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**USAID/Jordan Local Enterprise Support Project
(USAID LENS)**

**ASSESSMENT OF THE MOUNTAINEERING SECTOR IN
JORDAN**

JANUARY 20TH 2017

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executive summary



The adventure travel industry in Jordan is in a critical phase of development. The natural and cultural resources in Jordan are among the best in the world, as noted in successive Adventure Travel and Trade Association reports. Jordan is, in short, a country that has significant opportunity to become an internationally competitive player in the adventure travel scene within a matter of years. Locally, adventure travel can create up to 500 formal jobs that are sustainable and resilient to market shocks. Furthermore, the industry is capable of generating well over \$10,000,000 USD in direct and indirect revenue generation for micro- and small-enterprises (MSEs) in Jordan, most of which directly contributes to local economies. On an international stage, the adventure travel industry can serve as a basis for the development and growth of more traditional tourism and investment markets. It can demonstrate the country's stability and the prospects for long-term investment in the country, bringing in increased foreign direct investment and generating – indirectly – more jobs and more opportunities for businesses in a range of economic sectors.

Jordan has a solid foundation for a globally competitive adventure travel industry. In the 2016 Adventure Travel Development Index (ATDI) report, Jordan was nominated as one of the second highest scoring countries for adventure tourism, above the United Arab Emirates and Qatar. This is – in part - a direct result of the country's diverse array of physical activities its four topography types, its micro-climates, the remarkable number of archaeological sites, the hospitality of its people and the vast number of potential additional sites for adventure activities.

There exist however, a number of major market, regulatory and cultural challenges that require systematic change in order to maximize the industry's potential. This study will examine the opportunities and barriers that affect the development of the industry in Jordan today. By looking at the products, the regulatory environment and the market dynamics of adventure travel in Jordan, it will endeavor to map out how the country's adventure travel industry, examining in turn how the government, the local communities, the businesses and its broader stakeholders can work together to elevate Jordan as a leader in adventure travel worldwide.







introduction



This report will examine the case for adventure tourism in Jordan. It will assess the capacity, opportunities and barriers to developing adventure travel in the country, highlighting where changes are required and how the country can follow international best practice and make best use of its resources.

In order to understand Jordan's Adventure Travel industry, it is important to provide some context to Jordan's current tourism industry. At a strategic level, both by government and by the associated travel industry, Jordan has built its industry around mass tourism; the development of infrastructure made to support organized tours along a familiar circuit. In Jordan, this circuit typically consists of the Dead Sea, Jerash, Um Qais, Madaba, Karak, Petra, and Wadi Rum (extended stays may include Azraq Castles, Karak and Aqaba). The sites are served by an infrastructure that has been purposefully developed to serve a high volume of tourists through four and five-star hotels, a plethora of restaurants and a transportation network built around the needs of the tour operators. Indeed, the circuits are traditionally organized and operated by inbound and outbound tour operators, whose business models are almost entirely comprised of the attracting similar end-markets, namely travelers from the United States and Europe who are looking for a 7-day, organized vacation to see the 'highlights of Jordan'. The industry is supported by an array of legislation and government and quasi-government institutions whose licensing and regulatory authority serves to protect the interests and advance the relative value of this industry.

For decades this model has worked relatively well. Up until 2010, tourism in Jordan was on the increase and predicted to grow steadily as the country establishes itself as an accessible, safe, boutique destination. Following the so-called 'Arab Spring' in 2011 however, the industry has suffered. Businesses built around high volume and rapid turnover of customers have made significant losses, with many hotels and restaurants closing entirely and

hundreds of jobs lost. Local communities in towns such as Azraq, Jerash and Petra whose economy largely depends on tourism have had their revenues cut dramatically. The typical 'mass tourist' began to perceive Jordan as an increasingly dangerous destination, with countries like Syria, Palestine, Egypt, Iraq and even Saudi Arabia suffering from outbreaks of violence and terrorism. This issue was exacerbated by the tragic death of Moath Kasasbeh, whose violent execution at the hands of ISIS put Jordan at the center of a war.

Today, Jordan stands at a crossroads. On the one hand, it can continue with business as usual. Restoring mass tourism receipts could be wrought by effecting changes to visa processes while offering state-subsidized packages to local and international tourists to revitalize numbers and restore international confidence in the country's appeal and security. In the meantime, in-bound operators and local tourism agents (such as guides) should be encouraged and facilitated in order to find temporary sources of new income or to lower prices in so far as possible. While feasible, this endeavor will still be subject to the same volatility of the broader tourism market and shocks witnessed over the last 5 years.

Alternatively, the country can consider the downturn as an opportunity to diversify its tourism market portfolio, developing new systems, procedures and supporting new businesses with a new approach to tourism entirely. In particular, the report will examine the case for the mountaineering industry and to what extent Jordan's industry can be considered to be internationally competitive.

defining mountaineering



Mountaineering is a broad term, encompassing an array of activities on hills, mountains, canyons and trails. This report will cover the following under mountaineering: hiking, canyoneering, climbing, and caving. Note, this is not an official determination as set by international bodies such as the Adventure Travel Tourism Association (ATTA), nor the UNWTO, but rather, a classification that serves to group activities that are interrelated, use similar terrain, benefit from the same advantages (both natural- and human-related) and the providers suffer from similar issues. The latter reasoning also applies to why cycling is in this section as well.

Hiking: is walking for a set distance in nature usually for pleasure, exercise and exploration. Hiking for more than one day is referred to as trekking. Hiking and trekking are typically classified as soft tourism as they typically require neither specialized skills nor training. Hiking will often requires routes and trails to follow with the availability of maps, waypoints or GPS locations.

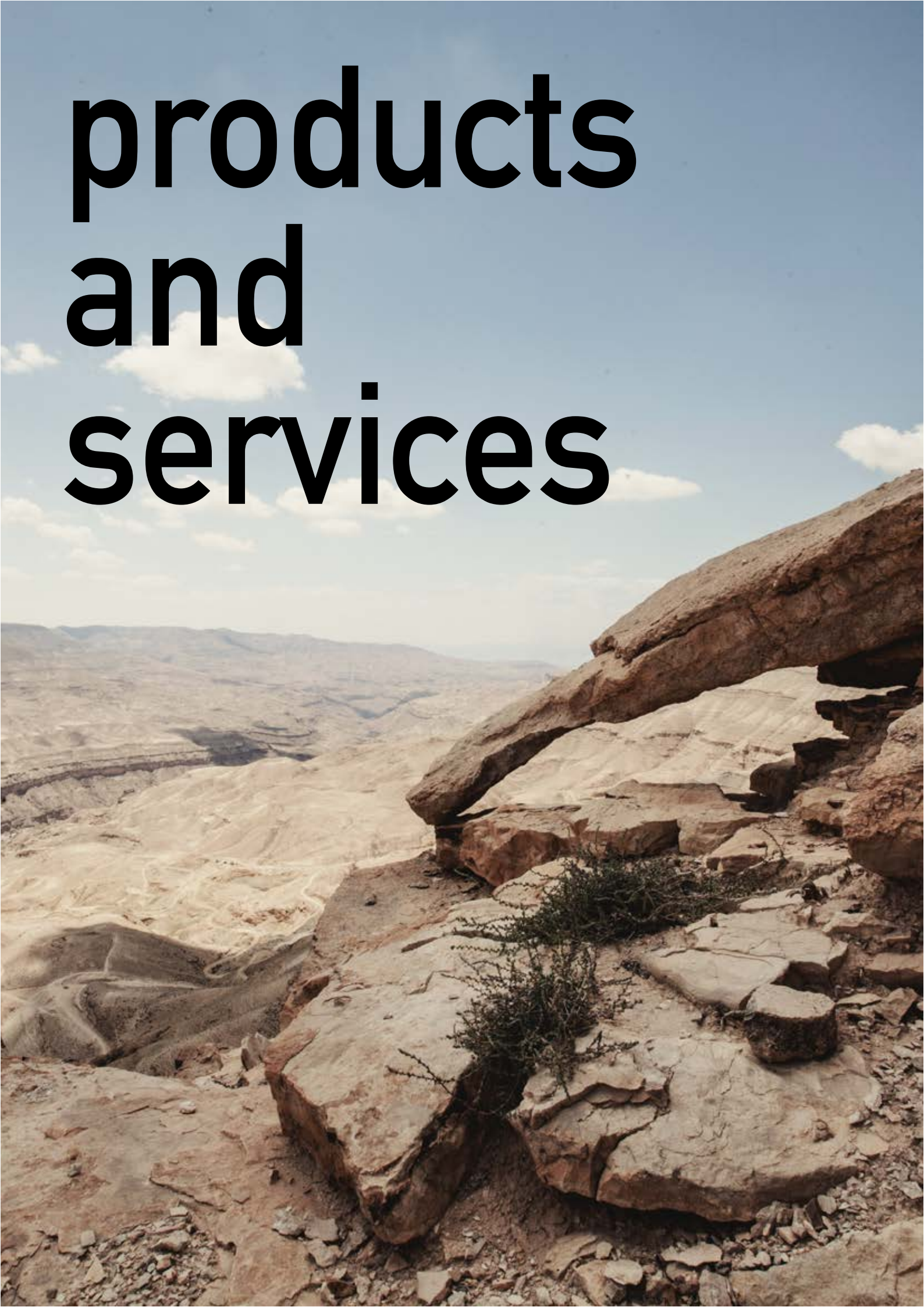
Canyoneering: typically refers to several activities undertaken in a canyon; hiking, scrambling and abseiling. Canyons can be wet or dry, and the same canyon can have a variety of starting points and trails. Canyoneering trips can be one day or multi-day experiences. The activity has been cited as one of the fastest growing sports in the world.

