 70% under age 29, Jordan has one of the youngest populations among lower-middle income countries.¹² If this large and young population is not engaged in employment, it will be vulnerable to regional Islamic militancy or emigration, the latter of which would result in potential long-term brain drain.

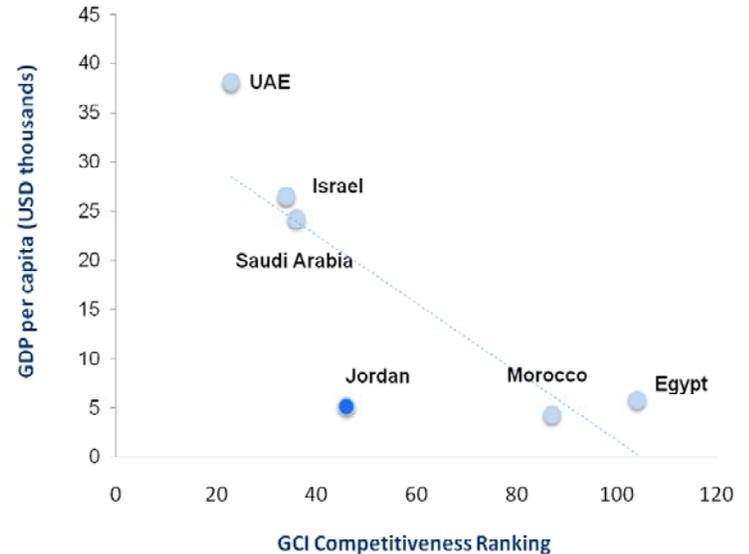
3. JORDAN DIAMOND ANALYSIS

3.1. OVERVIEW OF JORDAN'S COMPETITIVE POSITION

Jordan is something of an enigma. Since the Global Competitiveness Index (GCI) was created in 2001, the country has ranked well on the Index, and its 2008 ranking of 46 on the 134-country survey is an improvement over the last few years. Yet, the income level of Jordan is much closer to its less competitive neighbors Egypt and Morocco and further from levels of Israel and other more competitive peers, as illustrated in Figure 1. What is behind

this discrepancy? The following analysis highlights the key issues underlying the seeming strengths of the economy which may account for this.

Figure 1 Competitiveness Ranking vs. GDP per capita



Source: Global Competitiveness Index 2008

¹² IMF, "Jordan" <http://dsbb.imf.org/Applications/web/gdds/gddscountrycategorylist/?strcode=JOR#SUM>, accessed March 2009.

3.2. FACTOR CONDITIONS

3.2.1. Human Capital

Jordan ranks well across all factor conditions within the GCI, particularly in educational attainment and transportation, administrative, and capital market infrastructure, where it approaches the regional leaders. It ranks less competitively on telecommunications and innovation measures, much closer to expectations for a country with \$5,000 per capita income.

One explanation for the high social attainment is that the Government of Jordan (GoJ) spends 20% of its budget on education and 5% of the budget on health. These compare favorably to other countries in the region. Looking toward the future, the GoJ is moving toward a knowledge economy, using two thirds of its education budget to fund initiatives to teach English to all primary school students and to place computers in each classroom (Ministry of Planning and International Cooperation (MoP), 2004). Although Jordan already has a high number of scientists and engineers available, Jordan has extremely low levels of patents: only 21 utility patents on record with the United States Patent and Trademark Office.¹³

Despite the high level of educational attainment in Jordan, the labor market is puzzling. Companies in Jordan resort to hiring foreign workers to fill a variety of positions, including managers at all levels as well as nurses.¹⁴ Brain drain is a big concern in Jordan, as employees in the engineering, financial services, IT, and other sectors have left for higher paying jobs in the region (Ghazal “Rising Cost”, 2008). This hiring of foreign workers points to a gap between the jobs demanded and the skills available among Jordanians.

13 U.S. Patent and Trademark Office (USPTO), “Patents by Country, State, and Year – Utility Patents (December 2008),” http://www.uspto.gov/web/offices/ac/ido/oeip/taf/cst_util.htm, accessed May 2, 2009.

14 Nour Al Tarawaneh, Senior Researcher, Jordanian Ministry of Planning and International Cooperation, interview by authors (via telephone), Amman, Jordan, April 5, 2009.

Though the GoJ's proposal to increased technology and English language training is a step in the right direction, the effort was initiated only in 2004, and it will take many years for the impact to be realized and for this lagging indicator to appear in macroeconomic evaluations (MoP, 2004). To ensure short-term results, Jordanian authorities have worked with high schools, vocational schools, and universities to modify curricula to better align with the needs of employers. In addition, Jordan has expanded managerial training through technical and vocational and educational training (TVET). Given the recent real estate boom fueled by investments from the Gulf Coast Countries, the initial focus has been training 5,000 managers in the real estate sector, though TVET programs will soon begin targeting managers in other industries.¹⁵

Interestingly, high skilled jobs are not the only ones Jordan fills with guest workers. The Jordanian apparel industry employs large numbers of low-skilled workers from abroad. Foreign workers' willingness to work for lower salaries and a record of fewer complaints about poor working conditions accounts for much of the story. In response to a scandal where Jordanian companies were accused of abusing foreign workers in the apparel sector, the Jordanian legislature created an Action Plan to Strengthen Labor Compliance in 2007 aimed at protecting workers rights ((EIU, 2009; FIAS, 2008). Finally, recent immigration policies eased visa requirements for Iraqis, Chinese, and Indians, such that they can more easily travel to Jordan for work and tourism.

Compared to Egypt, Jordan's labor costs are more than 52% higher for the same low-skilled positions.¹⁶ However, labor productivity, measured in GDP per employee, is only 17% higher.¹⁷ One explanation is that a minimum wage law in the apparel sector artificially inflates wages. Yet despite

15 Nour Al Tarawaneh, Senior Researcher, Jordanian Ministry of Planning and International Cooperation, interview by authors (via telephone), Amman, Jordan, April 5, 2009.

16 Authors' calculations from International Labour Organization data from www.ilo.org, accessed March 2009.

17 Authors' calculations based on data from Groningen Growth and Development Centre web site <http://www.ggdc.net/databases/ted.htm>, accessed March 2009.

this, Jordan still has trouble hiring and retaining workers. Jordanian low-skilled workers are a less competitive than in neighboring countries.

3.2.2. Transport, Energy, and Telecommunications Infrastructure

Jordan's transportation infrastructure is strong overall and improving through better management and increased routes. The GoJ privatized the national airline in 2007, as part of easing restrictions on private investment and gradually privatizing other transportation, energy, and telecommunication industries. The GoJ is planning to expand the railway and create a new port south of Aqaba near the border with Saudi Arabia to ease competing demands of Jordan's lone port. This will strengthen Jordan's position as a transshipment point for Iraq, mirroring the way the airport has been a hub for travel to Iraq (EIU, 2008). Energy is considered to be adequate, though telecommunications are still less developed than they could be.

