

HOSPITALITY AND TOURISM SECTOR INCLUSIVE SKILLS DEVELOPMENT STRATEGY



وزارة السياحة والآثار
Ministry of Tourism & Antiquities



المجلس الوطني لمهارات قطاع السياحة والضيافة
Tourism and Hospitality National Sector Skills Council



STRATEGIC INTELLIGENCE SOLUTIONS
نماء للإستشارات الإستراتيجية



European Bank
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البنك الأوروبي لإعادة الإعمار والتنمية

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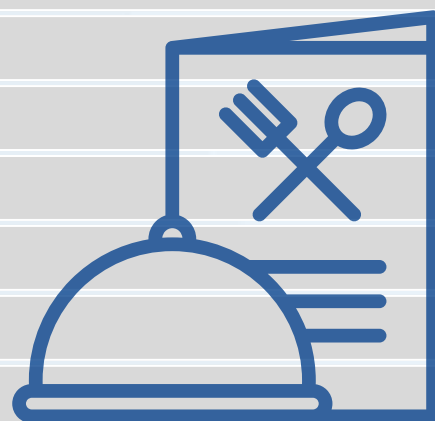
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Acronym	Description
ASEZA	Aqaba Special Economic Zone Authority
CSDT	Continuous Skills Development Taskforce
DOA	Department of Antiquities
EBRD	European Bank for Reconstruction and Development
ETF	European Training Foundation
F&B	Food and Beverages
GCC	Gulf Cooperation Countries
GDP	Gross Domestic Product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
GOs	Government Organization
GPS	Global Positioning System
HEAC	Higher Education Accreditation Commission
HR	Human Resources
H&T	Hospitality and Tourism
ICT	Information and Communication Technologies
INGOs	International Non-Governmental Organizations
JHA	Jordan Hotel Association
JHPTA	Jordanian Handicrafts Producers and Traders
JHTEC	Jordan Hospitality & Tourism Training Center
JITOA	Jordan Inbound Tour Operators Association
JRA	Jordan Restaurant Association
JTB	Jordan Tourism Board
JITOA	Jordan Inbound Tour Operator Association
KII	Key Informant Interview
KSA	Kingdom of Saudi Arabia
MICE	Meetings, Incentives, Conferences, Events



Acronym	Description
MOTA	Ministry of Tourism and Antiquities
MOL	Ministry of Labor
MS	Microsoft
MSME	Micro Small and Medium-sized Enterprise
NATA	National Aviation and Tourism Academy
NCHRD	National Center for Human Resource Development
NTS	National Tourism Strategy
PDTRA	Petra Development & Tourism Regional Authority
PTP	Pathways to Professionalism
SI	Strategic Initiative
SME	Small and Medium Enterprises
SO	Strategic Objective
SSC	Sector Skills Council
SSC H&T	Sector Skills Council – Hospitality and Tourism (SSC H&T)
RACA	Royal Academy of Culinary Arts
R&D	Research and Development
TVET	Technical Vocational Education and Training
TVSDC	Technical and Vocational Skills Development Commission
UNWTO	United Nations World Tourism Organization
VTC	Vocational Training Corporation
WTTC	World Travel and Tourism Council



Executive Summary

INTRODUCTION

In efforts to provide the Jordanian hospitality and tourism (H&T) sector with a strong pipeline of qualified and skilled labor force, NAMA Strategic Intelligence Solutions, in partnership with the European Bank for Reconstruction and Development (EBRD) and the European Training Foundation, developed an H&T Sector Inclusive Skills Development Strategy. This strategy is a coronation of the tremendous work by the EBRD in Jordan's tourism sector over the past few years, as the EBRD supported the creation, and thereafter adoption, of the Tourism and Hospitality National Sector Skills Council (SSC H&T).

The SSC H&T, formed by private sector representatives of key stakeholders (sub-sectors), was enacted in 2021 to play a pivotal role in determining and standardizing the qualifications of workers within the H&T sector by virtue of assuming an expert role in creating occupational standards, which contribute to improving the efficacy and alignment of training provision to the needs of the Jordanian H&T sector's labor market. Further, the SSC H&T works closely with the Technical and Vocational Skills Development Corporation (TVSDC) to develop standards for trainers, equipment, and curricula and establish qualification standards for the training centers.

To that end, the SSC H&T advocated with the EBRD to support the creation of this Sector Skills Development Strategy to essentially define its action plan for the next five years to enable the Council in leaping forward toward, and fulfilling, its operations in enhancing the skills of current and prospective labor within the H&T sector. Further, this strategy is also in line with the Ministry of Tourism and Antiquities' (MOTA) National Tourism Strategy 2021-2025 – particularly its Human Resources Pillar – and in line with the Economic Modernization Vision 2033 – especially its “Jordan: a Global Destination” component.

METHODOLOGY

In designing this strategy, collaboration was at the forefront, driven by the ETF guidelines, which place great value on inputs from the sector representatives. As such, throughout the series of kick-off meeting and introductory sessions, NAMA reviewed previous research and studies to assess the quantitative and qualitative H&T sector skills and labor gaps, whether current or anticipated. The literature review revealed a number of shortcomings that would inhibit the accuracy of the strategy. This is because most of the published research was done prior to the COVID-19 pandemic, whose implications on the tourism sector have transcended economic turbulences to include qualitative and attitudinal shifts in not only workers, but also the tourists. While there were some studies that explored the impact of the pandemic on the sector, they still relied on some outdated data, posing challenges to the strategy's accuracy. As such, NAMA agreed with the EBRD to survey H&T establishments to acquire the most updated data, from the point of view of the sector itself to triangulate with the findings of the literature review along with the qualitative research component, which featured key interviews with the demand, supply, and regulators of the sector, including MOTA, MOL, TVSDC, NHRC, and training providers.

NAMA developed six survey questionnaires for separate surveys with restaurants, hotels, handicrafts, tourism transport, tourism agencies and operators, and tour guide – all of which were developed jointly and in close collaboration and communication with each sub-sector representative within the SSC H&T. NAMA's experienced enumerators contacted all establishments whose contact details were available with their respective associations/ boards. In total, NAMA made over 10,000 contact attempts, as each establishment was contacted up to three times before omitting if no response was acquired. Overall,

NAMA completed successful contacts with a total of 797 establishments, representing 18.8% of the total size of the hospitality tourism sector. These 797 establishments also employ near 25% of the sector's labor force, as the survey was among the most representative studies to be conducted in Jordan.

Subsector	Sub-Sector Size	Number of Establishments Interviewed	Sample Representation against Sub-Sector Size
Restaurants	1,252	196	15.7%
Hotels	570	167	29.3%
Tourism agencies	705	188	26.7%
Tourist transport and car rental	247	49	19.8%
Handicrafts	232	62	26.7%
Tour guides	1,224	135	11%
Total	4,230	797	18.8%

Table 1: Survey Sample Size Broken Down by Sub-Sectors

The restaurants interviewed responded to a total of 829 questions; the 167 hotels responded to a total of 1,522 questions; the tourism agencies responded to a total of 480 questions; the tourism transport establishments responded to a total of 504 questions; the handicrafts interviewed responded to a total of 434 questions; and the tour guides interviewed responded to 176 questions. As a result, the surveys produced over half a million data points.

The data reviewed, data gathered, and consultations/ meetings held served primarily to answer key questions concerned with the H&T sector labor market and the skills required to match the qualifications of the jobs, yielding current and future labor market gaps and current and future skills gaps through triangulating among current and future gaps in terms of skills, qualifications, and jobs. With that, the Strategy Team was able to identify current and forthcoming skills necessary to address the skill gap in the sector, with emphasis on digital skills, along with emerging trends. The Strategy also defined the technical and behavioral competencies required for current opportunities in comparison with the competency/ skill gap in the content of the program and the competencies of available opportunities.

Once the gaps were fully identified, the Strategy Team defined the Strategic Objectives and their respective strategic initiatives which serve to fulfill the objectives in clear action plan that indicates and illustrates the responsible entities, the timeline of implementation, as well as the means through which the initiatives can be monitored and evaluated as well as their ability to mitigate any risks that could hinder their success.

Demand Analysis

The majority of H&T establishments interviewed are located in Amman. Most establishments employ workers on full time basis while around 10% employ workers on a seasonable basis, causing fluctuations in the size of the labor force, depending on the time of the year in which it is measured. When asked about how they hire their employees, most establishments – especially restaurants, hotels, and tourism agencies use social media platforms or rely on individual recommendations and direct requests by job seekers. Of the establishments that face difficulties in hiring labor, finding qualified workers was the main difficulty

across all sub-sectors, except for tour guides. Other difficulties such as the perceived lack of continuity, stability, and career development opportunities were also substantially cited especially among restaurants, hotels, and tourist agencies.

When it comes to foreign labor, 45.9% of restaurants, 38.3% of hotels, 14.9% of tourist Agencies, 16.1% of Transport, and 6.1% of handicrafts indicated they would hire foreign labor, mostly for roles involving manual labor, which they would perceive as unfavorable for Jordanians. When asked about mechanisms to Jordanize such jobs, most establishments highlighted that “Jordanians must accept professions occupied by foreign workers”; “Improving their level of training”; “providing tax incentives”.

Female labor force participation rate in this sector remains low, generally around 12%. When the establishments were asked how to increase the number of females in the industry, most establishments referred to providing flexible working hours and increasing society’s acceptance of female participation in the H&T sector.

As for persons with disabilities (PWDs), they remain marginalized – making up only 0.5% of the workforce. Most establishments attributed the low representation to their perceived “inability to perform the tasks needed of the job,” which entails the need for awareness raising among the establishments themselves. Ultimately, when delving into the skill gaps, the Strategy consultations revealed nine (9) most prevalent skill gaps, across all sub-sectors and governorates. These nine gaps are (a) operational and foundational skills and general knowledge; (b) languages – especially English; (c) customer service and etiquette; (d) overall cleanliness and hygiene, (e) business/ administration skills, (f) operating digital systems, (g) making food/ drinks along with their presentation and management, (i) work ethic including timeliness and the ability to learn and adapt quickly, and (j) marketing and sales skills.

As for training provision, 58.2% of restaurants have training programs for their employees, most of which are in the facility while some are external or online. In comparison, 39% of the hotels train their employees, 66.2% of tour guides, 43% of tourism agencies, 31% of tourism transport, and 11% of handicrafts.

Supply-Side Analysis

Of the 2,406 students who graduated into the tourism industry, 49.1% studied tourism and antiquities management, 25.1% studied hotel management. It is worth noting that the majority of workers in the H&T sector do not have degrees pertaining to the sector, as the majority of workers gain skills during the job.

Data demonstrates that there is a high number of students that graduate with a degree or certificate, but there is a low to medium percentage of job placement in the tourism sector. It is also important to note that this academic survey mainly consisted of public universities (80%) with VTCs comprising only 5%, let alone that most degrees tend to be purely academic, entailing a weak link between the academic training providers and the professional world.

Gap Analysis

The Strategy consultations revealed a mismatch in the perceived difference between what academic institutions see as necessary skills, compared to the labor market needs, coupled with an absence of follow-up mechanisms when it comes to practical training or graduates' status updates. As such, there needs to be more on-site training, especially for entry-level positions, since the majority of establishments do not train their employees. Additionally, continuous updates to current curricula to keep up with evolving market needs is imperative along with widening the reach of strong training and educational programs to reach more areas, as the majority are centered in Amman.

With the need to address current skill gaps and ensure anticipated jobs are occupied by qualified labor, training and education providers need to focus on training pertaining to operational and foundational skills, English for tourism, customer service and etiquette, personal hygiene, business/ administration skills, drinks making, marketing and sales (including digital), work ethic, and general sanitation. Emphasis should also be paid to future market needs such as entrepreneurship skills, logistics, artistic vocational skills, ticketing and reservation, eco-tourism and sustainability.

Looking at each sub-sector individually, the table below illustrates the skill gaps that ought to be prioritized, given their need at the H&T establishments and the prevalent training gaps to fulfill such needs:

Profession	Skill Gap 1 (No. Training Seats)		Skill Gap 2 (No. Training Seats)		Skill Gap 3 (No. Training Seats)		Skill Gap 4 (No. Training Seats)	
Restaurants: Current Labor								
Waiter/ Floor Staff	Etiquette, interacting with customers, and communication	3,080	Operational and foundational Skills, including order taking, memorizing, service provision, food presentation	1,629	Languages, especially English	1,236	Personal Hygiene	964
Bartender	Efficient product management and cost saving measures	111	Etiquette, interacting with customers, and communication	74	Teamwork and communication skills	59	Operational and foundational Skills, including order taking, memorizing, drink-making	49
Barista	Etiquette, interacting with customers, and communication	110	Operational and foundational Skills, including order taking, memorizing, service provision, drink decoration	94	Knowledge of products	43	Efficient product management and cost saving measures	32
Kitchen Staff: Apprentice to Supervisor	Work ethic, seriousness, connectedness, timeliness	137	Operational and foundational Skills needed to do the work as required, including food preparation, preferences, and value	91	Etiquette, cleanliness, interacting with customers, communication, especially in English	33	Financial planning, feasibility, knowledge of the sector	23
Chefs: All levels	Work ethic, seriousness, connectedness, timeliness, cleanliness	722	Operational and foundational Skills, including food preparation and knowledge of foods	666	Etiquette, interacting with customers, and communication and languages, especially English	158	Operational and foundational Skills required to do the job, mainly knowledge of operating the system	112

Finance and Accounting	Managerial skills and work ethic, including decision-making and problem-solving skills	93	Etiquette, interacting with customers, and communication, especially in English	33	Financial planning, feasibility, knowledge of the sector	30	Languages, especially English	26
Cashier	Etiquette, interacting with customers, and communication	206	Work ethic, seriousness, connectedness, timeliness, sharpness	118	Operational and foundational Skills required to do the job, mainly knowledge of operating the system	18		

Restaurants: Prospective Labor

Chefs: All Levels	Operational and foundational Skills required to do the job, including knowledge of recipes and food preparation	1,240	Work ethic, cleanliness, seriousness, connectedness, timeliness, sharpness	1,081	Managerial skills, including team management skills and efficient product management	1,058	Etiquette, interacting with customers, and communication - especially English	128
Waiter/ Floor Staff	Work ethic, seriousness, connectedness, timeliness, sharpness, and personal Hygiene	2,471	Etiquette, interacting with customers, and communication - especially English and with female customers	1,537	Operational and foundational Skills, including order taking, memorizing, service provision, knowledge of products	1,519	Tech/ Digital skills	216
Management staff: Branch Manager/ events/ sales	Etiquette, interacting with customers, and communication	178	Work ethic, seriousness, connectedness, timeliness, sharpness	178	Tech/ Digital Skills, including operating systems	178	Managerial skills, including team management skills and problem-solving skills	155
Bartender and Barista	Operational and foundational Skills, including how to make drinks, order taking, memorizing, service provision, and presentation	134	Etiquette, interacting with customers, and communication	127	Work ethic, seriousness, connectedness, timeliness, sharpness, cleanliness	103	Languages, especially English	24

Hotels: Current Labor

General Manager	Communication skills and languages, especially English	44	Work ethic, seriousness, connectedness, timeliness, sharpness	33	Managerial skills, including leadership skills and having experience	19	Tech/ Digital Skills, including for marketing	19
Finance and Accounting	Knowledge and experience in operating the hotel's finance system	120	Digital skills, including for communications and digital booking	41	Communication skills and languages, especially English	21	Knowledge of tax laws	10

Cashier/ Treasurer	Managerial skills and work ethic, including decision-making and problem-solving skills	49	Work ethic, seriousness, connectedness, timeliness, sharpness	19	Languages, especially English	17	Knowledge and experience in operating the hotel system	13
Reception/ Front Desk and Reservations	Etiquette, interacting with customers, and communication and languages, especially English	626	Work ethic, seriousness, connectedness, timeliness, sharpness	118	Digital skills, including operating the Opera System and MS. Excel	110	Knowledge and experience in operating the hotel's booking system (Opera System)	36
Housekeeping and Laundry	Operational and foundational skills required to do the work, including knowledge of proper cleaning, tidying, and using chemical products	446	Work ethic, seriousness, integrity, connectedness, timeliness, sharpness	300	Communication skills/ Languages, especially English	173	Etiquette, interacting with customers, and communication skills	128
Waiter/ Floor Staff	Operational and foundational Skills, including order taking, memorizing, service provision, food presentation	193	Languages, especially English	117	Ability to train other staff on service provision	50		216
Chefs: All levels	Knowledge and ability to cook many different recipes and how to present the food	71	Ability to train other staff members	21	Languages, especially English	18	Work ethic, seriousness, integrity, connectedness, timeliness, sharpness	155

Hotels: Prospective Labor

Chefs: All levels	Operational and foundational Skills, needed to do the work as required - how to make foods, knowledge of products and recipes and ability to innovate	351	Knowledge of making Jordanian foods, including pastries and desserts	182	Work ethic, seriousness, connectedness, timeliness, sharpness, cleanliness	140	Etiquette, interacting with customers, and communication	21
Housekeeping Staff	Knowledge and experience in cleaning and using chemical products	1,385	Etiquette, interacting with customers, communication, cleanliness	1,325	Languages, especially English	1,342	Work ethic, seriousness, connectedness, timeliness, sharpness, cleanliness	688
Waiter/ Floor Staff	Operational and foundational Skills, including order taking, memorizing, service provision, food presentation	963	Languages, especially English	919	Etiquette, interacting with customers, and communication	871	Work ethic, seriousness, connectedness, timeliness, sharpness, cleanliness	615
Reception/ Front Desk and Reservations	Etiquette, interacting with customers, and communication, especially in English	1,261	Operational and foundational Skills needed to do the work as required, including knowledge of the sector	571	Work ethic, seriousness, connectedness, timeliness, sharpness	346	Tech/ Digital skills to accommodate developments	243

Handicrafts: Current Labor

Sales and Marketing	Work ethic, innovation, seriousness, connectedness, timeliness, sharpness	12	Languages, especially English	8	Leadership skills and knowledge of the work	2		
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Handicrafts: Prospective Labor

Craftsman	Knowledge and creativity in making mosaics, especially in using the wheel	148	Artistic skills, drawing on glass, painting, sand calligraphy	142	Precision, creativity, innovation	114	Languages, especially English	52
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Tourism Transport: Current Labor

Sales and Marketing	Marketing skills and customer relations	28	Client relations and communications	14				
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Tourism Transport: Prospective Labor

Sales and Marketing	Knowledge of tourism products, sites, and operating systems	171	Digital skills	163	Etiquette, interacting with customers, and communication/ interpersonal skills	154	Languages, especially English	154
Drivers	Etiquette, interacting with customers, and communication and languages, especially English	988	Knowledge of tourism sites in Jordan and experience in tourism travel	489	Work ethic, seriousness, connectedness, timeliness, sharpness	10		
Mechanics	Experience in the field, ability to fix cars	77	Work ethic, seriousness, connectedness, timeliness, sharpness	77	Knowledge of tourism sites in Jordan and experience in tourism travel	10		

Tour Operators and Agencies: Current Labor

General Manager	Marketing skills	31	Communication skills and languages, especially English	30	Managerial skills, including financial management and team management	29	Knowledge of the tourism sector in Jordan	22
Sales: All levels	Communication skills, and English language	138	Sales and marketing skills	65	Etiquette, interacting with customers, and communication	39	Soft skills such as negotiation skills to convince customers	22
Ticketing and Reservations	Languages, especially English	142	Digital skills	19				

Tour Operators and Agencies: Prospective Labor

Ticketing and Reservations	Etiquette, interacting with customers, and communication, especially in English	1467	Digital skills to operate the ticketing and reservations systems and ability to market online	712	Experience and knowledge in the Jordanian tourism sector and sites	705	Work ethic, integrity, seriousness, connectedness, timeliness, sharpness	674
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Operations Staff, including field staff and guides	Etiquette, interacting with customers, and communication skills; languages, especially English	498	Work ethic, integrity, seriousness, connectedness, timeliness, sharpness	498	Experience and knowledge in the Jordanian tourism sector and sites	125	Marketing skills, client relations, outreach skills, and negotiation skills	19
Sales and Marketing	Experience in the field	35	Knowledge of accounting systems	26	Digital skills	26		

Tour Guides: Current Labor

Tour Guide	Adventure Tourism	407	Languages: English, Chinese, Spanish, German, Greek, Portuguese, Japanese, etc.	363	Knowledge of history and archeology of Jordanian tourism sites	310	Marketing, including on social media; digital skills, and communication skills	252
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Tour Guides: Prospective Labor

Tour Guide	Languages, including English and Chinese	30	Adventure Tourism	30	Knowledge of history and archeology of Jordanian tourism sites, including its environment	30	Etiquette, communication skills, public speaking, and interpersonal skills	10
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Table 2: Priority areas for training: number of training seats required, categorized by skill gaps and sub-sectors

Labor Market Forecasting

It is important to determine the extent to which training needs correlate with the labor market's projected growth. This is so the Strategy's action plan can inform H&T establishments as well as training providers with the skills demanded, in which sub-sector, in which governorate, for which jobs, and when – to coincide with the number of jobs expected to be demanded for such jobs, in a way cognizant of the market's projections. In analyzing the size of the H&T sector labor force over the past 10 years, restaurants sustained an average of 0.9% year-on-year change, compared to 2.6% for hotels, 1.1% for handicrafts, 8.6% for tourism transport, -0.75% for tour operators/ agencies, no change for tour guides, and 22.4% for other professions such as those involving diving centers, glass boats, and water sport. Looking ahead, there are two possible scenarios for the growth of the Jordanian H&T sector's labor market:

The Natural Growth Scenario – The H&T sector's labor force is expected to sustain a 2.38% increase between 2023 and 2027, adding an average of 1,368 new workers yearly within the existing establishments and their hiring capacity, as each establishment tends to employ, on average, 16 individuals, based on the size of the labor market in 2022. The sector is expected to add 6,840 new workers by 2027 compared to 2022. The sector's labor market is also expected to gain a total of 16,183 new workers by 2033.

The Economic Modernization Vision-Driven Growth Scenario – Taking into consideration planned investments as well as policies and regulations that are expected to drive further investments, the sector's labor force is expected to sustain a 12.8% increase between 2023 and 2027, adding an average of 9,000 new workers yearly within existing and new establishments to be driven and enacted by the Vision. With this scenario, it would be expected to gain a total of 99,000 new workers over these years.

- It is worth noting than an alternative projection views 2023-2025 as an incubation period in which policies, programs, incentives, and initiatives can materialize before they can start meeting the targets of the Vision.

Achieving the targets of the Vision necessitates two approaches, both of which require heavy investments to either (a) enhance the capacities of current establishments to be able to demand and absorb the targeted number; and/or (b), provide incentives for investors to enter the market and open new establishments in Jordan's H&T sector. The first approach assumes a natural growth in the number of establishments, consistent with historical trends, each establishment would have to employ, on average, 44 individuals to accommodate the Vision's target of 99,000 new jobs by 2033, as opposed to an average of 20 individuals if the labor market grows in a similar pattern to how it performed in the past decade. The second approach entails that the sector needs to have a total of 7,639 establishments by 2033, which is 4,178 more establishments that ought to be incentivized into opening.

Skills Development Strategy Overview

There has been a decline in the number of graduates from training programs and from higher education tourism programs. Challenges facing the tourism sector also include high unemployment, as the employment rate for graduates of training programs is around 75%, compared to 25% among graduates of educational institutions. Thus, it is necessary to work on enhancing the attractiveness and competitiveness of the sector to enable it to target, train, employ, and maintain high caliber of labor, including women and PWDs.

The diagnostics conducted has resulted into two main strategic objectives for this Sector Inclusive Skills Development Strategy. These objectives have three distinct operational outputs, each:

Strategic Objective I – Focuses on developing Jordanian human resources. This particular objective looks to result into developing training and educational programs that meet the required skills in the domestic and international tourism labor market; establishing an organized domestic tourism job market; and enabling balanced growth in the enrollment and graduation of students in tourism training and education programs, considering factors such as the governorate, specialization, and women, refugees, and PWDs. This objective assumes the willingness of training and education providers in the tourism sector to respond to program development plans and quality assurance standards. It also assumes that stakeholders in the tourism labor market must exhibit a commitment to mutually coordinate and cooperate with each other. It assumes that SSC H&T is empowered to effectively fulfill its roles and responsibilities.

Strategic Objective II – Aims to create sustainable growth in employment opportunities for Jordanians in the domestic and international tourism labor markets. It aims to result into developing accurate and timely data on the domestic and international tourism labor market; achieving continuous growth of the number of Jordanians employed in the domestic and international tourism labor market; and developing competent government and private administrations and personnel who are proficient in managing the growth of the labor market. This strategic objective assumes the Jordanian government to ensure effective coordination with counterpart institutions in the destination countries' governments regarding employment opportunities for foreign tourism employment. It assumes the willingness of the tourism establishments to collaborate by providing accurate and regular information about their human resources and job vacancies. It assumes an increase in the number of foreign and local tourists; the development and improvement of tourist sites' management; and an increase in the number of tourism establishments. It also assumes the provision of special incentives for workers in the tourism sector and the establishment of wide partnerships with the private sector.

Strategic Initiatives to Bridge the Current and Future H&T Labor Market and Skills Gaps

In order to bridge the gaps between current skills and demands, and future demands, and increase the workforce in the H&T industry, the following strategic initiatives are proposed:

Strategic Initiative 1.1.1 – Monitoring the Future Competency and Skill Requirements of the Domestic Labor Market: Looks to conduct an annual study of job vacancies on different employment platforms like LinkedIn and Siyahajobs. It features creating an inquiry system for tourism establishments to understand their specific skill requirements. The goal is to prepare the labor market by identifying skill gaps and market trends. The findings will guide education and training efforts to meet emerging needs. This initiative will review investment opportunities in small projects in each governorate to support economic development, create new jobs, and promote entrepreneurship. This initiative aims to foster a more dynamic and responsive labor market by providing strategic insights into job demand, skills gaps, and investment potential.

