

PART III:

**UPDATE OF COMPETITIVE POSITION
OF FIVE SECTORS ANALYZED
IN 2007 REPORT**

1. Introduction

In 2007, JNCT issued the First Jordan Competitiveness Report. The purpose of the report was to provide a comprehensive picture of the state of competitiveness of Jordan's economy. The study reviewed the macroeconomic and microeconomic environment in order to analyze the competitiveness of five sectors: pharmaceuticals, information technology, tourism, medical tourism, and higher education.²³⁴

The update focuses on the following areas:

- **Current state of the sector:** describing how the sector is influenced by the global economic and financial crisis as well as providing some other recent general data and facts on the sector.
- **SWOT analysis:** strengths, weaknesses, opportunities, and threats are analyzed.
- **Recent key initiatives** launched between 2007-2009 are analyzed to show more focused context for future developments in the sectors;

The update was prepared based on discussions with selected representatives of the sectors' stakeholders, as well as available data.

The Key Conclusions that can be Derived from the Update are the Following:

1. In general, despite the global financial crisis all 5 sectors are performing well. During difficult times, some of them like medical tourism and tourism even managed to increase their revenue. Due to the global trends some of the sectors, especially: ICT, pharmaceuticals, and medical tourism have a great potential to further develop and grow.
2. It is important to mention that many positive changes took place in the sectors during analyzed period that led to strengthening their competitive position in comparison to 2007.
3. Despite continuous efforts to develop, they are not immune to the global financial crisis. But paradoxically, for some of them recent problems may give ground to future expansion (ICT, medical tourism). Some of them need to adjust to changing patterns and find less traditional way to approach their business (tourism).
4. There is one common element that is repeated by representatives of different sectors in the context of strengthening competitive position of the industry: adjust higher education curricula to market needs of industries in Jordan and improve soft skills of new graduates.

2. Pharmaceuticals

2.1 Current State of the Sector

MENA market size is approximately USD 10 billion, with 300 million people living in the region. There are industry estimates that the market may double up to USD 20 billion within the next few years. As the government controls the pharmaceutical market, in many cases it is strongly influenced by the current political situation.²³⁵ New estimates show the market in Jordan should reach around USD 540 million by 2012, up from an estimated USD 336 million in 2007. In Jordan, market prices are regulated by the Jordan Food and Drug Administration (JFDA). In terms of the market share local companies cumulate 30% of the industry in value, and 55% in units. It is still a fragmented market with no one player controlling more than 10%. There are certain signs of market consolidation, the example being a 2008 merger between the largest and the oldest company. Most of the production is exported to the Arab world.

The Financial Crisis and Pharmaceuticals in Jordan

The present financial crisis seems to have taken influence on the sector in Jordan, mainly due to affecting credit lines in the banks and drop in exports figures. Conservative lending policies and regulations might as a result affect companies' liquidity and further investments necessary to grow. In 2008, the Amman Stock Exchange market index dropped 25%, which also hit the pharmaceutical sector, lowering shares' price. The difficult market situation has not yet led to mass layoffs. Majority of the players focused their budget cuts on e.g. travel expenses, other miscellaneous costs, as well as freezing wages and bonus decreases, especially those of executive staff. The policy of hiring new staff became stricter and required more explanation and justification concerning employing new personnel. According to the newly released statistical data on the sector for the first quarter of 2009, export figures showed decrease of 22.6% in comparison to the first quarter of 2008.

²³⁴ First Jordan's Competitiveness Report 2007: JNCT 2007

²³⁵ As the example Egypt is attempting to open the market, which may lead to the doubling of medicine prices, and would cause deep political and social repercussions.

The Kingdom's strong population growth, which should exceed 2.8% year-on-year, should drive market expansion, as will GDP growth, which is expected to be around 5% in real terms for the forecast period.²³⁶ Property rights protection, which is an extremely important issue in the case of pharmaceuticals, is improving. In Jordan property right laws are fully enforced.

2.2 SWOT Analysis

Key Strengths

1. Good reputation of Jordanian manufacturers, especially in the region. Majority of exports from Jordan go to the MENA countries thus the market is considered to be well penetrated, with well established contacts and trade links.
2. In the past few decades, Jordan has taken large steps towards improving its management structures for medicines. The establishment of two autonomous structures, the JFDA and the Joint Procurement Department, was a progressive step backed and supported by political leadership. These two agencies, among others, have improved the transparency of medicines governance and decreased the system's vulnerability to corruption.
3. JFDA is doing a good job in terms of regulating the market, monitoring quality, and registering new drugs. Other countries know that if a certain drug passed a registration procedure in Jordan, it must be of high quality. In general collaboration of the government with private sector is highly assessed by the industry representatives.
4. Jordanian market is most open and competitive in the region, which has a positive influence on the quality. There are no restrictions on foreign ownership. Free repatriation of profits is possible.
5. High quality specialists are working in the sector. This sector requires a very qualified workforce in factories. As pharmaceutical production requires complicated formulas and high extent of research and development, the industry in general employs many PhD's.
6. There are strong legal protection and enforcement to secure IPR (Jordan's accession to the WTO, the signing of the TRIPS²³⁷ agreement and the ratification of JUSFTA – Jordan-US Free Trade Agreement).
7. There is zero tax on profits generated by drug exports. Jordan enjoys a WTO exemption that allows it to charge zero income tax on exports earnings until the end of 2015. It can also be extend beyond this date.
8. Recently the chain pharmacy concept has been approved in Jordan, which should lead to further growth of the pharmacy market.
9. Jordan is an open market for importers with no allocation of quota in product categories.