3.2.3. Access to Finance

Jordan receives good marks on the GCI for easy access to loans and other financial indicators. However, a number of sources, including the World Bank's Doing Business Survey, cite access to credit as one of the major constraints in the Jordanian economy. An interview with a representative of the Ministry of Planning in Jordan¹⁸ and USAID's department of Development Credit¹⁹ confirmed this as a major issue, as well. In Jordan, 99% of firms are small and medium enterprises, accounting for 40% of the value added production and employ 70% of workers in the country (MoP, 2009). Small and medium enterprises (SMEs) are widely expected to play a major role in Jordan's growth, but can only do so with the ability to take out loans to expand their businesses and to employ more workers.

18 Nour Al Tarawaneh, Senior Researcher, Jordanian Ministry of Planning and International Cooperation, interview by authors (via telephone), Amman, Jordan, April 5, 2009

19 Sashi Salvendran, USAID Development Credit Authority, interview by authors, April 21, 2009.

3.3. DEMAND CONDITIONS

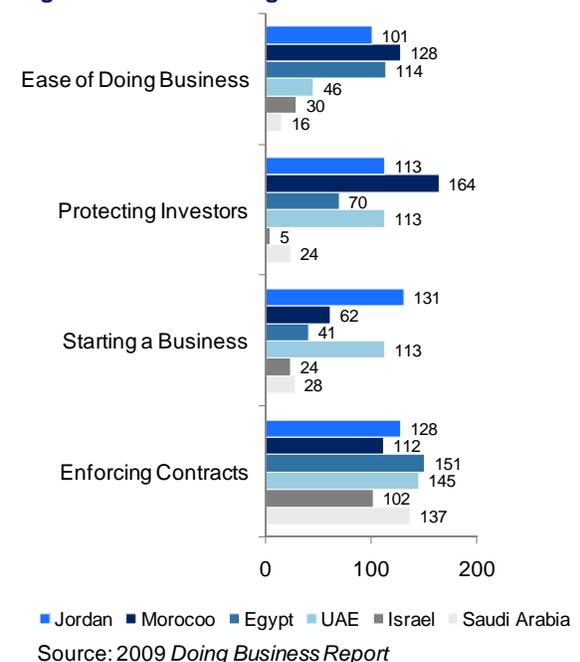
Jordan is a small market with relatively unsophisticated demand. Most of the major clusters, such as tourism and hospitality, apparel, and agriculture, are export-oriented and are not particularly focused on meeting the demands of the local market. Jordan does compare more favorably on the GCI in areas of information communication and technology (ICT) promotion and procurement of advanced technology, which is in alignment with their focus on evolving into a knowledge economy. While this could be a driver of demand and sophistication in the IT sector moving forward, this cluster has yet to develop substantially. Information technology makes up a negligible percentage of Jordan's exports, having fallen significantly since its peak in 2001 (ICCP, 2008).

3.4. CONTEXT FOR FIRM'S STRATEGY AND RIVALRY

Jordan ranks well on CSR indicators on the GCI relative to regional competitors. Since 1997, the Government of Jordan (GoJ) introduced a series of policies to increase the country's economic competitiveness. Examples include the 1997 Executive Privatization Unit, which assisted in the completion of 64 privatization transactions since its inception, and the launch of the 2001 Aqaba Special Economic Zone (ASEZA), which is a model for streamlining investment procedures. The ASEZA successfully attracted over 1,500 new enterprises and a total investment of US\$ 1.5B in registered capital between 2001 and 2005, with an estimated US\$ 11B additional investment forecasted for 2006-2014 (JNCT, 2007).

Despite this progress, there is still significant room for improvement, as evident in the World Bank's Doing Business Report (Figure 2). Specific weaknesses include protecting investors

Figure 2 Ease of Doing Business Index 2009

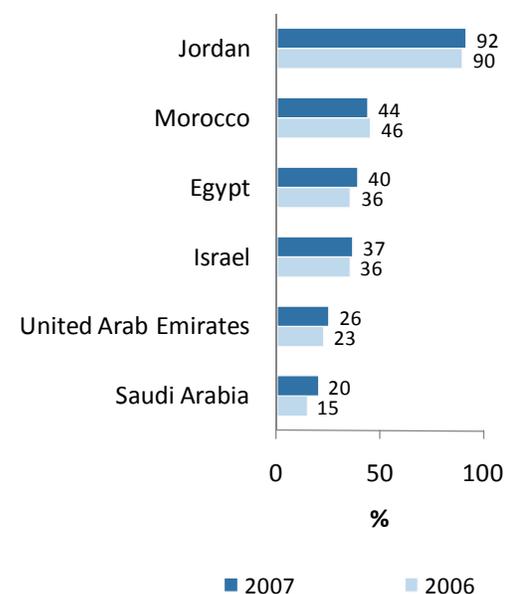


(Jordan ranks 113th out of 181 countries), starting a business (131th), and enforcing contracts (128th), which collectively increase the risks, delays, and transaction costs of doing business in Jordan. The “one-stop-shop” initiated under the Jordan Investment Board (JIB) in 2004 aims to streamline procedures for licensing and registration of new investment projects by having nine of the 16 relevant government agencies co-located. However, the CEO of the JIB acknowledges room for improving the efficiency of the operation, the main obstacles being the lack of legal authority of ministry officials to make decisions regarding projects, the lack of representation of certain ministries, and the delay caused by late responses from institutions or ministries to requests.²⁰

The Jordanian government, aware of the challenges to doing business, is scheduled to launch the new National Investment Strategy (NIS) later in 2009 to simplify investment procedures (EIU 2009). Drawn up in consultation with key business leaders, the NIS concentrates not only on easing bureaucratic restrictions (for example by simplifying rules for business start-ups and by easing hiring and firing regulations), but also on reforming the tax system. However, the implementation of the NIS may be delayed due to the more urgent challenges presented by the global financial crisis.

Jordan has made great strides following its 2000 accession to the WTO in liberalizing its trade regime. In addition to membership with the Pan-Arab Free Trade Area and the Free Trade Area with Egypt, Morocco, and Tunisia, Jordan has bilateral trade agreements with the United States, Singapore, and the European Community European Free Trade Association. Although tariff rates for imports are

Figure 3 FDI stock as percentage of GDP



Source: World Investment Report 2008

²⁰ Jordan Business Magazine, “National Strategy”, http://www.jordan-business.net/magazine/index.php?option=com_content&task=view&id=217&Itemid=40, accessed May 2009.

still high,²¹ they are likely to be progressively lowered with the implementation of the various free trade agreements. Also, under the Qualifying Industrial Zone (QIZ) initiative, exports from designated industrial parks in Jordan have benefitted from duty-free and quota-free access to the United States²² (WTO, 2008).

From 2000 until 2006, Jordan has attracted significant amounts of FDI (Ghazal “Jordan Ranked,” 2008). Inward FDI flows as a percentage of gross fixed capital formation was 42.7% in 2007, and as illustrated in Figure 3, FDI stocks as a percentage of GDP amounted to 91.9%, much higher than regional comparators (UNCTAD, 2008). High FDI flows are partly attributable to the political stability of Jordan, its government’s commitment to economic reform, and its location in the neighborhood of Gulf Coast Countries (GCCs).²³ Until the recent decline in oil prices, Jordan had been flush with high liquidity due to its endowment of oil and natural gas reserves. Eighty-five percent of these foreign direct investments bankrolled industrial projects, which includes an unreported but large component funding real estate, 10% to hotels and agriculture, and the rest to hospitals and exhibitions and conferences. Since FDI plays such a significant role in the economy, the new NIS can give the Jordanian Government more guidelines in managing investments, such as those from Saudi Arabia and Qatar, and Abu Dhabi National Energy Company’s investment in the oil shale sector.