Strategic Initiative 1.1.2 – Monitoring the needs of the international tourism labor market: Focuses on assessing the needs of the international tourism labor market, particularly in emerging markets like Saudi Arabia to help identify global competencies and qualifications in demand, enabling the tailoring of domestic tourism training and education programs accordingly. This initiative aims to establish partnerships and twinning relationships with institutions in promising tourism growth countries, through which best practices and successful strategies from these countries can be shared and adapted domestically.

Strategic Initiative 1.1.3 – Reviewing and developing tourism training and education program: Focuses on revising and developing tourism training and education programs to meet market demands, by way of incorporating insights from previous studies about domestic and international labor market needs into program plans. New programs will be introduced to address skills gaps and match emerging trends, guided by quality assurance and accreditation processes to enhance the credibility and value of these programs for students and employers.

Strategic Initiative 1.2.1 – Establish a Joint and sustainable framework for stakeholders in the tourism sector: Aims to create a cooperative framework connecting stakeholders through a digital system to continuously manage, monitor, and develop the skills of the H&T labor force by integrating feedback into training and education programs at the local and regional levels. It involves bringing together various stakeholders, including MOTA, the SSC H&T, TVSDC, tourism establishments, embassy staff, training providers, and representatives from relevant stakeholders. A digital system will be developed to gather information on job vacancies and corresponding education and training programs, providing a comprehensive view of the tourism labor market and improving alignment between labor supply and demand. Twinning agreements will be established with counterpart institutions in other countries to exchange information and expertise, enriching the domestic labor market.

Strategic Initiative 1.2.2 – Tourism Professions Classification Guide: A Tourism Professions Classification Guide will be created, which will define job titles, levels of professions, professional standards, required competencies, and key tasks for each sub-sector in the tourism industry. This standardized guide aims to provide clarity, improve career progression, and enhance understanding of job roles, making it a valuable resource for employees, employers, educators, and job-seekers in the tourism sector.

Strategic Initiative 1.3.1 – Developing and Enacting a Policy to Encourage Enrollment in the Local and Foreign Tourism Labor Market: Aims to develop policies that encourage Jordanians to work in the H&T sector, with a focus on inclusivity and equal opportunities for women, people with disabilities, and workers from different regions. The policy aims to create a supportive and attractive work environment in tourism facilities, improve working conditions, and provide employee support services to retain staff. It also includes recognizing previous work experiences in salary calculations and providing salary bonuses for specialized and certified training. The policy intends to formalize informal professions within the occupational classification guide framework, offering greater job security and legal protections to workers in these roles.

Strategic Initiative 1.3.2 – Designing a Digitized Map for Tourism Training and Education Providers within the platform “SiyahaJobs”: Aims to create an interactive online platform for job seekers seeking tourism education and training providers. The platform offers comprehensive information, allowing users to select their preferred governorate and specialization. It provides details such as application requirements, financial fees, program duration, academic calendar, location of providers, program completion requirements, and transportation routes through GPS. This platform seeks to bridge the information gap between potential employees and education/ training providers and facilitate the job-seeking process in the H&T sector.

Strategic Initiative 2.1.1 – Developing a Hospitality and Tourism Labor Market Information System: Aims to create a database that continuously updates job vacancies and required skills in the hospitality and tourism sector. Both local and international tourism establishments will contribute to the data, providing diverse opportunities and requirements. Education and training providers can access the system to understand current market needs and align their programs accordingly. Overall, the database enhances communication and coordination between employers, training providers, and job seekers in the H&T sector.

Strategic Initiative 2.2.1 – Internal and external marketing program for Jordanian tourism competencies: Aims to promote graduates of tourism training and educational institutions through various marketing strategies like traditional advertising, social media, job fairs, and networking events. It looks to work with Jordan’s embassies in promising tourist destinations to facilitate job placements for Jordanian graduates in international tourism markets. This System helps match graduates with suitable job vacancies in local establishments. This initiative also looks to work with the GOJ to enhance small to medium enterprises established by graduates, with plans for a dedicated bank to provide funding and support for their tourism-related entrepreneurial projects.

Strategic Initiative 2.3.1 – Enhancing the Capacities of Ministerial Staff to Enhance the Quality of the Hospitality and Tourism Sector: Aims to improve the capacities of ministerial staff to drive more effective policy development and implementation, better customer experience, increased competitiveness, and alignment with the needs of the labor market. It will enhance the sector’s ability to attract investment, promote economic growth, and create jobs. It focuses on capacity-building on essential aspects, such as establishing professional standards, implementing quality systems in training and education, developing strategic plans, conducting market research, and enhancing personal skills.

Strategic Initiative 2.3.1 – Enhancing the Capacities of Ministerial Staff to Enhance the Quality of the Hospitality and Tourism Sector: Focuses on designing and accrediting a procedural guide for workplace training in classified tourist facilities. These facilities are expected to implement periodic training programs to enhance the capabilities and skills of current employees and job seekers. The goal is to improve employability and prepare individuals for successful careers in the tourism industry. Additionally, the program aims to attract tourism university students, fulfilling their graduation requirements, enhancing practical skills, and complementing theoretical knowledge to better prepare them for future careers.



1. INTRODUCTION

1.1 About the Hospitality and Tourism Sector Skills Development Council

Jordan's technical and vocational education and training (TVET) landscape has faced some challenges in recent years. Formerly excluded from having any influence on training or employment, the private sector is now playing a bigger role in determining the future of the workforce. In 2016, the National Human Resource Strategy and recognizing the need for a unifying entity to supervise and develop the TVET market, the Government of Jordan (GOJ) formed the Technical and Vocational Skills Development Commission (TVSDC) in 2017, essentially picking up where the Employment -Technical & Vocational & training Fund had left off.

The private sector formed the Sector Skills Councils (SSCs) in collaboration with donors to serve as the government's main partner in developing the TVET system autonomy. By 2021, the first SSC was established, indicating official recognition of the SSCs.

SSCs have played an integral part in improving the TVET system by developing occupational standards, establishing training criteria, and accrediting institutions. They work closely with the TVSDC to develop standards for trainers, equipment, and curricula and establish qualification standards for the training centers. While the TVSDC still acts as a regulator, the SSCs have effectively adopted the expert decision-making and advisory role.

At the same time, labor market information systems are not yet fully integrated within the SSCs. Further, the national workplace training framework remains rather ambiguous, and smaller institutions frequently lack the capacity, resources, or motivation to train. To that end, it is imperative to address these challenges, empower the SSCs to contribute to policymaking, and improve the overall TVET system to develop a comprehensive and effective Skills Development Strategy.

1.2 About this Strategy

NAMA Strategic Intelligence Solutions, in collaboration with the European Bank for Reconstruction and Development (EBRD), has developed a **Sector Inclusive Skills Development Strategy for the Jordanian Tourism Sector**, particularly the hospitality and tourism (H&T) sector, spanning 2023-2027. This strategy is designed to complement the **National Tourism Strategy 2021-2025** and its subsequent action plan, as developed by the Ministry of Tourism and Antiquities (MOTA), turn it into a comprehensive skills development strategy.

This skills development strategy looks to ensure complementarity, relevance, and adaptability with the MoTA Strategy – HR Pillar and turn the challenge of high unemployment in Jordan and inadequacy of skills development into a proper comprehensive skills development strategy that enables the H&T sector to employ qualified and trained individuals who retain the skills relevant to current and future tourism sector labor market.

Once approved and implemented, this strategy can set an important precedent for other SSCs to develop their own skills development strategies to ensure that the skills supplied are in line with the current and future labor market demands within their respective sectors.

1.3 Rationale: The Importance of a Skills Development Strategy

Despite unprecedented levels of unemployment in Jordan, especially among women and youth, and the growth of the tourism sector over the past few years as a major contributor to Jordan's GDP, with nearly 13%, the sector has yet to realize its full potential. This can be attributed to several internal and external reasons. The common denominator among internal reasons is the skill set of Jordanians who are currently working in the tourism sector or those who are unemployed and need to develop employable skills. Skilled Jordanians are also being targeted by the emerging markets after the post-COVID-19 reopening of countries for tourism. In this context, the Saudi market, for instance, is expected to recruit a substantial number of skilled Jordanians rendering the Jordanian market in shortage.

It is evident that across all tourism industry sectors, there is a significant weakness in high-end competitive skills. This weakness does not only have a negative impact on the retention of workers in the sector, but it also makes the sector unattractive for entry-level job seekers. These jobs were made unattractive by many underlying reasons such as fluctuations and seasonality, regional instability-related market shocks, absence of social security coverage and adequate health insurance for workers and their dependents, lack of affordable transportation (reliability and safety especially for women), cultural impediments (gender roles and social status), and the widely held perception that jobs are short-term without a clear professional career path.

Despite 16 vocational training corporation (VTC) centers and a growing “Pathways to Professionalism” programs, which offer inclusive, industry-based training and certification in eight hospitality and tourism professions at four levels, training remains limited and not widely available. Therefore, enhancing the attractiveness of tourism sector jobs for Jordanians is essential.

Furthermore, the skill set in the sector has not caught up properly with entrepreneurship. The latter has become so integral to hospitality and tourism to the extent that realizing the potential in the future cannot be sufficiently addressed without tech-enabled sector human capital. This element needs to be nurtured as it is in ICT and technology, with special training involving both technical and “soft” skills. Given the size of the unemployment problem, competitive skills will create alternative opportunities for unemployed Jordanians to live and work in emerging tourism markets in GCC, especially in KSA.

Moreover, designing a skills development strategy is integral to describing the gap between the demand and the supply in the tourism sector labor market, with emphasis on both quantitative and qualitative gaps, which would serve to illustrate the need to bridging these gaps with future employment and skills requirements for the various sub-sectors. It would essentially ensure that tourism sector education and training institutions are provided with the roadmap to produce skilled individuals who meet the needs of employers and the expansion of small and medium enterprises in the sector. At the same time, such a strategy would serve to direct job seekers toward training and educational opportunities that are compatible with the skills demanded.

In addition to that, the strategy is important as a reference for the SSC H&T to be able to plan tourism professions, set performance standards for each profession, and link the labor market with education and training providers. The strategy is also essential in planning future skills in the tourism sector by virtue of enacting a mechanism for continuous skills assessment to ensure the sustainability and coherence between skills provided and the competencies and skills required by the labor market.

In order to address the above-mentioned issues, and many other deficiencies, constructing a skills development strategy for the tourism sector has become essential. Its significance has been recognized institutionally by the Ministry of Tourism and Antiquities (MOTA) through its Tourism Strategy 2020-2025, especially its Human Resources Pillar, yet, the absence of a clear action plan necessitates developing a strategy that ensures the sustainability of bridging the gaps between labor market needs and the availability of relevant skills.

In the summer of 2021, a new council for skills in hospitality and tourism was established and is headed by the private sector to identify, facilitate, and expedite the training for the needed skills. However, such an effort needed to be linked by a clear strategy, as providers of hospitality skills are not guided by a national strategy either; instead, they develop their own programs and initiatives benefiting from the available resources to support specific programs.

Given the MOTA strategy and the hopes of tourism to recreate 2019 levels of success by 2025, there is a need to prepare a sustainable plan to ensure skills are developed to meet the demands of the sector and its expected potential growth in the next few years. Hence there was a need to design an evidence-based strategy for skills development. An assessment of the existing landscape of training providers, their curriculum, standard operating procedures, employability of their graduates, digital skills and knowledge of graduates, employer satisfaction with the skills of their graduates, employee retention rate, and potential growth will be carried out in preparation for the strategy.

1.4 Rationale: The Importance of Establishing a National Committee to Support the Strategy

In order to enhance the connectivity of the TVET mechanism in the hospitality and tourism (H&T) sector, the Skills Development Strategy was created. As the lead entity, and owner of this Strategy, the SSC H&T has the responsibility of working with different stakeholders to pursue its implementation, and ultimately improve the skill set of the sector.

An important aspect of this transformation is the formation of a national committee, which is made up of representatives from various stakeholder groups, including the Ministries of Education (MOE), Higher Education (MOHE), Labor (MOL), Tourism and Antiquities (MOTA), TVSDC, training and education providers, and Donors. The committee supported the implementation of the Skills Development Strategy throughout the H&T sector by bringing these different perspectives to the table.

Second, the SSC H&T, as part of this Strategy, will work closely with MOE to define the needs of the H&T sector and direct the ministry's efforts in both the academic and vocational sectors. The MOHE, MOL, MOTA, TVSDC, and other training and education providers will also collaborate closely with them to ensure that the Skills Development Strategy is well-coordinated and focuses on the appropriate priorities.

Recognizing the value of donor funding, this Strategy will also guide the SSC H&T in working with donors, encouraging them to work only with the SSC in order to streamline their efforts and increase their impact. As the sectoral arm, the TVSDC sees the SSC as a crucial partner in advancing the Skills Development Strategy, bringing together the training landscape in the H&T sector, and ultimately fostering a well-prepared workforce.



2. CONTEXT - TOURISM SECTOR IN JORDAN

2.1 Tourism and Hospitality Sector Overview

2.1.1 Economic Contribution

The tourism sector is among the most important economic sectors in Jordan, as it has long contributed substantially to the country's GDP, through the creation of employment opportunities, receipts, expenditures, and exports. The year 2019 was one of the most successful in Jordanian tourism history, with record numbers of visitors (5.3 million) and revenues (JOD 4.1 billion), contributing approximately 13% of that year's GDP[1]. Tourism's reliance on human resources and local suppliers generates the enormous income-earning potential for micro, small, and medium enterprises (MSMEs) along with local community members living in or near major tourism centers, often considered disadvantaged. The positive influence of tourism on other service industries underlines its strategic importance.

Tourist inflows foster services such as the food industry, transport, health and well-being, culture, and sports and adventure activities for tourists[2]. However, The COVID-19 pandemic has had a significant impact on Jordan's H&T sector, leading to a substantially gruesome decline in both the number of visitors and the number of receipts. In fact, the number of tourist arrivals declined by 73% in 2020, compared to 2019, and tourism receipts decreased by 77%[3]. The Government of Jordan implemented several measures to mitigate the effects of the pandemic on the H&T sector, including offering financial support to businesses, waiving taxes and fees, and promoting domestic tourism through the Urdunna Jannah Initiative (Jordan, Our Paradise), among other measures related to health and safety[4].

By the end of 2022, Jordan's economy began to recover, and the country's GDP demonstrated a growth rate of 2.6% in Q3 of 2022 compared to -2.2% in 2020 and even 1.9% in 2019[5]. When it comes to the recovery in the H&T sector, the Central Bank of Jordan stated that Jordan's tourism revenue has increased by 110.5% reaching \$5.816 billion, exceeding the level achieved prior to the pandemic in 2019, which stood at 0.4%[6]. In 2022, around 5 million visitors arrived in Jordan[7], surpassing what the national tourism strategy sought to accomplish[8]. Equally important, the number of workers in the H&T sector increased by 11.3% to reach 54,764 workers, compared to 49,209 in 2021[9].

[1] "Jordan National Tourism Strategy 2021-2025", Ministry of Tourism and Antiquities, 2021, [https://www.mota.gov.jo/ebv4.0/root_storage/en/eb_list_page/national_tourism_strategy_en_\(release_1.0\)_20.12.2021.pdf](https://www.mota.gov.jo/ebv4.0/root_storage/en/eb_list_page/national_tourism_strategy_en_(release_1.0)_20.12.2021.pdf)

[2] "Employment-Oriented MSME Promotion Project", GIZ, September 2022, <https://www.giz.de/de/downloads/giz2022-en-jordan-msme-promotion-project.pdf>

[3] "Tourist Overnight and Same Day Visitors By Nationality during 2019-2020", Ministry of Tourism and Antiquities, <https://shorturl.at/bhOP0>

[4] "Tourism Receipts and Expenditures by Month 2019- 2020 (JD Million)", Central Bank of Jordan, <https://shorturl.at/eEF15>

[5] "2.6% GDP growth rate at constant prices in the third quarter of 2022", Department of Statistics, January 2023, <http://dosweb.dos.gov.jo/2-6-gdp-growth-rate-at-constant-prices-in-the-third-quarter-of-2022/>

[6] "2022 tourism revenue edges out pre-pandemic levels — CBJ", The Jordan Times, January 2023, <https://jordantimes.com/news/local/2022-tourism-revenue-edges-out-pre-pandemic-levels-%E2%80%94-cbj>

[7] "Tourist Overnight and Same Day visitors by Month, 2021 –2022", Ministry of Tourism and Antiquities, 2022, <https://shorturl.at/akrMS>.

[8] "Jordan's economy shows signs of pandemic recovery", The Jordan Times, January 2023, <https://jordantimes.com/news/local/jordans-economy-shows-signs-pandemic-recovery>

[9] "Number of Employees in different Tourism Activities, 2021-2022", Ministry of Tourism and Antiquities, 2022, <https://shorturl.at/gpDHP>.

2.1.2 Tourism Labor Information

Looking at the sub-sector and demographic distribution of the 54,764 workers in the H&T sector, data shows that Jordanians constitute around 80% of this labor force, albeit, foreign nationals are overrepresented in restaurants and tourist shops. When looking at the ratio of male to female workers, data shows that women's participation in this sector as a whole remains very low, with 12%. Women were more likely to work in tourist shops and travel agencies than in any other subsector.

Subsector	Jordanians	Non-Jordanians	Males	Females	Total
Hotels	18,447	3,388	19,471	2,364	21,835
Tourism Restaurants	14,447	6,323	18,345	2,425	20,770
Travel Agencies	4,179	348	3,275	1,252	4,527
Rent a Car Offices	1,867	300	2,165	2	2,167
Tourist Transport Companies	2,010	90	2,040	60	2,100
Tourist Guides	1,307	-	1,231	76	1,307
Tourist Shops	647	336	560	423	983
Horses Guides	530	-	530	-	530
Water Sports	204	51	255	-	255
Diving Centers	130	40	170	-	170
Glass boats	120	-	120	-	120
Total (2022)	43,888	10,876	48,162	6,602	54,764
Percentage	80.1%	19.9%	88%	12.1%	100%

Table 3: Number of Employees in different Tourism Activities by Nationality and Gender, 2022, MOTA



Males
48,162

88%



Females
6,602

12%

2.1.3 Tourism Establishments Information

There was a total of 3,305 registered and regulated establishments as of 2022. Most establishments were tourist restaurants, followed by travel agencies and hotels.

Location	Tourist Restaurants	Travel Agencies	Hotels	Tourist Shops	Rent a Car Offices	Diving Centers	Tourist Transportation Companies	Water Sports	Total
Amman	941	668	390	113	216	-	15	-	2,343
Aqaba	56	29	85	42	14	27	-	6	259
Petra	7	31	47	40	-	-	-	-	125
Irbid	59	54	15	6	7	-	-	-	141
Dead Sea	13	-	11	2	-	-	-	-	26
Madaba	31	4	19	57	1	-	-	-	112
Zarqa	40	31	6	-	4	-	-	-	81
Al Azraq	2	-	3	-	-	-	-	-	5
Ajlun	7	3	7	7	-	-	-	-	24
Karak	3	2	6	4	-	-	-	-	15
Jarash	14	2	4	34	1	-	-	-	55
Wadi Rum and Deesah	2	-	16	-	-	-	-	-	18
Ma'an	-	2	2	1	-	-	-	-	5
Tafiela	-	-	9	3	-	-	-	-	12
Balqa	14	5	3	10	9	-	-	-	41
Fuhais	27	1	-	-	-	-	-	-	28
Russeifa	-	-	-	-	-	-	-	-	0
Ramtha	-	2	-	-	-	-	-	-	2
Mafrq	4	7	1	-	1	-	-	-	13
Total	1,220	841	624	319	253	27	15	6	3,305

Table 4: Number of the Tourism Activity by Location in 2022, MOTA

2.2 Tourism Products

Jordan's National Tourism Strategy 2021-2025 recognizes that there is a wide array of niche markets that Jordan can potentially leverage and serve. It emphasizes six priority markets, namely **(a)** culture and heritage; **(b)** Meetings, Incentives, Conferences, and Events (MICE); **(c)** domestic tourism; **(d)** well-being tourism - including wellness and medical tourism; **(e)** adventure tourism; and **(f)** faith tourism.

- **Culture and Heritage** - This segmentation of product offerings has long been led by culture and history tourism, representing approximately 85% of visitors to Jordan. Most of the classical tours around Jordan center around Petra, Jerash, and other historical sites.
- **Meetings, Incentives, Conferences, Events (MICE)** - MICE tourism refers to business travel for meetings, incentives, conferences, and exhibitions. These are organized to achieve a wide range of business, academic, professional, or cultural objectives[10].
- **Domestic Tourism** - Domestic tourism in Jordan increased by 363% from 2018 to 2019 revenue of 17.9K in 2018 83k in 2019)[11]. Moreover, Domestic tourism is a relatively new niche in Jordan that was mostly promoted by the Ministry of Tourism and Antiquities and Jordan Tourism Board through the Urduna Jannah program (Jordan, our paradise) that was launched in 2020 during the COVID-19 pandemic. Domestic tourism was also supported by the latest update to the Tour Operators Bylaws that allowed the licensing of domestic tour operators. Domestic tourism is foreseen as a tool to offset the impact of seasonality as well as an essential pillar to develop a robust and resilient industry.
- **Wellness Tourism** - Wellness tourism is projected to grow globally at 7.5% annually, with 1.2 billion wellness travelers worldwide by 2030. Wellness tourism is travel associated with the pursuit of maintaining or enhancing one's physical and inner well-being. It is based on relaxation and the proactive prevention of illnesses. Jordan's Maean hot springs and the Dead Sea are two iconic and unique products for this niche market that have been attractions since the early 1990s. However, there are more untapped assets that have the potential to be developed to attract this niche market. Medical tourism also presented itself as an opportunity in the years following the Arab Spring and as a result of political instability in the region. Jordan was able to provide a desirable product for neighboring countries. However, the market is complicated and legalities to be able to work on an international level, such as medical malpractice law, are complicated and require a long time to realize.
- **Adventure Tourism** - The Adventure Travel Trade Association defines adventure tourism as a type of tourism involving exploration or travel with perceived (and possibly actual) risk, and potentially requiring specialized skills and physical exertion[12]. Adventure tourism has become a priority market segment for Jordan most recently. The global adventure tourism market is projected to grow at an annual rate of 13.3% by 2026[13]. While it is its youngest niche market, it is certainly a promising one for the country that has also attracted sustainable tourists. Adventure travelers spend more time in the country with a better geographic distribution of tourism receipts and minimal environmental impact than any other niche market.

[10] "The European Market Potential for Mice Tourism," CBI, <https://www.cbi.eu/market-information/tourism/mice-tourism/market-potential>.

[11] "Jordan National Tourism Strategy 2021-2025", Ministry of Tourism and Antiquities, 2021, [https://www.mota.gov.jo/ebv4.0/root_storage/en/eb_list_page/national_tourism_strategy_en_\(release_1.0\)_20.12.2021.pdf](https://www.mota.gov.jo/ebv4.0/root_storage/en/eb_list_page/national_tourism_strategy_en_(release_1.0)_20.12.2021.pdf)

[12] "Adventure Travel Guide Qualifications & Performance Standard – III. Definitions," Adventure Travel Trade Association, <https://www.adventuretravel.biz/education/adventure-edu/guide-standards/adventure-travel-guide-qualifications-performance-standard-iii-definitions/>.

[13] "Adventure Tourism Market Size, Growth: Global Industry Analysis, 2028," Allied Market Research, July 2021. <https://www.alliedmarketresearch.com/adventure-tourism-market>.

- **Faith Tourism** - Faith tourism is divided into two categories. First is faith[14]. The World Tourism Organization estimates that approximately 330 million tourists visit the world's key religious sites every year[15]. The second is sacred tourism, which refers to travel for religious or spiritual purposes, such as undertaking a pilgrimage and visiting sacred sites. Faith tourism in Jordan saw a major milestone with the visit of Pope John Paul to Jordan in 2000. Jordan has many religiously significant sites such as the Baptism Site, Mount Nebo, Makawer, and many others. There is growing interest in developing the Islamic pilgrimage route.

2.3 Future Trends in the Tourism Industry

The United Nations World Tourism Organization's (UNWTO) 2021 Report on the future of tourism in Jordan provides several recommendations to help the country's tourism sector to recover and grow sustainably in the post-COVID-19 era[16]. Some of the main recommendations include:

Safety and hygiene - The tourism industry will continue to prioritize safety and hygiene measures in the future. Protocols such as the Hotel Operational Protocols will continue to be implemented for years to come as more consumers regain confidence in travel safety. Additionally, Jordan's relatively high percentage of 4- and 5-star hotels set high consumer expectations regarding the implementation of stringent safety and hygiene measures.

- Developing training programs to ensure a common understanding of protocols.
- Communicating safety and hygiene standards to travelers in the form of traveler requirements, in-country restrictions, and government regulations.
- Incorporation of safety and hygiene standards into private sector enterprises' marketing strategies.

Sustainable tourism - Travelers are increasingly aware of the environmental impact of tourism and the use of single-use plastics. Studies show that a large number of travelers use reusable bottles. Sustainable tourism: Travelers are increasingly aware of the environmental impact of tourism and the use of single-use plastics. Studies show that a large number of travelers use reusable bottles while traveling and have negative feelings towards establishments that do not implement sustainability practices. To encourage sustainable waste management practices, the Ministry of Environment has released the Waste Sector Green Growth National Action Plan 2021-2025. Recommendations include:

- Offering capacity building to local business owners to enable them to successfully implement sustainability practices
- A tourism-specific sustainability strategy that aligns with the UNWTO's Glasgow Declaration on Climate Action should be developed by destination management.
- Eco-friendly businesses in the tourism industry should display their sustainable practices and goals on their websites to inform customers when booking trips.
- Urge the Jordan Tourism Board to promote and list more social tourism enterprises on their website.

- [14] "The European Market Potential for Religious Tourism." CBI, October 2020. <https://www.cbi.eu/market-information/tourism/religious-tourism/market-potential#product-description>.
- [15] National Tour Association. "Faith Travel Association." NTA Online, February 15, 2023. <https://ntaonline.com/markets/faith-travel-association>.
- [16] "Facilitating Tourism Recovery in Aftermath of Covid-19 in Jordan Development of a Roadmap on the Future of Tourism in Jordan", UNWTO, April 2022

More time spent outdoors - As a direct result of COVID-19 and its social distancing requirements, there is now a widespread preference amongst consumers to spend more time outdoors. This trend necessitates making use of previously unutilized outdoor space in order to cater to changing customer preferences. Recommendations include:

- Communicate restrictions and availability of alternative outdoor seating areas to customers.
- Encourage customers to use outdoor seating areas to accommodate capacity shortages.
- Advertise availability of open spaces on websites with photos and descriptions.