Climbing: the activity of using your hands and feet to surmount a steep obstacle such as an artificial wall, boulder, cliff, or mountain. Climbing encompasses several types each requiring different technical equipment and refers to varying types of terrain; artificial indoor climbing walls, rock climbing on limestone, ice climbing and alpine climbing. As for techniques and ways of climbing there is traditional climbing, multi-pitch, solo climbing, sport climbing, top rope climbing and bouldering.

Cycling and Mountain Biking: this pertains to bicycle-based activities including road-biking, pursuit, and mountain biking/cyclo-cross. Road and mountain biking typically require routes that are followed or explored using a bike, which is either designed to be off- or on-road.

Caving: the activity or sport of exploring caves or caverns. This activity requires rope, clear mapped trails and waypoints, and often a guide to ensure the safety and well-being of those exploring the cave. Caves can be both wet and dry and will often require equipment such as harnesses, ropes, head lights, life-jackets and an array of bolts and pins. Usually the biggest thrill is finding undiscovered caves that have not been documented.





products and services

the global mountaineering industry



The purpose of this chapter is to identify and assess the existence and quality of products in the mountaineering sector in Jordan and to examine the market dynamics that drive the industry. It will analyze the status quo and current condition of these products and services, and will present the barriers to their sustainable development. Recommendations as to how the industry can develop and be supported are outlined at the end of the chapter.

The mountaineering industry represents one of the largest industries of adventure travel worldwide. While accurate statistics for participation in outdoor sports are difficult to obtain, there are a number of national figures that point to the growth of popularity of mountaineering activities. For instance, in Germany alone, approximately 30% of national tourists have taken a holiday ‘focused on walking tours’. Similarly, in the UK, the number of hikers a recent survey entitled “Active People Survey” suggests that around 211,000 people (aged 14+, living in England) go climbing or hill walking at least once a month, with 84,000 people taking part at least once a week. The increase in popularity of hiking is not an isolated occurrence however. Rock climbing, canyoneering and cycling have all witnessed similar levels of growth. The International Federation of Sport Climbing estimates that there are now more than 25 million regular climbers worldwide. While in cycling, according to a Trendscape Survey for the European Parliament, every year in the EU around 25.6 million people go on a cycling trip involving at least one overnight stay, which equals 3% of all holidays taken by the EU population. As such, the mountaineering industry represents an industry that is growing globally and has considerable promise to continue to do so, both nationally and internationally.

“Adventure travellers seek the enjoyment of nature and companionship, the challenge itself, or an escape from their work-lives”

Mountaineering is a sector that promises high rates of return, with foreign and domestic adventure travelers developing loyalty for preferred destinations. This is in large part due to the fact that mountaineering is treated as sport or hobby. Customers seek the enjoyment of nature and companionship, the challenge itself, or an escape from their work-lives. As a result, hikers will travel frequently to the same destination for convenience, appreciation and familiarity. This is in contrast to traditional, mass tourism activities in which countries are ‘ticked-off a bucket list’ and rarely repeated. Consequently, tourism based around the development of a mountaineering industry is one that benefits from repeated excursions and visits and therefore can generate more revenues that are more resistant to market shocks.

Recent studies have revealed that mountaineering adventurers are looking to explore new cultures, new places and willing to spend more and stay longer for the experience. In a recent George Washington Study, adventure travelers indicated that their average trip was between 7 and 8 days. Moreover, they indicated that their next trip would be longer and also involve more challenging activities and far-flung destinations. The profile of the typical adventure traveler was stated as being on average single/never married, with the higher percentage of single adventure travelers due to the fact that travelers skew younger with an average age of 36, compared to non-adventure travelers who have an average age of 41. Household income stands at around \$46,800 USD with the majority having at least a 4-year degree. Overall therefore, the adventure traveler – and the mountaineer in particular – marks a very distinct profile from the typical non-adventure traveler. Tour operators and adventure travel sectors should therefore accommodate and adapt to meet new demands and market differently to a new customer.

jordan: a land of plenty



In volume of potential mountaineering sites alone, Jordan has the potential to become a major mountaineering & cycling destination worldwide.

There are more than 600km of potential hiking and cycling routes in Jordan, covering multiple topographies, landscapes and biodiversity. These routes span the entire North and South of Jordan (characterized by the existence of the Jordan Trail Association, see below) and cater to a full range of skills and abilities, with the existence of both long and short hikes. In canyoneering, there are over 140 canyons (or an equivalence of more than 200km of canyoneering), an estimated 60 of which are accessible for exploration. Many of these promise waterfalls, diverse flora and fauna and unique and spectacular rock formations. Climbing, meanwhile, offers hundreds of crags, walls and ascents (many of which have never been done) across the country, boasting more than 500 rock climbs at all grades from single pitch (traditional and sport) to multi-pitch big walls and superb mountain traverses.

Jordan is almost unique in its diverse landscape, from north to south, east and west. Few countries worldwide promise such a diverse set of mountaineering activities in such a small space. The country's northern topography is famous for its mountainous terrain - its many hills and valleys - which provide an excellent opportunity hiking and mountain biking, with views of celebrated olive groves, historical landmarks and mountainous passes and expansive views of local communities dotted across country. In the South and East, Jordan's landscape opens up to multi-colored deserts and the awe-inspiring Wadi Rum, which promises extraordinary rock climbing opportunities, hikes and desert trails. Indeed, the area is deemed as "one of the world's best desert climbing areas". Finally, the West is home to some of the most spectacular canyons in all of Jordan, rivalling canyons in New Zealand, the US and across the Mediterranean.

Jordan's mountaineering resources are easily accessible. Unlike countries such as the United States, France and Australia, most hikes, canyons and cycling trails in Jordan can be accessed within a few hours' car journey from the capital, Amman. As such, there is sizeable potential for the emergence of day-trip excursions. While it would be reasonable to argue that improved infrastructure and the existence of maps and signposting would greatly benefit accessibility to these

sites, the simple fact that they are not far from major cities means Jordan is in an enviable position worldwide. Mountaineers, cyclists and hikers are able to reach multiple sites, or hike multiple routes without extensive transit. This represents a boon in particular for domestic markets, or regional tourists who are wishing to explore Jordan on weekends only.

Jordan's trails should allow for easy access to local communities. Many existing and potential trails and routes are close to towns and villages. This means that – without incurring sizeable investment – it should be possible to develop single-day or multi-day excursions that are well serviced by local communities and their facilities. This will allow tours to offer food through local restaurants, medical assistance, restrooms and transport and logistics without investing in visitor centers or investment in larger infrastructure.

Local communities and their respective cultures should be promoted and protected. Adventure tourism can have significant benefits to local communities, particular as the typical traveler wishes to engage directly in local culture, whether it is food, dance, art or history. Jordan has immense resources in this regard. There are over four distinct cuisines in the country, numerous ethnic groups, each boasting cultural practices and societal norms that should be explored and protected. Indeed, the country's ancient and modern histories present significant, exciting opportunities for an entrepreneurial travel operator.