One major concern relating to FDI inflows is the likelihood that the majority of capital might be going to unproductive real estate investments and threatening upward pressure on inflation and the cost-of-living (JNCT, 2007). Furthermore, the majority of 2006 and 2007 FDI increases can be attributable to a few major privatization initiatives that attracted large interest from regional

21 High tariff rates include those for agricultural imports at an applied MFN average rate of 16.7% in 2008.

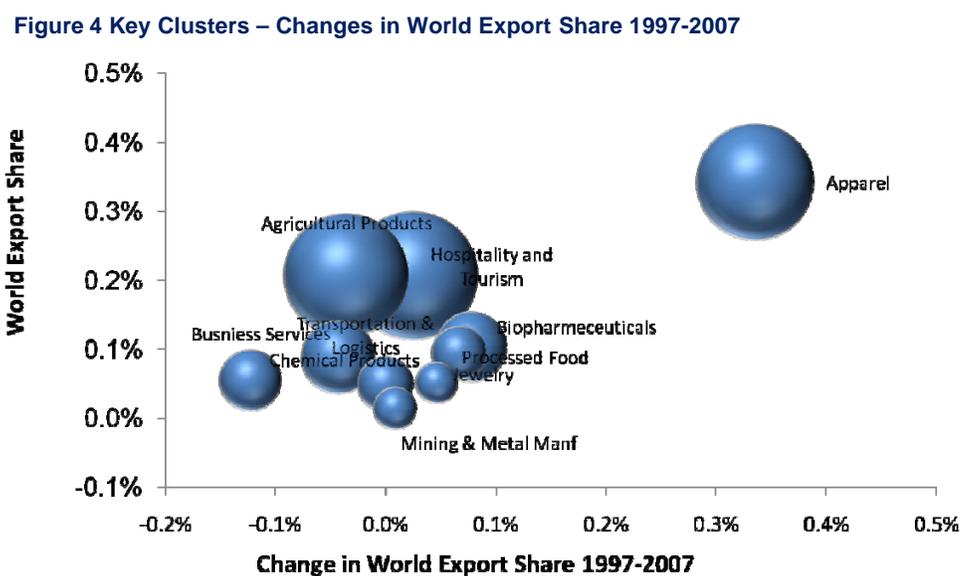
22 These are subject to specified shares of inputs originating in certain countries in the region (Israel, Jordan and Palestine) and from the United States.

23 Gulf Coast Countries include: Saudi Arabia, Kuwait, Bahrain, Qatar, the United Arab Emirates, and Oman.

investors. Relatively little FDI financed new business initiatives that would support the competitiveness of the Jordanian economy.²⁴

3.5. RELATED AND SUPPORTING INDUSTRIES

Jordan ranks well on most RSI indicators and has made progress in cluster development. The Jordan National Competitiveness Team (JNCT) was set up by the Ministry of Planning and International Cooperation in 1997. Funded by USAID from 1998 to 2007, the JNCT was tasked with assessing, evaluating, and improving the competitiveness of various industries and economic clusters in Jordan.²⁵ The Jordan National Competitiveness Observatory (JNCO) was established in 2007 to sustain the JNCT's efforts and to systematically assess and measure the competitiveness of the Jordanian economy.²⁶ In addition, the Jordan Enterprise Development Corporation (JEDCO) was established in 2003 and responsible for export promotion and financial and technical support to upgrade Jordan's industries.



Source: ICCP

24 AME Info, "Jordan steps up efforts to attract foreign direct investment", <http://www.ameinfo.com/147262.html>, accessed May 2009.

25 Jordan National Competitiveness Team, "Origin of JNCT" <http://www.competitiveness.gov.jo/origin.php>, accessed May 2009.

26 Jordan National Competitiveness Observatory, "What is JNCO" <http://www.jnco.gov.jo/static/about1.shtm>, accessed May 2009.

As can be seen from above Figure 4, the largest export clusters are hospitality and tourism, agricultural products, and apparel, followed by transportation and logistics and biopharmaceuticals. Of these, only apparel and biopharmaceuticals have shown any meaningful increase in world market share over the last ten years. Apparel has grown at 58% CAGR and biopharmaceuticals at 33%. However, in the last few years, the apparel sector has shown no growth, while the biopharmaceuticals industry has been expanding rapidly.

Various challenges to cluster development exist. In particular, an unsatisfactory level of support services across many of the clusters seems to have inhibited their development. For example, the apparel sector has been constrained by a lack of managerial, exporting, and marketing skills (USAID 2007), while in the tourism sector, a shortage of skilled personnel in communications, management, marketing and sales, and customer care has been identified as a problem. Moreover, a lack of investments to upgrade capital in the agriculture and apparel clusters has kept productivity low. Figure 5 (next page) summarizes the progress made and main challenges faced by key clusters in Jordan.

3.6. CONCLUSION

After reviewing the data, several possible explanations exist to the question, why has Jordan not grown more quickly than it has, considering its competitive position? The first possibility is that despite the high level of competitiveness Jordan exhibits, the Global Competitiveness Indicators are unable to account for a few critical factors that present binding constraints to accelerated economic growth, including a skills gap, lack of financing for SMEs, and FDI in the form of hot money that is being funneled primarily into unproductive real estate projects. A second explanation is that the correlation between competitiveness and income is not perfect, and it may be unreasonable for us to expect this to be so. Finally, there might be a lag between improved competitiveness measures stemming from new policy initiatives and increased income.