Key Weaknesses

1. There is a general perception of people in Jordan that generics are not equally good as international brands. As a result, generics are treated as second class drugs.
2. There is a general perception that young graduates are less committed, impatient, and less loyal to the employers. They require intensive training after graduating from the university and lack basic soft skills such as communication or writing. Universities do not teach creative thinking, which makes new graduates less competitive in the labor market.
3. Understanding of intellectual property concepts should be strengthened within the public administration. Patent applications are not published until they become granted. During this period efforts may be wasted on patented applications.
4. R&D spending is low compared to other countries. Some multinational companies spend more on R&D than Jordan does altogether. In 2008 IMD World Competitiveness Report Jordan scored 48th (out of 55 analyzed countries) in terms of total expenditure on R&D per capita.
5. With 90% of total revenues still generated by branded generics, Jordanian manufacturers are facing a rising threat from lower cost producers in other markets.
6. Further enforcement of new regulations that cover all medicine promotion activities, and the establishment of a committee that will be responsible for controlling and monitoring medicine promotion.
7. Limited supporting industries supplying raw materials and packaging.²³⁸

²³⁶ Jordan Times July 16, 2008: HIKMA dominates Jordan's pharmaceutical market

²³⁷ TRIPS: Agreement on Trade Related Aspects of Intellectual Property Rights. Jordan was one of the first Arab countries to adopt TRIPS.

²³⁸ reported in 2007 Jordan Competitiveness Report. No changes in pattern observed in 2009.

Key Opportunities

1. Despite the crisis, the prospects for the pharmaceutical sector are promising and give a chance to double market value.
2. Demographic trends in the region, such as increasing life expectancy and literacy rate, are expected to lead to greater awareness of health-related issues and consequently increase the demand for pharmaceutical products. For example, in Jordan, life expectancy has increased from 69 years in 1995 to 71.6 years for males and 74.4 years for females in 2007²³⁹ and literacy rates (15 year-plus) stood at 91.8%.²⁴⁰ An increase in life-style related diseases like diabetes and cardiovascular diseases is also expected to have a positive impact on the industry in the region.
3. There are more Jordanian companies starting to compete on brand recognition and unique product value.²⁴¹

Key Threats

1. Although there is low-cost and well-trained technical personnel in Jordan, expansion of the industry and its growth will require more specialized workforce with practical expertise in the industry.
2. There is no sufficient research and development capacity to bridge the industry's growth into higher value medicines.

2.3 Recent Key Initiatives in the Sector

1. Jordan is benefiting from stronger intellectual property rights through an increase in pharmaceutical research and development investment. There are more than 60 patents in drug delivery systems and others.²⁴² Clinical research activity has been growing at a healthy pace, with more and more Clinical Research Organizations (CROs) established in the last few years. Major international pharmaceutical companies like Organon, Novartis and Aventis, have worked with both local CROs and Jordanian hospitals in clinical trial studies. Further, Jordanian pharmaceutical companies are beginning to invest more on product research and development. For example, some of them expressed interest in investing in research to produce patent worthy drug delivery mechanisms.
2. There is a project launched on 30th May, 2009, that aims at increasing transparency and accountability in medicines supply chains. The UK Department for International Development (DFID), in partnership with the World Health Organization (WHO) and the World Bank, is carrying out the design, consultation and execution of "Medicines Transparency Alliance" (MeTA). MeTA is an international multi-stakeholder initiative to promote increased transparency in the supply of essential medicines, with particular attention to ensuring equitable access to low income populations. DFID is currently providing grant financing to support the introduction of MeTA projects in selected pilot countries around the world. MeTA's focus will be on strengthening developing country capacity to collect, analyze, disseminate and use data on medicine quality, availability, pricing, and use. This will help improve transparency and accountability around the way medicines are selected, regulated, procured, distributed, supplied, and then prescribed to and used by patients.
3. The USAID Jordan Economic Development Program (SABEQ) and the JAPM are cooperating to develop and upgrade the pharmaceutical industry in Jordan, into world-class standards. To export Jordanian pharmaceuticals, mainly branded generics, a prerequisite of their registration, demands a bioequivalence study which proves generics' comparability with originators' products. The bioequivalence study is usually conducted at Contract Research Organizations (CRO), that apply Good Clinical Practices (GCP) and Good Laboratory Practices (GLP). The project aims to develop CRO systems to be in line with international GCP and GLP standards. Such standardization will enhance opportunities for Jordanian pharmaceuticals, and meet regional and international demand as well as ensure internationally accreditation and recognition.

²³⁹ Jordan in Figures, Department of Statistics, May 2008, issue 10

²⁴⁰ 2008 IMD World Competitiveness Report

²⁴¹ reported in 2007 Jordan Competitiveness Report. No changes in pattern observed in 2009.

²⁴² JAPM - Jordanian Association of Manufacturers of Pharmaceuticals & Medical Appliances

3. Information and Communication Technology

3.1 Current State of the Sector

According to the First Jordan's Competitiveness Report of 2007, the ICT sector has been witnessing fast changes after being identified as a key catalyst for economic growth. A lot of efforts have been made in the last few years to create a policy and regulatory environment. Several public-private initiatives have been launched in the IT education and connectivity. The result of these actions is emerging, as Jordan is being recognized as a potential regional hub for IT.

Businesses are increasingly spending more on IT as it becomes a vital tool to remain competitive. In Jordan, the total market size in 2007 reached USD 883 million. Domestic revenue reached USD 686 million, whereas exports revenue reached USD 197 million (the growth rate correspondingly of 18.6% and 2.81 % comparing to 2006).²⁴³ The exports destinations concentrate on the MENA countries (ca. 70% of the export value) in 2007, the biggest single importer being Saudi Arabia – 20.35%. 11% of exports of the sector went to the United States.²⁴⁴

The Financial Crisis and ICT Sector in Jordan

The telecommunication industry has been least affected by the crisis as shown in the continuing market growth rate and strong support tendered by government and private organizations, making the industry more stable and less affected by the current financial crisis. The decline in worldwide demand and slumping prices of oil are forcing companies to improve efficiencies. One of the solutions to the downward trend is to invest and apply modern information and communication technologies to better streamline its operations. Thus despite the crisis it may be business opportunity for the sector to expand. Moreover, the Internet space is still at its infancy in the region. Due to the fact that many web-based companies will not be profitable within the next few years of its functioning anyway, now seems to be a good time for start-ups. Those aspects may lead to further growth of employment in the sector.