Jordan's micro-climates and four seasons allow for almost year-round exploration. The country's Mediterranean-style climate makes the country accessible for almost 10 months of the year. The country is marked by a significant variance in temperature (with the exception of the Rift depression which results in temperatures rarely dropping below 15°C [59°F]). The country's long summer reaches a peak during August with temperatures occasionally exceeding 40°C (104°F) nationwide, while January is usually the coolest month, with temperatures dropping as low as -5°C (23°F). One of the major characteristics of Jordan's climate is the contrast between a relatively rainy season from November to April and very dry weather for the rest of the year. As such, Jordan is a country that can be explored easily by most ages and for most activities reliably for the 10 months of the year.

the jordan trail



There is an active industry already operating with events and trails identified, which are regularly visited. The adventure industry in Jordan has exploded in the last 20 years. There are more than 50 hiking and canyoneering operators in Jordan, 7 in cycling, and 2 firms specializing in rock climbing. While these firms vary greatly in quality of services and operations, the foundations for a flourishing mountaineering industry are present. Furthermore, there are a number of events that relate to adventure activities in Jordan conducted in the mountaineering industry, including the Dead-to-Red Marathon, The100 Cycling Marathon, the Tissot Race, Wadi Rum Marathon and a range of upcoming trails and excursions along the Jordan Trail.

Jordan has already begun developing trails and marking routes in all its mountaineering activities. There are already existing examples of Jordan designing and way-marking trails across Jordan. In certain parts of Rasoun, Ajloun there are identified trails, while in Wadi Mujib and Wadi Hidan, the Royal Society for the Conservation of Nature (RSCN) have begun mapping trails for guided and unguided tours. In addition, there do exist a number of books that detail some of the hiking routes in Jordan, such as 'Hiking in Jordan: Trails Around Petra' and 'Trekking and Canyoning in the Jordanian Dead Sea Rift'. While most of these are not comprehensive topographical maps, the books and texts that do exist can help in identifying the general path and in following certain points within a trail or route.

Mountaineering operators offer basic services relating to the activity, often providing integrated services including food and transportation. Most adventure operators offer the activity, such as cycling, canyoneering, hiking or climbing and provide customers with transportation to the site. Typically, this will be a rental car or bus (sometimes a school bus). Equipment – in the form of life-jackets, harnesses and helmets – are provided by the more established, better managed firms, although there are numerous reports of larger groups going without the necessary equipment and protection for the types of activities. Finally, in most cases, food and water are included on the trip at no additional cost, with the majority of firms offering one bottle of water and store-bought sandwiches from Amman.

The Jordan Trail is a walking trail crossing and connecting the length of the country of Jordan from Um Qais in the north to Aqaba and the Red Sea in the south. Offering around 40 days of trekking across more than 600 kilometers of trail, it traverses the diverse landscapes and vistas of the country: the rolling wooded hills of the north, the rugged wadis and cliffs overlooking the Jordan Rift Valley, the salty waters of the Dead Sea, the pink sandstone rock of Petra, the dramatic sands and towering mountains in Wadi Rum, and the colorful corals of the Red Sea. It is also a journey through the layers of Jordanian history and an encounter with the country's peoples and their cultures, traditions, and cuisine. The trail uses the best walking routes, going through popular sites and traverses 52 villages, creating jobs in rural areas supporting local economic development while also preserving culture and heritage.

This trail serves as a major opportunity for adventure tourism development in Jordan, serving as the country's first truly national adventure product. The trail's quality and success will depend on the availability of well-managed homestays, since adventure tourists are generally less interested in 5-star hotels, but rather prefer authentic homestays with families that can provide basic comforts. Moreover, the success of the Jordan Trail also depends on an established association of mountaineering companies - the Jordan Mountaineering Association. Ideally, the association member-companies will develop a mutually beneficial relationship with the Jordan Trail; profiting out of its infrastructure, while working to sustainably promote and market it.

Establishing such a trail in Jordan represents not only an exciting prospect as a tourism product, but equally as a means through which local communities can find new sources of revenue and diverse incomes. Furthermore, a result of the nature of adventure travel is the preservation and sharing of local culture and local history, and as such, Jordan will be better placed in the future to promote and sustain its diverse and rich cultural history, whether in the form of food, dancing, arts or language and dialect. The establishment of the Jordan Trail could mark a significant turning point in the country's efforts to become an international leader and regional hub for adventure travel.

sample trails

Um Qais to Ziglab

This 24km route is in one of the most northerly and greenest parts of Jordan. The route covers hills and canyons that host ruins of many ancient civilizations and offer outstanding views.

Rasoun to Ajloun Castle

This 16km route offers a hike through the green rural villages of Al Ayoun, where homestay options are available. The route progresses through increasingly high semi-forested hills and past the ruins of the ancient church of Mar Elyas to the Islamic castle of Ajloun.

Petra back trail

This 16km route follows a Bedouin trail from Little Petra, through the mountains into the main city. The route explores Petra's tombs and temples, then exits the ancient city through a spectacular and little-known slot canyon - the dark sight.

Wadi Mukhaires

This is a 12km canyon trail that allows hikers to experience a “rock garden” composed of an array of rock formations formed from sandstone, limestone, conglomerates and sedimentary stalactites. It has 3 major drops measuring up to 25 meters, requiring descent by abseiling. This canyon ends at a dead sea hotel.

Dana Reserve

The Dana, run by the RSCN, reserve offers spectacular hiking opportunities, presented tourists with approximately 600 species of plants (ranging from citrus trees and juniper, to desert acacias and date palms), 180 species of birds, and 45 species of mammals (25 of which are endangered). These include the ibex, mountain gazelle, sand cat, red fox and wolf.

Wadi Hassa

This 18km route progresses through Jordan's second longest canyon, and is best enjoyed as a two-day, overnight trip. The limestone canyon is wet, and offers stunning views and multiple hot springs.

Rum Village to Al-Qider

An 18km hike through the spectacular Wadi Rum, heading south through the wide desert, with Jordan's most impressive mountains on either side. Passing Jebel Khazali, with Neolithic and Thamudic rock art in its impressive canyon to Al Qidder, where you will learn to make bread over an open fire.





market demand and product development



The adventure tourist values - above all else - an attractive natural environment and meeting and communicating with local people who live in that environment. Therefore, the first and most fundamental goal of Jordan's adventure travel industry is to build consensus across the private sector and civil society around the mechanisms through which they can successfully and sustainably protect the environment, and engage with local communities, establishing links between home-based businesses (HBBs), guides and the tour operators in order to provide a holistic, integrated approach to the industry's development. This section will outline the major barriers and obstacles towards achieving these two objectives.

Demand for adventure travel activities has risen sharply. Since 2000, Jordanian demand for services in the adventure travel industry has risen in line with both international demand. In 2001, the estimated number of adventure travelers per week is as little as 50 persons. Today, that number is closer to 800. This increase is projected to continue to grow over the next few years and seems to be the result of two converging phenomenon: first, consumers worldwide have demanded new experiences that involve cultural and natural discovery through physically activities; second, informal, smaller operators and destination have been able to quickly adapt products to meet demand and are now offering more trips with an element of "adventure". The convergence of these phenomena has been proliferate by the simultaneous rise of social media and content-sharing platforms, and the desire (particularly among young people) to take 'selfies' and to stand out.

Unsurprisingly therefore, supply in mountaineering activities has risen dramatically. At the turn of the 21st century, Jordan's hiking trails, rock climbing and canyoneering activities were limited to a few, smaller operators, most of which were based in Amman. As demand for adventure activities increased so did the number of operators offering services in the industry. Tour operators, formal or otherwise, rapidly established tours primarily for their local markets (both Jordanian and non-Jordanian residents) for relatively little structural costs. This made the barriers to market entry relatively low in real cost terms and competition grew rapidly.

This has resulted in a saturation of suppliers, which in turn has increased competition. Unsurprisingly, prices have therefore converged to the bottom. As of 2010 the majority of firms offered tours to Wadi Hidan, Wadi Hassan and other canyons for approximately 35 - 50 JOD per person. The operators at the time were however concentrating on demand from high-value customers in small numbers, operating tours of around 10 persons per tour, using between one and

two guides per group. However, as the industry grew in popularity, new operators began expanding to tap into new end markets, attracting new types customers by offering lower price tours that could appeal to a much broader base that found the lower prices more affordable. In so doing however, the same operators began transporting approximately 300 persons at a time, all to a single canyon. This significant shift in pricing and the numbers of customers has had a heavy toll on the environment and local communities, as mentioned above.

Unless mitigated, the long-term viability of adventure travel in Jordan and its prospects are at risk. In recent years, as a result of injury and deaths in canyons and on trails, a number of sites have been shut or have had their access removed. Furthermore, the total number of returning customers has been relatively low. This is a direct result of a poor first impression, whether due to mismanagement of the hike, too long waiting times, poor food or experiential quality, or a lack of trust (often times justified) in the operator itself. Indeed, if demand continues to rise, the unchecked growth in supply in the adventure tourism industry will result in complete product and market homogeneity.