Figure 5 Key Clusters – Progress and Main Challenges

Key Clusters	Progress	Main Challenges
Tourism / Medical Tourism	<ul style="list-style-type: none"> • Brought regulations in line with international standards • Two internationally accredited hospitals • Preliminary plans to establish medical and nursing institutes in Irbid economic zone 	<ul style="list-style-type: none"> • Skills shortage in communication, customer care, supervisory management skills, marketing and sales, operations • Shortage of nurses • Poor coordination across cluster
Agriculture	<ul style="list-style-type: none"> • Constitutes 13% of total export value in 2007 • Boom in revenues from fertilizers and steady growth in agriculture, expanding downstream phosphate and fertilizer processing • Specialized program to promote horticultural products, aiming for exporters to export at international standards 	<ul style="list-style-type: none"> • Low productivity due to low investments and use of traditional farming techniques • Little quality control to face global competition • Employs relatively few workers compared to volume of exports • Water for agriculture is used inefficiently and water shortages loom
Apparel	<ul style="list-style-type: none"> • QIZ, FTA and EU agreements offer duty free entry • Dismantling of Multi-Fiber Agreement (2005) had limited negative impact • Largest export growth sector in Jordan from 1997-2007, though declined in 2008 • Currently suppliers to some of the largest retailers in the US, e.g. Wal-Mart, JC Penny and Jones Apparel 	<ul style="list-style-type: none"> • Leading exporting countries have been implementing upgrading programmes – some factories considering development away from Jordan into Egypt and SE Asia • Alleged abuses of migrant workers and increased compliance costs • Suboptimal supply chain management and inefficiencies • Lack of support services to promote export logistics and lack of exporting and marketing skills
Transportation and Logistics	<ul style="list-style-type: none"> • Transportation sector among the fastest growing economic sectors (at around 7% in 2008) • Air and logistics hub for movement of people and goods into and out of Iraq • Plans to expand ports through public-private partnerships • Plans for Mafraq zone to serve as transport and logistics hub • Railway between Zarqa and Amman to be constructed 	<ul style="list-style-type: none"> • Neighbours have made significant infrastructure investments (e.g. Dubai, integration of airport and sea port) • Services such as road transport, rail and air transport auxiliary services and maritime transport still subject to restrictions on foreign ownership • Limited rail system • Inadequate port space competing for various markets
Biopharmaceuticals	<ul style="list-style-type: none"> • Internationally certified cGMP compliant manufacturing facilities • Nearly 75% of production for exports, but 80% sold in Middle East region • Collaboration between pharmaceutical and biotechnology companies • Recent acquisitions by Jordanian companies (e.g. Hikma's acquisition of German company and majority stake in Saudi Arabia Aljazeera Pharmaceuticals Industries) • Net profit margins above international companies in generic manufacturing, but have benefitted from tax breaks for exported drugs • One of first Arab countries to adopt TRIPS 	<ul style="list-style-type: none"> • Limited supporting services e.g. clinical research organizations (though MONOJO established in 2005) • Shortage of research and technical professionals • Migration of skilled workers • University-industry collaboration rarely results in marketable products • 90% of total revenues from branded generics, face rising threat from other lower cost producers

Sources: JNCT (2007), USAID (2007), Amwal Invest (2009), Jordan Ministry of Labor (2007), FIAS (2008), ICCP (2007), EIU (2008).

3.7. STRATEGIC ISSUES AND RECOMMENDATIONS

Macro and National Recommendations for Jordan		
Issue	Recommendations: Short Term (ST), Medium Term (MT), Long Term (LT)	Primary Actors
<p>High Priority</p> <p>Skills gap between available jobs and qualifications of employees in key areas such as management, nursing, sales, and marketing</p>	<ul style="list-style-type: none"> • Offer scholarships for careers in key fields related to cluster strengths (ST) • Privately funded TVET (technical and vocational education and training) toward executive management training across all industries (ST) • Promote Jordan's role as technological and educational center for region (LT) 	<ul style="list-style-type: none"> • Universities • Private companies • Government of Jordan Ministries of Planning and Education
<p>Low access to finance for SMEs</p>	<ul style="list-style-type: none"> • Improve regulations governing granting of loans (MT – LT) • Provide loan guarantees for qualifying SMEs (MT – LT) 	<ul style="list-style-type: none"> • National Government • USAID Development Credit Authority
<p>Hot money flows towards real estate, while there is a lack of investments in upgrading clusters</p>	<ul style="list-style-type: none"> • Jordan Investment Board to launch active campaign of promoting alternative investment opportunities in Jordan, in coordination with recommendations from the JNCO (ST) • Remove restrictions on foreign ownership in services such as road transport, rail, and air transport auxiliary services, and maritime transport to enable FDI to flow into these essential sectors (MT – LT) 	<ul style="list-style-type: none"> • Government – Jordan Investment Board and the Jordan National Competitiveness Observatory • Government
<p>Medium Priority</p> <p>Non-Transparent Policymaking</p>	<ul style="list-style-type: none"> • Increase transparency (ST) 	<p>Government</p>
<p>Regulatory environment not conducive to doing business</p>	<ul style="list-style-type: none"> • Maintain momentum for support and implementation of new National Investment Strategy (ST) • Grant legal authority to ministry officials at “one-stop-shop” to make decisions regarding licensing and registration of investment projects (ST) • Mandate representation from all 16 related ministries in the “one-stop-shop” (ST) 	<ul style="list-style-type: none"> • Government – Jordan Investment Board • Business community

4. JORDAN TOURISM CLUSTER ANALYSIS

4.1. GLOBAL TOURISM INDUSTRY

The global tourism industry has shown robust growth in recent years, with international tourist arrivals increasing from 536M to 924M between 1995 and 2008. At the same time, tourists have sought out an increasingly diverse²⁷ number of destinations over the last 50 years. The Middle East has been one of the main beneficiaries of this diversified growth. In 2006, tourist arrivals into the region grew by 15%, compared to 6.9% for the world (World Tourism Organization, 2009). The tourism industry's growth is inhibited by a range of threats including, virus outbreaks such as SARS, international terrorism, and more recently the global recession. These threats are much more pronounced in the Middle East, where political instability and terrorism has often resulted in tourists being targets.²⁸

4.2. TOURISM IN JORDAN

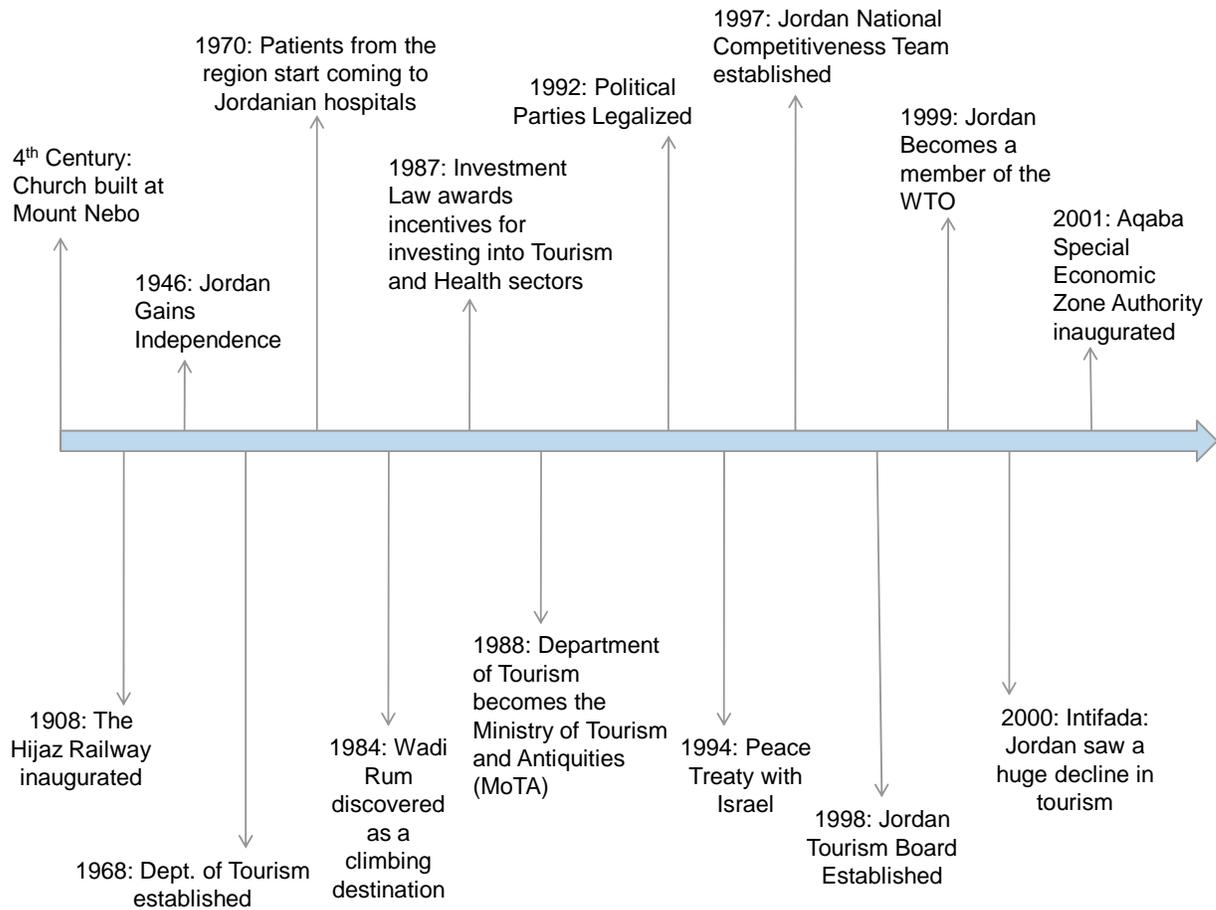
The history of tourism in Jordan extends back to the 4th Century when Christian pilgrims started arriving to church built on Mount Nebo. Figure 6 is a timeline of developments in the tourism sector. The industry makes a substantial contribution to the Jordanian economy. For 2008, it accounted for 10.5% of the GDP, with a CAGR of 15.4% during the period 2003-07 (ABC, 2009). Employment in the tourism cluster, including indirect employment, was estimated at around 130,000 (11% of the work force). The tourism cluster itself employs 34,405 people, of which 77.5% were in the hotels and restaurant industry. In 2008, the employment just around Amman accounted for 71% of the total national employment. Women just form 10% of the overall tourism employment, a proportion that has not changed much over the years. Within the hotel industry, five-star hotels