The following key figures describe the state of the sector at the end of 2008²⁴⁵:

- Internet penetration stood at 26% (comparing to 20% in 2007, and 13.7% in 2006).
- 39% of Jordanian families had PC's.
- 91% of Jordanians were reported of owning a cell phone.
- Over 300 companies were working in the ICT sector in Jordan.
- ICT contribution to GDP stood at 12.2% for 2007.
- There were around 22,000 workers in the ICT sector.²⁴⁶

The above results caused the Kingdom to jump 3 places on the World's Information and Communications Technology Readiness Index, ranking 44th out of 134 countries, according to the Global Information Technology Report for 2008/09.

The index measures the level and sophistication of the knowledge economy and the studied countries' capacity to generate technology or absorb and adapt it to meet national needs, with the aim of improving their competitiveness. The best Arab country was UAE that ranked 27th. The countries ahead of Jordan are there because of the rapid liberalization of the telecom sectors where new services, such as 3G, have already been introduced. In terms of the availability of local talents, Jordan remains way ahead of the countries in the region.²⁴⁷

3.2 SWOT Analysis

Key Strengths

1. The sector recognizes the opportunity for increased software and hardware utilization within the education sector; which is probably the most attractive local market.
2. There are a growing number of ICT companies operating in Jordan.
3. The government has one common ICT strategy, which formulates clear and measurable goals within certain period of time.²⁴⁸

²⁴³ IT Industry Statistics 2007, INTAJ

²⁴⁴ Ibid.

²⁴⁵ Telecom Market Statistics, www.trc.gov.jo, Telecommunications Regulatory Commission

²⁴⁶ Jordan Times May 16, 2009

²⁴⁷ The Global Information Technology Report for 2008-2009

²⁴⁸ There are ongoing efforts to implement the National ICT strategy 2007. The goals of the strategy are the following: increase number of people who use internet from 26% (2008 figure) to 50% by 2011; increase employment from 22,000 (2008 figure) to 35,000 by 2011; boost current revenue from USD 2,2 billion (2008 figure) to USD 3 billion by the end of 2011. Before strategy's implementation, the number of Internet users stood at 11%,

4. There is a growing interest for business processes outsourcing (BPO) in Jordan, especially call-centers. IT enabled services require more people. In the 2009 AT Kearney Global Services Location Index, Jordan ranked 9th out of 50 countries that were analyzed.²⁴⁹
5. There are continuous efforts to integrate stakeholders. The MoICT holds regular meetings with the industry. There is also INTAJ, a very strong and influential association of ICT stakeholders.
6. IT is a deregulated sector. Soon, the amendment to telecom law will be introduced, which should give a stimulus to further develop the audio-visual sector.
7. There is highly competitive mobile phones market in Jordan.
8. According to the industry the government policy and interventions are considered favorable, and getting better.

Key Weaknesses

1. IT usage is still low. SMEs especially small family businesses do not use IT to strengthen their competitiveness.
2. High telecom costs and PC prices, compared to the average income level, lead to low penetration of PC's and Internet usage in the country.
3. Uncertainty over the expected removal of sales tax on computers has contributed to a significant drop in sales in the local market since the beginning of this year. Buyers are reluctant to buy, pending a possible reduction in price. Sales in the computer market have dropped by 50% during the first half of this year compared to 2008. MoICT announced the government was planning to erase sales tax in 2009 as part of their ICT strategy launched in 2007.
4. Low public spending on research and development slows down potential expansion of the ICT sector. Jordan spends 0.34 – 0.4% of its GDP on research and development, compared to the 1% average for developing countries, and 2-4% spent by highly industrialized countries. In the developed world, 2/3rd of the funding comes from the private sector, which invests in R&D for the development of their products and services.²⁵⁰
5. There are also poor linkages between ICT sector and academia. Fortunately the situation is gradually improving as a positive example: there is a R&D fund available, as well as a specialized fund for IT.
6. There is still limited ICT cluster development, which as a result limits core business specializations and innovation capacity. The local market is considerably small and fragmented.

Key Opportunities

1. The key issue for any publisher in the MENA region is the Arabization. This provides an interesting investment opportunity to attract a developer into Jordan. The opportunity could attract one of three types: Third Party, Independent (mostly internet exposure) or In-house organization.
2. The application of ICT services throughout Jordan continues to expand. Much of the existing training requires residents to go abroad such as for SAP or Oracle skills. Therefore, an opportunity exists for a recruitment and training organization to support the market and its future development.
3. As more and more enterprises are enabling their workforce to become mobile, interactive and collaborative, there is a huge opportunity to build smart processes into the enterprise enabling Jordanian companies to compete not only at a regional level, but at a global level (IBM's Institute for Business Value predicts that there will be one billion mobile Web users by 2011 and a significant shift in the way the majority of people will interact with the Web over the next decade.²⁵¹
4. There is an opportunity to attract more off-shore and outsourcing operations in Jordan (as Jordan ranked 9th out of 50 countries in the last AT Kearney Global Services Location Index of 2009).
5. Last year the Ministry of Interior prepared a draft law on cyber crime that will further strengthen security of using the Internet.
6. Domestic revenue is constantly growing from USD 226 million in 2003 up to USD 686 million in 2007.

but now is predicted to reach 50% by 2011.