Current 'management solutions' of sites and operators are insufficient as a form of industry protection. The cost of maintaining and managing a site from the supply-side (as currently being done by the RSCN on a range of sites) will be insufficient to mitigate against the level of demand. For example, the RSCN currently protect to major areas with regards to hiking and canyoneering: Wadi Hidan, and Wadi Mujib. By controlling access points through the establishments of centers and contracting a firm to manage these sites, they are able to protect the site from damage and control incoming numbers. Should an operator wish to avoid incurring additional fees or being made to limit their group size, they are able to do so by simply visiting one of the remaining 60 canyons accessible in the country. Noting the extent of available sites for operators therefore, and the limitations of groups like the RSCN or



even the Ministry of Environment, Ministry of Tourism and Antiquities and indeed, the Tourism Police to protect and ensure the protection of all sites, site management alone will be insufficient as a means of protecting natural resources, the adventure traveler and the local community.

The convergence of all these factors could threaten overall local and international demand in Jordan's adventure travel industry. As quality declines, and the overall number of firms and operators acting in an area increases, the industry is likely to produce negative externalities that will threaten demand. With the unchecked build-up of pressure on the natural environment resulting from excessive visitor-numbers and poor environmental awareness, current management of resources is insufficient to protect the environment. Litter has increased exponentially. Local communities, more cognizant than ever as to the presence of 'foreign' tours are increasingly antagonistic towards tours that do not include or benefit the local town or village. There is a strong probability therefore that sites of exceptional natural beauty will be permanently damaged, and ultimately robbed of their appeal. As the natural and local engagement environment declines, the quality of service available will also decline, ultimately resulting in a permanent fall in demand.

Local communities are not economically or socially integrated into the mountaineering value chain. As the adventure tourism industry has gained significant popularity in the last two decades, the number of local and international tourists traversing canyons, trails and farmlands have dramatically increased. This has not gone unnoticed by local communities and landowners whoever, who feel they are being taken advantage of, and not being sufficiently integrated. This dynamic will continue to worsen as the number of adventure travelers increase. There are a number of issues complicating the integration of local communities in the mountaineering industry, relating to tribal and cultural barriers, a lack of clear market incentive on the part of the tour operators and a lack of opportunity to host discussions between

communities and private operators – most of whom are from Amman. Unless addressed, these disputes threaten long-term animosity between stakeholders that will take years to resolve, while at the same time preventing the development of the mountaineering industry (and thus, the economic development of local communities).

Low-quality of services offered by operators risk bringing the whole mountaineering industry into disrepute. The few businesses in Jordan that are legally operating in the mountaineering sector (in compliance with national law) have generally good technical proficiency to deliver safe, high quality experiences. However, the rapid growth of all types of operators in this sector have resulted in a 'pricing downwards', which has adversely affected quality of services and tours offered. Increasingly competitive pricing has forced many operators to cutting corners in a rush to the bottom. Customers are offered tours and experiences that are below their increasingly high expectations, particularly as global travel allows them to compare it with similar tours offered elsewhere. Unless there is a shift towards improved experiences and an effort to regularly attract the same customers and develop more local adventure aficionados, then Jordan's domestic and international markets will see the country as one with potential, but unappealing in terms of overall experience. In order to grow rapidly and build a resilient market therefore, it is essential that the country does not allow such a reputation to develop.

challenges impeding economic growth

Environmental damage is widespread as dumping of waste is common in rural areas.

Despite its extraordinary natural beauty, the country is blighted by widespread pollution and environmental damage. Roadside waste is widespread, with the disposal of plastics, non-perishables and glass across the landscape. This is in part caused by a lack of infrastructure and services relating to waste disposal, which in turn leaves little option but to dispose of waste improperly. Without waste disposal options, local communities are forced to dump waste in their immediate environment which causes serious environmental damage, particularly to the local flora and fauna. To make matters worse, few of the existing environmental laws are enforced effectively in the adventure tourism industry, with most operators traveling in large groups and failing to observe or enforce even the most basic environmental protection practices. As popularity of mountaineering steadily increases, the damage being done to hikes, trails, canyons and climbing walls has grown, particularly as the types of end markets has diversified and expanded, with those less educated in the importance of environmental protection frequently disposing plastic, chemical and domestic waste in rivers, caverns, canyons and forests.

There exists a very real threat not only to the sustainability of the industry, but to the flora and fauna that inhabits the area. Firms operating in the area exacerbate the situation by not informing or teaching their customers about best practice. Furthermore, customers are rarely provided with the necessary refuges facilities nor instructed on standards and practices relating to leave no trace. As such, there has been a continual degradation of the environment and Jordan natural resources. **A lack of coordination, organization and proper management of sites and the operators results in poorly executed**

“If left unchecked, Jordan’s natural habitat will degrade beyond reversal, and will not be able to be returned to its former state.”



services that threaten the safety of travellers and the natural environment. All too frequently Jordan's trails, canyons and rock faces are explored by large groups of people who are doing so without proper safety equipment, the relevant information or cared for in manageable group sizes. Groups of up to 200 persons are at any given time in a canyon led by guides who lack the training and who lack the equipment to ensure the safety of its customers. This occurs not just with an individual company bringing too many people, but as a result of a lack of coordination amongst operators. As a direct result, there are avoidable accidents, injuries and in certain cases, fatalities. In order to ensure the continuity and sustainability of the industry, mountaineering requires careful management and deliberate coordination between a range of operators and service providers. It requires the inclusion of public, private and civil society actors. As an example, in order to rescue teams to be able to effectively extract someone from a canyon or cave, they require an understanding of the natural environment and be able to execute an existing plan. As another example, tour operators wishing to offer high-end products need to be aware of which canyons will meet the expectations of its customers, who may be wanting to traverse a canyon or hike a route without large groups. Without coordination, this becomes particularly difficult.

Although common ground is apparent, actual confidence and trust across current stakeholders and associated parties in the adventure travel industry in Jordan remains relatively low. Over the last two years of its research and efforts to support the adventure travel industry, USAID LENS encountered a number of public and private disagreements between various actors. On the issue of the development of qualifications for instance, the International Federation of Alpine Associations (UIAA) – during its development of a guiding qualification in the country – wrote in a report dated 2015 “There appears to be considerable disagreement about who should be leading the development of qualifications.” Similarly, on the approach to establishing a private sector association or society that would support the industry, consolidate mountaineering data and information, and provide general guidelines and information there emerged further disagreements as to the appropriate strategy and ways forward.



improving products & services in jordan



Engage with local communities to ensure their participation and buy-in with adventure travel.

As highlighted above, adventure travel is built on, and around, local community engagement and experiences that explore cultures, foods and natural landscapes. The dynamic between local communities and tour operators (informal or otherwise) which is characterized by sporadic, isolated engagement and a lack concerted effort to engage with communities has resulted directly in alienation and unfortunately in certain cases, violence and threats. The public, private and civil society sectors should hold regular meetings with local communities to address the worsening of this situation. Communities should be given the opportunity to develop an understanding of what adventure travel means, to highlight their concerns and priorities in their local areas and to engage in the development of any strategy around adventure tourism. Thus, there needs to be open discussions and a forum for highlighting risks, issues and opportunities with regards to the local community.

Provide the necessary legal framework and supporting environment that will allow local communities to benefit from adventure tourism.

Jordan has taken the first steps towards passing laws that allow for individuals to register their homes as a place of business. However, it lacks the necessary regulations to effectively create, for instance, a Bed and Breakfast (B&B). The country should therefore establish the required licensing procedure, and build specific guidance towards what is required to register a home-based business, a local tour destination or as a service provider in a niche sector. It is critical that the country provides a regulatory framework that is accommodative, and not restrictive in this regard. In the UK, for instance, B&Bs are required to pass laws relating to H&S, fire safety standards, and register on a database and provide a number of details about their business. These are all excellent practices that do not place undue or overly-complex burdens on a home-based business. It is vital that is Jordan is to accommodate B&Bs, they do so from the perspective of local communities, and with a clear understanding as to who the customer ultimately will be, and thus, what standards are needed.