²⁷ The top 15 destinations accounted for 98% of all tourist arrivals in 1950; the same for 2007 was 57%.

²⁸ Al Jazeera. "Chronology of attacks on tourists in Egypt"
<http://english.aljazeera.net/news/middleeast/2008/09/200892213927831637.html>, accessed May 2009.

employed 7,358 workers amounting to 20% of the overall direct employment in the tourism industry.²⁹

Figure 6 Timeline for Jordan Tourism



In comparison with regional peers however, Jordan's tourism industry shows very low growth, both in terms of tourist arrivals as well as their expenditure. This is illustrated in Figures 7 and 8 below.

²⁹Ministry of Tourism and Antiquity Statistics. <http://www.locateme.jo/stat2008/1/statE.htm>, accessed March 2009.

Figure 7: Tourist Arrivals (M)

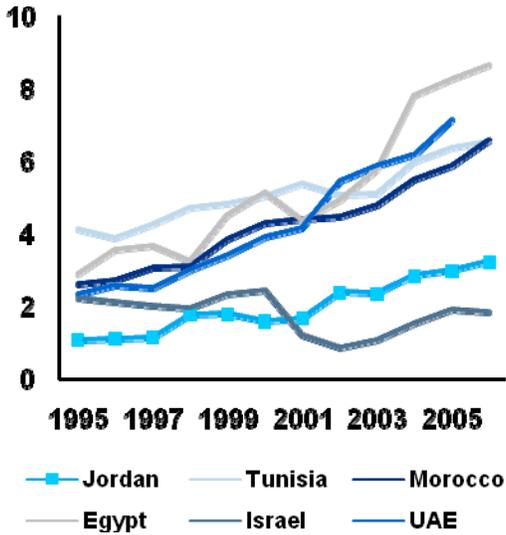
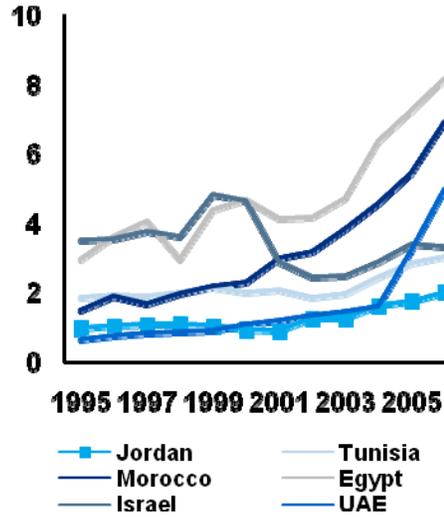


Figure 8: Tourist Expenditure (\$B)



Source: World Tourism Organization 2009

4.3. NATIONAL TOURISM STRATEGY: VISION 2004-2010

Given the importance of the tourism sector to the economy, the GoJ, through the Ministry of Tourism and Antiquities (MoTA), has focused considerable attention in recent years on developing a coherent strategy. Previously, this strategy had been driven by ad hoc foreign aid and private investments.

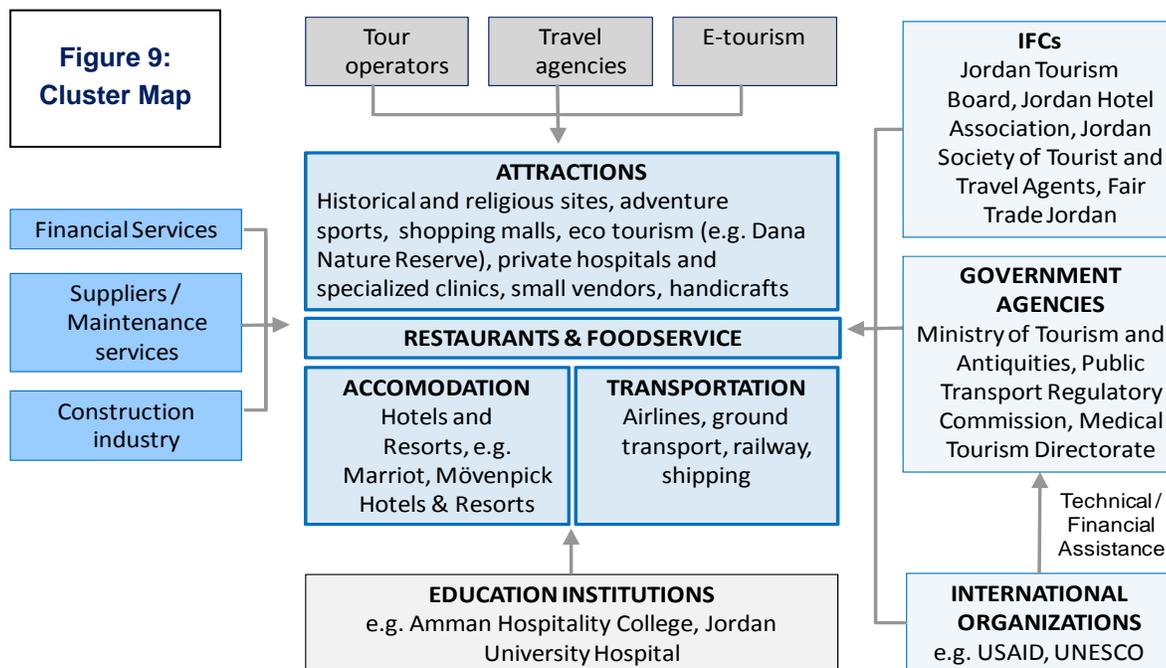
The GoJ focuses on medium to high-end customers in order to maximize the total daily revenue per tourist. Presently, tourism demand is concentrated in the archaeological and medical tourism segments. The MoTA has identified several potential niche tourism markets such as eco-tourism, adventure tourism, health tourism, leisure and wellness tourism, religious tourism, and volunteer tourism. Targeting the low-end mass market is unsustainable, because Jordanian tourist sites do not

have the infrastructure to support large volumes, and because low-end tourists will not generate high revenues.³⁰