Detailed information sharing - The recovery of the tourism industry from the impact of COVID-19 is dependent on restoring customer confidence in travel. One way to achieve this is by consistently sharing relevant and up-to-date information with customers regarding travel guidelines. Both the government and private sector enterprises must offer confidence throughout the entire journey, starting from the booking process until the return of the customers. Recommendations include:

- Travel protocols must be clearly and effectively communicated to customers.
- Accommodation providers and tour operators must keep track of changes in travel protocols and communicate them to travelers.

Product development - Focusing on product development will not only offer the benefit of providing positive tourist experiences, but it will also serve to boost the local economy and encourage minority participation and inclusion in the tourism sector. Additionally, developing products that possess traditional value will provide Jordan's tourism industry with a competitive edge, especially if value for money is being offered. Recommendations include:

- Providing capacity building to relevant stakeholders within the tourism industry to encourage product innovation and development as well as the cultivation of authentic experiences.
- Creating a list of existing products under certain market segments and analyze their competitiveness in the aforementioned markets.

Sharing economy: The sharing economy is a system of sharing of resources and assets, usually for a fee. In Jordan, the most commonly used sharing economy enterprises are accommodation providers such as Airbnb and ride share apps such as Careem and Uber, who both have also introduced taxi services to their apps in an effort to encourage the use of public transport in Jordan. Recommendations include:

- Run diagnostic assessments into the number of available rentals in Jordan, their locations, costs, ratings, etc.
- Provide training to service providers in the tourism industry in order to enhance customer experiences.
- Lobby for the introduction of a car hire feature to the ride sharing apps and encourage collaboration between car hire companies and ride share apps.



Inclusion and diversity - Tourism is becoming more inclusive and diverse, with a focus on making travel accessible to marginalized groups such as people with disabilities. Jordan's tourism industry is working to provide infrastructure to make tourism more accessible to PWD, including wheelchair access, accessible bathrooms, and access to hearing and vision impaired guides and tours. The country's Tourism Strategy 2021-2025 emphasizes the importance of providing equal opportunities to all within the industry. Recommendations include:

- Training private enterprises on the benefits of providing accessible infrastructure to PWDs and investments needed.
- Collecting and publishing data on women's involvement in tourism-based activities to promote inclusion.
- Including accessibility details on the Jordan Tourism Board website.
- Offer capacity building to marginalized communities interested in the tourism industry workforce.



Cancellation and refunds - Travelers highly value the ability to cancel trips and receive refunds, especially after the pandemic. It is important for private sector enterprises to be informed about changing policies and for airlines and accommodation providers to communicate their cancellation policies to customers. Recommendations include:

- Private sector enterprises should be informed of changing policies and international standards for refund and cancellation policies.
- Accommodation providers should disclose their refund and cancellation policies on their websites.
- Airlines should communicate cancellation policies and relevant travel protocols to travelers prior to booking.

Changes in customer decision-making processes - Research by Trip.com Group shows that prior to COVID-19, consumers would typically book their trips 36 days in advance. Now, 80% of bookings are made within two weeks of the desired departure date. Safety and hygiene measures have become a primary concern for travelers, with price being a secondary factor. However, the pandemic's financial impact has made consumers more price conscious and seeking trips that offer value-for-money. Recommendations include:

- Tracking customer decision-making trends to inform pricing and promotional strategies.
- Airlines, tour operators and accommodation providers staying current with changing consumer priorities and values.
- Providing hygiene and safety recommendations to appeal to customers.

Traditional and authentic experiences - Customers in the tourism industry desire authentic cultural experiences and are starting to value them over material possessions. Jordan has a rich heritage of traditional food, handicrafts and many other cultural facets that are not effectively marketed. Local communities and marginalized groups are becoming active participants in the tourism industry through the production of traditional handicrafts. Recommendations include:

- Link the tourism and retail supply chains to promote inclusion of local communities in handicraft production.
- Encourage storytelling around the production process and history of handicrafts.
- Promote and educate customers on traditional local cuisine.

2.4 Stakeholder Mapping

2.4.1 Public Sector

The public sector, or the regulator, of the H&T sector is comprised of the following[17]:

Entity Name	Description
The Ministry of Tourism and Antiquities (MOTA)	MOTA is the government body responsible for the development and promotion of the tourism sector and the preservation of antiquities in Jordan. Its mandate includes formulating and implementing tourism policies, overseeing the management of archaeological sites, and promoting Jordan as a tourist destination. MOTA also works to foster public and private sector partnerships to ensure sustainable growth in the industry.
Jordan Tourism Board (JTB)	JTB is a public-private partnership responsible for promoting Jordan as a tourist destination internationally. Its role includes marketing and advertising, targeting key markets, and partnering with travel agents, tour operators, and other stakeholders to increase tourist arrivals. JTB works closely with MOTA to implement the national tourism strategy.
Aqaba Special Economic Zone Authority (ASEZA)	ASEZA is the autonomous regulatory body responsible for managing the Aqaba Special Economic Zone, a duty-free zone located around the port city of Aqaba. Its mandate includes attracting investments, promoting economic growth, and managing the zone's infrastructure and services. ASEZA plays a significant role in the development of tourism in the region, including the establishment of hotels, resorts, and other tourism facilities.
Petra Development & Tourism Region Authority (PDTRA)	PDTRA is an autonomous government body responsible for managing the Petra region, including the ancient city of Petra, a UNESCO World Heritage site. Its mandate includes the conservation and preservation of the site, promoting sustainable tourism, and overseeing infrastructure and services in the region. PDTRA works with various stakeholders, including local communities and international organizations, to achieve its objectives.

Tourism Development Zones	These are designated areas in Jordan, established by the government to promote tourism development and investment. The zones provide incentives and support to investors and developers, with the aim of creating sustainable tourism projects that contribute to the local economy and preserve the environment. Tourism Development Zones help diversify the country's tourism offerings and promote regional development.
Baptism Site Commission	The Baptism Site Commission is a governmental body responsible for the management, preservation, and promotion of the Baptism Site at Bethany Beyond the Jordan, a significant religious and archaeological site. The Commission works to ensure the site's proper maintenance, promote its religious and cultural significance, and develop it as a sustainable tourism destination for pilgrims and visitors.

Table 5: Excerpt of GIZ's 2021 study illustrating and description the main public sector H&T stakeholders

2.4.1.1 Regulatory Framework for the H&T Sector

MOTA's National Tourism Strategy 2021-2025 comprises the Human Resource Development Pillar, which looks, inter alia, to address skills gap in the tourism and hospitality sector industry Labor market needs, and highlighted the importance of updating and modernizing the legislative structure and as such many donor projects supported different aspects of the system, mainly regulations and instruction but attempts to simplify the main tourism law.

Tourism Law No. 20 (1988) governs the Tourism Sector in Jordan, where MOTA is considered the main governmental entity in charge of the Tourism Industry, while other governmental bodies, stakeholders and International Partners perform complementary tourism roles / contribution respectively. The Ministry of Tourism and Antiquities (MOTA) was established in 1967, entrusted with the tasks of organizing and developing the Tourism Sector, providing the necessary support to showcase Tourist Attractions and Development, whether those related to history, culture, heritage or the natural environment, in conjunction with activating the role of the Private Sector in the areas of development and investment.[18]

The Department of Public Antiquities has always been an independent institution primarily responsible for protecting, preserving and restoring antiquities. Its relationship with MOTA is formally established through its direct reporting line to the Minister of Tourism and Antiquities, to ensure coherence and coordination when it comes to the significance of antiquities in tourism, and encompass the main policies governing the core business of both the Tourism and Archaeological Authorities in a coherent manner under the umbrella of one Minister.

There are other governmental entities that directly and indirectly contribute to the Tourism Sector, with various decrees often setting forth the relationship between the MOTA and other governmental regulatory bodies. These institutions comprise the Governance Framework for the Tourism Sector in Jordan, as briefly illustrated in the below figure[19]:

[18] "Labour Market Analysis in the Tourism Sector," GIZ, 2021.

[19] "Jordan's Tourism Sector Analysis and Strategy for Sectoral Improvement," GIZ, May 2019, <https://d-nb.info/1195898355/34>.

Department of Antiquities (DOA)	This included the expansion of Directorates and the establishment of new Sections and antiquities offices throughout Jordan[20].
Jordan Tourism Board (JTB)	As an independent public – private sector partnership committed to utilize marketing strategies to brand, position and promote the Jordan tourism product internationally as the destination of the choice.
Aqaba Special Economic Zone Authority (ASEZA)	The Aqaba Special Economic Zone Authority plays a leading role at the administrative and governmental level in the Hashemite Kingdom of Jordan and applies the principle of good governance based on transparency and effectiveness in the decision-making process.
Petra Development Tourism Region Authority (PDTRA)	PDTRA that aims to develop the region, economically, socially, culturally, and as a tourist destination, as well as contribute to local community development

Table 6: Governance framework for the H&T sector

2.4.2 Formal Private Sector Associations

The table below illustrates the H&T associations that represent their respective interest:

Entity Name	Description
Jordan Hotel Association (JHA)	The JHA is a non-profit organization representing hotels and resorts in Jordan. It aims to enhance the hospitality industry in the country, provide a platform for collaboration among its members, and promote Jordan as a premier tourist destination
Jordan Restaurant Association (JRA)	The JRA represents the interests of restaurants and cafes in Jordan. It works to improve the quality of food and services in the industry, promote culinary tourism, and advocate for better policies and regulations.
Jordan Inbound Tour Operator Association (JITOA)	JITOA is a professional association representing inbound tour operators in Jordan. It aims to promote and enhance the quality of tourism services, create a supportive business environment, and foster cooperation among its members.
Jordan Trail Association	The Jordan Trail Association is dedicated to the development, promotion, and preservation of the Jordan Trail, a long-distance hiking path that traverses the country. The association works to maintain the trail, engage local communities, and promote sustainable tourism
Jordan Travel Guide Association (JTGA)	JTGA is a professional association that represents licensed tour guides in Jordan. It seeks to ensure high standards of service, enhance the professional development of its members, and promote Jordan as a top tourist destination

[20] “Labor Market Analysis in the Tourism Sector”, GIZ, December 2021, page 57.

Jordanian Handicrafts Producers & Traders Association	This association supports local artisans and craftsmen, working to preserve traditional handicrafts and promote their products both locally and internationally. It provides training, marketing assistance, and advocacy for the handicrafts sector in Jordan
Jordan Society of Tourist and Travel Agents	This organization represents travel agencies and tour operators in Jordan. It works to promote tourism, maintain professional standards, and advocate for its members' interests within the industry
Specialized Tourism Transportation Association	This association represents specialized tourism transportation providers, including bus and coach operators, in Jordan. It aims to ensure high standards of service and promote sustainable and accessible transportation options for tourists.
The Royal Film Commission	The Royal Film Commission is a government organization that promotes and supports the development of the film industry in Jordan. It provides support to local and international filmmakers, organizes training programs, and showcases Jordanian films at festivals around the world.
Petra Trust	Petra Trust is a non-profit organization dedicated to the preservation, protection, and promotion of the ancient city of Petra, a UNESCO World Heritage site. It works to conserve the site, support research, and promote responsible tourism.
Tourism Transport Association	This association represents transportation companies involved in the tourism sector in Jordan, working to ensure high standards of service, promote sustainable practices, and advocate for its members' interests.
Jordanian Car Rental Association	The Jordanian Car Rental Association represents car rental companies in Jordan. It works to promote responsible car rental practices, provide a platform for collaboration among its members, and advocate for favorable policies and regulations within the industry

Table 7: Illustration and description of H&T private sector associations



2.4.3 Informal Private Sector

GIZ's *Labor Market Analysis in the Tourism Sector (2021)* study defined informal tourism as “**any service offered directly to the local or international tourists with no official registration under the Ministry of Tourism and Antiquities, municipalities, and /or any other relevant authorities.**” The study cites that informal employment constitutes around 44% of the total employment in Jordan, mostly operating in:

- **Accommodation** - Informal accommodation through platforms such as Airbnb that are not registered with the Jordan Hotels Association.
- **Food and Beverages (F&B)** - Home-based foods that are also linked with “experience tourism” that are cooked by local communities throughout Jordan.
- **Travel and Tour Operators** - There are a considerable number of companies and individuals that are using social media as a tool to become informal tour operators, thus risking the quality of services and safety of the tourist.
- **Tour Guides** - Services are conducted by local community members who have substantial knowledge of the areas around them, which leads to conducting walking or soft adventure tours. These services are becoming more common in adventure tourism and as an example the Jordan Trail alone utilizes the services of 23 guides or escorts, who are also not synonymous with adventure tour guides, a specialized profession under the Tour Guides Association.
- **Handicrafts** - The Jordan Handicraft Producers Association (JHPA) is a voluntary association that is not registered under MOTA and has 650 members. These members are either formal workshops registered under the ministry of trade or home-based craft producers. Most of these establishments are small, employing 4-5 individuals, on average, albeit some workshops hire over 50 home-based producers.
- **Passenger Transport** - Individuals are offering their personal cars to escort tourists around the country.

There were also other types, mostly related to community-based, interactive activities, covering different experiences including craft making, cooking classes, cultural experience, and agricultural experiences[21].

3.4.4. Supporting Sectors

Moreover, there are supporting sectors and stakeholders that either directly or indirectly play a role in the H&T sector[22]:

- **Marine:** Passengers port; Aqaba Aquarium; boats and yacht rentals; and private marinas.
- **Equipment and supplies:** Hospitality and F&B equipment suppliers and adventure tourism equipment suppliers.
- **Aviation:** Local airlines; Queen Alia International Airport (Amman); Marka International Airport (Amman); and King Hussein International Airport (Aqaba).

[21] “Labor Market Analysis in the Tourism Sector”, GIZ, December 2021, page 57.

[22] “Labor Market Analysis in the Tourism Sector”, GIZ, December 2021, page 76.

- **Events, festivals, and exhibitions:** Event management companies; catering; equipment and supplies rental; and exhibition venues or spaces.
- **Non-Tourism Transportation:** Taxis; Bus Rapid Transit; and ride-sharing companies; among others.
- **Filming industry:** Formal and informal tourism private sector; equipment and supplies; events and spaces; and transport.
- **INGOs and donors:** EBRD; GIZ; and UN organizations; among others.

2.4.4 Training and Education Providers

Training and education providers can be divided into the following categories:

- Vocational education through the Vocational Training Centers (VTCs)
- Higher education including academic higher education establishments and applied higher education providers
- Independent training programs and on-site job training



3. METHODOLOGY

3.1 Strategy Design Method and Preliminary Findings

In designing the strategy, the team collected primary data and reviewed secondary data from a variety of sources and relied on mixed research methods in preparation for the analysis that informed the design of the strategic objectives and their respective strategic initiatives. The Strategy Team followed the guidelines of the European Training Foundation (ETF), as illustrated in the table below, especially in relation to the inclusion of stakeholders throughout the strategy preparation phase, including, but not limited to sub-sector and industry representatives, via the SSC H&T. The Strategy also relied on a number of ETF Guidelines, namely the volumes illustrated below:

- **Vol. 1** - Using labor market information - Guide to anticipating and matching skills and jobs
- **Vol. 2** - Developing skills foresights, scenarios and forecasts - Guide to anticipating and matching skills and jobs
- **Vol. 3** - Working at sectoral level - Guide to anticipating and matching skills and jobs
- **Vol. 4** - The role of employment service providers - Guide to anticipating and matching skills and jobs
- **Vol. 5** - Developing and running an establishment skills survey - Guide to anticipating and matching skills and jobs
- **Vol. 6** - Carrying out tracer studies - Guide to anticipating and matching skills and jobs

In reviewing existing literature and data, the Strategy Team reviewed literature that offered insights pertaining to national strategies concerned with the H&T sector; strategies, policies, and literature that address skilling in general, and H&T in particular, globally, regionally, and in Jordan in specific; literature addressing labor market and skills market analyses in the H&T sector; and future trends in the sector; among other relevant components.

The literature review conducted revealed a number of gaps that needed to be addressed before designing the strategy's objectives and action plan. Such gaps were mostly caused by the fact that much of the available literature relied on inputs and data collected prior to the COVID-19 pandemic whose implications on the tourism sector are not only economic, but they are also behavioral.

3.2 Data Collection Process for Demand and Supply Analysis

To that end, the Strategy Team conducted primary research involving quantitative and qualitative methods, targeting both the demand and supply sides of the H&T sector. As such, in collaboration with major stakeholders, the Strategy Team built the research tools and proceeded with the data collection once buy-in was secured, particularly from the sector's representatives.

The primary research involved six subsectors, namely **(a)** restaurants representing establishments from JRA and ASEZA; **(b)** hotels representing establishments from JHA and ASEZA; **(c)** tourism agencies; **(d)** tourist transport and car rental; **(e)** handicrafts; and **(f)** tour guides. The data collection process, for both the demand and supply analysis worked in parallel as illustrated below.



Figure 1: Infographic detailing the demand analysis survey process

When it comes to the restaurant establishments, the enumerators contacted all 989 establishments that are affiliated with the JRA, resulting in 153 successfully completed interviews. The enumerators also contacted a total of 263 establishments in Aqaba, resulting in 43 successfully completed interviews. Together, a total of 1,252 establishments were contacted, with a total of 196 successfully completed interviews (15.7% of the size of the population). When it comes to the contacts that did not result in completed interviews, a small number of establishments refused to engage in interviews whereas the majority either did not answer the calls, their telephone numbers were off or canceled, or the establishments themselves were closed or no longer in business.

For the hotels, the enumerators contacted all 512 establishments affiliated with the JHA, resulting in 146 successfully completed interviews. The enumerators also contacted a total of 58 establishments in Aqaba, resulting in 21 successfully completed interviews. As such, a total of 570 hotels were contacted, with a total of 157 successfully completed interviews (29.3% of the size of the population). Similar to the restaurants, the contact attempts with hotels did not result in completed interviews, about 67 establishments refused to engage in interviews while the rest did not answer, their telephone numbers were off or canceled, or the hotels were no longer operational.

For the tourist agencies, the enumerators contacted a total of 705 establishments, resulting in 188 successfully completed interviews (26.7% of the size of the population). 132 establishments refused to be interviewed whereas the rest featured reasons similar to restaurants and hotels. Further, a total of 231 tourism transport and car rental establishments were contacted, resulting in 49 successfully completed interviews (19.8% of the size of the population). Moreover, the enumerators contacted 232 handicrafts, resulting in 62 completed interviews (26.7% of the size of the population). Finally, 135 tour guides were successfully interviewed from a total of 1,224 registered tour guides in Jordan (about 11% of the total size of the population).

Sub-Sector	Sub-Sector Size	Number of Establishments Interviewed	Sample Representation against Sub-Sector Size
Restaurants	1,252	196	15.7%
Hotels	570	167	29.3%
Tourism agencies	705	188	26.7%
Tourist transport and car rental	247	49	19.8%
Handicrafts	232	62	26.7%
Tour guides	1,224	135	11%
Total	4,230	797	18.8%

Table 8: H&T establishments interviewed in relation to the total H&T establishments

Overall, a total of 797 establishments were interviewed across the six sub-sectors. The 196 restaurant establishments interviewed from the JRA and ASEZA responded to a total of 829 questions; the 167 hotels from JHA and ASEZA responded to a total of 1,522 questions; the 188 tourism agencies responded to a total of 480 questions; the 49-tourism transport and car rental establishments responded to a total of 504 questions; the 62 handicrafts interviewed responded to a total of 434 questions; and the 135 tour guides interviewed responded to 176 questions.

The data reviewed and the data gathered served primarily to answer key questions concerned with the hospitality and tourism sector labor market along with the skills needed to match the qualifications of the jobs. In collecting and analyzing data, the team focused on both the current and future labor market gaps and current and future skills gaps through triangulating among current skills available/ unavailable; training provided/ lacking; jobs available/ needed; qualified labor available/ needed; and qualifications available/ needed for both the current market and that projected in the future.

The labor market gap analysis and the skills gap analysis highlighted the prevalent gaps, from the perspective of both the demand and the supply when it comes to skilling and hiring, with consideration for disadvantaged groups, including disabled persons, women, and Syrian refugees with permits. More specifically, when it comes to the H&T labor market gap analysis, the Strategy Team examined both the demand and the supply, whereby the team reviewed job seekers' qualifications and the majors required for vacant positions. When crossing-examining both, the team identified quantitative gaps between the number of job seekers and the number of vacant positions along with the extent to which the qualifications of job seekers are compatible and aligned with the vacant positions.

As for the skills gap analysis, the Strategy Team reviewed the outcomes of training programs, and they analyzed the technical and behavioral competencies required for vacant positions. Through that, the team identified qualitative gaps between available training programs' objectives, topics, and outcomes with the competencies of vacant positions. At the same time, this analysis provided insights into the gaps vis-à-vis the type and level of skills that are not covered by available training programs to match the skillset sought after by vacant positions.

Simultaneously, the Strategy Team continued with research for existing studies on skills gaps and training needs within the H&T sector along with KIIs and site visits with **(a)** relevant stakeholders in the sector, which served to assess training programs, skills provided, and the general provision of tourism sector training/ education programs; and with **(b)** representatives of accredited tourism training/ education institutions, which resulted in a greater understanding of the skills and knowledge provided in the training programs, and the extent to which it meets employers' demands.

The Strategy Team was able to identify current and forthcoming skills necessary to address the skill gap in the sector, with emphasis on those for the future of the labor market and its participants, with emphasis on digital skills, along with emerging trends. The Strategy Team also defined the technical and behavioral competencies required for current opportunities in comparison with the competency/ skill gap in the content of the program and the competencies of available opportunities. For that, the team examined the outputs of the accredited training and education programs with the competencies of current available job opportunities within job categories.

Once the gaps were fully identified, the Strategy Team defined the Strategic Objectives and their respective strategic initiatives which serve to fulfill the objectives in clear action plan that indicates and illustrates the responsible entities, the timeline of implementation, as well as the means through which the initiatives can be monitored and evaluated as well as their ability to mitigate any risks that could hinder their success.

3.3 Stakeholder Communication and Coordination

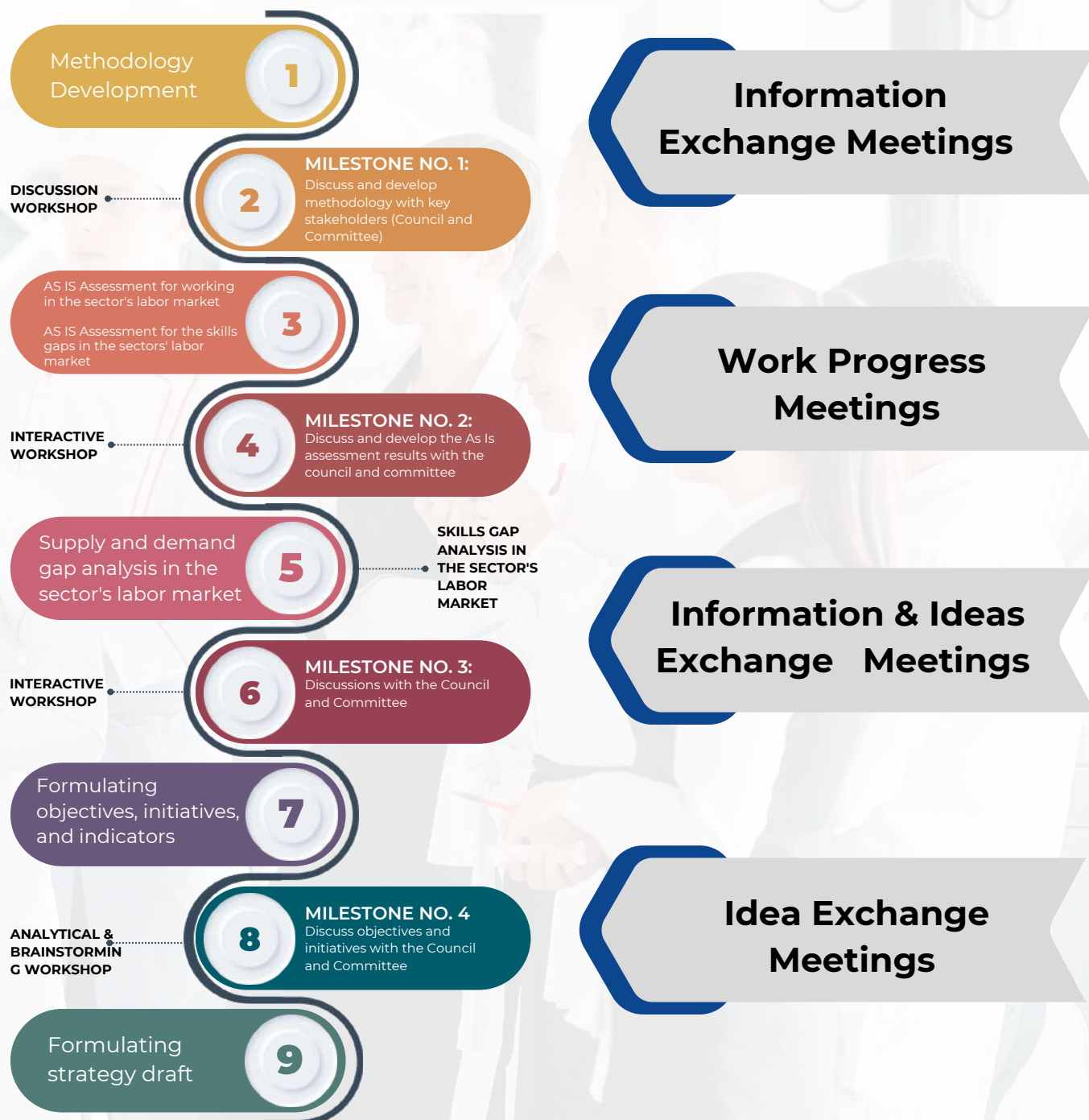


Figure 2: Infographic illustrating the communication process throughout the whole project

At the start of implementation, NAMA held a kick-off meeting with EBRD and ETF along with a second kick-off meeting series, individually, with each of the following stakeholders **(a)** the Minister and Secretary General of MOTA; **(b)** the Minister of MOL; **(c)** the SSC H&T Chairman and board members; **(d)** TVSDC General Manager; and **(e)** the NCHRD director. These meetings served to introduce and discuss the project and its objectives, introduce its key personnel, acquire initial support from these stakeholders, and identify the focal points from each stakeholder.