Train the private sector on how product diversification and up-selling be beneficial to their revenues. The common assumption across the private sector in the adventure travel industry is that in order to be competitive, prices should be lowered in

order to secure the best 'value for money'. This concept has been proven false, and should be countered through tuition and business service provider support that can demonstrate to firms that the inverse can actually be true. As noted, forcing prices downwards results in lower-quality services offered. Higher paying customers will not consider products that are below their industry standards and expectations and will therefore be permanently dissuaded from the industry. Firms must decide on their target end-market and cater specifically to them by being innovative and finding smart ways of cutting costs sustainably, while keeping product- and service-offerings intact.

In order to tackle environmental issues, the private sector should leverage existing institutions and associations to pool resources and ongoing activities to safeguard the environment. There are a number of institutions in Jordan whose responsibility it is to preserve the natural environment. It is paramount that the adventure travel industry works closely with these institutions and coordinate with them on best practice and ongoing activities to offset, or even counter environmental damage. Examples of these institutions include the Royal Society for the Conservation of Nature (RSCN), the Ministry of Environment (MoE), the Ministry of Water (MoW) and the Ministry of Municipal Affairs (MoMA). Jordan's mountaineering industry should take part in consultations and committees that are designed to protect and restore the environment in order to identify areas of vulnerability, to help propose how adventure activities can in fact help the environment.

The private sector should be incentivized to self-regulate and police the natural resources and environment. As the management of sites alone will be not sufficient protection, there must be a change in market dynamics. Firms should be obliged to maintain high standards and encouraged to self-regulate their industries through incentive structures and proper instruction on how poor implementation and lazy standards will have long-term implications on their business models. Consumers should also be made aware as to proper standards and practices, in order to ensure both supply-side management, and demand-side self-regulation. Firms should be obliged to take Leave No Trace training, or be required to distribute materials published by the RSCN on site conservation to guides, to their employees and to the travelers.



Establish an association or body that will promote and safeguard the collaboration of the industry and the protection of the environment.

In almost all successful mountaineering or hiking industries worldwide, there is a society promoting and safeguarding the activities of hiking and mountaineering, whether it is environmental preservation or management of firms operating in the industry so that they coordinate on their location. In order to sustainably grow the mountaineering industry, it is essential that there is a society of passionate individuals, companies and guides, or indeed any persons who are simply enamoured with the sport, who can take the lead on promoting and encouraging best practice and the sport itself. This Society will have the motivation and impetus to address some of the key barriers to the development of the mountaineering industry. These include barriers relate to the acquisition of activity insurance, managing numbers of customers in canyons and on hikes, coordinating with rescue and emergency services, supporting and protecting local cultures and heritages, and promoting the environmental, economic and social sustainability of the local community. Furthermore, the proposed association needs to be well placed to advance the competitiveness of Jordan's adventure tourism industry globally, joining groups like the Adventure Tourism Travel Association, the International Climbing and Mountaineering Federation (UIAA), organizing fam-trips with international tour operators and crucially, actively engaging with international tour operators to develop new partnerships and products that will focus on adventure activities in Jordan.

All of the functions above are effected successfully by mountaineering associations across the world. Groups such as the British Mountaineering Club (BCC), the American Mountaineering Association, the Alpine Club of Canada, and others have established themselves as the guardians of best practice and responsible for the social, economic and cultural development of mountaineering activities in their respective countries. Without such an association of private, civil and public sector stakeholders, there will continue to be major challenges. As the demand for adventure activities grows, Jordan will likely face a gradual decline of standards in health and safety, environmental protection. Indeed, with over 11 deaths in 2014 - 2015, and a number of the canyons closed indefinitely (and without forewarning) it is evident that the industry is currently reacting to challenges, rather than taking the preventative measures and the steps required to ensure sustainable growth.

“If Jordan can establish a common and accepted vision for the local and mountaineering community, then its potential may be limitless”



entrepreneurship & investors



opportunity in jordan's adventure industry



There are many benefits to well-targeted and timely tourism investment, such as generating positive spillovers to other industries; the creation of new employment opportunities; the diversification of the economy — which is particularly important in many regional communities, and; direct contributions to local economic development. At first glance, given the variety of both local demand and the natural resource supply in the country in the context of adventure travel, it is somewhat surprising that there is not a greater level of innovation and investment in Jordan's adventure travel industry. Indeed, despite remarkable growth, the adventure tourism industry has received only limited interest from local or international investors. With job creation and revenue generation high on the Government of Jordan's agenda, particular with regards to rural, underserved communities across the country, encouraging an enabling environment for local and national investment is critical. This section will examine the nature of the dynamics of entrepreneurship and investments in the country and how the broader investment environment in the mountaineering industry can be supported.





Jordan's adventure travel industry is one made for and by local entrepreneurs. The growth of adventure travel in Jordan and the availability of supply is a direct result of the entrepreneurship and innovation. Even since the 1980s, in the nascent years of any form of adventure 'travel' in Jordan, from the scuba diving conducted by Mohammad Momani to the hikes led by Anthony and Diana Howard, the industry has been initiated and driven by a passion for the sport or activity. Since this time, little has changed, with most operators having started as a leaders of an activity-group or as aficionados, passionate about what they do. In the last decade, it is the young people in this industry that have identified the demand and addressed it through the establishment of businesses, NGOs, CBOs and other types or groups that have rallied interest and driven demand for the activity. If the industry is to continue to develop in this way, it is pivotal that these entrepreneurs are supported through as many means as possible, and are not penalized nor driven out of business.

Innovation in mountaineering can be characterized as 'high effort, low cost'. Notwithstanding the costs of business registration and licensing as a tour operator, the cost of product development in adventure tourism can be relatively low. The development of a new climbing wall, for instance, requires only the materials required for bolting, services rendered, maps and marketing. Similarly, the establishment of a food tasting or gastronomy tour can – in some instances – require only the training of the food processor on customer service, hygiene and the acquisition of some basic items (such as chairs, plates and some new kitchen equipment) in order to have a fully functioning tour. This is in stark contrast with other tourism industries that rely on major investment efforts, such as the construction of major infrastructure such as new power-lines, water-networks or roads.

There are positive signs for investors in Jordan's adventure travel industry. There are two Jordanian adventure tour companies that have successfully received investment from licensed tour operators - Terhal (Discovery Circle) and Experience Jordan (Guiding Star). These developments are a positive indication of the industry's potential for attracting investment, however only where adventure tour businesses are registered and recognized. Other investments in the industry have occurred at the product development level – primarily through the RCSN. Recent examples of this include the Shawmari reserve, Wadi Mujib and most recently, Wadi Hidan.

Investment in the development of adventure sites such as climbing walls, cycling parks or tracks, hiking trails or canyons represents a major opportunity for local economic development. With over 160 canyons, 650km of hiking trails identified by the JTA and multiple nature reserves, investment opportunity in Jordan's adventure travel industry is sizeable. Establishing eco-camps or establishing zip-line, bungee, or new climbing walls could represent a major opportunity for an investment given the relatively small structural costs. The unique natural scenery lends Jordan also to a globally competitive position, through which a well-made, targeted investment could reap significant returns. The impact of such investment on a local community would be sizeable, adding new and diversified revenue streams for communities across the country. Indeed, its relative impact against current revenues of these communities would be significant, resulting in direct job creation and potentially sustainable incomes for families.

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barriers to investment & entrepreneurship



Jordan has yet to develop a sustainable investment framework for adventure tourism. There are two main ways that an adventure company can receive investment; firstly, through a conventional acquisition by an investor or a larger firm, and secondly, through a joint venture model. However, in adventure tourism, the majority of firms and operators have an informal, unclear legal status which makes investment more difficult. Indeed, the legal gray area itself serves as a red flag for potential investors or partner tourism companies. As such, there have been few instances of merger and acquisitions in Jordan's adventure travel industry. Furthermore, when asked about effective measures to facilitate local tourism investment, most respondents – from hotel chains to MSEs – stated that public infrastructure and preferential zoning was critical to their sustained work. Promotional, marketing activities were also cited as important through the Jordan Tourism Board.

The legal environment in Jordan prevents investment in adventure travel operators in Jordan. The complexity of the legal status, zoning laws and investment laws in the country hinders sustainable investment. As an example, in order to develop and maintain an investment into a water canyon in the country, more than six unique ministries would be involved, tens of pre-approvals required, and the successful navigation of a complicated, diluted investment law.

The lack of regulation results in a inadequate insurance and liability mechanism through which investors can protect themselves. USAID LENS contacted over 30 local insurers in Jordan, none of whom offered insurance for activities deemed as 'risky or adventurers'. Local companies are therefore required to purchase international insurance, which is costly and often inadequate. Indeed, even international insurance can be waived if the activity itself is deemed illegal or non-compliant with local customs and regulations (which in most cases, adventure travel is in Jordan).