²⁴⁹ The 2009 AT Kearney Global Services Location Index

²⁵⁰ JO, issue 69, May 2009 – Vice President of the Royal Scientific Society Mr. Khaled Kahhaleh

²⁵¹ Jordan Times, 30 March 2009

The total size of the market grew from USD 296 million up to USD 883 million in 2007. According to the Jordan's Competitiveness Report 2007 domestic IT expenditure is still low compared to regional and international benchmarks. Thus it shows the market potential and possibility for further expansion.²⁵²

7. There are more examples of cross-regional cooperation between Jordanian and regional companies especially in case of big size companies.

Key Threats

1. Domestic consumers are not global trend setters. This could adversely affect innovation also taking into consideration the fact that the R&D expenditure is low in Jordan.
2. There is still limited use of the IT systems in companies especially in the SMEs.
3. Education system requires review. There is general industry perception that new graduates lack soft skills (eg. writing skills).
4. In Jordan's Competitiveness Report 2007 one of the constraints to growth of the sector was lack of access to venture capital and other non-traditional forms of financing: risk and growth capital. Due to the financial crisis and tighter credit policy this still remains an issue that would slow down the development and expansion of the sector.
5. Although privatized, the fixed telecommunication market still faces monopoly – this time by Jordan Telecom.

3.3 Recent Key Initiatives in the Sector

1. A Jordanian IT company and UAE company are currently under way to establish a free IT zone in Amman: to house software companies, content and business development firms, industries exempt from sales tax, income tax, as well as from customs duties.²⁵³
2. MoICT is keen on upgrading the curricula in IT, in the country's universities and providing students majoring in ICT-related subjects with training. It is to be done through cooperation with the willing universities in Jordan.²⁵⁴
3. UNIFEM initiated the idea of a National Technology Parade event, working side by side with the Jordanian University to launch it. The parade was developed in an effort to encourage women to participate in highly demanded ICT disciplines and to grasp any innovative ideas students would offer in order to provide any technological solutions to challenges facing businesses, governments, civil society, and local communities. In May 2008, the Jordan University hosted the First Annual Technology Parade.²⁵⁵
4. There is an ongoing laptop for each student initiative. Over 11,000 laptops were sold at affordable prices and a similar initiative will be launched for teachers.
5. The Ministry wants to extend a fibre optic network to 3,300 schools located in remote areas to increase the number of Internet users (at prices that are 20-25% cheaper than prices elsewhere in Jordan). The network will be ready by 2011.
6. Government reduced sales tax imposed on the Internet for households to 8 percent last year, and the Ministry of Finance is to introduce more tax cuts in 2009.
7. There is an internship program established between the MoICT and private businesses which aims at employing new graduates. Of the 300 JD salary, 50% is paid by the government.

²⁵² IT Industry Statistics, INTAJ

²⁵³ Jordan Times, 16 May, 2009

²⁵⁴ MoICT representative.

²⁵⁵ E-pulse, January 2009

4. Tourism

4.1 Current State of the Sector

The number of tourists who arrived in the country reached 7.1 million in 2008, compared to 6.5 million in 2007 (increase of 8.8%). Same-day visits constituted 3.37 million arrivals. Majority of visitors came from Arab countries: 4,792,734 – among them from Saudi Arabia – 1,117,000, Syria 2,019,167 and Europe 994,338. Jordanians leaving and working abroad constituted 825,465 visitors.²⁵⁶

The statistics show an increase in number the of nights occupied in hotels from 5,148,488 in 2007, to 5,762,432 in 2008. Majority of tourists spent their time in 5-star hotels: total of 2 184 183 in 2008, compared to 1,816,410 in 2007 (increase of 20%). The highest dynamics was reached by 1-star hotels – increase from 189,938 in 2007, up to 252,312 in 2008 (32.8%). As per the location of nights spend: 3,743,466 are in Amman, followed by Aqaba (868,693), Petra (587,280), and the Dead Sea (445,204).²⁵⁷

Tourism in Jordan generated JD 2,088.9 million in 2008, compared to JD 1,638.3 million in 2007, which constitutes an increase of 27.5%.²⁵⁸ There were 38,294 people employed in the tourism sector in Jordan in 2008 (compared to 34,405 in 2007). Majority of them worked in hotels (13,994) and restaurants (15,498). There were 873 tourist guides. Most of employees of the sector are males: 34,370 (90%) and Jordanians: 31,259 (82%).²⁵⁹

In the recent Travel and Tourism Competitiveness Report 2009, published by the World Economic Forum, Jordan ranked 54th out of 133 countries analyzed.²⁶⁰

4.2 SWOT Analysis

Key Strengths

1. Jordan is generally perceived as stable and safe country which positively influences tourists willingness to visit.
2. There is strong and visible diversification of tourist products: eco-tourism, cultural tourism, family, religious tourism. It helps to match different tastes and interests of visitors.
3. Strong partnership between public and private sector institutions in order to improve and further develop the tourism sector.
4. There are many world renown tourist sites in the country such as: Petra, Wadi Rum, Jarash, Dead Sea, biblical sites.
5. Tourism sector is generally open to foreign investment. The only restriction comes for the tour operators: investment requires a 50% involvement of a Jordanian partner.
6. There are many 5-stars internationally recognized hotel brands together with well-developed overall hotel and restaurant infrastructure.
7. Tourist sector is one of government's priorities. It supports efforts to establish special touristic zones, and further develop areas for tourism (e.g. Ajloun and the Dead Sea) investing in upgrading the infrastructure (see also part on recent initiatives).