These focal points, together, will serve on the Stakeholder Engagement and Coordination Committee (National Committee), which is integral to the implementation of the project. SSC H&T Chairman, who agreed with each member of the committee and informed the ministry of the committee's make up, who indicated their buy-in.

4. H&T LABOR MARKET AND SKILLS DEMAND-SIDE ANALYSIS MAIN FINDINGS

4.1 H&T ESTABLISHMENTS' SAMPLE DISTRIBUTION

When it comes to the establishments' distribution in the sample in the table below, there was a substantial concentration of establishments in Amman. Moreover, when looking at restaurants and hotels, Aqaba trails behind Amman. However, looking into the distribution of handicraft establishments shows that there is a smaller degree of establishment consolidation around Amman, compared to the rest of the establishments, as around a quarter of the respondents were located in Madaba (24.2%), followed by Jarash (19.4%).

Sub-sector		Irbid	Jerash	Ajloun	Mafraq	Amman	Zarqa	Balqa	Madaba	Maan	Karak	Tafileh	Aqaba	Total
Restaurants	No. of Respondents	12	3	3		109	8	10	10	3	3		35	196
	% of Respondents	6.1%	1.5%	1.5%		55.6%	4.1%	5.1%	5.1%	1.5%	1.5%		17.9%	100%
Hotels	No. of Respondents	1	2			113	1		8	15		3	24	167
	% of Respondents	0.6%	1.2%			67.7%	0.6%		4.8%	9%		1.8%	14.4%	100%
Tourist Agencies	No. of Respondents	13		1	1	156	6	2		8	1			188
	% of Respondents	6.9%		0.5%	0.5%	83%	3.2%	1.1%		4.3%	0.5%			100%
Tourism Transport	No. of Respondents	2	1			44			2					49
	% of Respondents	4.1%	2%			89.8%			4.1%					100%
Handicrafts	No. of Respondents	3	12	3		25		1	15	1	1	1		62
	% of Respondents	4.8%	19.4%	4.8%		40.3%		1.6%	24.2%	1.6%	1.6%	1.6%		100%
Tour Guides	No. of Respondents	135												135
	% of Respondents	100%												100%
Grand Total	No. of Respondents	31	18	7	1	447	15	13	35	27	5	4	59	797

Table 9: H&T demand analysis sample distribution per subsector and Governorate

4.2 H&T Establishments' Labor-Related Findings

4.2.1 H&T Establishments' Sample Labor Breakdown

The Respondents were asked to provide the number of workers they have per type; permanent, seasonal, Jordanian, Syrian refugees, Egyptian, other foreign labor, and people with disabilities. Further, the number of workers per labor type was then aggregated per establishment as shown in the table below.

Notably, the count of permanent workers surpasses that of seasonal workers, underscoring the importance of maintaining a diverse workforce within establishments, irrespective of tourism seasons. This highlights the value of retaining employees across various roles throughout the year. Looking deeper into the table, restaurants employed the highest number of permanent workers followed by hotels, then tourist agencies. Seasonal worker distribution also followed the same line as the permanent workers, with hotels having the most permanent workers. On the other hand, Jordanian women were more likely to work in handicrafts, followed by hotels, tourist agencies, then restaurants. On the other hand, Jordanian women were the least likely to be employed in tourism transport establishments. When it comes to Syrian refugees, they were mostly employed in restaurants, followed by hotels. However, Egyptian labor was the most employed out of all the foreign labor. When it comes to people with disabilities, their participation rate is extremely low across the board.

Sub-sector	Labor Type: How many (insert worker type) do you have in your establishment?	Number of workers
Restaurants 	Permanent workers	3,360
	Seasonal workers	659
	Jordanian women	408
	Syrian refugees	121
	Egyptian workers	501
	Other foreign labor	215
	People with disability (PWD)	29
Hotels 	Permanent workers	2,993
	Seasonal workers	206
	Jordanian women	716
	Syrian refugees	8
	Egyptian workers	178
	Other foreign labor	134
	People with disability (PWD)	20
Tourist Agencies 	Permanent workers	1,158
	Seasonal workers	98
	Jordanian women	511
	Syrian refugees	3
	Egyptian workers	22

	Other foreign labor	2
	People with disability (PWD)	3
Tourism Transport 	Permanent workers	575
	Seasonal workers	149
	Jordanian women	31
	Syrian refugees	5
	Egyptian workers	24
	Other foreign labor	5
	People with disability (PWD)	0
Handicrafts 	Permanent workers	334
	Seasonal workers	64
	Jordanian women	104
	Syrian refugees	4
	Egyptian workers	16
	Other foreign labor	4
	People with disability (PWD)	12

Table 10: H&T demand analysis sample- labor breakdown per subsector and per labor type

4.2.2 Main Sources of Hiring Labor

The respondents were asked about their main methods of recruiting workers in their respective establishments, in which they were provided with several options to choose from, in addition to being able to provide more than one answer. The results were then analyzed and presented in the table below.

When it comes to restaurants, hotels, and tourist agencies establishments, findings show that social media platforms, individual recommendations, and direct requests by job seekers were the most common methods used in hiring labor. On the other hand, handicraft establishments were more likely to hire workers based on individual recommendations and used social media platforms at a lower rate than the aforementioned three establishments. Meanwhile, the majority of tour guides interviewed stated that they rely on tourist agencies to provide them with work opportunities. It is important to note that throughout all of the subsectors, newspapers were used the least, in addition to recruitment platforms not playing a large role in hiring labor (reaching 8.3% at best).

	Restaurants	Hotels	Tourism Agencies	Transportation	Handicrafts	Tour guides
Method 1	Social media platforms (30.2%)	Social media platforms (31.3%)	social media platforms (26.3%)	Individual recommendations (31.8%)	Individual recommendations (44.6%)	Tourist agencies in Jordan (65.8%)
Method 2	Direct requests by job seekers (20.5%)	Individual recommendations (21.0%)	Individual recommendations (26.0%)	Social media platforms (22.7%)	Direct requests by job seekers (15.4%)	tourists themselves (10.9%)
Method 3	Individual recommendations (18.8%)	Direct requests by job seekers (21.0%)	Direct requests by job seekers (19.5%)	Direct requests by job seekers (22.7%)	Sector recommendations (9.2%)	Tourist agencies in outside Jordan (6.5%)
Method 4	Recruitment platforms (8.3%)	Sector recommendations (7.8%)	Sector recommendations (12.6%)	Recruitment platforms (7.6%)	Social media platforms (7.7%)	Social media platforms (4.9%)
Method 5	Sector recommendations (6.6%)	Recruitment platforms (6.8%)	Recruitment platforms (7.3%)	Sector recommendations (6.1%)	Newspapers (1.5%)	Tourism boards (4.3%)
Method 6	Newspapers (4.8%)	Newspapers (3.9%)	Newspapers (1.5%)	Newspapers (1.5%)	Other (21.5%)	Newspapers (0.5%)
Method 7	Other (10.3%)	Other (8.5%)	Other (6.9%)	Other (6.1%)		other (7.1%)

Table 11: H&T Demand analysis sample- H&T establishments' main sources of hiring labor per subsector



4.2.3 Main Difficulties faced in Hiring Labor

Establishments were asked if they faced any difficulties in hiring labor. The majority of restaurants (52.6%) indicated they do face some difficulties in hiring labor, followed by hotels (41.9%), tourist agencies (20.4%), tourist transport (17.7%), and handicrafts (16%). As for tour guides, they were asked if they face difficulties in finding work. Nearly a quarter of the respondents indicated yes, of whom were then asked to reference such main difficulties, and they could provide more than one answer. The results were analyzed and illustrated in the table below.

	Restaurants (52.6%)	Hotels (41.9%)	Tourism Agencies (20.4%)	Transportation (17.7%)	Handicrafts (16%)	Tour guides (24%)
Difficulty 1	Scarcity of qualified labor 36.28%	Scarcity of qualified labor 27.33%	Scarcity of qualified labor 53.41%	Scarcity of qualified labor 50.0%	Scarcity of qualified labor 86.67%	Lack of tourism in Jordan 40.9%
Difficulty 2	Job seekers fear stability and continuity in the sector 17.70%	Job seekers fear stability and continuity in the sector 18.60%	Poor opportunities for career and skill development 14.77%	High wages for Jordanian workers 8.3%	Other: 13.33% (Paying social security, lack of trained individuals)	High Competition 34.1%
Difficulty 3	Negative societal view of some jobs in the sector 14.16%	Negative societal view of some jobs in the sector 12.21%	The job seeker fears stability and continuity in the sector 9.09%	The job seeker fears stability and continuity in the sector 8.3%		Other 25.0%: (Political issues, Lack of transportation)
Difficulty 4	High wages for Jordanian workers 9.73%	Poor opportunities for career and skill development 11.63%	High wages for Jordanian workers 6.82%	Other: 33.3% (Weak work ethic, lack of trained individuals)		
Difficulty 5	Other 16.81%: (Weak work ethic; lack of trained individuals; transportation)	Other 20.93%: (Weak work ethic, lack of trained individuals)	Other: 11.36% (Lack of trained individuals, weak work ethic)			

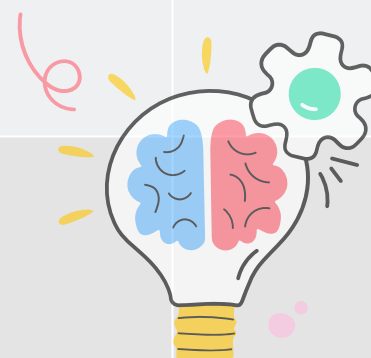


Table 12: H&T Demand analysis sample- H&T establishments' main difficulties faced in hiring per subsector

Over the board, all of the establishments indicated that their first challenge in hiring labor is finding qualified labor, which the majority of handicrafts and nearly half of tourist transport and agencies cite this as the primary challenge. Other difficulties such as the perceived lack of continuity, stability, and career development opportunities were also substantially cited especially among restaurants, hotels, and tourist agencies which are the biggest employers in the H&T subsector (in this sample and nationally speaking). Tour guides, on the other hand, indicated that lack of tourism is the main challenge to finding work (40.9%), followed by high competition (34.1%).

4.2.4 Foreign Labor

Establishments were asked if they want to employ foreign workers in their establishments. The results show that nearly half of restaurants do want to employ foreign labor, followed by hotels (38.3%), then tourist transport (16.1%), tourist agencies (14.9%), and handicrafts (6.1%). Of those who answered “yes”, they were then asked to list the professions in which they would prefer to hire foreign workers. The answers were then analyzed and illustrated in the table below.

	Restaurants (45.9%)	Hotels (38.3%)	Tourist Agencies (14.9%)	Tourist Transport (16.1%)	Handicrafts (6.1%)
Foreign Labor 1	Kitchen Staff (27.2%)	Housekeeping (26.5%)	Sales (25.7%)	Cleaning staff (60%)	No specific position (100%)
Foreign Labor 2	Cleaning Staff (17.4%)	Room Service (21.8%)	Reservations (17.1%)	Mechanical work (20%)	
Foreign Labor 3	No specific position (13%)	Cleaning Staff (21.8%)	Cleaning Staff (14.3%)	No specific position (13%)	
Foreign Labor 4	Shisha Worker (9.8%)	Kitchen Staff (6.3%)	Other (42.7%)		
Foreign Labor 5	Hall Staff (5.4%)	Other (4.6%)			

Table 13: H&T Demand analysis sample- H&T establishments' preferred professions for foreign labor per subsector

Over the board, it was not surprising that “cleaning staff” were significantly mentioned (except for handicrafts). When it comes to restaurants, kitchen staff were mentioned the most (27.2%), followed by cleaning staff (17.4%). Hotels mentioned housekeeping (26.5%), followed by both room service and cleaning staff (21.8%). Tourist agencies on the other hand mentioned sales personnel (25.7%), followed by reservations staff (17.1%), then cleaning staff (14.3%). Tourist transport mainly mentioned cleaning staff (60%), while Handicrafts did not indicate any specific position.

The establishments that indicated their desire to hiring foreign workers, were then asked to provide their reasons. More than a quarter of restaurants (27%) indicated that foreigners are more qualified. When it comes to hotel establishments, more than a third also indicated that foreigners were more qualified (33.3%), while 18.2% indicated that Jordanians request higher wages. 18.2% also indicated that Jordanians will not work in positions that are usually held by foreigners. Nearly half of the transportation establishments stated that Jordanians require higher wages than foreigners (45.5%), while 36.4% indicated that foreigners are more qualified. 27.3% also indicated that there are cultural barriers that necessitate them to higher foreigners rather than Jordanians. Finally, all of the handicrafts that answered yes stated that foreigners are also more qualified.

Following that, all of the interviewed establishments were provided with a list of options in which they are asked what would allow them to replace foreign labor with Jordanians, they were also able to provide more than one answer. The results were then analyzed and illustrated in the table below.

Over the board, all of the establishments are in line with the belief that Jordanians need to take up professions that are usually occupied by expatriates. This can also explain the previous results which show that establishments prefer to hire foreigners in cleaning, room service, and kitchen staff positions. Setting aside the first suggestion, improving the level of training, and providing tax incentives, flexible working hours, and transportation were also significantly mentioned throughout all of the subsectors.

	Restaurants	Hotels	Tourist Agencies	Tourist Transport	Handicrafts
Suggestion 1	Jordanians must accept professions occupied by expatriate workers 31.9%	Jordanians must accept professions occupied by expatriate workers 37.6%	Jordanians must accept professions occupied by expatriate workers 59.4%	Jordanians must accept professions occupied by expatriate workers 43.8%	Jordanians must accept professions occupied by expatriate workers 50%
Suggestion 2	Improving the level of training 14.5%	Improving the level of training 16.8%	Improving the level of training 12.5%	Tax incentives 12.5%	Tax incentives 16.7%
Suggestion 3	Tax incentives 9.2%	Tax incentives 11.9%	Tax incentives 9.4%	Providing flexible working hours 12.5%	Improving the level of training 16.7%
Suggestion 4	Providing flexible working hours 9.2%	Providing transportation 10.9%	Providing flexible working hours 6.3%	Marketing the potential of the career path in the sector 6.3%	Providing flexible working hours 16.7%
Suggestion 5	Providing transportation 8.7%	Providing flexible working hours 9.9%	Others 12.5%	Providing transportation 6.3%	
Suggestion 6	Marketing the potential of the career path in the sector 6.3%	Marketing the potential of the career path in the sector 3%		Improving the level of training 6.3%	
Suggestion 7	Others 20.3%	Marketing the potential of the career path in the sector 3%		Others 12.5%	

Table 14: H&T Demand analysis sample- H&T establishments' suggestions for replacing foreign labor with Jordanian labor per subsector

4.2.5 Increasing Jordanian Female Participation

The establishments were asked about what needs to be done to increase Jordanian women in the H&T sector, in which they were able to provide more than one answer. The answers were then analyzed and illustrated in the table below.

Overall, when it comes to suggesting ways in increasing female participation in the hospitality and tourism sector, the most two answers provided by the establishments were either that **(a)** providing flexible working hours, or **(b)** increasing society's acceptance of female participation in the H&T sector. Therefore, we can no longer merely attribute that the main barrier to female participation is due to culture, as seen below there are other prevalent obstacles that have been mentioned across all subsectors such as the lack of flexible hours (either the first or the second most suggested solution across the board), and transportation issues (the third most suggested solution across the board). The only exception came from the tour guides suggesting an increase in acceptance by a margin. Moreover, there seems to be an issue when it comes to the marketing of career path potential in the H&T sector since it was the fourth most suggested solution across all of the subsectors.

	Restaurants	Hotels	Tourist Agencies	Transportation	Tourguides	Handicrafts
Suggestion 1	Increasing society's acceptance of Jordanian women's work in the tourism sector (25.7%)	Increasing society's acceptance of Jordanian women's work in the tourism sector (30.2%)	Provide flexible working hours (33.9%)	Provide flexible working hours (26.6%)	Increasing society's acceptance of Jordanian women's work in the tourism sector (42.1%)	Provide flexible working hours (23.5%)
Suggestion 2	Provide flexible working hours (24.2%)	Provide flexible working hours (23.4%)	Increasing society's acceptance of Jordanian women's work in the tourism sector (20.7%)	Increasing society's acceptance of Jordanian women's work in the tourism sector (21.9%)	Provide flexible working hours (9.8%)	Providing transportation (22.4%)
Suggestion 3	Providing transportation (16.8%)	Providing transportation (15.7%)	Providing transportation (13.7%)	Providing transportation (14.1%)	Marketing career path potential in the sector (7.3%)	Increasing society's acceptance of Jordanian women's work in the tourism sector (18.4%)
Suggestion 4	Marketing career path potential in the sector (10.6%)	Marketing career path potential in the sector (5.1%)	Marketing career path potential in the sector (12.2%)	Marketing career path potential in the sector (12.5%)	Providing transportation (4.9%)	Marketing career path potential in the sector (6.1%)

Table 15: H&T Demand analysis sample- H&T establishments' suggestions increasing Jordanian female participation per subsector

4.2.6 Increasing PWD Participation

The establishments were asked on what needs to be done in order to increase the amount of disabled people (PWDs) in the H&T sector, in which they were able to provide more than one answer. The answers were then analyzed and illustrated in the table below. Overall, when it comes to the challenges faced by people with disability in the H&T sector the most common answer throughout all the subsectors (with the exception of the handicrafts establishments) was their inability to perform the tasks needed. However, a substantial portion of establishments throughout all the subsectors (most predominately within the handicrafts) stated that there are no obstacles facing PWD when it comes to working in the H&T subsector, therefore it seems that there is also a marketing and communication issue when it comes to promoting the sector as PWD friendly. Moreover, the lack of PWD-friendly infrastructure was also stated among the top 4 challenges.

	Restaurants	Hotels	Tourist Agencies	Transportation	Tourguides	Handicrafts
Challenge 1	Inability to perform the tasks needed of the job (34.20%)	Inability to perform the tasks needed of the job (49.70%)	Inability to perform the tasks needed of the job (30.3%)	Inability to perform the tasks needed of the job (69.4%)	Inability to perform the tasks needed of the job (37.0%)	There are no obstacles with PWD employment (53.2%)
Challenge 2	There are no obstacles with PWD employment (14.30%)	There are no obstacles with PWD employment (24.60%)	There are no obstacles with PWD employment (14.9%)	There are no obstacles with PWD employment (22.4%)	There are no obstacles with PWD employment (32.6%)	Inability to perform the tasks needed of the job (19.4%)
Challenge 3	Degree of disability and capability to do the job (12.20%)	Lack of structures and infrastructure that are handicap accessible (9%)	Lack of structures and infrastructure that are handicap accessible (6.9%)		Degree of disability and capability to do the job (14.8%)	Degree of disability and capability to do the job (11.3%)
Challenge 4			Degree of disability and capability to do the job (5.8%)		Lack of structures and infrastructure that are handicap accessible (10.4%)	Lack of structures and infrastructure that are handicap accessible (6.5%)

Table 16: H&T Demand analysis - H&T establishments' suggestions to increase PWD's participation per subsector

4.2.7 Labor Demand

The establishments were asked if they had a specific department in their establishments. Of those who said they did, they were provided with a list of professions to list how many workers they currently have employing these professions and the number they needed to bridge shortages. The answers were analyzed and aggregated per sub-sector and divided per location as illustrated below. In total, there are 1,693 Jobs needed from the H&T sample, with most of them being requested by both restaurants and hotels establishments. Moreover, when it comes to the geographical distribution, it is not surprising that Amman comprises the largest of workers demanded, this is however followed by Irbid (143 workers) with the majority of them were demanded by restaurants . Moreover, Maan and Aqaba lightly trail behind Irbid (96, and 84 respectively).

Sub-sector	Ajloun	Irbid	Jerash	Mafrq	Amman	Balqa	Madaba	Zarqa	Aqaba	Maan	Karak	Tafleh	Total
Restaurants	0	100	0	0	523	13	13	0	43	0	0	0	692
Hotels	0	43	77	0	431	0	0	0	41	74	0	2	668
Tourist Agencies	0	0	0	0	191	0	0	8	0	22	0	0	221
Handicrafts	0	0	0	0	34	0	7	0	0	0	0	8	49
Tourism Transport	0	0	0	0	63	0	0	0	0	0	0	0	63
Total	0	143	77	0	1242	13	20	8	84	96	0	10	1693

Table 17: H&T Demand analysis sample- Labor currently demanded from the subsectors

4.3 Most Common Skills Currently Demanded Across All Subsectors and Professions

The data gathered demonstrate that there were 9 most prevalent skill gap categories that are demanded across all or most sub-sectors and professions, namely **(a)** operational and foundational skills and general knowledge; **(b)** language – especially English; **(c)** customer service and etiquette; **(d)** overall cleanliness and hygiene; **(e)** business/ administration skills; **(f)** operating digital systems; **(g)** making drinks, presentation, and management; **(h)** work ethic including timeliness and the ability to learn and adapt quickly; and **(i)** marketing and sales skills. For an in-depth look into the most common skills currently demanded at a sub-sector or departmental level, please refer to **Appendix A** and **Appendix B**. Moreover, when it comes to what constitutes as a foundational skill, please refer to **Appendix C**.

4.3.1 Operational and Foundational Skills and General Knowledge

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Floor staff	Waiter/ floor staff, delivery staff, barista, runner
	Kitchen	Demis chef, Commis chef, executive chef
	Operations and logistics	Quality control and production supervisor, quality control employee, food safety and quality control supervisor, food health and safety, technician, Janitor
	Administration and finance	General manager, cost control officer, deputy manager, head of HR, financial controller
Hotels: JHA and ASEZA establishments	Administration and finance	Head of finance, deputy head of finance, head of accounts, general cashier/ treasurer, head of credit, accounting team leader, auditor, financial controller, night auditor, HR supervisor, head of personnel
	Front office/ reception	Head of reservations, head of customer/ guest relations
	House cleaning	Housekeeper, laundry host, head of waiters/ floor staff
	Food and beverage	Hostess, waiter/ floor staff, bartender, order taker
	Operations and logistics	Head of purchasing, supplies manager
Handicrafts	Administration and finance	Accountant



Table 18: H&T Demand analysis-skills needed across all sub-sectors and professions (Operational and Foundational skills and general knowledge)

4.3.2 Languages - Especially English

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Floor staff	Waiter/ floor staff, delivery person, bartender, barista
	Kitchen	Demis chef, Chef de partie, Commis cook
	Operations and logistics	Janitor
	Administration and finance	Head of HR, financial controller

Hotels: JHA and ASEZA Establishments	Administration and finance	General manager, executive secretary, head of finance, general cashier, head of credit, cashier
	Front office/ reception	Head of front office, front office, team leader-front office, head of reservations and reservations employee
	Housekeeping	Housekeeper
	Food and beverage	Hostess, waiter/ floor staff
	Kitchen	Chef de partie, junior Sous-chef
Tourist Agencies	Administration and finance	General manager, head of HR, head of product development, business development
	Marketing and sales	Sales, marketing
	Operations	Head of ticketing, reservations, ticketing
Tourist transport and car rentals	Administration and finance	Sales, marketing
	Operations and transport	Head of ticketing, reservations, ticketing
Handicrafts	Marketing and Sales	Head of marketing
	Operations (handicrafts production)	Handicrafts worker
Tour guides (English)		



Table 19: H&T Demand analysis-skills needed across all subsectors and professions (the English language)

4.3.3 Customer Service and Etiquette

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Floor staff	Waiter/ floor staff, delivery, bartender, barista, runner
	Kitchen	Executive chef, kitchen supervisor
	Operations and logistics	Food health and safety technician, Janitor
	Administration and finance	General manager, cashier
Hotels: JHA and ASEZA Establishments	Administration and finance	Cashier/ treasurer
	Front office/ reception	Head of front office, front office, reservations, head of customer/ guest relations
	Housekeeping	Head of rooms, housekeeping team leader, housekeeper, laundry host
	Food and beverage	Waiter/ floor Staff
	Kitchen	Executive chef



Tourist Agencies	Administration and finance	General manager, secretary, business development
Tourist transport	Administration and finance	General manager, head of finance, head of accounting, head of HR, administrative assistant
	Marketing and sales	Head of sales, head of marketing, sales, marketing
	Operations	Reservations

Table 20: H&T Demand analysis-skills needed across all subsectors and professions customer service and etiquette)

4.3.4 Overall Cleanliness Hygiene

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Food and beverage	Waiter/ floor staff, delivery, bartender, barista
	Kitchen	Commis chef, Chef de Partie, executive chef, assistant executive chef, Commis cook, Sous-chef, kitchen supervisor
	Bakery	Baker, assistant baker, apprentice baker, executive baker, pastry trainee
	Operations and logistics	Janitor
Hotels: JHA and ASEZA establishments	Housekeeping	Housekeeper, laundry host
	Food and beverage	Waiter/ floor staff

Table 21: H&T Demand analysis-skills needed across all subsectors and professions (overall cleanliness hygiene)

4.3.5 Business/ Administration Skills

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Floor staff	Waiter/ floor Staff
	Kitchen	Chef de Partie, executive chef, assistant executive chef
	Administration and finance	Cost control officer, deputy manager, receipt and delivery worker, financial controller
Hotels: JHA and ASEZA establishments	Administration and finance	Executive secretary, HR supervisor
	Front office/ reception	Head of front office, reservations, head of customer/ guest relations
	Housekeeping	Housekeeper, laundry host
	Engineering	Health and safety engineer
Tourist agencies	Administration and finance	General manager

Table 22: H&T Demand analysis-skills needed across all subsectors and professions (business/ administration skills)

4.3.6 Operating Digital Systems

Subsector	Department	Profession
Hotels: JHA and ASEZA establishments	Administration and finance	<u>Using OPERA</u> : Credit collector, Head of human resources
		<u>Operating accounting system</u> : Deputy head of finance, Head of accounts, Auditor, Night auditor, Cashier Head of training
		<u>Using computers/ digital literacy</u> : Head of accounts
	Front office/ reception	Head of front office, Head of reservations
	Food and beverage	<u>Using OPERA</u> : Front office, Reservations
	Housekeeping	<u>Using computers/ digital literacy</u> : Housekeeper
Restaurants: JRA and ASEZA establishments	Administration and finance	Accounting: General manager
Tourist Agencies	Administration and finance	Accounting: General manager
		Using computers/ digital literacy: General manager
Tourist transport and car rental	Administration and finance	Accounting: General manager Using computers/ digital literacy: General manager
	Operations and transport	Using computers/ digital literacy: Vehicle maintenance technician
Handicrafts	Marketing and sales	Using computers/ digital literacy: Head of marketing, marketing



Table 23: H&T Demand analysis-skills needed across all subsectors and professions (operating digital systems)

4.3.7 Making Drinks, Presentation and Management

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Floor staff	Cost saving, drink making and presentation, and menu memorization: bartender, barista, waiter/ floor staff
	Operations and logistics	Food health and safety technician
	Administration and finance	Cashier
Hotels: JHA and ASEZA Establishments	Food and beverage	Drink making and presentation: bartender

Table 24: H&T Demand analysis-skills needed across all sub-sectors and professions (Making Drinks, Presentation and Management)

4.3.8 Work Ethic

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Floor staff	Timeliness: Barista, Waiter/ Floor Staff Ability to learn and adapt quickly: Runner
	Kitchen	Ability to learn and adapt quickly: Kitchen apprentice, Executive chef, Sous chef, Kitchen supervisor, Assistant executive chef
	Operations and logistics	Ability to learn and adapt quickly: Janitor
Hotels: JHA and ASEZA establishments	Administration and finance	Timeliness: Cashier
	Housekeeping	Timeliness: Housekeeper

Table 24: H&T Demand analysis-skills needed across all subsectors and professions (work ethic)

4.3.9 Marketing and Sales (Including Digital Marketing)

Subsector	Department	Profession
Restaurants: JRA and ASEZA establishments	Floor staff	Delivery
	Administration and finance	General manager
Hotels: JHA and ASEZA establishments	Operations and logistics	Head of purchasing
Tourist agencies	Administration and finance	General manager, Secretary, Head of product development, Head of business development, Business development
	Marketing and sales	Head of sales, Sales
Tourist transport and car rentals	Administration and finance	General manager
	Marketing and sales	Head of marketing, Marketing
Handicrafts	Marketing and sales	Head of marketing, Marketing
		Tour guides

Table 25: H&T Demand analysis-skills needed across all subsectors and professions (marketing and sales)

4.4 Top 5 Forecasted Jobs and skills in The Future

Those who answered “yes” to hiring more workers in the next 5 years, provided a list of jobs needed in addition to the skills needed for the next 5 years, below are the answers.