Existing adventure travel operators do not generate sufficient profit to invest in the sizeable registration fees to become formalized tour operators, nor are they able to reinvest capital into innovative product design and marketing. A significant challenge for the current operators is that they lack access to capital that would otherwise allow them to invest in their business and the surrounding industry infrastructure. Bank loans are – as has been well document elsewhere – difficult to obtain without sizeable guarantees. In fact, given that banks are relatively risk-averse in well-establish industries such as food processing and transportation, the appeal of adventure tourism for banks is very low. Consequently, most Jordanian adventure businesses operate with a survivalist mindset, rarely developing or innovating business models.

Investors consider adventure tourism to be a high-risk investment, as the industry is relatively unstable, unknown and poorly regulated. For the reasons noted above, investors in Jordan are unfamiliar with mountaineering industry in Jordan. The lack of laws and regulations qualifying and safe-guarding investment means investors will see the sector as high-risk, as they are not protected or insured against claimants or changes in legal circumstances. Furthermore, due to the rapid rise of the industry, the stakeholders themselves (whether public, private or civil society) are underprepared to make effective pitches to most investors. With a lack of familiarity on both sides, the absence of a legal framework and an industry that lacks scientific evidence or data behind market dynamics, it is particularly difficult to attract investment.

There is a lack of information or data about potential investments nation-wide. Municipal and national governments lack the required expertise and resources to be able to identify and map potential natural resources. As such, investors and entrepreneurs are only aware of opportunities through private or personal experience. Even in cases where investment opportunities are apparent, the lack of local, communal familiarity with a site often results in failed endeavors to approach and encourage municipal or national government support. The only body that is routinely investing and developing sites to date is the Royal Society for the Conservation of Nature.





improving the investment environment



Recognizing the processes and existing norms that dictate investment and entrepreneurship in the mountaineering industry will be a critical in Jordan is to become a regional hub for adventure travel and attract international operators.

Resolving the legal complexities and the existing lack of clarity surrounding adventure travel in Jordan should be a priority for the Ministry of Tourism. The Ministry should work with the companies – both formal and informal – that work in the sector in order to create legislation to allow them to be considered as viable, legal businesses. As noted in the legal section below, establishing new laws around business classifications and the registration fees and startup costs is pivotal. Once the businesses are registered, MoTA should hold workshops with investors and the private sector to identify what the demands and expectations are regarding investment frameworks.

Jordan should simplify its investment laws and then promote adventure tourism as a potential investment opportunity to both local and international investors. Greater efforts should be made on first mapping investment opportunities and examining how they compare with similar international investments. Opportunities should then be marketed and supported by all the actors across the chain. This endeavor should become a priority for the Ministry of Tourism and Antiquities, working with the Jordan Tourism Board and the Jordan Investment Commission.

More efforts should be made at the community-level to have them actively engage in and encourage local investment. As potentially a function of the Jordan Tourism Board, Jordan must reach out to local communities to make them familiar with the adventure travel industry and demonstrate its benefits. This should be in concert with the outreach program addressed above. A key result of this stakeholder outreach process will be a more investor-friendly environment which encourages foreign and local direct investment in facilities and activities in the adventure travel industry.

Banks and micro-finance institutions should be consulted and encouraged to build products that are catered to the mountaineering sector and the broader adventure travel industry. Difficulties in accessing finance are by no means the sole concern of the tourism industry. Rather, they represent a broader financial challenge for the country. They do, however, have a major impact on the tourism industry, in that the difficulty faced by most firms in the tourism industry limit their capacity to re-invest in their businesses and expand their outreach to allow them to reach new end markets. This will allow the businesses to invest in their businesses and in new products. There are positive signs to this effect, with The Housing Bank working with USAID BEST on the establishment of financial products specifically for the tourism industry that account for timing of repayments based on fluctuations in seasonality.

The Government needs to improve awareness about investment facilitation currently offered. Although the composition of the industry, with its high proportion of SMEs makes this challenging, it is essential to achieving improved tourism investment performance. The Jordan Tourism Board, Jordan Investment Commission, MoTA and the private sector should make a concerted effort around marketing investment opportunities. There are significant opportunities for a major international adventure travel firm to invest in specific sites and establish new revenue sources. However, this will only arise through targeted marketing and reassurance of the industry that such opportunities are sustainable and profitable.





regulatory
environment

regulation & adventure

The regulatory environment establishes how the industry can function. It is a significant factor in enabling industry development and sustainable operations. Regulatory frameworks are constantly in need of renewal, in order to keep up with business development, the establishment of new norms and practices, and to allow for continued innovation, investment and sustainable development.

As discussed above – in Jordan’s case – the framework in the tourism sector has been built to allow mass tourism and travel to thrive. It is ill-fitting however, for emerging types of tourism and in particular, adventure travel. This section will examine the dynamics of the enabling environment and will detail particular regulations or instructions that could unleash the potential of the industry. In turn, it will look at the standards established by regulation and its impact on the industry; market access and barriers to entry; followed by advocacy and public consultation. Standards establish the legal practices for the industry and act as both codes and guidelines for the operations of stakeholders. They are critical to the functioning and development of the industry.

However, operators in Jordan have little industry standards to follow or guide them and as a result, are ‘free’ to operate in accordance are able to place business interests first. This, as noted above, is rarely a good thing. It allows operators to place profit over quality, sustainability and oftentimes, safety. Firms are ‘allowed’ to function without punitive pressures or enforcement that would otherwise ensure they follow industry standards and practices. Mountaineering in Jordan is thus characterized by varying practices and standards, a wide range of industry certifications and qualifications, and a multitude of ‘norms’, a dynamic that has served to exacerbate and perpetrate poor relationships both between customers and the operator, and operators themselves. One example of this is the number of persons allowed into a particular canyon. As there exist no laws relating to the limits of access and persons in a canyon at a time, firms will frequently bring as many in as possible, creating both environmental and very real safety concerns.





regulatory barriers affecting economic growth



The spontaneous emergence of adventure tour operators responding to market demand has resulted in a distorted, informal economy. Due to the speed with which market supply has emerged - with the exception of scuba diving - many operators, actors and stakeholders undertake activities that are outside of the legal and regulatory framework, or indeed, their activities have no clear legal status whatsoever. For instance, in mountaineering, there are an estimated 40 operators offering weekly activities, ranging from hiking, canyoneering, rock-climbing, food tours, bird-watching and others. According to the last records, only five of these operators are registered as tour operators, and as such, the only companies legally eligible to conduct the type of activities and tours conducted by all fifty in the mountaineering industry.

Many operators in Jordan are in fact registered under different ministerial entities, as non-governmental organizations, training organizations and as both sole proprietorships, and limited liability companies. This section will examine why companies are not registering as formal tour operators, what the incentives for them to register are, what they should be, and how Jordan's governing authorities can encourage better practice and a more inclusive approach.





A primary reason for the high levels of informality in the mountaineering sector is the absence of regulatory frameworks that safeguard the industry. Among the primary reasons tour operators register is that it is a requirement of the industry in order to obtain licenses, to meet national and international standards, expand their business and acquire access to managed and controlled sites or services. The business cedes oversight and registration fees in return for access and permit. In adventure travel however, no such trade-off can be made. The Ministry of Tourism, however, has not yet established rights and standards pertaining specifically to the mountaineering industry. There is no legal system surrounding the mountaineering industry; no laws on hiking or trails; no laws that assure freedom of movement across public lands; and no regulations that protect their sites from exploitation or development. As a result, there are really few incentives for an adventure operator to license its business as a tour operator, beyond it being required when traveling with a group. For instance, despite Jordan's rich history of nomadic communities, right to pass and hiking is not clearly codified in Jordanian Law, and there exists little legal precedence to establish the extent to which it is permitted, nor what the rights of the traveler are.

Formalizing a tour operator is a costly affair that requires excessive access to capital, beyond the capacity of almost all entrepreneurs. According to Law §11 2005 of Tour Operators, a company must have a license to legally operate in the tourism industry. There exist three categories of licenses;

- Category (A) capital requirement of 100,000 JOD to obtain and can organize and facilitate inbound and outbound trips and organize internal trips.
- Category (B) costs 75,000 JOD to obtain and the tour operator can welcome, organize and facilitate inbound trips inside the country.
- Category (C) requires a 25,000 JOD in capital to obtain and can organize trip itineraries for outbound trips and sell outbound trips organized by tour operators of category (A).