In 2004, the MoTA developed a four-pronged strategy to develop the tourism cluster: 1) strengthen tourism marketing (generating demand), 2) support product development (related and supporting industries), 3) develop human resources (factor conditions), and 4) provide an effective institutional and regulatory framework (context for firm strategy and rivalry). To this end, the GoJ has allocated resources for international marketing, product development, and human resources development through 2010.

4.4. CLUSTER ANALYSIS

The cluster map is centered on the four pillars of tourism: accommodation, restaurant and food service, transportation, and attractions. Actors in Jordan's tourism range from small vendors to USAID.

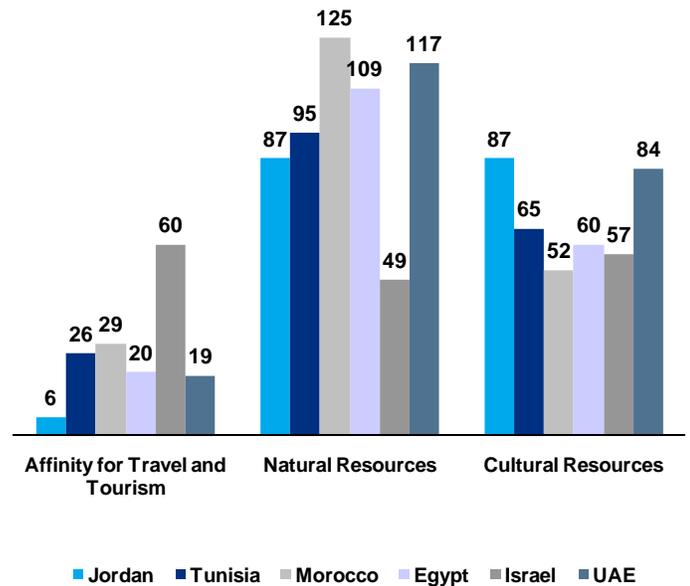


30 Malia Asfour, Director of Jordan Tourism Board North America, interview by authors, Washington DC, March 31, 2009.

4.5. FACTOR INPUTS

Jordan’s tourism industry relies heavily upon its historical and natural resources. The country ranks higher than many of its peers on the quality of its historical as well as its natural heritage, as well as highly on the openness of its people to tourism and to foreigners (Figure 10). However, various threats to the tourism sector also exist. For example, high concentrations of tourists threaten Petra,³¹ and degradation and environmental concerns related to the Gulf of Aqaba³² are also rising.

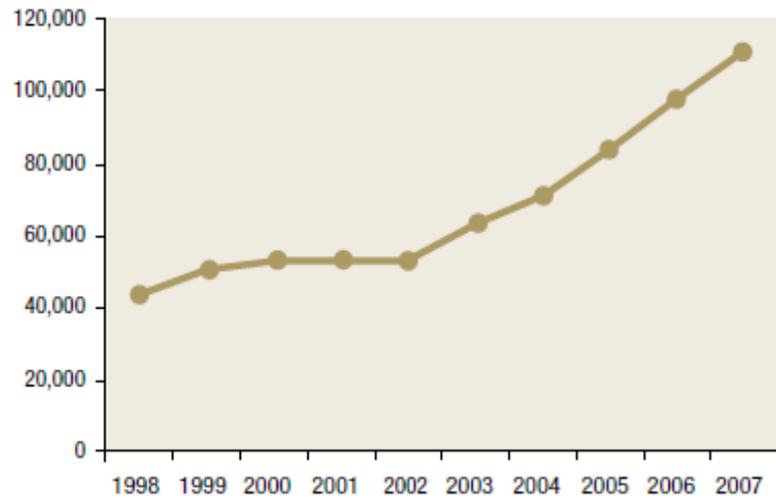
Figure 10 T&T Competitiveness Ranking



Source: The Travel & Tourism Competitiveness Report 2009 by World Economic Forum

Ground transportation infrastructure plays a very important role in Jordan’s tourism cluster. For one thing, it is the preferred means of entry to Jordan for 76% of foreign visitors.³³ Jordan ranks lower on the quality of its ground transport than some of its leading regional neighbors.³⁴ Some of the main problems the public transport sector faces are a very low level of coordination among transporters as well as an alarmingly high increase in accidents in recent

Figure 11 Number of accidents by year



Source: Transportation Sector (2009) Amwal Invest

31 Ministry of Tourism and Antiquity reports Petra attracted 26% of all tourists who visited historical sites.

32 Gulf of Aqaba is being promoted as a beach resort.

33 MoTA Statistics. <http://www.locateme.jo/stat2008/1/statE.htm>, accessed March 2009.

34 Jordan ranks 69th, while Tunisia is 42nd, Israel 36th, and UAE 39th on the TTCR 2009.

years. The Public Transport Regulatory Commission was formed in 2001 specifically to oversee the public transport sector. The commission is currently addressing the problem of low-coordination by consolidating unprofitable routes.

Presently, a total of 11 universities (including three state-owned), 10 colleges and 16 vocational training centers are involved in providing tourism specific education. However, various business surveys³⁵ indicate that a majority of the industry respondents were not satisfied with the quality of graduates produced by these institutes. The skills shortage might be a reason why in 2008 foreigners constituted 18% of the overall tourist workforce, up from 10% in 2004.³⁶ The Government is also cognizant of this fact, and therefore allows new businesses in Aqaba to hire foreigners, up to 70% of the workforce.

4.6. RELATED AND SUPPORTING INDUSTRIES:

Figure 12 below depicts the typical tourism value chain and highlights the degree of interdependence which exists among the different sectors. It suggests the importance of a national strategy for tourism buttressed by a strong public and private collaboration and coordinated development. For instance, popular tourist sites need to be supported by information and good



**Figure 12:
Tourism
Value Chain**

Source:
Ministry of Tourism and Antiquities.
Jordan National Tourism Strategy 2004 – 2010

³⁵ Siyaha Project USAID. Survey carried out by the JNCO 2007.
³⁶ MoTA Statistics. <http://www.locateme.jo/stat2008/1/statE.htm>, accessed May 2009

infrastructure in order to create a strong brand and to generate repeat visitors. Similarly, good hotels and high quality services should support a good marketing campaign. Hence, a national tourism strategy becomes imperative for coordinated development (JNCO, 2007). The GoJ analyzed the strengths and weaknesses of the salient pillars of tourism, including accommodation, transport, food, tourism services, and activities for each of the aforementioned niche markets.