- **Restaurants:** Both waiters/ floor staff and chefs were the most demanded positions in the future. When it comes to the skills forecasted, customer service and etiquette were the most demanded followed by operational and foundation skills.

- **Hotels:** Kitchen staff was the most demanded job for the future followed by housekeeping. When it comes to skills forecasted, the English language was the most demanded skill followed by operational and foundational skills.
- **Tourist Agencies:** Reservationists were the most demanded position for the future, followed by sales. When it comes to the skills forecasted, the English language was the most demanded skill followed by interpersonal skills and sales.
- **Tourism Transport:** Drivers were the most demanded position for the future, followed by reservationists. When it comes to the skills forecasted, logistics and driving was the most demanded skill followed by the English language.
- **Handicrafts:** Both sales personnel and mosaic craftsmen were demanded the most. When it comes to skills forecasted, artistic vocational skills were demanded the most, followed by English.

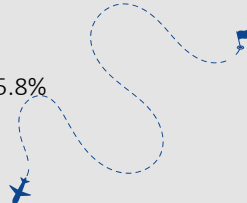
Sub-sector	Predicted labor needs	Predicted skill needs
Restaurants	Chef; Waiter/ Floor Staff; Cook; Barista	• Customer service 18.0% • Operational and foundational skills and general knowledge 17.0% • Cooking skills 7.7% • Languages (mainly English) 6.7% • Entrepreneurship 4.1% • Digital literacy 2.6% • Work ethic 2.6% • Mixology 2.1% • Barista 1.5% • Other various skills 37.6% 
Hotels	Kitchen staff; Housekeeping; Receptionist; Janitor	• Languages (mainly English) 20.1% • Operational and foundational skills and general knowledge 19.6% • Customer service and etiquette 7.9% • Cooking 7.4% • Sanitation skills 4.8% • F&B serving skills 3.7% • Digital literacy 1.6% 
Tourist agencies	Reservations; Sales; Ticketing; Marketing/e marketing	• Languages (mainly English) 19.7% • interpersonal skills 14.0% • Sales 14.0% • Ticketing and reservation skills 13.4% • General knowledge 11.5% • Digital literacy 10.2% 
Tourism Transport	Drivers; Reservations/ Booking; Vehicle Technician (maintenance); Car Mechanic	• Other 21.1% • Logistics and driving skills 18.4% • Languages (mainly English) 13.2% • Personal presentation and interpersonal skills 15.8% • General knowledge 10.5% • Sales skills 10.5% • Mechanical and handy skills 5.3% 
Handicrafts	Sales person; Mosaic art crafting; Glass crafting; Embroidery; Antiques selling	• Artistic vocational skills 43.3% • Languages (mainly English) 23.3% • Other 20.0% • General knowledge 13.3% 

Table 26: H&T Demand analysis sample- H&T establishments' forecasted labor and skills needs.

4.5 The State of Training and Education - Establishments' Perspective

4.5.1 Restaurants

When asked if the establishments implement training programs to reduce skill gaps, 58.2% answered "yes". Of those who answered yes, 94.7% of the respondents stated that they do implement training programs inside their establishments. Moreover, 21.9% of the respondents stated that they implement training programs outside the establishment. Furthermore, 13.2% of the respondents do implement online training programs. Finally, those who stated that they conduct external and/or online training, were asked to rate their degree of satisfaction with the institution and/or platform. Below lists the number of establishments that were rated, in addition to the degree of rating.

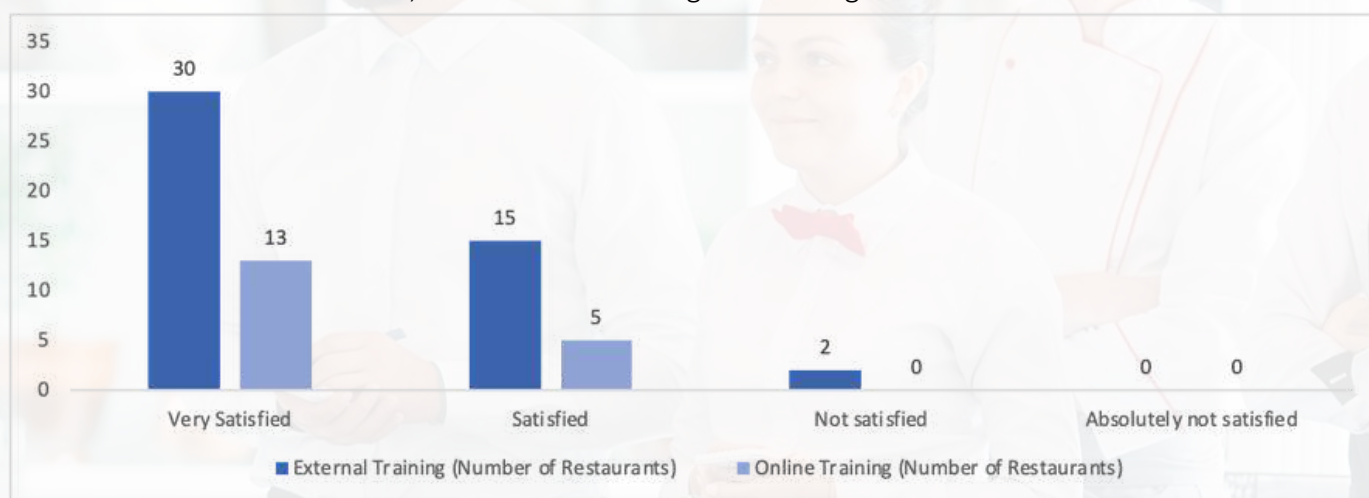


Figure 3: H&T Demand analysis sample- restaurant establishments' rating of external and online training and education establishments

4.5.2 Hotels

When asked if the establishments implement training programs to reduce skill gaps 38.9% answered "yes". Of those who answered yes 96.9 % of the respondents stated that they do implement training programs inside their establishments. Moreover, 7.7% of the respondents stated that they implement training programs outside the establishment. Furthermore, 7.7% do implement online training programs. Finally, those who stated that they conduct external and/or online training were asked to rate their degree of satisfaction with the institution and/or platform. Below lists the number of establishments that were rated, in addition to the degree of rating.



Figure 4: H&T Demand analysis sample- hotel establishments' rating of external and online training and education establishments

4.5.3 Tour Guides

When asked if they ever underwent training in order to reduce skill gaps, 66.2% stated “yes”. Of the tour guides who answered yes, 73% stated that they train in centers. Moreover, 19.4% do “self-studying”. Furthermore, 7.4% did training via online courses. Finally, those who stated that they conduct external and/or online training, were asked to rate their degree of satisfaction with the institution and/or platform. Below lists the number of tour guides that rated, in addition to the degree of rating.

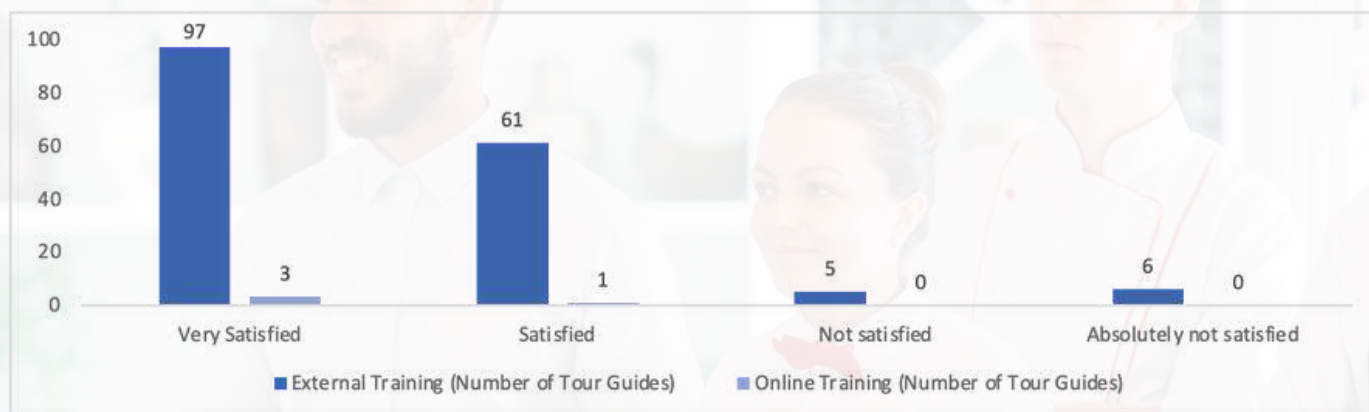


Figure 5: H&T Demand analysis sample- tour guides' rating of external and online training and education establishments

4.5.4 Tourist Agencies

When asked if the establishments implement training programs to reduce skill gaps 42.6% answered “yes”. Of those who answered yes, 87.5% of the respondents stated that they do implement training programs inside their establishments. Moreover, 31.3% of the respondents stated that they implement training programs outside their facility. Furthermore, 6.3% do implement online training programs.

4.5.5 Tourist Transport

Most establishments interviewed in the transportation sub-sector, do not participate in a form of training; of the 30.6% of establishments implementing a form of training in this sub-sector, 100% implement internal training, 20% implement external training, and only 6.7% implement online training. The establishments did not report their satisfaction with the level of training offered by the training facilities.

4.5.6 Handicrafts

When asked if the establishments implement training programs to reduce skill gaps, 11.3% answered “yes”. Of those who answered yes, 85.7% of the respondents stated that they do implement training programs inside their establishments. Moreover, 42.9% of the respondents stated that they implement training programs outside their establishments. However, none implement online training programs.

5. H&T SUPPLY-SIDE ANALYSIS MAIN FINDINGS

The Strategy Team conducted the supply analysis by dividing the H&T training providers based on their types, which were: **(a)** independent training programs and on-site job training; **(b)** higher education providers; and **(c)** non-academic: vocational training institutions. The team relied on a mix of reviewing existing research and conducting primary research through KIs and site visits. A total of 13 H&T training and education providers were interviewed, for more information, please refer to **Appendix D**.

5.1 Independent Training Programs and on the Job Training

In 2018, the National Center for Human Resources Development released a market assessment for the major skills gap in the H&T industry. A sample of national 2,345 tourist establishments and the study address the establishments that presented the demand side that was compromised due to the following subsectors:

- Single (retail) trade in other specialized stores.
- Ground transportation of passengers in cities and suburbs.
- Short-term accommodation activities.
- Campsites and parking for recreational vehicles and caravans.
- Catering and mobile food service activities.
- Beverage serving activities.
- Travel agency activities.

Findings of the study show that only 30% of tourism entities have formal training plans with only 21% allocating budgets for training, even though the entities depend on additional training from their staff. For example, the Jordan Hotels Association (JHA) offers an industry-based training program Pathways to Professionalism (PTP) to employees at 4- and 5-star establishments. Such training provides the following:

- Competence in basic cookery, food and beverage service, and housekeeping skills
- Communication skills and personal and professional attitudes
- Preparing all trainees to work within any domain such as; kitchens in restaurants, cafes, and housekeeping departments.
- The program above addresses the gap of challenges of training and education program

Other examples of specialized training providers that provide on-the-job training:

- **Tawasal:** offers training on craft skills based on needs and builds the capacities of producers to become specialized trainers. Tawasal also complements technical training with soft skills training as well as providing psychological support when needed.
- **Salt Development Corporation:** the corporation designs projects and seeks funding directed towards training opportunities that creates income generation and job opportunities. The corporation is not specialized in training and relies on sub-contracting training activities
- **Baraka:** where needed supports local craft producers in enhancing their products to link them with tourist experiences, trainers are usually outsourced and focused on developing experiences as well as products

- **Bookagri:** For agritourism, Bookagri is heavily involved in raising the awareness of rural communities to produce nature-based products as well as building the necessary capacities to produce high-quality sellable products. Bookagri offers in-house on-job training and sometimes outsources specialized trainers to support the process. Their training covers both technical skills as well as necessary soft and business skills.
- **Sela'a:** Aiming at protecting cultural heritage Sela' builds capacities within communities living in the surroundings of heritage and Archeological sites. While their certified training revolves around archaeology conservation and documentation Sela' is also involved in creating tourism experiences around cultural activities which include the production of skilled based value-added products and artisanal food
- **PDTRA:** As part of its mission to create economic opportunities from tourism to the local communities PDTRA supports artisans and NGOs by providing outsourced specialized trainers based on needs and requests
- **Amman Design Institute:** A specialized training venue for design offering specialized training in jewelry design, jewelry making, and fashion design which compliments the final products of artist decennial skill-based production and fills the identified skill gaps for product design and development

5.2 Higher Education in H&T and Other Relevant Streams

Currently, there are 17 higher education institutes private and public that offer qualification certificates, diplomas, professional diplomas, bachelor's, and master's degrees. The most common departments are tourism and hotel management, yet not all courses are covered in one institution alone. Most importantly, only Ammoun provides tour guides certifications in Jordan. Further, community colleges are becoming more prevalent as an alternative to quality education at more affordable rates. As of 2021, a total of 1,200 young Jordanians were trained in the tourism industry in addition to over 9,000 others in hospitality and tourism to gain diversified additional skillsets in the industry.

The table below provides a detailed view of higher education suppliers of H&T instruction programs:

University	Faculty	Department	Degree	Designed by	Planned by
Yarmouk University in Irbid	Faculty of Tourism and Hotel Management	Hotel Management	BA	The training program is designed by academic faculty	Fixed programs depend on the theoretical side
		Travel and Tourism	BA, MA		
	Faculty of Archaeology and Anthropology	Archaeology	BA, MA		
		Anthropology	BA, MA		
		Epigraphy	BA, MA		
		Conservation and Management of Cultural Resources	BA, MA		

University	Faculty	Department	Degree	Designed by	Planned by
Jordan University Amman	Faculty of Archaeology and Tourism	Cultural Resources Management and Conservation	BA	The training program is designed by academic faculty	Fixed programs depend on the theoretical side
		Tourism Management	BA		
		Archaeology	BA, MA		
		Management and Development of Tourism and Heritage Sites	MA		
Al-Ahliyya Amman University Salt	Faculty of Business	Hospitality management and culinary arts	BA	The training program is designed by academic faculty	Focus on theoretical and practical side
Philadelphia University Jerash	Department of Marketing	Hotel and Tourism Management	BA	The training program is designed by academic faculty	Fixed programs depend on the theoretical side
Ammon Applied University College		Hotel Management	BA	They have an advisory board that includes individuals from the tourism sector (public and private) to determine the skills needed for the tourism sector	The program is planned and modified according to market needs. They also an 6 months internships programs
		Event Management	BA		
		Hotel Management	Diploma		
		Culinary Arts	Diploma		
		Tour Guides	Qualification Certificate		
		Trade and Travel Retail Management	Training Diploma		
Luminous Technical University College		Hotel, Restaurant, and Event Management	BA	They have an advisory board that includes individuals from the tourism sector (public and private) to determine the skills needed for the tourism sector	The program is planned and modified according to market needs. They also an internships programs
		Culinary Arts Management	BA		
Jordan University in Aqaba	School of Tourism and Hospitality	Tourism Management	BA	The training program is designed by academic faculty	Theoretical program: It has 400 Hours practical and applied program put with weak follow-up system
		Hotel Management	BA		

University	Faculty	Department	Degree	Designed by	Planned by
Balqa Applied University Salt		Hotel Management	Diploma	The training program is designed by academic faculty	Fixed programs depend on the theoretical side have 8 weeks practical applied training
		Hotel Management	Diploma		
		Tourism Management	Diploma		
Al Hussein Bin Talal University in Maan	Petra College of Tourism and Archeology	Hotel Management	BA	The training program is designed by academic faculty	Fixed programs depend on the theoretical side
		Archeology	BA		
		Cultural Heritage	MA		
		Tourism Management	MA		
Mutah University in Karak	Faculty of Social Sciences	Archeology and Tourism	BA	The training program is designed by academic faculty	Fixed programs depend on the theoretical side
Hashemite University in Zarqa	Queen Rania Faculty of Tourism & Heritage	Conservation Science	BA	The training program is designed by academic faculty	Fixed programs depend on the theoretical side
		Sustainable Tourism	BA		
		Cultural Resources Management and Museology	BA		
		Hotel Management	Diploma		
		Culinary Arts	Diploma		
Khawarizmi Technical University College in Amman		Hospitality and Tourism Management	Diploma	They have an advisory board that includes individuals from the tourism sector (public and private) to determine the skills needed for the tourism sector	The program is planned and modified according to market needs. They also an 8 weeks practical and applied training program at hotel sections
Madaba Institute for Mosaic Art and Restoration		Restoration and Conservation of Mosaic Art	Diploma	The training program is designed by practitioners	Technical specialized prgram theortical and prtactical
Royal Academy of Culinary Arts (RACA)		Food and Beverage Management	BA	They have an advisory board that includes individuals from the tourism sector (public and private) to determine the skills needed for the tourism sector	The program is planned and modified according to market needs. They also have 5 months an internships programs at 5 stars hotel with strorg follow-up system

Table 27: H&T Supply analysis- H&T Training and education providers' courses information

5.3 Non-Academic Training Providers

5.3.1 National Aviation and Tourism Academy NATA

The main courses offered include Hotel Management, Airport Management, Travel and Tour Operation, and Culinary Arts.

5.3.2 Vocational and Training Institutions

VTC offers vocational training over a wide spectrum of specialties and levels, including nine training programs, in collaboration with the Al-Balqaa Applied University, at the level of technical diploma (comprehensive test community college diploma) aligned with the technical diploma from VTC. VTC also has the capability to conduct several specialized training programs according to the requirements of the private sector. Relevant vocational training programs offered include:

- **Handicrafts:** Pottery making and decoration; straw and bamboo making; stitching and beading; weaving; copper engraving
- **T&H Training Courses:** Basic knowledge of tourism and hospitality; hotel management; hotel receptionist; restaurant host; tourism and travel; food and drink services; oriental confectioner; exotic confectionery maker; oriental sweets maker; pastry maker and bakeries; and food production.

5.3.3 The First Institute for Training and Education

This institution offers courses, vocational training, and local experiences to high school students, the adult community, and foreign visitors. They offer a diverse portfolio of training programs and are currently implementing a training program on mosaic making and restoration in cooperation with the Young Women Christian Association and the International Labour Organization (ILO).

5.3.4 The Ministry of Education

The Ministry of Education (MOE) offers students throughout grades 11-12, the option to enter vocational education based on their marks throughout grades 8-10. However, only 27 schools spread across the country offers that extra curriculum which happens to be a school for girls only.



5.4 Training and Education Graduates'

5.4.1 Applied Training and Education Providers

Moreover, based on our supply analysis, the table below highlights the number of graduates throughout the years:

Establishment	years	Major	# of graduates	Total	Employability Rate	M:F Ratio
Applied University College education program	1999\2020-2021\2022	BA- Hotel Management – Closed	930	2218	NA	NA
		BA- Tourism Management	99			
		BA- Event Management	17			
		Diploma – Hotel Management	999			
		Diploma – Tourism Management	6			
		Culinary Arts Diploma	167			
Applied University College Training program	1999\2020-2021\2022	Tour Guides	960	6824	93%	NA
		Long training Courses	1234			
		Short training Courses	4252			
RACA	2010-2022	Culinary Arts	890	890	91%	M 36% F 64%
NATA	2020 - 2022	Tourism and hospitality Management	364	364	89%	NA
JHTEC	2017-2022	Tourism and hospitality training courses	1332	1332	96%	NA
VTC	2019	NA	2464	2464	72%	M 80% F 20%
	2020	NA	2063	2063	57%	M 85.9% F 14.1%
	2021	NA	1138	1138	57%	M 66.3% F 33.7%
	2022	NA	1252	1252	75%	M 46% F 54%
Luminus Technical University College	2019 - 2022	NA	731	731	77%	NA

Table 28: H&T Supply analysis- H&T applied training and providers' number of graduates

5.4.2 Academic Training and Education Providers

As of 1018, There were a total of 2,406 H&T graduates from academic education providers, with antiquities management having the highest enrollment rate (49.1%), followed by hotel management (25.1%) as displayed in the table below[22]:

	2018-2019		2019-2020		2020-2021		2021-2022		2022-2023		Total for each study	Percentage of total Graduates by study
	S1	S2	S1	S2	S1	S2	S1	S2	S1	S2		
Antiquities	18	39	12	34	15	51	17	0	20	0	206	8.6%
Antiquities & tourism	16	16	5	8	8	16	14	0	6	0	89	3.7%
Antiquities Management	117	195	105	99	122	325	108	0	110	0	1181	49.1%
Anthropology	15	25	14	19	8	17	6	0	13	0	117	4.9%
Legacies resource Management & maintenance	22	33	18	32	9	33	10	0	27	0	184	7.6%
Hotel Management	87	106	33	89	52	100	60	0	77	0	604	25.1%
Antiquities preservation	5	5	4	7	0	0	0	0	4	0	25	1.0%
Year total	699		479		756		215		257		2406	

Table 29: H&T Supply analysis- Academic education providers' number of graduates (HEAC figures)

5.4.3 H&T Workers by Educational Background

One of the main challenges during the consultation phase is trying to obtain solid data regarding the H&T labor market segmented by their educational background. However, to have an indication concerning the degree of education within the H&T sector, we will build our assumptions based on the following:

- **The Ministry of Labor's Annual Report (2021):** Report findings show that around 50% of employed Jordanians have below secondary education. On the other hand, less than 35% of employed Jordanians hold a Bachelor's degree or higher. Furthermore, less than 10% of employed Jordanians have either a secondary education or a diploma.
- **Previous research with 345 JRA establishments:** shows that the majority of the sample stated that they did not have local hospitality graduates working at their respective establishments. Moreover, of those who have graduated, 6% are not satisfied due to
 - Low level of vocational training exposure
 - No practical experience (lack of internships)
 - Generally, not qualified
- **Demand Analysis Findings:** Under the demand analysis findings subsection which highlights the establishment's rating of training providers, shows that the majority of H&T establishments do not conduct external training. Those who do; however, they mainly focus on internal training rather than utilizing the training and education providers in Jordan (except tour guides).

[22] "2022 Annual Program," HEAC, 2022, <http://heac.org.jo/wp-content/uploads/2023/04/ttt2022.pdf>.

Therefore, based on the aforementioned studies in addition to our demand analysis findings when it comes to training providers, the majority of the H&T labor force are not graduating from the training and education programs provided in Jordan. Moreover, the majority of workers gain skills during the job.

5.5 Latest H&T Supply Analysis Studies

The Skills Gap Analysis for the Jordanian Tourism Sector is a project under the Memorandum of Understanding signed in March 2017 for the Italian Aid Programme 2017-2019 between the Italian and Jordanian Governments. The Skills Gap Analysis focuses on the Tourism, hospitality, and Heritage sectors.

Mixed research methodologies and processes are organized through desk research, an academic survey, a focus group with the private sector, and a new graduates survey to conclude the skills gap analysis. However, it is important to note that there were no surveys/quantitative data collected from the H&T establishments themselves. Therefore, the findings of this study will be used to strengthen the consultations gap analysis, with emphasis on its supply analysis findings.