The law also demands that the operator uses a 45 square meter office space, hires at least 7 Jordanians for category (A), 5 Jordanians for category (B) and at least 2 for category (c) all of which can speak a second foreign language. Such stringent regulations – the rationale behind which remains unclear – essentially preclude almost all but the wealthiest of startups from operating in the tourism industry. Indeed, these criteria make tourism one of the least accessible sectors for a startup in the economy.

Lengthy and complex approval processes can dissuade a business from registering and acquiring the correct licenses. Should the operator choose to license its business, there are, on average, 10 to 15 stages required to the registration process, and many more relating to the acquisition of a license. This includes registering and licensing procedures from different ministries and departments within the same ministry, as well as municipalities. The nature of mountaineering being relatively new to the country, the required approval processes are often confusing and unclear – even to the authorities charged with administering them. This affects hiking, rock climbing and canyoneering companies in particular as their activity naturally leads them to remote parts of the country and often on an intercept path with tourism police, security and military installations. The extent and nature therefore of their permits – both for the security forces and for the private sector themselves – is unclear.

“Despite Jordan’s rich history of nomadic communities, right to pass and hiking is not clearly codified in Jordanian Law. Regulation must be created to codify best practice and support the establishment of the industry”

regulatory barriers affecting economic growth



Ultimately, adventure enterprises are not incentivized to pay the high cost of formalization.

In lieu of proper business registration and formalization, most operators have exploited the legal ‘gray area’ of business registration, an indeterminate legal space that is neither in violation, nor in the spirit of the law. Examples of these types of businesses include:

- Non-registered informal group of enthusiasts organizing trips on Facebook out of their own knowledge of certain places.
- Non-registered informal group led by specialists who have been trained by a recognized international entity but not recognized nationally, therefore remaining informal.
- Inappropriately classified companies running excursions, trips and activities, potentially registered as a; non-governmental organization; a training company; or other
- Non-registered group of specialists partnered with a legally licensed tour operator
- Registered (or unregistered) group under the legal umbrella of a tour operator that acquired the business and all its operations.

The exploitation of this legal gray area will continue indefinitely should the regulatory environment not establish the market norms and standards for the mountaineering industry. It is critical therefore that MoTA and associated Ministries and governing bodies establish the legal practices and the trade-off between freedom to grow a business and protect business interests as soon as possible, and in a manner that is conducive to the needs of the private sector.

Sporadic enforcement of tourism laws limits the establishment of norms and in certain instances can lead to accusations of bias.

Invariably, adventure tourism comprises of small groups being taken to remote parts of the country. It is very difficult therefore to police. With limited resources and an extremely complex inter-ministerial legal system pertaining to the conduct of tours and groups, stakeholders and the authorities struggle to address what is legal and what is not, and how to enforce the law. An example of this relates to the registration of businesses. The law that posits how a tour operator should be established and the legal requirements therein can be bypassed should an operator instead register as a ‘non-governmental training organization’. In so doing, the operator may be able to carry out activities that should be under the Ministry of Tourism’s jurisdiction, yet are registered through the Ministry of Interior. Such activity is not necessarily a deliberate distortion of the legal system, but has been used out of necessity, the reasons for which are noted above. Public sector activities that affect the mountaineering industry are accused by factions in the civil society and private sector of being secretive and inaccessible.



understanding the struggles of local guides



Guiding has been a mainstay for employment in the tourism industry in the country. In the last few years however, as overall tourism receipts have dropped significantly, the number of guides employed regularly has plummeted. It is estimated that only 6% of guides are regularly employed throughout the year. This section will examine the nature of the industry in Jordan and how its current status is both affected by, and impacting, the mountaineering industry.

As with the broader legal framework in tourism in Jordan, the guiding industry is by design tailored to the mass tourist. The process for becoming a legal guide in Jordan is relatively intensive, with a six-month training course and examination followed by the procurement of a license issued by the Jordan Tourism Guide Association. This is a costly process that imposes stringent rules on both what is required pre-certification, and the limitations upon being a guide. For instance, guides are required to speak at least one foreign language and have attended university. Once certified however, it is illegal for a guide to acquire another form of income. Obviously, this severely limits a guides' capacity to drive-up revenue and subjects him/her to the market fluctuations of the local tourism industry.

The official tour guide licenses – site and general – are inapplicable and largely irrelevant for the needs of a mountain adventure guide. While it is mandatory for a guide in Jordan to take a 6-month training course and learn about the history of Petra and the country at large, while fluent in a second language, these skills are largely incidental or secondary for mountaineering, an industry that places an emphasis on the health and safety of its customers, requires highly specific local knowledge and an intimate familiarity with the local environment. Currently therefore, few of the skills acquired by official general guides in Jordan would be in demand or relevant to the tour operators and as a consequence, the tour operators rarely employ their services, even if that means breaking the law. Indeed, as of 2016, with over 1,200 guides registered and licensed under the Tourism Guiding Law and certified by the Jordan Tourism Guide Association only 10% of the existing tour operators in mountaineering actively use JTGA guides.

Certification does not equate to qualification.

While operators may not use the official JTGA guides, that does not mean they do not take guides at all. Most operators will take a number of guides or 'leaders' with them to canyons, on trails or to lead in rock climbing. Typically, these have been persons that are part-time or full-time employed in the operator, and who possess skills, qualifications, or at the very least, a passion for the activity. The quality and standards of these guides varies greatly however. Most operators will claim that their guides are independently certified by a third party organization (often international) and that they do so in the interests of the customer. Upon closer inspection however, the quality and applicability of many of these licenses or qualifications are questionable, and of limited relevance to the intended activity. Ultimately, while there are a number of certifications in Jordan relating to adventure travel, these do not necessarily translate as somebody having the necessary skill and knowledge to carry out a particular task effectively.

There are a plethora of qualifications and training programs that are not coordinated or properly organized. In the last three years alone, USAID LENS identified up to 10 training programs and active qualifications in the country, amounting to the training of up to 150 individuals in different national and international standards in a variety of specializations. Unfortunately, few of these programs will address key market drivers such as requirements set by international insurance firms, international tour operators or even the adventure aficionado. The impact of this has been programs and trainees that do not agree on which system is suitable for different activities, what level of training is required and their applicability to the local context or environment. As observed above, this has led to disagreements over which organization or body should be leading efforts in the issue of guiding qualifications





recommendations for the guiding industry



Guiding in Jordan is in dire need of new regulation and new instructions that affix internationally-recognized industry standards to Jordan's current legal framework. It is crucial however that the design of said standards is done in consultation with the private sector and the existing guiding industry. Bypassing stakeholders will simply lead to new standards that are not relevant, not applied, or not conformed to by the private sector should they feel that they remain external to the design process.

The private sector and the JTGA, its guides and adventure travelers should have public workshops to discuss how to develop the guiding frameworks and ensure that all parties are consulted. The relationships between the traditional Jordanian guides and the new adventure travel operators has deteriorated rapidly in the last 5 years. Accusations – both baseless and accurate – have been made on both sides and there is a high level of mistrust of the other. These meetings should be mediated by an objective third party body that can ensure that both sides can see the significant advantages to cooperation and working together. While the JTGA and its members should be respected as the licensed authority on guiding, they should equally recognize that their skills do not meet the needs of the adventure travel operators.

The JTGA should be consulted and encouraged to innovate on the development of new guiding laws and regulations. Acquiring their consensus and buy-in on the establishment of new laws and regulations is pivotal, otherwise they will not be adhered to. During the consultation process however, it is important that the JTGA are informed on new norms and standards, and critically, are introduced to the end market itself. The latter is particularly important as the JTGA has, since its inception, catered to an end market that is markedly different and less diverse than that of the adventure traveler. Therefore, its assumptions and understanding of the industry will be different to that of the expectations of those wanting guides.

New cost and pricing plans should be developed by firms and the guides in order to account for specialization. There is a lack of clarity surrounding the appropriate costs for a guide in Jordan. This has resulted in both a lack of trust on the part of the operator hiring the guide, the customer in paying the fees and the guide in what he or she should be charging. To mitigate this, through a recognized public body and in consultation with the private sector's capacity to absorb changes in costs and thus changing in pricing, the industry should have continual consultation on acceptable pricing plans in relation to location, the level of specialization required in the activity and in the quality of the guide itself. It is important however that guides are not provided with simply standardized pricing, as the system should allow guides to vary prices according to the specificities of demand.