The Financial Crisis and Tourism in Jordan

It seems that the impact of the global and economic crisis had little adverse influence on Jordan's tourism. Jordan's tourism economy is based more on affluent tourists from Western countries: US and Europe who spend their time in 5-star hotels. Those visitors are not price-sensitive customers, and they may not be the first to cut their travel budgets. Nevertheless according to the industry representatives from the Jordan Hotels Association, it will be difficult to sustain average hotel occupancy in 2009, comparing to 2008, due to the global financial crisis. Aqaba has recently reported a drop in occupancy levels in hotels. Despite the hospitality plan of the sector to increase inbound tourism by 20-25% in 2009, the Jordan Hotel Association (JHA) still expects a drop.

²⁵⁶ Main Tourism Indicators during 2007-2008: Ministry of Tourism and Antiquities 2009

²⁵⁷ No. of Hotel, Apartments & Others, Rooms, Beds & Number of Employees Distributed by Nationality & Classification 2008: Ministry of Tourism and Antiquities 2009

²⁵⁸ Monthly Tourism Receipts Distributed by Countries Groups 2006-2008: Central Bank of Jordan and Tourism Receipts and Expenditures by Month 2007-2008: Central Bank of Jordan

²⁵⁹ Accommodation Establishments Indicators, 2007 – 2008: Ministry of Tourism and Antiquities 2009; Number of Employees in different Tourism Activity by Nationality & Gender 2008: Ministry of Tourism and Antiquities 2009

²⁶⁰ Travel and Tourism Competitiveness Report 2009

Key Weaknesses

1. According to Travel and Tourism Competitiveness Report 2009, out of more than 70 indicators, in 21 of them Jordan scored below average (ranking was done among 133 countries).²⁶¹
2. According to the First Competitiveness Report 2007 there is a lack of top-notch tourist operators in Jordan.²⁶² Lack of such competitors may mean lower quality service.
3. There is a lack of proper planning of visits to tourists places, which in turn lead to overcrowding.
4. Access to some major tourist sites in Jordan is limited to due to the short time of admissions. The example is Jarash, which closes already at 6 PM during the weekends.
5. There is still no research institution on tourism.
6. There is still little use of the IT in the sector.
7. Domestic tourism needs more attention. Little has been done so far to promote and strengthen local patterns. Although, for some time, the tendency to travel and explore the country by Jordanians, seems to be developing. In order to know the opinion of domestic tourists, there was a survey conducted. The results showed that for many, domestic tourism is too expensive, as many facilities are built for foreign tourists and thus service is more expensive. Domestic demand is still small and unsophisticated and focuses mainly on entertainment.
8. According to the medical tourism industry representative, insufficient cooperation between tourism and medical tourism sectors exists. Thus it is difficult to reach synergy between those two sectors.
9. There is limited number of specialized guides in eco-tourism, religious tourism, and adventure tourism comparing to the growing number of tourists interested in those types of activities.

Key Opportunities

1. Past experience has shown that Travel & Tourism always rebounds from cyclical downturns—sometimes even stronger than before, the examples being: 9/11, SARS, or even the Gulf War. Despite the present global crisis, people still want to travel. Once the economic recovery starts, there is likely to be a huge pent-up demand.
2. Based on discussions conducted during 2009 annual Jordan Tourism Mart in the USA, it seems that the Kingdom is already steps ahead of other countries in the region in terms of developing adventure tourism, and has infrastructure and planning to become a leading global destination for adventure and ecotourism. Although adventure travelers come in smaller groups, they are high value consumers concerned about respecting and preserving nature and environment, as well as eager to interact with local community.²⁶³
3. There is a potential in opening and targeting emerging markets: in South America, China, and India. Entry procedures for Indian and Chinese tourists have been eased (Jordan was featured prominently in travel magazines in the US, Canada, and Brazil).²⁶⁴
4. There is ongoing process of upgrading the Queen Alia International Airport (QAIA). By 2011, the airport should increase its capacity from 3,5 million to 9 million passengers (see also 4.3. Recent key initiatives in the sector). It is in line with high demand for aviation infrastructure in the Arab world due to underdeveloped regional transport network and rapidly growing populations. With tourism likely to grow, large number of businessmen, aid workers and military staff going for Iraq, expansion of capacity for the Queen Alia International Airport is by no means desirable move.²⁶⁵
5. There are several well-established universities, colleges, and vocational training facilities that assist in upgrading the workforce.
6. It is expected that religious tourism may increase due to the latest Pope's visit to Jordan in May 2009.

²⁶¹ Ibid.

²⁶² All international operators must have Jordanian partner or partners by law.

²⁶³ Jordan Property, May 2009

²⁶⁴ Ibid.

²⁶⁵ Jordan Business, May 2009

Key Threats

1. No common marketing strategy for tourism sector exists. The Ministry of Tourism points to the Jordan Tourism Board as the prime entity to deal with marketing issues. There are examples of common actions, such as tourism fairs in the US market. In the recent Travel and Tourism Competitiveness Report 2009, Jordan ranked 46th in terms of effectiveness of marketing and branding to attract tourists (out of 133 countries). There is room for improvement.²⁶⁶
2. It is reported that key indicators and goals for the strategy has been already achieved. There are intensive works going on at the moment to update the National Strategy.
3. Lack of data and analysis on customer's demand and needs may lead to wrong investments and decreasing number of tourists dissatisfied with the quality of service received.