The quantitative and qualitative research steps involved an academic survey to highlight the gap between developed and required skills. The sample consisted of 85 total answers, of which 55 of them were deemed valid. The data demonstrated that while there is a high number of students that graduate with a degree or certificate, there is a low/medium percentage of job placement. In Jordan's tourism sector, the level of unemployment is high from these results. It is important to note that the sample of this academic survey mainly consisted of public universities (80%) with VTCs comprising only 5%. Moreover, the certifications of the sample mainly consisted of purely academic certificates such as the Bachelors (42%), Master's (24%), Ph.D. (7%), and both bachelor and master degrees (7%) - for a total of 80%. Diplomas and certificates only made up 5% each.

When it comes to this study's findings regarding the supply side, The main conclusion is that there is a weak connection between the academic training providers and the professional world, since the study found that there is a mismatch between the perceived importance (and the level of teaching) of digital skills and the real requests of an evolving labor market. Finally, they emphasized the importance of integrating educational tools to facilitate the "learning by doing process".

5.6 Supply Analysis Conclusions

Academic higher education institutions apply supply-driven training instead of demand-driven, thereby creating a shortage of adequately trained and skilled staff suitable for the tourism job market. However, those who graduate from vocational training institutions, applied higher education institutions, or other training providers, such as Jordan Hospitality and Tourism Training Center (JHTEC), were rated better than applied universities since their programs are designed by representatives of the main H&T subsectors and implemented with a practical focus, let alone the use of effective follow-up mechanisms with their graduates. Moreover, applied higher education institutions and training providers offer short courses as well as illustrated in the table below:

Tourism Education	Program Planning, Design, and Implementation	Graduates Follow up System	Employability Rate
20 vocational training institutions , with branches in govern orates outside of Amman	Representatives of the main tourism sectors are involved to Identify tourism and hospitality labor and skills market needs. Moreover, the program is planned and modified according to market needs. The training program focuses on both the theoretical and practical aspects of skilling.	There is a follow-up system, have graduation follow-up unit	75%
Academic higher education (Including Public Universities)	The training program is designed by the academic teachers, in which there are fixed programs that depend on the theoretical side. Moreover, as per Politecnico Milano's findings, there is a mismatch in the perceived difference between what academic institutions deem what skills are necessary, and what the labor market needs. Training program adopts the theoretical model and even though there is a requirement for an internship, there is no follow-up system.	There is no follow-up system. Weak connection between the academic training providers and the real world	No data found since there is no follow-up
Applied higher education Ammon (2 programs) and Short Courses; Luminus (2 programs) and Short Courses; AL-Khawarsmi; Royal Academy of Culinary Arts (RACA); Madaba Institute for Mosaic Arts. Designed to enhance students' knowledge, skills, career and marketability.	They have an advisory board that includes individuals from the tourism Sub-sector (public and private) to determine the skills needed for the tourism sector in which they also provide equipped facilities for practical training. Moreover, the program is planned and modified according to market needs. They also have a strong internship programs coordination with 5 stars hotels through signing MOUs with them. Implementation of the programs focuses on both the theoretical and practical side. However, program implementation is more practical-oriented, English language-oriented, and attitude and discipline-oriented.	There is a follow-up unit that includes a coordinator from the university and a coordinator at the training site (Hotels)	Ammon (93%) Luminus (77.3%) RACA (91%)
Training providers: Jordan Hotel and Tourism Education; Visual Academy for Consulting and Teaching; The National Academy for Tourism and Aviation Sciences Training (NATA); The Jordanian Institute of Culinary Arts; Jordan Hospitality & Tourism Training Center (JHTEC)	They have an advisory board that includes individuals from the tourism Sub-sector (public and private) to determine the skills needed for the tourism sector in which they also provide equipped facilities for practical training. Moreover, the program is planned and modified according to market needs. They also have strong internship programs coordination with 5 stars hotels through signing MOUs with them. All training programs are tailored to market needs. Moreover, there are also special programs that are customized to meet specific labor market needs, and most implemented programs are practical.	Strong follow-up system for graduates	NATA (89%) JHTEC (96%)

Table 30: Consultation Supply Analysis Findings

6. H&T Sector – Labor Market Forecast

6.1 Introduction

As the consultation team conducted a skills gap analysis, exploring current and projected skills development needs for the Jordanian H&T sector from the point of view of a representative sample of the sub-sector's operators, an important step is to determine the extent to which such training needs correlate with the labor market's projected growth or decay. This is so the strategy's action plan can inform H&T establishments as well as training providers with the skills demanded, in which sub-sector, in which governorate, for which jobs, and when – to coincide with the number of jobs expected to be demanded for such jobs, in a way cognizant of the market's projections.

To that end, the consultation team relied on a mixed-methods approach, featuring (a) research approach in which 797 H&T establishments were interviewed; (b) historical analysis based on labor data of the H&T sector since 2013 from MOTA – disaggregated by governorates and sub-sectors; (c) contextual research approach involving the Economic Modernization Vision 2033 and its tourism labor market targets; and (d) an advanced quantitative approach featuring a mix of regression analysis, linear programming, and data mining.

As such, in analyzing the size of the H&T sector labor force from 2013 until 2022, restaurants sustained an average of 0.9% year-on-year change; 2.6% for hotels; 1.1% for handicrafts; 8.6% for tourism transport; -0.75% for tour operators/ agencies; 0% for tour guides; and 22.4% for other professions such as those involving diving centers, glass boats, and water sport, as shown below:

Governorate	Restaurants	Hotels	Handicrafts	Tourism Transport	Tour Operators	Tour Guides	Other
Ajloun	1.840	1.793	1.004	0.905	1.31	1.000	1.000
Irbid	1.072	1.107	0.907	1.065	1.04	1.000	1.000
Jarash	1.065	1.170	0.944	1.095	0.96	1.000	1.000
Mafrq	3.635	4.167	1.000	0.929	1.08	1.000	1.000
Amman	1.010	1.020	0.996	1.112	0.99	1.014	1.000
Balqa	1.086	2.190	6.029	1.074	1.12	1.000	1.000
Madaba	1.300	1.000	1.097	1.214	1.05	1.000	1.000
Zarqa	1.069	1.124	1.000	0.962	0.99	1.000	1.000
Aqaba	0.945	1.077	1.005	1.222	1.01	1.000	1.237

Maan	0.991	1.012	0.971	1.052	0.96	0.980	1.000
Karak	0.892	1.167	1.723	1.000	0.94	1.000	1.000
Tafilah	1.000	1.020	5.011	0.929	1.83	1.000	1.000
Total	1.009	1.026	1.011	1.086	0.99	1.000	1.224

Table 31: Average Rate of Labor Change over the Past 10 Years - By Governorate and Sub-Sector (Other includes diving centers, glass boats, and water sport)

When examining the data on a year-on-year basis, the Jordanian H&T sector enjoyed a steady increase in the size of its labor market between 2010 and 2014, at which point the rate of increase understandably slowed down given the impact on the Jordanian tourism sector, caused by the Syrian civil war and rise of violent extremist groups between Iraq and Syria. While the sector managed to sustain a 1-2% increase in its labor force, it was not until 2019 that the tourism sector's labor force flourished, adding around 1,954 new workers, or a 3.8% increase. Unfortunately, the COVID-19 pandemic was debilitating to the tourism sector's positive trajectory, and certainly, the labor market suffered massively, as over 12,300 workers lost their jobs in 2020, as the sector lost over 23% of its labor force. Jordan's tourism sector, fortunately, managed to bounce back in 2022. Equally important, 13,607 workers regained their jobs, or joined the sector, as the size of the H&T sector's labor force by the end of 2022 exceeded that of 2019 by 1,234 workers. Looking ahead, there are two possible scenarios for the growth of the Jordanian H&T sector's labor market:

6.2 Natural Growth – Consistent with Historical Trends

When it comes to the first scenario, **the natural growth scenario**, the H&T sector's labor force is expected to sustain a 2.38% increase between 2023 and 2027, adding an average of 1,368 new workers yearly within the existing establishments and their hiring capacity, as each establishment tends to employ, on average, 16 individuals, based on the size of the labor market in 2022. With this natural growth scenario, the sector is expected to add 6,840 new workers by 2027 when compared to 2022. When applying this natural growth scenario until 2033, the H&T sector's labor market would be expected to grow by an average of 2.38% between 2023 and 2033, as it would be expected to gain a total of 16,183 new workers over these years.

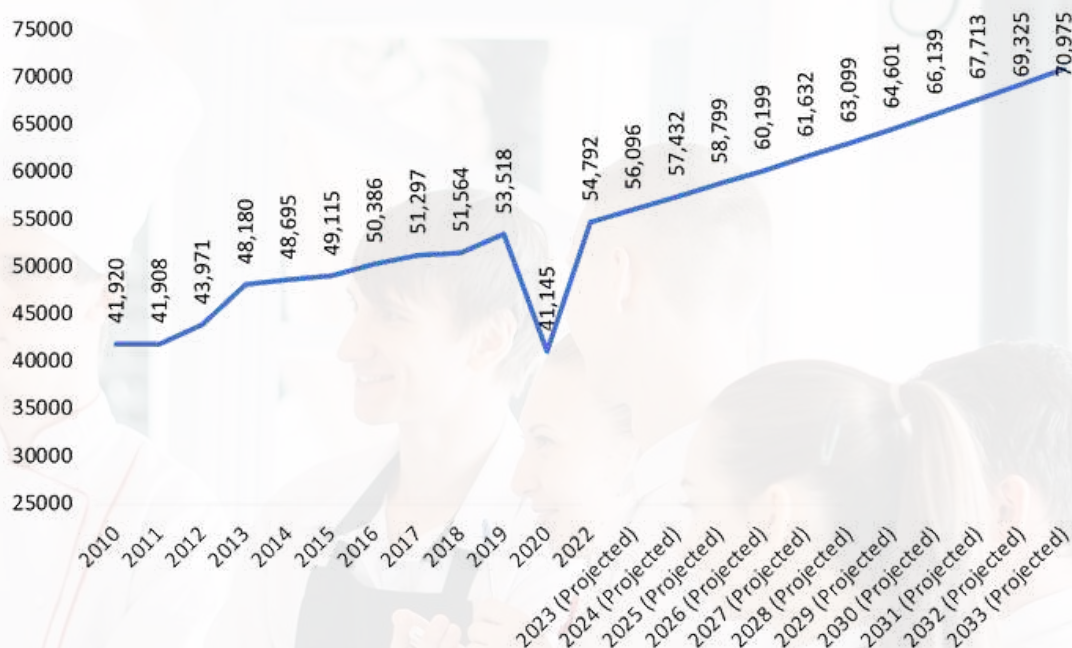


Figure X: Tourism Sector's Labor Market Growth, Natural Projection Based on Historical Trends

6.3 Growth Driven by the Economic Modernization Vision 2033

The second scenario takes into consideration planned investments as well as policies and regulations that are expected to drive further investments, **in line with the Economic Modernization Vision 2033**. For instance, there are four large projects that are currently up for investment, namely, Al Matal Resort in Aqaba, the Olympic Sports City in Aqaba, an amusement park in Amman, and a boutique hotel in Amman. With that, the H&T sector's labor force is expected to sustain a 12.8% increase between 2023 and 2027, adding an average of 9,000 new workers yearly within existing and new establishments to be driven and enacted by the Vision. With this scenario, the sector is expected to add nearly 46,246 new workers by 2027 when compared to 2019. When projecting the growth of the sector's labor force until 2033, it would be expected to gain a total of 99,000 new workers over these years.

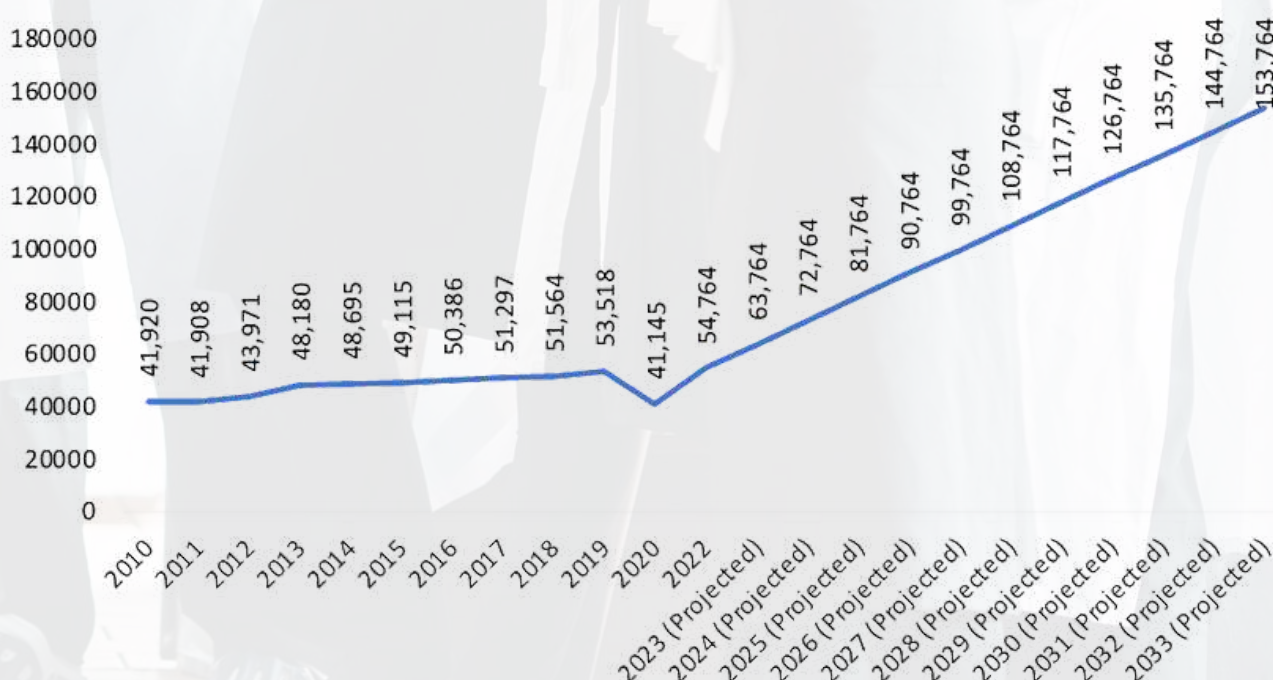


Figure 6: : Tourism Sector's Labor Market Growth, Projection based on the Economic Modernization Vision

6.4 Ensuring the Achievement of the Vision's Targets

In analyzing the gaps between the two scenarios, there is an average 7,529 new jobs, on an annual basis that are required to be created to achieve the targets of the Economic Modernization Vision 2033. This deficit entails that current job creation trends within the market need to quintuple, i.e., grow five-folds. Otherwise, 83.7% of the target would not be achieved.

Year	No. New Jobs Created, Natural Growth in Market	No. New Jobs Created; Driven by the Economic Modernization Vision	Annual Deficit	Percentage Deficit
2023 (Projected)	1,304	9,000	-7,696	-85.5%
2024 (Projected)	1,335	9,000	-7,665	-85.2%
2025 (Projected)	1,367	9,000	-7,633	-84.8%
2026 (Projected)	1,400	9,000	-7,600	-84.4%
2027 (Projected)	1,433	9,000	-7,567	-84.1%
2028 (Projected)	1,467	9,000	-7,533	-83.7%
2029 (Projected)	1,502	9,000	-7,498	-83.3%
2030 (Projected)	1,538	9,000	-7,462	-82.9%
2031 (Projected)	1,574	9,000	-7,426	-82.5%
2032 (Projected)	1,612	9,000	-7,388	-82.1%
2033 (Projected)	1,650	9,000	-7,350	-81.7%

Table 32: The number of new jobs that need to be created, annually, on top of projected new jobs, in order to achieve the targets of the Economic Modernization Vision (Fixed Outlook)

Achieving the targets stipulated by the Economic Modernization Vision 2033 necessitates two approaches, both of which require heavy investments to either (a) enhance the capacities of current establishments to be able to demand and absorb the targeted number; and/or (b), provide incentives for investors to enter the market and open new establishments in Jordan's H&T sector.

Looking at the first approach, assuming a natural growth in the number of establishments, consistent with historical trends, each establishment would have to employ, on average, 44 individuals to accommodate the Vision's target of 99,000 new jobs by 2033, as opposed to an average of 20 individuals if the labor market grows in a similar pattern to how it performed in the past decade. As for the second approach, the sector needs to have a total of 7,639 establishments by 2033. That is 4,178 more establishments that ought to be incentivized into opening, when compared to the natural growth in the number of establishments, which is estimated at 0.65%.

Year	Total No. of Est.	Natural Projected Growth		Bridging the Gap with the EMV Targets				
		Average No. of Worke/ Est.	Total Workers	Current Establishments		New Investments Approach		
				Required No. Workers/ Est.	Increase in No. Worker/ Est.	Required No. Est.	Increase No. Est.	No. Est Create/ Year
2016	3,143	15	50,386	15	0	3,143	0	
2017	3,075	16	51,297	16	0	3,075	0	
2018	3,086	16	51,564	16	0	3,086	0	
2019	3,151	15	50,492	15	0	3,151	0	
2022	3,223	16	54,792	16	0	3,223	0	
2023 (Projected)	3,244	17	56,096	19	2	3,703	459	480
2024 (Projected)	3,265	17	57,432	22	5	4,167	902	464
2025 (Projected)	3,286	17	58,799	24	7	4,615	1,328	447
2026 (Projected)	3,308	18	60,199	27	9	5,046	1,738	431
2027 (Projected)	3,329	18	61,632	29	11	5,461	2,132	415

2028 (Projected)	3,351	18	63,099	32	14	5,860	2,510	400
2029 (Projected)	3,373	19	64,601	34	16	6,245	2,872	384
2030 (Projected)	3,394	19	66,139	37	18	6,615	3,220	370
2031 (Projected)	3,417	19	67,713	39	20	6,970	3,553	355
2032 (Projected)	3,439	19	69,325	41	22	7,311	3,873	341
2033 (Projected)	3,461	20	70,975	44	24	7,639	4,178	328

Table 33: Fulfilling the targets of the Economic Modernization Vision requires either enhancing current establishments' capacity to employ and/or investing in new establishments. This excludes tour guides, as they are self-employed

6.5 Considering the Incubation Period

Considering 2023-2025 as the incubation phase, the following table illustrates the number of jobs required to be created on an annual basis until 2036 to achieve the Vision's targets.

Year	No. New Jobs Created, Natural Growth in Market	No. New Jobs Created; Driven by the Economic Modernization Vision	Annual Deficit	Percentage Deficit
2023 (Projected; Incubation)	1,304	1,332	-28	-2.10%
2024 (Projected; Incubation)	1,335	1,335	0	0.00%
2025 (Projected; Incubation)	1,367	1,367	0	0.00%
2026 (Projected)	1,400	8,711	-7,311	-83.93%
2027 (Projected)	1,433	8,711	-7,278	-83.55%
2028 (Projected)	1,467	8,711	-7,244	-83.16%
2029 (Projected)	1,502	8,711	-7,209	-82.76%

2030 (Projected)	1,538	8,711	-7,173	-82.35%
2031 (Projected)	1,574	8,711	-7,137	-81.93%
2032 (Projected)	1,612	8,711	-7,099	-81.50%
2033 (Projected)	1,650	8,711	-7,061	-81.06%
2034 (Projected)	1,690	8,711	-7,021	-80.60%
2035 (Projected)	1,730	8,711	-6,981	-80.14%
2036(Projected)	1,771	8,711	-6,940	-79.67%

Table 34: The number of new jobs that need to be created, annually, on top of projected new jobs, in order to achieve the targets of the Economic Modernization Vision (Variable Outlook)

When it comes to reconciling the deficits within this variable outlook, the following table outlines the magnitude of investment required for each current establishment (or new establishment that are likely to open should the sector grow in a consistent pattern) and/or the number of new establishments that ought to be enacted every year to meet the targets by 2036:

Year	Total No. of Est.	Natural Projected Growth		Bridging the Gap with the EMV Targets				
		Average No. of Worke/ Est.	Total Workers	Current Establishments		New Investments Approach		
				Required No. Workers/ Est.	Increase in No. Worker/ Est.	Required No. Est.	Increase No. Est.	No. Est Create/ Year
2016	3,143	15	50,386	15	0	3,143	0	0
2017	3,075	16	51,297	16	0	3,075	0	0
2018	3,086	16	51,564	16	0	3,086	0	0
2019	3,151	15	50,492	15	0	3,151	0	0
2022	3,223	16	54,792	16	0	3,223	0	0

2023 (Projected, Incubation)	3,244	17	56,096	17	0	3,244	0	21
2024 (Projected, Incubation)	3,265	17	57,432	17	0	3,265	0	21
2025 (Projected, Incubation)	3,286	17	58,799	17	0	3,286	0	21
2026 (Projected)	3,308	18	60,199	20	2	3,723	416	437
2027 (Projected)	3,329	18	61,632	22	4	4,145	816	421
2028 (Projected)	3,351	18	63,099	25	7	4,551	1,200	406
2029 (Projected)	3,373	19	64,601	27	9	4,942	1,569	391
2030 (Projected)	3,394	19	66,139	29	11	5,318	1,924	376
2031 (Projected)	3,417	19	67,713	32	13	5,680	2,264	362
2032 (Projected)	3,439	19	69,325	34	15	6,029	2,590	348
2033 (Projected)	3,461	20	70,975	36	17	6,363	2,902	335
2034 (Projected)	3,484	20	72,665	39	19	6,685	3,202	322
2035 (Projected)	3,506	21	74,395	41	20	6,994	3,488	309
2036 (Projected)	3,529	21	76,166	43	22	7,291	3,762	297

Table 35: Fulfilling the targets of the Economic Modernization Vision requires either enhancing current establishments' capacity to employ and/or investing in new establishments. This excludes tour guides, as they are self-employed

6.6 Priority Areas for Training: Natural Growth

Ultimately, when cross-examining the skill gaps with the labor forecast, the below table illustrates the main priority areas for skilling, triangulated with the number of workers demanded in 2023 and forecasted in the next few years, until 2027, in line with the objectives of this H&T Sector Inclusive Skills Development Strategy:

Priority Areas		No. of Current Workers	No. of Demanded Training Seats	Number of Anticipated Vacancies				
Sub-Sector	Job/ Profession			Demanded 2023	2024 (F*)	2025 (F)	2026 (F)	2027 (F)
Restaurants	Chefs: All levels, including pastries	5,499	3,507	390	394	398	401	405
	All floor staff: Waiters/ Reception	10,865	5,743	508	512	517	522	526
	Management staff: Branch Manager/ events/ sales	1,465	689	59	59	60	60	61
	Lifeguards	0	186	31	31	31	32	32
	Barista	187	316	36	37	37	37	38
Hotels	Housekeeping staff	3,391	4,740	483	495	499	504	508
	Restaurant Floor Staff: Waiters/ Reception	2,406	3,368	313	321	324	327	329
	Chefs/ cooks: All levels, including junior kitchen staff	1,952	694	114	117	118	119	120
	Front Office Staff/ Reception	2,062	2,421	212	217	219	221	223
Handicrafts	Craftsman	198	456	42	43	43	44	44
	Salesperson	257	62	17	17	17	17	18

Tourism Transport	Drivers	1,343	1,487	153	166	180	193	206
	Salesperson/Reservations/Booking	651	642	49	54	58	62	66
	Mechanics	378	164	27	29	31	34	36
Tour Operators/Agencies	Ticketing/Sales/Reservations staff	3,184	3,558	251	249	247	245	243
	Operations Staff, including field staff and guides	582	1,497	168	167	166	164	163
	Marketing Officer	764	553	60	59	59	58	58

Table 36: H&T Sector Skilling and Hiring Forecast - By Priority Areas (*forecasted)



7. GAP ANALYSIS

7.1 Skills Gap Analysis Findings

The consultation team cross-reviewed the available H&T training and education programs with the skills demanded and forecasted in order to ascertain whether the current programs fulfill the current and future skills demanded. Refer to **Appendix E** for further information.

- **Operational and foundational Skills** - The basic skills demanded across all sub-sectors. Such skills are generally addressed by applied training providers and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **English Language** - The English language as a skill that was addressed mainly by applied training providers (under English for Tourism), and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Customer Service and Etiquette** - It was addressed mainly by applied training providers and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Personal Hygiene** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Business/ administration skills** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Operating digital systems (OPERA, accounting software, booking software, Microsoft tools, etc.)** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Drinks making (alcoholic and non-alcoholic), menu memorization** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Marketing and sales (including digital)** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Work ethic (timeliness, learning quick)** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **General Sanitation** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Entrepreneurship Skills (forecasted)** - It was addressed mainly by applied training providers and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Logistics (forecasted)** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Artistic Vocational Skills (forecasted)** - Only addressed by three applied training providers.
- **Ticketing and reservation (forecasted)** - It was addressed mainly by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.
- **Eco-Tourism and sustainability (forecasted)** - It was addressed by applied training providers, and some academic institutions. However, the vast majority are located in the central region of Jordan.

- **Courses that have an internship** - Addressed mainly by applied training providers in central Jordan.
- **Courses on dealing with PWDs** - Only the Hashemite University Queen Rania's Faculty of Tourism & Heritage Conservation Science covers this.
- **Courses with destination/heritage management** - Addressed by two academic institutions.

7.2 Demand and Supply Concluding Analyses

When it comes to the demand and supply gap analyses, the Strategy Team found that:

- There is a large gap between higher academic education providers and the H&T demand side in which:
 - Programs are designed theoretically by academic teachers without involving key sector representatives/ practitioners;
 - There is a mismatch in the perceived difference between what academic institutions see as necessary skills, compared to the labor market needs; and,
 - There is an absence of follow-up mechanisms when it comes to practical training or graduates' status updates.
- There were minimal or no gaps when it came to the programs provided by applied higher education institutions, VTC, NATA, and JHTEC since their programs are designed according to market needs and in coordination with the H&T sector representatives.
 - There is a geographic gap since most of these training and educational opportunities are located in Amman, except for the VTC, which has branches outside of Amman as well as Luminus' recently opened branch in Irbid.
 - The contents of the programs still require reviewal to be updated according to the evolving digital trends, especially in a post-COVID-19 reality.
- There is a gap when it comes to on-site job training since the majority of the employees in the H&T sector, those in entry-level professions, have not received training at educational or training establishments. Most establishments do not attempt to train their employees either, except for major four- and five-star hotels and restaurants.
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8. ANALYSES DIAGNOSTIC AND CONCLUSION

The tourism sector is considered one of the largest contributing sectors to the Jordanian economy and attracting investments to it. In addition to increasing revenues from hard currencies, the Kingdom enjoys unique sites distributed among religious, archaeological, heritage, and natural sites, as well as a suitable climate for tourism throughout the year. Jordan has gained a distinguished position in the medical tourism market and attracts tourists seeking heritage, natural, and therapeutic tourism experiences. This is supported by a strong tourism infrastructure in safe local environments that are easy to navigate. However, the flow of tourism investments remains relatively modest.