More effort should be made to train and employ female guides. While there are undoubtedly cultural dimensions to the employment of women as guides in the country, their recruitment would be a significant achievement for the adventure travel industry. As adventure activities frequently involve physical contact and close proximity guiding, the importance of having female guides who are properly trained and instructed cannot be understated for tour groups that have women in them, or who are made wholly of women. This will impact not only international groups, but also local Jordanians groups as well. The Ministry of Tourism and Antiquities, the private sector and civil society groups should make a concerted and coordinated effort to incentivize and encourage women to engage more in the profession.

recommendations for the guiding industry...

Jordan should learn from existing best-practice on regulations relating to the mountaineering sector.

There are many international systems and guidelines on mountaineering guiding and best practice. In the development of these new systems, Jordan must adhere to international standards. This will allow operator and guides to become internationally insured and registered as qualified to an internationally-recognized standard – something that is crucial not only for protection and well-being of the traveler, but equally as a form of access to international markets. See Case Study C for further examples on guidelines in adventure guiding.

A uniform, standardized guiding certification is required. Under the newly established bylaw stipulating the existence of a ‘specialized guide’, MoTA and the JTGA must work together with an accredited body to establish a certification that precisely meets the needs of the private sector. This certification, as noted above, must draw on existing best-practice and be in-line with common international norms and standards.

Jordan must diversify its certifying bodies in order to cater for an entirely new specialization and practice.

The current guide-certifying partner of the JTGA has well-established expertise in hospitality and classical tourism, offering a 6-month course in guiding in Jordan. Its offering, nor indeed - its future capacity, caters to that of adventure travel. Rather, MoTA, the JTGA must find a local partner and academy that has the expertise and location suitable for adventure travel guiding. This would preferably be in a location that is suitable for trainings that include rescue, flora and fauna, ‘leave-no-trace’ and orientation and navigation as well as managing risks, hazards and emergency situations are required skills in all adventure activities soft or hard. Similarly, first aid training is also required for adventure travelers.



Guide laws should be relaxed to allow for more local guides and those without the ‘qualifications’ required under other certificates. As noted above, certification does not equate to qualification. This is particularly evident in the requirement of guides to be multi-lingual, or have university degrees. Guiding in adventure industry should be made accessible to those that do not have access to education or the financial resources to cover the cost of language courses. In order for guides to be more familiar with their environment and with local history, culture and society, it is highly recommended that they be sourced and located within a community that are familiar with.

Self-guided tours should be permitted in Jordan.

A significant number of tourists - both local and international - prefer hiking independently and without the assistance of a guide. As the Jordan Trail continues to develop and expand, it is important therefore that self-guided tours be permitted, rather than guides enforced. This will allow greater development in the early stages of the tour and circuits, and an increased concentration for guides required for more difficult activities. This is a key factor in limiting the likelihood of a surplus of guides in Jordan, which is a key contributor towards downward-pricing (as witnessed by the service-operators themselves). Self-guiding is also an excellent gateway towards more advanced activities for beginners and ‘adventure grazers’. It allows them to experience hiking and touring without the added cost - which can often be unnecessary - of a local hiking guide.

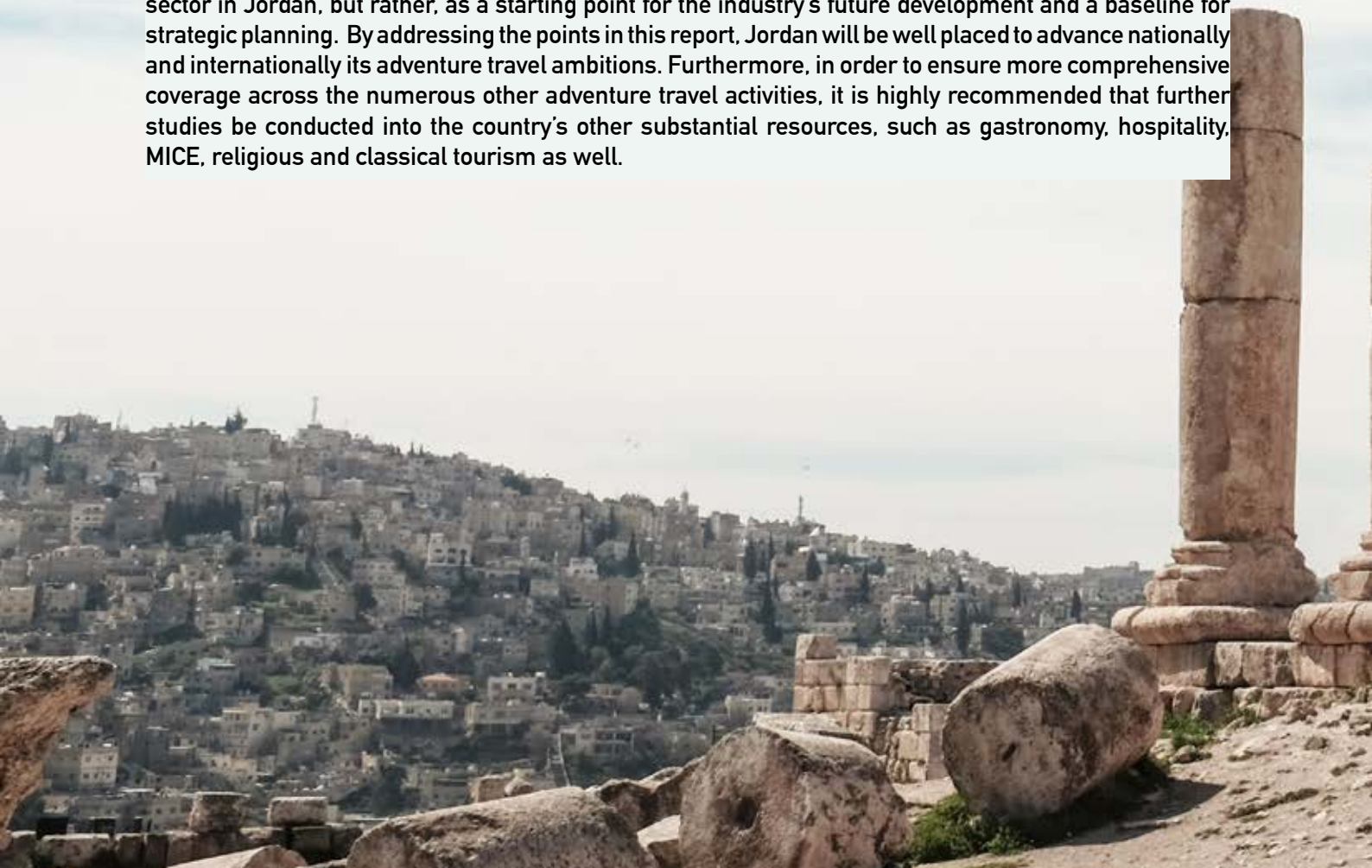


jordan: a country of unrivalled potential

The future of Jordan's adventure travel industry is bright. As demonstrated in this report, the country has extraordinary potential and is almost unrivalled in the region for adventure travel. Culturally, socially, historically, politically and economically, the country remains stable and well placed to become a regional hub and globally competitive. With over 600km of hiking and cycling routes in Jordan, covering multiple topographies, landscapes and biodiversity, more than 140 canyons, many of which promise waterfalls, diverse flora and fauna and unique and spectacular rock formations. and an enumerated 500 rock climbs at all grades from single pitch (traditional and sport) to multi-pitch big walls and superb mountain traverses; Jordan is truly a natural treasure.

The adventure industry is growing nationally, with increased interest in the country's potential growing around the world. The explosion of the number of local operators and entrepreneurs operating in the adventure travel industry - despite the setbacks and barriers - demonstrates both the local passion for and dedication towards the development of this industry. Jordan should look proudly on those already investing in adventure travel and the associated activities, recognizing them for their entrepreneurial endeavors and pursuit of establishing a livelihood that will benefit not only the travelers, but could become a cornerstone of local economic development across the country. Based on the economic analysis conducted by the USAID LENS team, adventure travel could generate up to 100 million USD annually for the Jordanian economy. If combined with figures taken from ATTA's report into the impact of adventure travel in Jordan, up to 66 million USD would remain within the local economy, representing an almost unrivalled impact in terms of local economic development and source of new income for underserved communities across the country.

This report, although informative, does not serve as a comprehensive review of the entire mountaineering sector in Jordan, but rather, as a starting point for the industry's future development and a baseline for strategic planning. By addressing the points in this report, Jordan will be well placed to advance nationally and internationally its adventure travel ambitions. Furthermore, in order to ensure more comprehensive coverage across the numerous other adventure travel activities, it is highly recommended that further studies be conducted into the country's other substantial resources, such as gastronomy, hospitality, MICE, religious and classical tourism as well.





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