4.6.1. Hotels and Restaurants

Jordan's hotels and restaurants employ the bulk of the labor force working in tourism. In 2008, they contributed 1.7% of GDP (ABC, 2009). Hotel accommodations range from one- to five-star hotels. In 2008, five-star hotels accounted for almost half of the total nights spent.³⁷ The hotel sector has managed to attract a substantial amount of investment in recent years.³⁸ Many international hotel chains are competing in the industry and include some award-winning spas near the Dead Sea.³⁹ In recent years, the tourism industry has gone through changing dynamics, where restaurants are becoming the high growth segment, while hotels are showing stagnancy.⁴⁰ Increasing growth in the restaurant sector indicates a rising appetite of Jordanians for eating out. A wide variety of international restaurant franchises have entered the market, which suggests increased competition in the industry.⁴¹ The stagnancy in the hotel industry might be explained by low occupancy rates or by the fact that Jordanian hotels are highly dependent upon European tourists for its demand.⁴² This is a market segment that is very vulnerable to changes in perceptions about Jordan's security emanating from regional instability. The GoJ has been encouraging hotel construction, with special emphasis in the Aqaba specialized economic zone (JNCO, 2007).

³⁷ MoTA statistics, <http://www.locateme.jo/stat2008/1/statE.htm>, accessed March 2009.

³⁸ Catholic Student Bay (US\$500M), the Ayla Oasis project (US\$750M), the Saraya Aqaba project (UD\$362M), the Sun Days Water Park (US\$60M), the Aqaba Ishkar Kempinski Hotel (US\$60M), the Royal Metropolis-Jordan Gate and Royal Villages of Amman (US\$1B), the Dead Sea Holiday Inn Hotel (US\$21M), and the Crowne Plaza Hotel at the Dead Sea (US\$49M).

³⁹ Include: Movenpick, Marriot, Intercontinental, Radisson, Crown Plaza, Grand Hyatt among others.

⁴⁰ JNCO reports that from 2003 to 2006, there has been a 62% increase in the number of restaurants.

⁴¹ Includes: McDonalds, KFC, Pizza Hut, Subway. <http://meltingpot.fortunecity.com/oregon/639/ammanrestaurants.html>, accessed March 2009.

⁴² Europeans accounted for more than 50% of the nights spent in hotels ranked 3-star and above.

4.6.2. Health Tourism

Health tourism is a core part of the tourism cluster. During the 1970s, Arab patients from around the region started arriving in Jordan for medical treatment. Today, Jordan's health sector has a reputation for subspecialties, such as cardiovascular surgery, transplantation, cancer treatment, and plastic surgery. The private sector accounts for 54% of the hospitals and 46% of the beds available.⁴³ The GoJ has been very responsive towards the needs of the industry. In 1998, the MoH established an office at the Queen Alia International Airport (QAIA) to assist foreigners with immigration, information, and transportation to hospitals.⁴⁴ Currently, the Medical Tourism Directorate follows-up on complaints from foreign patients and works in collaboration with an association representing doctors and private hospitals. The Investment Law of 1987 also provides tax incentives for investing into the health sector.

The health industry, however, is suffering from stagnation. The total number of foreign patients increased only modestly from 95,000 to 108,000, between 1998 and 2005 (WHO, 2009). Given low occupancy rates in private hospitals (around 50%), this stagnation is not due to supply side constraints. Specialized hospitals are running at 70% occupancy (JNCO, 2007). Despite the potential of Jordan's health tourism sector, there are threats on the horizon, including a shortage of qualified nurses due to brain drain. Also, as the Dubai Health Care city establishes itself, it will target the same labor market that has traditionally made up the bulk of Jordan's health tourism industry.

43 WHO web site <http://gis.emro.who.int/HealthSystemObservatory/PDF/Trade%20And%20Health%20Services/Jordan.pdf>, accessed May 2009.

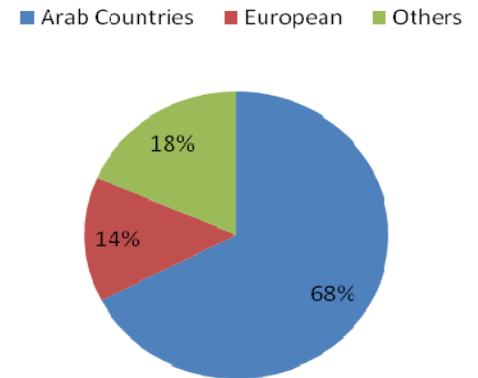
44 WHO web site <http://gis.emro.who.int/HealthSystemObservatory/PDF/Trade%20And%20Health%20Services/Jordan.pdf>, accessed May 2009.

4.7. DEMAND CONDITIONS

The industry shows a cyclical pattern in its demand, with the peak tourist season beginning at the end of July and lasting through the end of August, coinciding with school holidays. Most visitors come from Arab countries (Figure 13). Within the Archaeological Tourism segment, the demand is somewhat concentrated on Petra, which accounted for 26% of the foreign visitors who visited Jordan historical sites in 2008.⁴⁵ This lack of diversification in terms of origin countries, as well as preferred tourist destinations, puts the industry at risk, while at the same time the lack of sophistication in demand discourages the development of more value-added options. To elaborate further, while Arab visitors constitute 68% of foreign tourists, they contribute only 43% of the overall tourism receipts. One reason is that (in 2008) Arab visitors stayed an average of 3.9 days, compared to European visitors who stayed 5.0 days. Furthermore, in terms of nights spent, 30% of the Arab nights were at the cheapest accommodation available.⁴⁶ In contrast, 43% of European nights were spent in five-star hotels, indicating that the Europeans have a much larger and more sophisticated demand than Arab visitors.

In broader terms, Europeans accounted for 54% of all the nights spent in Jordanian hotels rated 3 stars and above. European tourists also account for 91% of the nights stayed in camp sites. With less than 15% of occupancy rates, camp sites are the most underutilized of all Jordanian accommodation options. Although the MoTA's National Tourism Strategy 2004-2010 did target

Figure 13: Breakdown of visitors by region (2008)



Source: MoTA

⁴⁵One of the new wonders of the world, Petra was constructed by the Nabateans around 100 BC. <http://www.calvin.edu/petra/about/nabataeans.php>, accessed March 2009.

⁴⁶ Classified apartment "C" by MoTA.

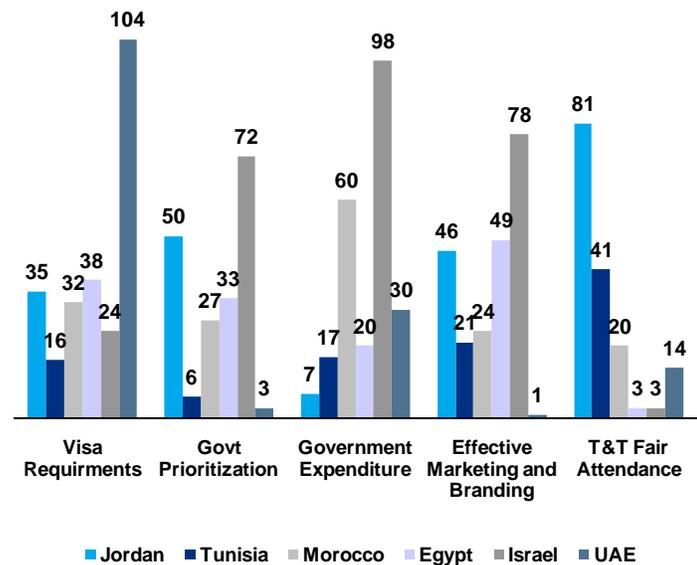
niche markets, such as adventure tourism, cruising, and eco-tourism, occupancy rates of camps show no improvement between 2004 and 2007.⁴⁷

One of the challenges faced by Jordan is its location in a volatile region; it is very vulnerable to losing its customers, if the region experiences political turmoil. This highlights the need for Jordan to develop a sophisticated local demand that could support these high-value added businesses during times of turmoil.