4.3 Recent Key Initiatives in the Sector

1. There is a project underway to introduce electronic ticketing system in Jordan. Its purpose is to implement proper planning of visits and eliminate overcrowding. It is to be extended to cover all major sites in Jordan in the future.
2. There is an ongoing effort to upgrade the Royal Jordanian fleet, especially, after it was privatized in 2007. Additionally, there is a plan to add 19 new aircrafts to the RJ's fleet. Ajloun is the second plane in the fleet that allows passengers to use mobile phones onboard. RJ intends to provide this service to all Airbus 320 by the end of 2009.
3. There is an on-going process to upgrade the Queen Alia International Airport (QAIA) scheduled for 2011. It will increase its capacity from 3,5 million passengers to over 9 million. Now it accommodates ca. 4,4 million passengers and it stretches over its capacity.
4. The National Tourism Awareness Campaign has been recently launched among 50 000 high school students in attempt to enhance their perceptions of tourism and job opportunities in the industry, to educate about the benefits of tourism while encouraging positive behavior towards tourists. USAID/ Jordan Tourism Development Project (JTDP) has organized it.
5. In order to strengthen the quality of personnel in the sector, the Ministry of Tourism and Antiquities, together with the Ministry of Education, and the Ministry of Higher Education, revise all curriculum within universities and colleges to improve quality of teaching and adjust it to the demands of the modern tourism market. Special hospitality trainings are also supported by the USAID project. Moreover, in cooperation with Italy, a new hospitality school has recently been established, to make sure new graduates fit to the sectoral needs.
6. A new project was launched at the beginning of 2009 to establish touristic trails within the sites around Salt, Ajlun, Karak. Support for the development of local communities is important part of the project. They are involved in establishing those sites, and a special training is provided to them to develop small tourism infrastructure along the trails (such as shops, handicrafts, food etc.)
7. The Ministry of Tourism and Antiquities has launched the project on cultural heritage, tourism and urban development. The project of USD 70 million is financed by the World Bank and be implemented between January 2007-December 2011. Its aim is to contribute to tourism development in five key historically and culturally important cities: Jerash, Karak, Madaba, Salt, and Ajloun and contribute to their economic development. The second objective is to consolidate the tourism industry in Petra. The activities are to be concentrated in physical and economic revitalization of the historic centers, together with construction and opening of new visitors center in Petra.

²⁶⁶ Travel and Tourism Competitiveness Report 2009.

5. Medical Tourism

5.1 Current State of the Sector

Medical tourism in Jordan concentrates mainly within private hospitals. Out of 100 hospitals currently there are 60 private health institutions accommodating 5,000 beds. The leading nationality in terms of medical tourism are Iraqis, followed by Palestinians, Sudanis, the Gulf, Syrians, and Libyans. Considered one of the main contributors to national economy brings in revenue USD 1 billion annually, it witnessed steady increase of around 10% of foreign patients.²⁶⁷

A study conducted by the Private Hospital Association (PHA) shows that 210,100 patients from 48 countries received treatment in the Kingdom in 2008, compared to 190,000 in 2007.²⁶⁸ The phenomenon is not only limited to patients coming from other countries.

Usually they are accompanied by family or friends. The number of persons who usually accompany patients rose to 300,000 in 2008. Thus the positive impact on economy is multiplied as many of those people use available facilities such as: hotels, restaurants, tourist attractions. As a comparison, on average, a regular tourist leaves ca. USD 200-300 during the stay in Jordan, whereas the amount spent for medical tourist reaches ca. USD 4,000-5 000.

Amman is the city, in which majority of private hospitals is concentrated. 38 of them are situated in the capital. Despite growing number of foreign patients, still 60-65% of admitted to private hospitals are Jordanians. Moreover for every admitted patients, there are at least 3 so called out-patients²⁶⁹ (both Jordanians, and non-Jordanians). Medical tourism experts from the World Bank ranked Jordan number one in the Arab region and 5th in the world as a medical tourism hub. High quality medical service in Jordan is strengthened by two factors: state-of-the-art medical equipment and medical staff who in many cases graduated from renowned international medical schools both in Europe and the US.

5.2 SWOT Analysis

Key Strengths

1. There is high quality of services and modern equipment provided by private hospitals.
2. Professional, well-trained and experienced staff (both doctors and nurses) are one of the key assets of the sector.
3. Growing number of internationally accredited private hospitals in Jordan (4 at the moment) shows not only growing competition in the sector but also expansion of the industry. As a result, most likely it will further strengthen quality of services.
4. Stable political and economical situation in the country is additional argument for the people to use medical facilities in Jordan and not elsewhere in the region.
5. In majority of cases there is an easy access to the country, no special restrictions apply.²⁷⁰
6. Throughout the years of providing high quality medical services, Jordan was able to establish strong and recognizable regional brand with tight linkages to regional markets.
7. Domestic health expenditure is comparable to highly industrialized countries. In IMD World Competitiveness Yearbook 2008, Jordan ranked 10th out of 55 countries in total health expenditure as percentage of the GDP. Health infrastructure (in terms of meeting the needs of society) was ranked 19th out of 55 countries.

The Financial Crisis and Medical Tourism in Jordan

It seems that the global economic crisis benefits medical tourism industry in Jordan. The country offers high quality private treatment with moderate prices, which in many cases are lower than those in the OECD countries. Quality of private healthcare is comparable to that offered in the US, at the prices 20-25% of those in North America. At the moment four private hospitals in Jordan received international accreditation which should further strengthen their international competitive position.

²⁶⁷ Jordan Times, May 16, 2009

²⁶⁸ Ibid

²⁶⁹ Out-patients meaning those that do not require staying overnight, they are admitted only for a consultation.

²⁷⁰ Nevertheless the industry reports certain cases of difficulties for specific nationalities to enter the country to obtain private medical treatment, among them Iraqis, Nigerians.