The contribution of tourism is an important factor in the growth and revitalization of the Jordanian economy, representing 10% of the GDP in 2023. The tourism sector is also a major contributor to employment, with a total of 54,764 individuals employed in the Jordanian tourism sector in 2022, accounting for 3.2% of the total workforce in the kingdom. The GDP per worker amounts to 17,500 Jordanian Dinars, exceeding the average by 8%[23]. Furthermore, tourism plays a significant role as a main supporter in the development of local communities, as it has the ability to create comprehensive and sustainable development throughout the kingdom.

It is evident that the tourism sector was one of the most affected sectors by the repercussions of the COVID-19 pandemic, as all components of the tourism value chain, including hotels, restaurants, travel and tourism agencies, transportation, tour guides, and airlines, came to a halt. The impact of the pandemic was clear in 2020, with a sharp decline in the performance of the Jordanian tourism sector. Most key performance indicators experienced a decrease of over 75%, including tourist income, domestic tourism, overnight visitors, visitor numbers, ticket sales, and low-cost airline passengers. However, the sector showed some signs of recovery in the second half of 2021[24]. In 2022, tourist income achieved a growth of 110.5%, reaching \$5.816 billion compared to 2021. The latest data released by the Central Bank of Jordan indicates a 49% growth in tourist income during March 2023 compared to the same month in 2022, amounting to 435.8 million Jordanian dinars (\$614.7 million)[25]. It is worth mentioning that the tourist receipts in February 2023 reached the highest level for the same month in the past ten years.

The Jordanian tourism sector is influenced by factors affecting supply and demand. It is noticeable that the tourism sector has not witnessed growth in the number of establishments, which stands at 3,226[26], nor significant expansion in the operations of existing establishments. This has affected the availability of opportunities to accommodate new Jordanian workers, as the growth rate in the number of employees in the tourism sector was 11.3% from 2021 to 2022. Additionally, there is a gradual recovery in the demand for tourism products, and the number of tourists and visitors is increasing. The National Tourism Strategy aims to further increase this demand in the next three years through various factors related to improving tourist sites, increasing the number of projects, and attracting more domestic and international tourists.

[23] "Labor Market Analysis in the Tourism Sector", GIZ, December 2021, page 57.

[24] "Jordan National Tourism Strategy 2021-2025, Ministry of Tourism and Antiquities, 2021, [https://www.mota.gov.jo/ebv4.0/root_storage/en/eb_list_page/national_tourism_strategy_en_\(release_1.0\)_20.12.2021.pdf](https://www.mota.gov.jo/ebv4.0/root_storage/en/eb_list_page/national_tourism_strategy_en_(release_1.0)_20.12.2021.pdf)

[25] "Increase in Tourism Receipts in the First Quarter of 2023," CBJ, April 2023, <https://www.cbj.gov.jo/DetailsPage/CBJAR/NewsDetails.aspx?ID=391>.

[26] "Tourism facilities and workers for the year 2022, Ministry of Tourism and Antiquities, <https://shorturl.at/hAM69>.

In addition to that, the Economic Reform Document has highlighted several strategic potentials and priorities that can be focused on to maximize the return on investment in this sector. These include developing Jordan's potential to become one of the best tourist destinations for those seeking world-class experiences in archaeological, heritage, natural, adventure, religious, and medical tourism. It also emphasizes the continued development of the tourism product and enhancing its competitiveness, improving the infrastructure of tourist sites, enhancing tourism transportation services, developing educational and training curricula related to the tourism sector, opening opportunities for the private sector to manage training centers under the Vocational Training Corporation, and promoting tourism at archaeological, heritage, and natural sites by developing their potential to make Jordan one of the best destinations in this field. Furthermore, the document aims to position Jordan as a preferred destination for medical tourism, providing high-quality medical services and healthcare at affordable prices, developing the potential for Jordan to become a preferred destination in religious tourism, and establishing it as a major destination for specialized tourism such as conferences, events, and exhibitions.

The Economic Reform Document also highlighted several proposed initiatives to develop the tourism sector. These initiatives include the development and management of tourist sites and facilities while ensuring their preservation, the development of tourism products in various forms, the activation of the tourism investment initiative, facilitating travel to and within Jordan, launching a cost competitiveness initiative, and providing services at affordable prices, establishing a skills development program in the tourism sector, launching the digital tourist initiative, updating sector data to enable informed decision-making, continuing tourism marketing efforts, connecting Jordan to a wider network of tourism outlets, developing the brand identity, establishing globally recognized standards and regulations for the tourism sector, improving laws related to the tourism sector, streamlining government procedures, and launching the "Safe and Secure Jordan with a Clean Environment" initiative.

Jordan has diverse training and educational institutions that cater to most of the needs of the tourism sector. The number of tourism training providers is 30 institutions, while the number of university-level tourism education institutions is 14. It is worth mentioning that the total number of graduates from tourism training programs reached 21,682 graduates for the period between 2018 and 2022, with an average employment rate of 75% for graduates of tourism training programs during the same period. However, these institutions do not offer programs that would create new tourism establishments in certain specialties that have not been considered in Jordan yet, such as training in adventure tourism, digital tourism, religious tourism, medical tourism, and other specialized fields in tourism that may present future demand within Jordan and internationally in the near future.

It is worth mentioning that there has been a decline in the number of graduates from training programs, with a decrease of 72% in 2021 and 66% in 2022. Similarly, there has been a decline in the number of graduates from higher education tourism programs, approximately matching the decline in graduates from training programs. The number of graduates from higher education tourism institutions was 2,511. The average employment rate for these graduates during the same period was only 25%. There was no clear platform to promote the graduates of tourism education and training in Jordan in a way that enables tourism establishments in Jordan and neighboring countries to access and attract Jordanians to work for them. Recently, the first platform for employment in the tourism sector (Siyaha Jobs) was launched.

The establishment of this platform was supported by the European Bank for Reconstruction and Development (EBRD) and funded by the Foreign, Commonwealth & Development Office (FCDO) of the United Kingdom. This platform is the first of its kind specialized in the tourism sector, including hotels, restaurants, tourism offices, transportation, souvenirs, and related support services. The platform will facilitate connections between employers in the tourism sector and job seekers. It also includes a specialized link for training courses offered by various institutions and training centers, enabling everyone to benefit from them in developing the workforce in the sector.

The number of graduates in education and training institutions has been gradually declining from 2020 to 2022, accompanied by a decrease in the number of applicants and enrollees in these programs. This creates a gap in the labor market between supply and demand, as the number of graduates and job seekers exceeds the number of job opportunities offered by tourism establishments, which typically average around 220 positions per year. These positions are primarily filled through the internal mobility of current employees in the sector, with only a small percentage, not exceeding 30%, of new workers being hired. As a result, there remains a significant unemployment rate among graduates in this sector.

It is worth mentioning that the design of tourism training and educational programs in Jordan does not keep pace with or cover the specific needs required by the tourism sector in countries that attract foreign labor, such as the Kingdom of Saudi Arabia. These programs do not include any introductory information about the tourism reality in Saudi Arabia, its tourist sites, products, economy, and the specialized skills required in those countries. Therefore, these programs still rely on neutral training standards that may not be sufficient to meet the needs of those interested in working outside Jordan.

There is a significant challenge that also affects the tourism sector, which is the high unemployment rate in Jordan. Therefore, there is no relative advantage for the tourism sector in its ability to absorb more labor, as it is affected by the same conditions that have led to an increase in the overall unemployment rate in the country. The supply and demand in the labor market for this sector are influenced by several factors. There are individuals who are interested in entering this sector, represented by the number of applicants for tourism training and educational programs, which ranges from 400 to 450 new students annually during the years 2021 and 2022. This number is equivalent to the cumulative number of graduates, which also ranges from 450 to 500 graduates annually from all training and educational institutions. However, the employment rate for graduates of training programs reaches 75%, but it is very low for graduates of educational institutions, not exceeding 25%. This employment includes both working within the tourism sector and outside it, as there are graduates who work in sectors other than tourism.

The majority of workers in the tourism sector are concentrated in the capital city, where they accounted for 70% of the total workforce in the sector in 2022, while the remaining percentage is distributed among the other provinces of the kingdom. On the other hand, employees in tourist areas and various tourism activities account for only 25% of the total workforce in the sector in the country. However, it is worth noting that the capacity of hotels and tourist restaurants meets all the requirements of incoming tourists or domestic tourism needs. Hotels and tourist restaurants are among the most employment-intensive tourism establishments, with employees accounting for 78% of the total workforce in all tourism activities. Therefore, the prospects for expansion appear limited, but they may emerge in the future if the rates of inbound and domestic tourism change.

Employers consider that the skills gap among workers in this sector is primarily due to their lack of foundational skills, as they are not graduating from training and educational programs. Instead, they have acquired these skills through their peers in the sector and practical experience gained over years of work in tourism establishments. Employers also point out that graduates of training and educational programs often do not possess all the skills required for vacant positions in the sector.

Therefore, the quality of training and educational programs has an impact on the skill level of current workers in the tourism sector and affects the attraction of new employees. Employers lack confidence in the graduates of most training and educational institutions and the quality of their outputs, which could contribute to the ability of newcomers to the tourism labor market to meet the competencies, tasks, and responsibilities of the job.

Additionally, there are a significant number of training providers who are not subject to accreditation and quality standards set by the Skills Development Authority, and they produce students without standardized specifications that ensure the quality of graduates.

One of the key skills lacking in the workforce in the tourism sector is language proficiency, particularly in English. This hinders the recruitment of graduates for regional and international tourism markets, especially in Saudi Arabia, where proficiency in English is emphasized to interact with foreign tourists visiting the country. It is worth mentioning that a significant number of tourism establishments prefer to hire non-Arab foreign workers due to their language skills and core work competencies, as well as their adherence to work instructions. Approximately 20% of the workforce in the tourism sector consists of foreign workers, primarily in the hotel and restaurant sectors.

It is worth mentioning that the participation of women and persons with disabilities in this sector remains limited, and it has not witnessed significant growth over the years. The prevailing societal stereotypes of women working in this sector hinder their participation. Female workers in the tourism sector account for only 12% of the total workforce in the sector nationwide, with their employment mainly concentrated in hotels, tourist restaurants, and travel agencies. The stereotype perceives women working in the tourism sector as being in an environment lacking protection, safety conditions, and respect for their privacy.

Therefore, it is necessary to improve the image of this sector, increase its attractiveness, and activate the concept of a female-friendly environment, as this has become a key requirement to enhance women's participation. Additionally, the reluctance to hire persons with disabilities due to perceived limitations in performing job tasks and responsibilities has resulted in their limited presence in the sector, accounting for only 0.04%. Hence, it is essential to create supportive measures to increase their numbers and enable them to engage in professions that suit their abilities without being hindered by their disabilities.

The National Tourism Strategy 2021-2025 aims to achieve the following indicators: restoring total revenues to the level of 2019 by 2024, and increasing direct employment in tourism to exceed the numbers of 2019 by 2023.

The human resources development pillar in the National Tourism Strategy aims to produce skilled workforce that meets the needs of the local and regional markets, increase the participation of Jordanian workforce in the tourism sector, empower women and people with disabilities in tourism jobs, involve local communities in tourism activities, events, and business ventures, enhance the capacities of employees in the Ministry of Tourism and Antiquities, the General Department of Antiquities, the Tourism Promotion Board, the Tourism Skills Development Council, and those working in the private sector of the tourism industry.

The implementation plan for the human resources development pillar included the following projects:

- The Tourism Employment Platform (already launched).
- Administering COVID-19 vaccinations to workers in the sector (already accomplished).
- Developing a gender inclusivity plan.
- Developing an accessible tourism plan to prepare tourist sites for the reception and employment of people with disabilities.
- Training and qualifying employees in the Ministry of Tourism, the Department of Antiquities, and the tourism sector.

The National Tourism Strategy 2021-2025 aims to achieve the following indicators: returning total revenues to the 2019 level by 2024, and increasing direct employment in the tourism sector beyond the numbers of 2019 by 2023.

The diagnosis and analysis process, both desk-based and field-based, identified the main problem as the numerical gap arising from the increasing number of job seekers exceeding the demand for jobs and employment opportunities in the Jordanian tourism labor market. This problem is attributed to the following reasons:

- Slow growth of the tourism sector and limited job opportunities.
- Limited entry of new tourism facilities (especially small ones) and expansion of existing tourism facilities to generate increased demand for new workforce.
- Decrease in the number of enrollments in tourism training and education institutions.
- Decrease in the number of graduates from tourism training and education institutions.
- Excess of graduates compared to the available job opportunities in the labor market.
- Tourism training programs lack specific content related to the surrounding tourism job markets, especially the Saudi Arabian tourism job market.
- Current employees acquire skills from their supervisors and colleagues at work, with a minimal proportion being graduates of training and educational institutions.
- Tourism education outputs lack practical skills required in the tourism sector.
- Lengthy waiting period for graduates of training and education programs to secure a job, leading to loss of acquired skills over time.
- Limited capacity of the tourism labor market to grow its workforce over the past three years, while the national strategy aims to achieve growth in the next two years through a balanced strategy that focuses on developing and expanding Jordanian tourism capabilities to attract more local workforce.
- Lack of specific incentive policies to attract job seekers to the tourism labor market.

- Lack of a comprehensive study reflecting the external labor market's needs in terms of workforce (quantity and type) that can be utilized in exporting qualified Jordanian human resources.
- Concentration of job opportunities in the capital city of Amman and in hotels and restaurants, with a very weak presence in other governorates.
- Limited participation of women and people with disabilities in the tourism labor market.
- Discrepancies in available data on the sector from various government sources.
- Training and education plans are not fully based on estimations of the labor market needs, resulting in variations in employment rates among different training and educational specializations. In some years, not a single graduate finds a job in the tourism labor market.
- Due to high unemployment rates, graduates of tourism education tend to seek employment in other sectors outside of tourism establishments.
- Skill gaps are found in basic technical skills, personal skills, English language proficiency, and knowledge of international tourism culture.



9. SKILLS DEVELOPMENT STRATEGY OVERVIEW

9.1 Strategy Overview

After identifying the main problem and analyzing the causes and factors, it was possible to formulate the strategic objectives, in a results chain-like manner, As shown in the infographic below:

The “Skills Development Strategy” envisions a *“Balanced growth between the quantity and skills of qualified Jordanian human resources and the number of available jobs in the domestic and international tourism labor market.”* To that end, the strategy has two main strategic goals (outcomes), in which each strategic goal has 3 distinct operational goals (outputs) emerging from their respective strategic goals. Finally, there are distinct activities (initiatives) stemming from each operational goal (output). For more detailed information, please refer to **Section 9**.

The first strategic goal (outcome) intended by this strategy is to develop *“Jordanian human resources possessing skills that meet the needs of the domestic and international tourism labor market”* emerging from this strategic goal are three operational goals (outputs):

- **Output 1.1:** Developing training and educational programs that meet the required skills in the domestic and international tourism labor market.
- **Output 1.2:** Establishing an organized Domestic Tourism Job Market.
- **Output 1.3:** Enabling balanced growth in the enrollment and graduation of students in tourism training and education programs according to: the governorate, specialization, gender, and special categories (women, refugees, and people with disabilities).

The second strategic goal (outcome) intended by this strategy is to create. *“Sustainable growth in employment opportunities for Jordanians in the domestic and international tourism labor market.”* Emerging from this strategic goal are three operational goals (outputs):

- **Output 2.1:** Developing accurate and up-to-date data on the domestic and international tourism labor market.
- **Output 2.2:** Increasing the number of Jordanians employed in the domestic and international tourism labor market is experiencing continuous growth.
- **Output 2.3:** Developing competent government and private administrations and personnel that are proficient in managing the growth of the tourism labor market.



VISION

Balanced growth between the quantity and skills of qualified Jordanian human resources and the number of available jobs in the domestic and international tourism labor market.



STRATEGIC GOALS/OUTCOMES

Jordanian human resources possessing skills that meet the needs of the domestic and international labor market.

Sustainable growth in employment opportunities for Jordanians in the domestic and international tourism labor market.

OPERATIONAL GOAL/OUTPUTS

1. Training and educational programs that meet the required skills in the domestic and international tourism labor market.

2. Organized Domestic Tourism Job Market

3. Balanced growth in the enrollment and graduation of students in tourism training and education programs according to: governorate, specialization, gender, and special categories.

OPERATIONAL GOAL/OUTPUTS

1. Training and educational programs that meet the required skills in the domestic and international tourism labor market.

2. The number of Jordanians employed in the domestic and international tourism labor market is experiencing continuous growth.

3. Competent government and private administrations and personnel are proficient in managing the growth of the tourism labor market.

Figure 8: An overview of the Skills Development Strategy

9.2 Strategic Values

In order to ensure that the strategic outcomes are in line with the vision of the strategy, the strategy will be grounded by six values:

- **Quality:** Ensure that educational and training outcomes are able to meet employer's satisfaction standards
- **Innovation:** Fostering a hospitality and tourism sector that supports, directs, and encourages innovative ideas towards new tourism products.
- **Transparency:** Enabling the hospitality and tourism sector's institutions such as the employers, and policymakers to produce sufficient information and data about all internal interactions, in addition to ensuring the right to access information through all possible means.
- **Diversity:** A hospitality and tourism sector that focuses on diversifying skills according to the diversity of professions and tourism products
- **Flexibility:** A hospitality and tourism sector that is capable of adequately and quickly responding to local and international developments affecting the tourism sector.
- **Equity:** A hospitality and tourism sector that ensures equality and equal opportunities for both male and female workers and job seekers, people with disabilities, and geographical distribution.

Moreover, the strategic objectives and indicators are created taking the following strategic directions into account

- Encouraging Jordanian job seekers to enter the local and international labor market and replace foreign labor in the Jordanian tourism sector.
- Developing medium and small investments in the tourism sector to ensure the provision of more job opportunities.
- Subjecting all education and training providers to accreditation and quality standards by the relevant official bodies.
- Reorganizing the tourism labor market and developing a comprehensive information system that displays the local and international market needs for professions, jobs, and skills
- Privatizing the management of tourist sites to contribute to improving service quality and providing new job opportunities for Jordanians.

9.3 Strategic Assumptions

In order to achieve the results of the strategy, it relies on a set of assumptions that must be met for each key outcome, as follows:

The first strategic goal (outcome): "Jordanian human resources possessing skills that meet the needs of the domestic and international tourism labor market", relies on the following assumptions:

- **Assumption 1:** The willingness of training and education providers in the tourism sector to respond to program development plans and quality assurance standards.
- **Assumption 2:** Stakeholders in the tourism labor market must exhibit a commitment to mutually coordinate and cooperate with each other.
- **Assumption 3:** Ensuring that the Skills Development Council is empowered to effectively fulfill its roles and responsibilities.

The second strategic goal (outcome): “Sustainable growth in employment opportunities for Jordanians in the domestic and international tourism labor market”, relies on the following assumptions:

- **Assumption 1:** The Jordanian government to ensure effective coordination with counterpart institutions in the destination countries' governments regarding employment opportunities for foreign tourism employment.
- **Assumption 2:** Willingness of the tourism establishments to collaborate by providing accurate and regular information about their human resources and job vacancies.
- **Assumption 3:** An increase in the number of foreign and local tourists.
- **Assumption 4:** The development and improvement of tourist sites' management.
- **Assumption 5:** An increase in the number of tourism establishments.
- **Assumption 6:** The provision of special incentives for workers in the tourism sector.
- **Assumption 7:** The establishment of wide partnerships with the private sector.

9.4 Strategic Key Performance Indicators

The strategy further provides performance indicators (KPIs) for the strategic vision, strategic goals (outcomes) as a whole, and the operational goals (outputs), in order to monitor the progress of the strategy as seen below.

	Results Chain	Performance Indicator
Impact/ Vision	Balanced growth between the quantity and skills of qualified Jordanian human resources and the number and competencies of available jobs in the domestic and international tourism labor market.	Annual unemployment rate for graduates of tourism training and education programs.
Strategic Objective/ Outcome 1	Jordanian human resources possessing skills that meet the needs of the domestic and international tourism labor market.	Percentage of satisfaction among employers (both domestic and international) with the performance of new employees.
Output 1.1	Training and educational programs that meet the required skills in the domestic and international tourism labor market.	• Percentage of approved and developed programs. • Percentage of newly introduced programs (with new specializations). • Percentage of graduates receiving a final evaluation with a score of 85% or higher.
Output 1.2	Organized domestic tourism labor market.	• Sustainable integrated mechanism among stakeholders in the tourism sector. • Percentage of tourism professions linked to professional standards and accredited responsibilities.
Output 1.3	Increasing number of participants and graduates in tourism training and education programs by governorate, social category, specialization, and special categories.	• Percentage of female graduates. • Percentage of graduates with disabilities. • Percentage of graduates by governorate. • Percentage of graduates by specialization.

Results Chain		Performance Indicator
Strategic Objective/ Outcome 2	Sustainable growth in employment opportunities for Jordanians in the domestic and international tourism labor market.	- Percentage of employment of Jordanians in the domestic tourism sector annually. - Percentage of employment of Jordanians in the international tourism sector annually.
Output 2.1	Accurate and up-to-date periodic data on the domestic and international tourism labor market.	Effective Tourism Labor Market Information System (TLMIS).
Output 2.2	Increasing numbers of Jordanians in the domestic and international tourism labor market.	- Percentage of replacing foreign workers with Jordanians in the tourism labor market. - Percentage of Jordanian workforce to total foreign workforce in tourism labor markets. - Percentage of growth in the number of small tourism projects by governorate
Output 2.3	Competent government and private sector administrations and personnel capable of managing the growth of the tourism labor market.	- Percentage of employees benefiting from capacity-building programs in government institutions. - Percentage of employees benefiting from capacity-building programs in tourism establishments.

Table 37: Key performance indicators (KPIs) throughout the results chain



10. STRATEGIC INITIATIVES TO BRIDGE THE CURRENT AND FUTURE H&T LABOR MARKET AND SKILLS GAPS

10.1 Strategic Management Structure

In order to ensure proper implementation of the strategy, the implementation mechanism relies on a two-pronged approach. To that end, the implementation of the strategy requires the Sector Skills Council of the Hospitality and Tourism Sector (SSC H&T) to lead and supervise the implementation of this strategy, in addition to coordinating with the Ministry of Tourism and Antiquities (MoTA), and the National Council in order to acquire strategic support and funding. To that end, the SSC H&T will establish an executive office within their council in which its main purpose is to implement the strategy, the executive office will require establishing a core implementation team that will consist of 7 human resource points, consisting of the following:

- Executive office director
- Project manager
- Grants and preparation of budgets and partnerships liaison officer
- Principal researcher
- Monitoring and evaluation specialist
- Executive assistant and activities coordinator
- Training and education programs accreditation specialist

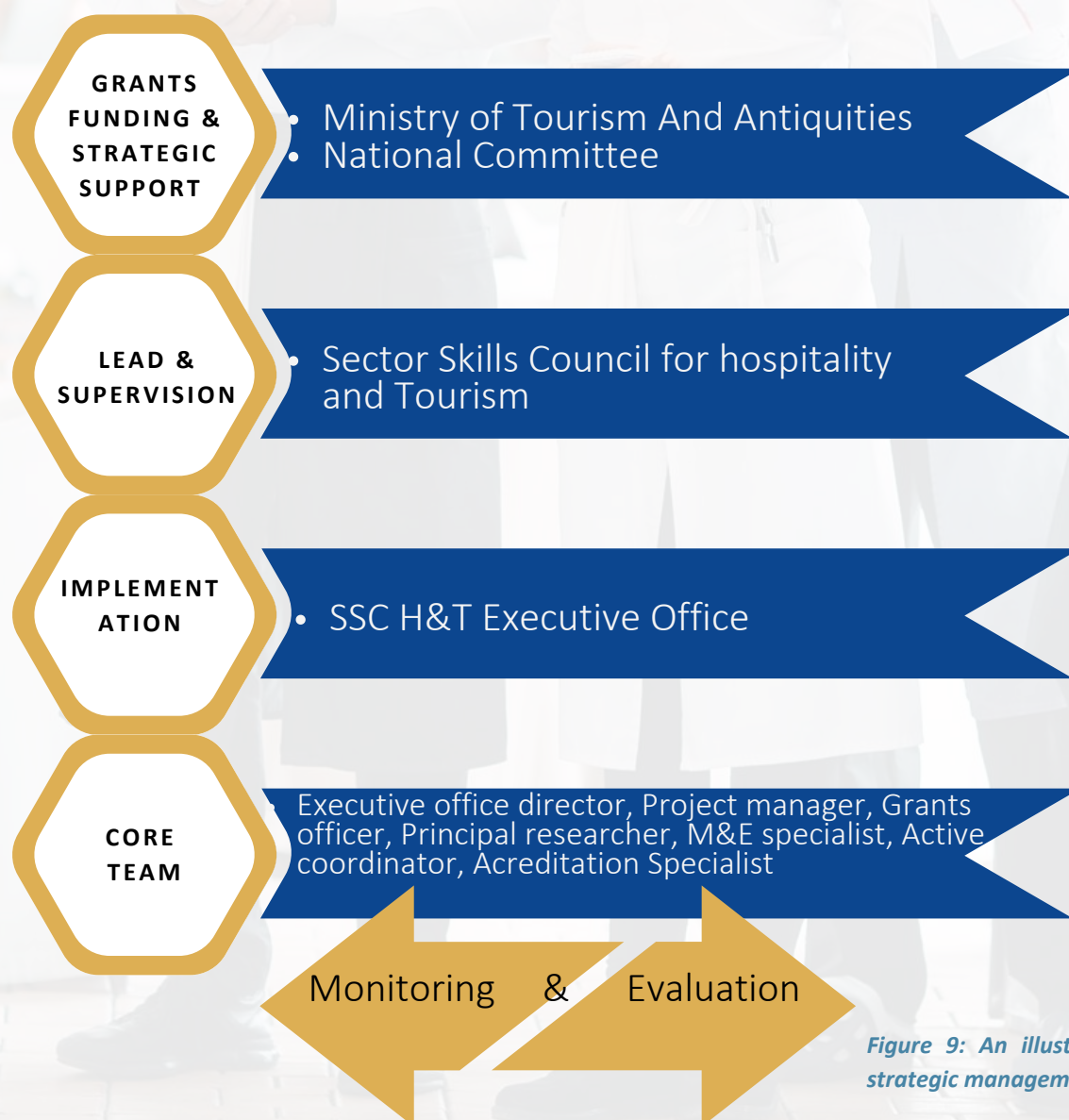


Figure 9: An illustration of the strategic management structure

10.2 Research Based Strategic Initiatives

This section will discuss the strategic initiatives (activities) needed in order to each operational goal (output). Henceforth, this section will be divided based on each operational goal.