4.8. CONTEXT FOR FIRM STRATEGY AND RIVALRY

On the context for firm strategy and rivalry, Jordan ranks highly compared to regional competitors on key metrics, such as visa requirements, government prioritization, government expenditure, and effective marketing and branding (Figure 14). The GoJ aims to work with the private sector to strengthen the industry's institutional and regulatory framework and thereby improve the competitiveness of the tourism sector. Nonetheless, the cluster can better coordinate activities across the tourism value chain and increase representation at international travel and tourism fairs. Further, the cluster can explore tourism markets for athletic events and conferences, which are both currently untapped.

Figure 14: Selected CSR Indicators



Source: The Travel & Tourism Competitiveness Report 2009 by World Economic Forum

The Jordan tourism cluster is quite competitive with more than 400 hotels, over 350 travel agencies, about 70 tour operators, and an unaccounted number of tour guides. In 1998, the MoTA established the Jordan Tourism Board (JTB) to market the cluster. The JTB is a joint initiative

⁴⁷ The occupancy rate for camps was 14% for 2004 and 2007.

between the public and private sectors with an 80% and 20% ownership, respectively. By running a marketing campaign and providing information to cluster members, the JTB acts as a liaison among the different tourism businesses in the cluster value chain to promote the cluster.

The GoJ has always been very receptive to foreign investments. Jordan ranks 44 on the “Business Impact of FDI,” ahead of Israel, UAE, Morocco, and Egypt, which rank 48, 49, 74, and 83, respectively (WEF, 2009). The JTB, in cooperation with the Jordan Investment Board (JIB), initiated the Tourism Investment Map, a regional map of investment opportunities in SMEs across the country in the tourism and hospitality sectors. The GoJ has upgraded the cluster by enforcing standards for tourism vehicle requirements and other criteria for tour operators. The Touristic Specialized Transports Regulation requires that transport companies use technically reliable and state-of-the-art vehicles for their tourism operations. Also, the Ministry of Transport lists other criteria by which tour operators need to abide.

4.9. INSTITUTES FOR COLLABORATION

Jordan has many IFCs that support the tourism cluster. The most influential IFCs are the Ministry of Tourism and Antiquities and the Jordan Tourism Board.

4.9.1. Ministry of Tourism and Antiquities

The Ministry of Tourism and Antiquities was established in 1988. Aside from helping set up the aforementioned National Tourism Strategy, the MoTA encourages cooperation and coordination across the different agents of the tourism supply chain and creates tourism policies. The MoTA supports tourists with a number of resources and compiled information. For example, MoTA has designed on-line maps that are categorized by type of destination and accompanied with a photo gallery and has compiled car rental, airline, and embassy information. These resources help tourists

efficiently access tour guides and locate historical and holy sites, among others. Finally, the MoTA hosts, Halla, a customer service phone line.

The MoTA also provides information and statistics on tourism receipts and number of visitors by nationality and places visited. It launched e-licensing initiatives, employee training employees, and quality control and monitoring activities. The MoTA has also published studies regarding investments and worked with the JTB to promote tourist sites and parks development and service provider information.⁴⁸

4.9.2. Jordan Tourism Board

Set up in 1998 by MoTA, the Jordan Tourism Board (JTB) is a cooperative institution to run international marketing abroad and to represent all associations of hotels, guides, travel agencies, and air-lines. Since 1998, the JTB has established marketing offices in major tourist markets in the United States, Europe, and the Arab world. Furthermore, it participates in tourism exhibitions and fairs and supports members (particularly travel agents and hotel managers) to enter international markets. The JTB website is a one-stop-shop for tourists and offers service in 10 languages and weather information, sample itineraries, accommodation, and restaurants.⁴⁹ Through its varied activities, the JTB has created an effective pull strategy for consumers through its website and push strategy by engaging with and providing relevant information to travel agents and tourism consortiums around the world. It also works with travel consortiums, such as AAA, American Express, and Virtuoso to become a preferred destination.⁵⁰

48 Ministry of Tourism and Antiquities, <http://www.mota.gov.jo/Home/index.htm>, accessed April 2009.

49 Official Website of Jordan Tourism Board, <http://www.visitjordan.com/>, accessed April 2009.

50 Malia Asfour, Director of Jordan Tourism Board North America, interview by authors, Washington, DC, March 31, 2009.

4.9.3. Risks and Recommendations

Tourism Cluster Recommendations		
Issue	Recommendations: Short Term (ST), Medium Term (MT), and Long Term (LT)	Primary Actors
<p>High Priority</p> <p>Security fears of tourist</p>	<ul style="list-style-type: none"> • Provide extra security for hotels and tourist destinations (ST) • Promote the image of a safe Jordan (ST) 	<ul style="list-style-type: none"> • JTB • Police
<p>Rising tension between local communities favouring cultural preservation versus tour companies</p>	<ul style="list-style-type: none"> • Increasing role in managing conflict and improving dialogue (ST) 	<ul style="list-style-type: none"> • Government
<p>Low quality of specialized education</p>	<ul style="list-style-type: none"> • Creation of a body that creates new syllabus with input from the private sector (ST) 	<ul style="list-style-type: none"> • Universities • Tourism businesses • Government • Donor agencies
<p>Medium Priority</p> <p>Brain drain of nurses</p>	<ul style="list-style-type: none"> • Ensure higher compensation and other incentives (ST) 	<ul style="list-style-type: none"> • MoH • Private sector hospitals
<p>Weak attendance of Jordanian companies at travel industry fairs</p>	<ul style="list-style-type: none"> • Increase marketing budgets to improve attendance at travel and tourism industry fair (ST) • Collaborate with partner countries to improve attendance (ST) 	<ul style="list-style-type: none"> • MoTA • JTB
<p>Low occupancy rates in hospitals</p>	<ul style="list-style-type: none"> • Aim at higher specialization by giving incentives to specialists for relocation (ST) • Offer specialized education in Medical Universities (LT) 	<ul style="list-style-type: none"> • MoH • Private sector hospitals • Universities
<p>Low occupancy rates in camp sites</p>	<ul style="list-style-type: none"> • Launch a campaign aimed at the adventure holiday market in Europe and the US (ST) • Offer adventure sport courses for Jordanian and Arab tourist to generate local demand for companies dealing in adventure tourism (ST) 	<ul style="list-style-type: none"> • JTB • Package tour operators • Adventure businesses

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