8. Strong and good quality medical training programs offer degrees in most medical specialities, thus the influx of new graduates to the sector should be maintained.
9. Basically there are no investment restrictions on opening the private hospital in Jordan. There is no minimal capital required, although certain regulations as to the land space available appear: 2,000 sq. meters for general hospital, and 1,000 sq. meters for specialized facility. A hospital must be situated in isolated building. Other special condition is that a potential investor should acquire a Jordanian-partner doctor in order to open a private hospital.
10. There is a free repatriation of profit from private hospital in Jordan.
11. Accreditation and standards enforcement has been strengthened lately, which should positively influence quality of services provided. Health Accreditation Council has been recently established. A new draft law on medical liability is in a governmental consultation process.

Key Weaknesses

1. Regulations within the sector need to be updated. Laws that govern the sector have been passed some 30 years ago in different economic and social conditions.
2. There is a growing demand for female nurses and visiting doctors. Unfortunately existing regulations do not support easy access to the market by foreign specialists as Jordanian doctors have priority.
3. Moreover low paid technical and support workforce (technicians, nurses) in Jordan may receive 3-4 times better financial conditions in the Gulf states. As a result this may additionally and negatively affect availability of technical workforce.
4. There are multiplied controls from different government bodies. Reports reveal the inspections have constant access to private hospitals and right to inspect anything at any time. Frequent controls destabilize work.
5. There is no common and national obligation of healthcare insurance which hinders further development of the sector in Jordan.

Key Opportunities

There are the following opportunities for the sector:

1. There are efforts to open new markets for the medical tourism in Jordan especially those in the US, Europe (Germany), former Soviet Union e.g. Russia or Kazakhstan as well as African countries.
2. Due to the global financial crisis, North Americans and Europeans patients will be looking for lower-cost options of medical treatment. Jordan will be definitely one of the destinations they will be considering.
3. There is growing global trend for specialized health services such as: IVF, eye surgery, organ transplant, plastic surgery, oncology.
4. In 2009 Jordan Tourism Board together with PHA started joint and coordinated efforts and actions to promote Jordan as medical tourism destinations.

Key Threats

1. On the one hand, low cost well trained workforce is an advantage but on the other hand the group is more vulnerable towards the brain drain, especially in the situation of a strong demand for specialists in the Gulf countries, where the wages are much higher than those in Jordan.
2. Due to the fact that there are many types of hospitals in Jordan e.g. Military, Ministry of Health hospitals, private hospitals, etc., there are difficulties to reach common opinion or position, as interests vary between stakeholders.

5.3 Recent Key initiatives in the Sector

1. Recently the sector established special Health Care Accreditation Council that will deal with hospital accreditation process. Its role will be to institutionalize health care quality on the HCAC model that applies international standards in a national environment. It is also open for other hospitals in the region. It is said to be the first such institution in the Middle East region. Its role is not only to accredit hospitals but also to provide training, infection, and safety controls.

2. There is a pilot project underway to connect 4 centers of medical treatment with common software and connect to the net. Patients will carry an electronic smart-card that would store all medical data on a patient. In time the system should cover all medical institutions in the country.
3. Several representatives from US medical sector and insurance companies visited Kingdom in July 2009 to have a firsthand look at the capabilities of the sector. To attract Americans seeking treatment abroad, who last year numbered 750,000 according to US based Medical Treatment Association, American will only have to pay 25% of the value of the same medical procedure in their country, package also includes plane ticket, accommodation, and a visit to Petra.
4. Next year (2010) the Kingdom will be hosting international conference to promote Jordan as medical tourism destination.
5. Ministry of Higher Education announced that they will increase annual scholarships provided to female nurses from 100 to 400 starting this academic year, the Ministry will allocate 70% of nursing seats in the Kingdom's institutions to females.²⁷¹

6. Higher Education

6.1 Current State of the Sector

During the academic year of 2008/2009, the total number of students enrolled in both public and private universities reached 237,000 (175,000 in public and 61,000 in private). Out of which, 219,000 students were enrolled at undergraduate studies and only 17,000 at graduate levels. Furthermore, it is reported that 28,000 Jordanian students study abroad. The average number of students in public universities reaches 17,500 per institution, whereas, in private ones the number is 4,067.²⁷² Additionally there are:

- 28,000 students enrolled in community colleges.
- 27 universities (10 public and 17 private).
- Two regional universities: Arab Academy for Banking and Financial Sciences and Arab Open University.
- Two other private universities under construction.
- 50 community colleges (28 – public including four belonging to the Ministry of Health, six to the Ministry of Defense), and 22 – private ones).²⁷³

In terms of student enrollment, the biggest public universities are: Jordan University (37,971), Yarmouk (31,058), Jordan University for Science and Technology (21,491), and Mu'tah (15,949). The biggest private universities are: Al-Zaytoonah (8,021), Applied Science (7,956), and Al-Isra (6,896).²⁷⁴

The number of faculty members totaled 7,365 (4,951 in public universities and 2,414 in private ones). Thus, the ratios of students vs. faculty members are correspondingly, 35 and 25. The highest number of faculty members are in Jordan University: 1,241 and Yarmouk: 767 and for the private sector – Applied Science: 317 as well as Philadelphia: 298. There are 1,129 current specializations in Jordanian Universities (676 bachelor programs and 453 graduate studies).²⁷⁵

Based on the latest Global Competitiveness Index 2009 Jordan ranked 48th out of 134 countries. The index among others measures the quality of higher education and training, among others. Jordan scored the following: tertiary enrollment – 54th; quality of management schools – 45th; local availability of research and training services – 53rd.

The Financial Crisis and Higher Education in Jordan

There is no visible influence of the global crisis on the sector. The problem that may appear during 2009 is connected with the government that is adjusting the levels of the 2009 budget revenues and expenditures, due to global turmoil. Most likely, the expenditures will have to be cut down. It is not known at the moment how, and if it will affect the level of state subsidies to the sector.

271 After The Jordan Times May 27, 2009

272 Jordan's Higher Education Strategy, Ministry of Higher Education and Scientific Research, 2007

273 Ibid.

274 Ibid.

275 Ibid.

6.2 SWOT Analysis

Key Strengths

1. Establishing the Higher Education Accreditation Commission that should guard the quality of higher education in Jordan (set up by Law (20) in 2007).
2. Establishing the Scientific Research Support Fund in 2007.
3. Establishing units for career counseling and tracing graduates at universities.
4. The Ministry of Higher Education and Scientific Research prepared the strategic document called: the National Strategy for Higher Education and Scientific Research Sector for the Years 2007-2012. It should guide the development and priorities of the sector.
5. There are many international programs executed in Jordan (for some examples see also 6.3. Recent key initiatives in the sector). Donor organizations such as the World Bank, EU, UNDP are very active in the field of tertiary education in Jordan.
6. From year to year, there is a rise in enrollment rates. The trend is in line with the growing international and regional demand for higher education. It means the sector in Jordan has still potential to grow and expand, benefiting from the fact that more foreign students come to study in Jordan.
7. There are many programs and studies (bachelor programs and 453 graduate studies), where students may choose their field of study and specialty.⁶⁷⁶

Key Weaknesses

1. Quality assurance of higher education outcomes should be strengthened as industries representatives report the need for improving soft skills among university graduates.
2. There is still a need to further bridge the gap between higher education and the labor market. Students choose their majors accidentally, not analyzing market trends or demand, and as a result, many graduates either work in different fields or leave the country because they are unable to find jobs within their field.²⁷⁶ As a result there is a growing unemployment rate among graduates (increasing during the last 7 years, from 13% to 21%).²⁷⁷
3. The government subsidies fluctuate considerably on a yearly basis and are unpredictable. Consequently, universities find it difficult to adopt long-term financing plans to support its activities.
4. Nurturing a vibrant science and technology sector is seen as the most effective way to ensure the long-term social and economic development of the Kingdom. Jordan spends 0.34 – 0.4% of its GDP on research and development, compared to the 1% average for developing countries, and 2-4% spent by highly industrialized countries. In the developed world, 2/3rd of the funding comes from the private sector, which invests in R&D for the development of their products and services. In Jordan, almost 70% of funding comes from the government.
5. Results from the 2007 Trends in International Mathematics and Science Study, found that university graduates in Jordan wait for a long time to transition into the job market because the learning they receive at universities, can best be describe as “old pedagogy”. They memorize textbooks and class notes of professors, and old textbooks in an age when knowledge becomes obsolete even before it goes to print.

Key Opportunities

1. There is a growing number of students in the sector. This helps the sector to expand.
2. There are certain plans to enhance universities' autonomy, and develop governance and institutional performance. As a result, strong independent academic institutions could be created, ready for the challenges of the XXI century global economy.
3. The Ministry of Higher Education and Scientific Research is helping universities set their 5-year strategic plans. This would strengthen management capacity and improve the functioning of the higher education institutions, also in terms of financial management due to widening financial perspective. Nevertheless,

²⁷⁶ According to the Department of Statistics 650,000 Jordanians live abroad, about 600,000 of whom are settled in the countries of the Gulf. The majority are skilled, white-collar workers employed in the construction, media, banking and financial sectors. See also JO Magazine, issue 69, May 2009: Paradise Lost by Laith Abou-Ragheb

²⁷⁷ The Jordan's Competitiveness Report 2007

due to the high fluctuation of public funds available to universities, it may diminish the positive aspects of strategic management that is to be introduced.

4. Community colleges are to be re-engineered, focusing their attention on technical education.
5. There are more international contacts between Jordanian universities and foreign institutions. The perception and knowledge of international demand seems to be changing, which positively influences the tertiary sector in the country. It creates the pressure on Jordanian universities to excel and modernize, especially since demand for European and/or American-style tertiary education is still growing.
6. Jordan benefits from political and social stability. Such a perception of the country greatly affects the decisions of foreign students, especially from the region, in regards to where to study.
7. There are two more private universities constructed at the moment, which will strengthen tertiary education for students, and will create more competitive pressure on existing institutions.
8. The Ministry has plans to establish scientific research networks among universities. It should enable and strengthen cooperation between the institutions, help to exchange ideas, knowledge, and experience.

Key Threats

1. Especially in the light of the global financial crisis and budget expenditure cuts, finding more resources for public universities could become difficult.
2. Finding adequate public funding that covers all applicants for loans and grants by the Student Support Fund, may again become very difficult, thus, undermining the idea of financial assistance.
3. There may not be enough high quality faculty members to accommodate the growing demand for tertiary education in Jordan.
4. According to new plans revealed in the National Strategy for Higher Education and Scientific Research Sector for the Years 2007-2012, there will be a limit imposed on the number of students allowed to enter public universities. The process will be guided by general and special accreditation criteria. Such a move may limit the number of people willing to study.

6.3 Recent Key Initiatives in the Sector

1. Trans European Mobility Program for University Students (TEMPUS – Jordan started to participate in the program in December 2002) and Erasmus Mundus (new window for scholarships for the period 2009-2013 is already opened) was launched in cooperation with the EU.
2. Support to Bridging the Gap between Higher Education and the Labor Market in Jordan project was launched in cooperation with UNDP between 2007-2009.
3. The Ministry is also looking at a plan to establish a bank at each university that will extend grants and interest-free loans to students.
4. The World Bank in Jordan will launch a package of reforms to develop higher education sector. The plan is to be implemented between January, 2010 and December, 2015.²⁷⁸

²⁷⁸ Specifically it will be devoted to build the capacity of the Ministry to introduce new funding mechanisms in order to promote transparency, innovation, and effective resource management, modernize governance, accountability, and management systems of universities, strengthen the quality of assurance and accreditation to improve employability of men and women graduates of university and community colleges programs.

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