Strategic Initiative (Activity) 1.1.1 (SI 1.1.1): Monitoring the Future Competency and Skill Requirements of the Domestic Labor Market

This initiative involves conducting an annual study to review and analyze the job vacancies posted on various employment platforms, such as LinkedIn, Siyahajobs, and Akhtaboot. It will also involve launching an inquiry system for tourism establishments. This is an effort to understand the specific skillsets these businesses are seeking and to prepare the labor market accordingly. The findings from these activities can serve as indicators for upcoming market trends and potential skill gaps, which can then guide education and training efforts to meet these emerging needs.

Moreover, the initiative also includes a review of available investment opportunities in small projects in each governorate. Understanding these opportunities allows for targeted support for economic development, potentially facilitating the creation of new jobs and promoting entrepreneurship. The initiative is aimed at promoting a more dynamic and responsive labor market by providing strategic insights into job demand, skills gaps, and investment potential.

Output: *Output 1.1-Training and educational programs that meet the required skills in the domestic and international tourism labor market.*

Supervisory Responsibility:

- SSC H&T
- Ministry of Labor
- Ministry of Investment

Funding Source: Allocation of funds in the budget of the Ministry of Tourism and Antiquities for the council.

Year of Starting Implementation: 2023

Indicators:

- Number of small projects reviewed per year
- Annual study (analysis and reviewal) of job vacancies posted on employment platforms
- Annual study (skill demanded inquiry) from tourism establishments

Strategic Initiative (Activity) 1.1.2 (SI 1.1.2): Monitoring the needs of the international tourism labor market:

This initiative/activity focuses on assessing the needs of the international tourism labor market, aiming to align the domestic labor force's skills with global demands in general, and in emerging gulf markets specifically (such as Saudi Arabia).

The initiative involves conducting surveys through the Kingdom's embassies. These surveys will be instrumental in gathering real-time information about the labor demands and skills needed in the international tourism sector. This can help identify the competencies and qualifications that are in demand globally, and tailor domestic tourism training and education programs to match these needs.

In addition, the initiative also entails the establishment of partnerships and twinning relationships with counterpart institutions in countries showing promise in tourism growth, such as Saudi Arabia. Twinning relationships usually involve two similar organizations from different countries working together to share best practices, exchange knowledge, and build mutual understanding. This can provide valuable insights into the practices and strategies that have been successful in these countries, which can then be adapted and applied domestically.

Output: *Output 1.1-Training and educational programs that meet the required skills in the domestic and international tourism labor market.*

Supervisory Responsibility:

- SSC H&T
- Ministry of Foreign Affairs and Expatriates

Funding Source: Allocation of funds in the budget of the Ministry of Tourism and Antiquities for the council.

Year of Starting Implementation: 2023

Indicators:

- Number of surveys conducted by Jordanian embassies in GCC Countries
- Number of surveys conducted by Jordanian embassies in MENA and Mediterranean countries
- Number of partnerships concerning tourism signed
- Number of twinning relationships signed between Jordanian SSC H&T with other countries' SSC H&T

Strategic Initiative (Activity) 1.1.3 (SI 1.1.3): Reviewing and developing tourism training and education programs

This strategic initiative/ activity revolves around revising and developing tourism training and education programs to align with market demands

The primary objective of this initiative is to incorporate the findings of the studies previously mentioned in SI 1.1.1 and 1.1.2 into training and education program plans. These studies provide crucial insights into domestic and international labor market needs, and integrating these findings can ensure that training and education programs are responsive to these needs.

Moreover, the initiative includes the introduction and launch of new programs. This will likely involve the development of courses or programs designed to fill identified skills gaps or meet emerging labor market trends.

Another key component of this initiative is ensuring the quality of content and seeking accreditation. Quality assurance and accreditation processes will enhance the credibility and recognition of these programs, increasing their value to students and employers alike.

Output: *Output 1.1-Training and educational programs that meet the required skills in the domestic and international tourism labor market*

Supervisory Responsibility:

- SSC H&T
- Higher Education Accreditation Commission (HEAC)
- Technical and Vocational Skills Development Commission (TVSDC)

Funding Source: Allocation of funds in the budget of the Ministry of Tourism and Antiquities for the council.

Year of Starting Implementation: 2024

Indicators:

- The number of developed and approved training and educational programs
- Percentage of training providers offering compliant introductory training programs on operational and foundational skills (basic skills)
- Percentage of training programs offering targeted advanced/ intermediate training programs focusing on technical and administrative skills necessary for specific careers
- Percentage of training programs offering targeted digital skills courses
- Percentage of training providers offering “English for Tourism” courses
- Percentage of training providers focusing on intercultural communication, etiquette, empathy, openness, respect for other cultures and cultural norms
- Percentage of training providers offering more targeted English courses that focus on specific needs such as marketing, culinary, logistics, and operations, customer service

Strategic Initiative (Activity) 1.2.1 (SI 1.2.1): Establishing a Joint and sustainable framework for stakeholders in the tourism sector

It is important to create a framework that brings together stakeholders in the tourism sector through a digital electronic system with the aim of continuously managing, monitoring, and developing the skills of the H&T labor to be reflected within training and education programs at the local and regional levels through a positive feedback loop.

To that end, this strategic initiative/ activity focuses on creating a cooperative, interconnected framework for stakeholders in the tourism sector to facilitate strategic management of skills development.

The initiative aims to create a contractual formula bringing together various stakeholders in the tourism sector. These stakeholders include local tourism establishments, the Skills Development Council, embassy staff responsible for labor affairs, training and education providers, and representatives from multiple ministries (Labor, Education, and Tourism), and the National Center for Human Resource Development.

One key tool in this initiative is the development of an electronic linkage system among all parties. Doing so enables the National committee to create a continuous mechanism for skills development. This system will gather information on current and future job vacancies both domestically and internationally, as well as data on corresponding education and training programs. This data-driven approach will provide a holistic view of the tourism labor market and the training ecosystem, fostering better alignment between labor supply and demand.

Additionally, the initiative includes establishing a twinning agreement between the Jordanian Skills Development Council and its counterparts in the Kingdom of Saudi Arabia, other Gulf countries, and regional countries. This agreement promotes the exchange of information and expertise and provides opportunities for developing Jordanian human resources, further enriching the domestic labor market. This initiative will leverage a database intended for this purpose, relying on the results of a recent study conducted by the National Center for Human Resource Development on the gap between supply and demand in the Jordanian tourism labor market. This data can help pinpoint areas of mismatch between labor market needs and the skills of the workforce, guiding the strategic management of skills development.

Output: *Output 1.2- Organized domestic tourism labor market.*

Supervisory Responsibility:

- SSC H&T
- The National Tourism Committee

Funding Source: Allocations of the council in the budget of the Ministry of Tourism and Antiquities

Year of Starting Implementation: 2023-2024

Indicators:

- Establishment of the framework with its respective committee
- The number of joint operations carried out between stakeholders within the approved work framework
- Annual skills gap analysis to identify the skills needs of the H&T labor market, including emerging technologies, tourist trends, and tourism products
- Number of new curricula and training programs developed to respond to the changing needs of the labor market, including the use of technology to enhance the customer experience
- Number of H&T establishments providing inputs on skill needs, skills emerging, and skills no longer relevant
- Number of learning resources, including digital tools, available on the platform
- Number of training providers relying on the platform to improve the efficacy of their training programs

Strategic Initiative (Activity) 1.2.2 (SI 1.2.2): Tourism Professions Classification Guide

It is essential to enhance the attractiveness of tourism sector jobs for Jordanians. These jobs were made unattractive by many underlying reasons such as fluctuations and seasonality, regional instability related market shocks, absence of social security coverage and adequate health insurance for workers and their dependents, lack of affordable transportation (reliability and safety especially for women), cultural impediments (gender roles and social status), and the widely held perception that jobs are short-term without a clear professional career path. Lack of clarity on “career pathways” in the sector has been a major hurdle facing employee’s retention and skill accumulation and progress.

The guide will specify job titles for each sub-sector in the tourism industry. By providing clear definitions of job roles in each sub-sector, it can help to eliminate confusion and ambiguity about the responsibilities and skills associated with each role.

The guide will also define levels of professions. This typically refers to the hierarchical structure within a profession, starting from entry-level positions and moving up to more senior roles. By outlining this progression, the guide can help employees understand the potential career pathways within the tourism industry.

Professional standards will be clearly laid out in the guide. These standards often refer to the expected level of performance or the rules and guidelines that a professional in the tourism industry should follow.

The competencies required for each profession will be defined. Competencies typically include a combination of skills, knowledge, and abilities required to perform a job effectively.

Finally, the guide will list key tasks required for performing each profession. This can provide a clearer understanding of what each job role involves on a day-to-day basis.

Overall, the creation of a Tourism Professions Classification Guide is a crucial step in standardizing job roles, clarifying career progression, and improving understanding of the competencies and tasks associated with each role in the tourism sector. Such a guide can be an invaluable resource for employees, employers, educators, and job-seekers in the tourism industry.

Output: *Output 1.2- Organized domestic tourism labor market.*

Supervisory Responsibility:

- SSC H&T
- HEAC
- TVSDC

Funding Source: Allocations of the council in the budget of the Ministry of Tourism and Antiquities

Year of Starting Implementation: 2023-2025

Indicators:

- Percentage of increase in improved relevance and compliance of training provision to the quality of skills necessary in the market
- Percentage of employers' satisfaction with the performance of new employees in the sector
- Number of drafted career pathways / occupational standards developed featuring the skills and qualifications needed
- Number of drafted career paths / occupational standards mapped with potential employees and shared with them
- Number of drafted career paths / occupational standards shared with training providers
- Percentage of flexibility within the career paths/ occupational standards to enable horizontal mobility

Strategic Initiative (Activity) 1.3.1 (SI 1.3.1): Developing and Enacting a Policy to Encourage Enrollment in the Local and Foreign Tourism Labor Market

The strategy consultation revealed a noticeable lack of awareness of the career pathways as well as the benefits of employment in the H&T sector, which diminishes the attractiveness of the jobs and even turns current employees away. Moreover, the strategy consultation also revealed that obstacles faced when working in the H&T sector is attributed to transportation difficulties (especially for women), non-flexible working hours (especially for women), perceived lack of job security (exacerbated by Covid-19), and low wages. The main outcome of this initiative is to develop and enact policies that encourage Jordanians to work in the hospitality and tourism sector, whether it be within the Jordanian H&T labor market or in foreign H&T labor markets.

The core of this initiative is a national policy aiming to provide an array of job benefits to individuals entering the tourism labor market. The policy intends to focus particularly on women, people with disabilities, and the regional diversification of new workers. This focus indicates a commitment to inclusivity and equal opportunity in the tourism labor market.

One aspect of the policy concentrates on creating a supportive and attractive work environment for human resources in tourism facilities. This could involve measures to improve workplace culture, working conditions, and employee support services, which can make the sector more appealing to potential workers and help retain existing staff.

The policy also includes recognition of previous work experiences in salary calculations for sector workers.

This practice ensures that employees are adequately compensated for their experience and skills, making the tourism sector more competitive with other industries.

Additionally, there are provisions for salary bonuses for those who gain specialized and certified training related to their job responsibilities. This encourages continuous learning and skill development among employees, enhancing the quality of service in the tourism sector.

The policy also plans to incorporate all informal professions within the occupational classification guide framework. By doing so, it ensures that practitioners of these professions are recognized and protected under law. This step can help to formalize these roles, providing greater job security and legal protections for workers in these positions.

Output: *Output 1.3 – Increasing numbers of enrollees and graduates in tourism training and education programs.*

Supervisory Responsibility:

- SSC H&T
- Ministry of Labor
- Chambers of Commerce

Funding Source: Allocation of funds in the budget of the Ministry of Tourism and Antiquities for the Skills Development Council.

Year of Starting Implementation: 2024-2025

Indicators:

- Percentage increase of Jordanian workers in H&T sector
- Percentage increase in female participation in the H&T sector
- Percentage increase of H&T workers by governorate
- Percentage increase of Jordanians working in foreign countries' H&T sector
- Percentage of female graduates.
- Percentage of graduates with disabilities
- Percentage of graduates by governorate
- Percentage of graduates by specialization.

Strategic Initiative (Activity) 1.3.2 (SI 1.3.2): Designing a Digitized Map for Tourism Training and Education Providers within the platform “SiyahaJobs”

The strategy consultation revealed that difficulties for finding and hiring labor were due to a perceived lack of job stability, perceived lack of continuity, and perceived poor career and skills development opportunities in the H&T sector. This means that there is a lack of clarity of information when it comes to what the H&T sector has to offer for prospective workers. Moreover, the strategy consultation also revealed that difficulties for hiring workers in general and women in particular were due to difficulties in finding transportation.

The initiative aims to create an interactive public online platform designed to ease the process for job seekers seeking tourism education and training providers. This platform provides comprehensive and essential information, bridging the gap between potential employees and education/training providers.

The platform works by allowing users to click on the name of their preferred governorate on the map. This action presents them with options for educational and training specializations. Users can select the specialization that suits them best, which then provides detailed information related to the chosen program. Specific details provided include:

1. **Application requirements for the program:** This gives prospective students clear guidance on what they need to do to apply for the program.
2. **Financial fees:** This provides information on the costs associated with the program, enabling individuals to make informed financial decisions.
3. **Program duration:** This information can help individuals plan their time commitment and understand how long it will take to complete the program.
4. **Academic calendar:** This gives users a clear understanding of important dates and timelines.
5. **Location of the education/training provider:** This helps users understand where the provider is located, which can influence their decision based on factors like travel time or proximity to home.
6. **Program completion requirements:** This outlines what students need to do to successfully complete the program, allowing them to understand what's expected of them.
7. **Transportation routes through GPS:** This practical feature helps users navigate to the education/training provider's location, making it easier for them to plan their journey.

Output: *Output 1.3- Increasing numbers of enrollees and graduates in tourism training and education programs.*

Supervisory Responsibility:

- Ministry of Tourism
- SSC H&T

Funding Source: Allocation of funds in the budget of the Ministry of Tourism and Antiquities for the council.

Year of Starting Implementation: 2024-2025

Indicators:

- Number of university students engaging in the website/platform
- Percentage of beneficiaries from access mechanisms to training and education providers

Strategic Initiative (Activity) 2.1.1 (SI 2.1.1): Developing a Hospitality and Tourism Labor Market Information System

This initiative/ activity aims to establish a database that consistently updates with information about available job vacancies in the hospitality and tourism sector and the required skills to perform those jobs. The data for this system will be supplied by both local and international tourism establishments, offering a broad and diverse range of opportunities and requirements.

One of the core features of this system is its accessibility to education and training providers. These providers can use the system to gain an understanding of the current market needs. With this information, they can reflect these needs in their annual training and educational programs, ensuring that their offerings are closely aligned with the sector's requirements.

Additionally, the system provides job platforms with relevant needs and suitable programs. This functionality makes it easier for these platforms to match job seekers with the right opportunities, facilitating more effective and efficient labor market matching.

Output: *Output 2.1- Accurate, updated, and regular data about the domestic and international tourism labor market.*

Supervisory Responsibility:

- SSC H&T
- Ministry of Labor

Funding Source: Allocations for the Labor Market Information System within the Ministry of Labor, in addition to allocations for the Skills Development Council

Year of Starting Implementation: 2024-2025

Indicators:

- Establishment of a LMIS
- Datapoints supplied by local H&T tourism establishments
- Datapoints supplied by International H&T tourism establishments
- Number of H&T training and education providers as beneficiaries to the LMIS
- Number of establishments using this LMIS beneficiaries

Strategic Initiative (Activity) 2.2.1 (SI 2.2.1): Internal and external marketing program for Jordanian tourism competencies:

This initiative outlines a periodic program that is intended to promote the graduates of tourism training and educational institutions. Marketing can be achieved through various means, including traditional advertising, social media promotion, job fairs, and networking events.

One key aspect of this program is the utilization of the communication relationships between the Kingdom's embassies in promising tourist destinations. These embassies can provide valuable links to international tourism markets and can help to facilitate job placements for Jordanian graduates in these countries.

The Tourism Labor Market Information System (as per SI 2.1.1) is also used to facilitate this marketing within local tourism establishments. This system can help to match graduates with suitable job vacancies, based on their skills and qualifications.

Furthermore, this initiative includes the adoption and implementation of a policy to enhance small to medium enterprises owned by graduates. This policy supports them in establishing economically viable tourism-related entrepreneurial projects. To make this possible, a dedicated bank for innovative tourism ideas is planned. This bank could provide funding, mentoring, and other resources to help graduates launch their own tourism ventures.

Output: *Output 2.2- Increasing numbers of Jordanians in the domestic and international job market.*

Supervisory Responsibility:

- SSC H&T
- Ministry of Investment
- Ministry of Tourism and Activities
- Jordanian Enterprise Development Corporation (JEDCO) in partnership with national financing institutions

Funding Source: External grants

Year of Starting Implementation: 2023-2026

Indicators:

- Number of women enrolled in tourism training programs
- Number of young Jordanians enrolled in tourism training programs
- Number of people with disabilities enrolled in tourism training programs
- Percentage of youth and women who reach out to inquire about employment within the H&T sector among those reached
- Percentage of Syrian refugees joining the tourism labor market.

Strategic Initiative (Activity) 2.3.1 (SI 2.3.1): Enhancing the Capacities of Ministerial Staff to Enhance the Quality of the Hospitality and Tourism Sector:

Improving the capacities of ministerial staff to enhance the quality of the hospitality and tourism sector in Jordan has the following benefits: **(a)** policies and regulations in the H&T sector can be developed and implemented more effectively, leading to better alignment with the needs of the sector; **(b)** better customer experience and increased competitiveness; **(c)** better alignment with the needs of the H&T labor market, leading to better support for the sector's growth and development; **(d)** the ability to attract investment into the H&T sector can be enhanced, leading to increased economic growth and job creation; and **(e)** better collaboration with relevant stakeholders, including industry associations, educational institutions, and government agencies, can be achieved, leading to a more coordinated and effective approach to support the sector.

To that end, this initiative focuses on the institutional and individual capacity-building program for relevant institutions. It aims to empower institutions that play critical roles in the tourism sector, such as the Ministry of Tourism, Tourism Skills Development Council, and accreditation bodies. Empowerment is achieved by providing these institutions with the necessary institutional work tools and capabilities.

Part of this initiative involves training employees on a range of essential topics to enhance their skills and improve the services they provide. These topics include:

1. **Establishing professional standards and occupational classification:** This training aims to standardize job roles and responsibilities within the sector, ensuring clear expectations and consistency across the industry.
2. **Implementing quality systems in training and education:** This training emphasizes the importance of quality assurance in training and education, ensuring that industry professionals receive top-tier instruction.
3. **Developing and reviewing strategic plans:** This involves providing guidance on how to design, implement, and review effective strategic plans, a crucial skill for organizational success.
4. **Developing monitoring and evaluation plans:** This focuses on creating systems to monitor performance and evaluate outcomes, ensuring that initiatives and programs achieve their intended results.
5. **Managing initiatives and projects:** This provides essential project management skills, enabling staff to lead and manage projects effectively.
6. **Market research methodologies:** This instructs staff on how to conduct and analyze market research, equipping them with vital information about the tourism industry's current state and future trends.
7. **Personal skills:** This aspect of the training focuses on enhancing interpersonal skills, communication abilities, and other soft skills crucial for effective workplace performance.

Output: *Output 2.3- Competent government and private administrations in managing the growth of the labor market.*

Supervisory Responsibility:

- Ministry of Tourism and Activities
- Jordan Institute of Public Administration

Funding Source: Budget of the Ministry of Tourism and Antiquities

Year of Starting Implementation: 2024-2026

Indicators:

- Percentage of employees benefiting from capacity-building programs in government institutions.
- Percentage of employees benefiting from capacity-building programs in tourism establishments.
- Number of accredited programs for institutional capacity building
- Number of beneficiaries of the capacity building program in the targeted institutions and entities
- Number of staff members undergoing mentorship or capacity building with local or international experts
- Number of staff members engaging in exchange opportunities

Strategic Initiative (Activity) 2.3.1 (SI 2.3.1): Enhancing the Capacities of Ministerial Staff to Enhance the Quality of the Hospitality and Tourism Sector:

The strategy consultation revealed large gaps when it comes to on-site job training, with the exception of a few restaurants and four and five-star hotels. Findings also showed that when it comes to the skills needed, they were mostly concentrated among entry-level staff, including waiters/ floor staff, janitors, housekeepers, baristas, and other similar professions. These types of professions require skills pertaining to customer service, timeliness, adaptability, and operational and foundational skills (for any entry level profession), yet these skills are completely practical and cannot be taught by using conventional methods. They require shadowing and learning by doing.

To that end, this This initiative involves the design and accreditation of a procedural guide for workplace training that primarily targets classified tourist facilities from first to third grade. These facilities, as per their classification, are expected to implement a periodic training program for their current employees and job seekers in the tourism industry. The goal of these programs is multi-fold:

- 1. Enhance capabilities:** Improve the existing skills of employees and prepare job seekers with the abilities necessary for a successful career in the tourism industry.
- 2. Develop skills:** Through these training programs, employees and job seekers can develop new skills or deepen existing ones, making them more versatile and adaptable in their roles.
- 3. Prepare job seekers:** The program is designed to equip job seekers with the skills they need to enter both the local and international tourism labor market, thus increasing their employability.

Another critical aim of the program is to attract students of tourism programs in universities to participate in this program. This is particularly beneficial for students as it:

- 1. Fulfills their graduation requirements:** Many university programs require students to gain practical experience in their field of study. This training program could help students fulfill these requirements.
- 2. Improves practical skills:** By participating in the training program, students can enhance their practical skills and gain real-world experience in the tourism industry.
- 3. Complements theoretical knowledge:** Practical training complements the theoretical knowledge acquired at university. This balanced blend of theory and practice can better prepare students for their future careers in the tourism industry.

Output: *Output 2.3- Competent government and private administrations in managing the growth of the labor market*

Supervisory Responsibility:

- SSC H&T

Funding Source: Budget allocation for the Skills Development Council

Year of Starting Implementation: 2024-2026

Indicators:

- Number of tourism establishments providing periodic training for current staff
- Number of university students engaging in on-site training/ job shadowing
- Development and adoption of an executive training guide

10.3 Initiatives' Implementation Timeline

Strategic Initiatives	2023	2024	2025	2026	2027
SI 1.1.1 Monitoring the Future Competence and Skill Requirements of the Domestic Labor Market	X	X	X	X	X
SI 1.1.2: Monitoring the needs of the international tourism labor market	X	X	X	X	X
SI 1.1.3: Reviewing and developing tourism training and education programs		X	X	X	X
SI 1.2.1: Establishing a Joint and sustainable framework for stakeholders in the tourism sector	X	X	X		
SI 1.2.2: Tourism Professions Classification Guide	X	X	X		
SI 1.3.1: Developing and Enacting a Policy to Encourage Enrollment in the Local and Foreign Tourism Labor Market		X	X		
SI 1.3.2: Designing a Digitized Map for Tourism Training and Education Providers within the platform "SiyahaJobs"		X	X		
SI 2.1.1: Developing a Hospitality and Tourism Labor Market Information System		X	X		
SI 2.2.1: Internal and external marketing program for Jordanian tourism competencies	X	X	X	X	
SI 2.3.1: Enhancing the Capacities of Ministerial Staff to Enhance the Quality of the Hospitality and Tourism Sector		X	X	X	
SI 2.3.2: Workplace Training Guide (Entrepreneurial Training)		X	X	X	
Implementation M&E	X	X	X	X	X

Table 38: Strategic initiatives timeline

11. STRATEGY MONITORING AND EVALUATION PLAN

Results Chain	Performance Indicator	Baseline	Target	Data Sources	Frequency of Collection
Impact/ Vision: Balanced growth between the quantity and skills of qualified Jordanian human resources and the number and competencies of available jobs in the domestic and international tourism labor market.	Annual unemployment rate for graduates of tourism training and education programs.	-	5% Decrease	Pre-and post-assessments	Once per year
Strategic Objective/ Outcome 1: Jordanian human resources possessing skills that meet the needs of the domestic and international tourism labor market.	Percentage of satisfaction among employers (both domestic and international) with the performance of new employees.	0	60% Medium to High Rate	Pre-and post-assessments	Once per year
Output 1.1: Training and educational programs that meet the required skills in the domestic and international tourism labor market.	Percentage of approved and developed programs.	-	X	Monitoring reports	Once per year
	Percentage of newly introduced programs (with new specializations).	-	50% Increase	Pre-and post-assessments	Once per year
	Percentage of graduates receiving a final evaluation with a score of 85% or higher	-	85%	Pre-and post-assessments	Once per year
SI 1.1.1: Monitoring the Future Competency and Skill Requirements of the Domestic Labor Market	Number of small projects reviewed per year	0	10	Pre-and post-assessments	Once per year
	Annual study (analysis and reviewal) of job vacancies posted on employment platforms	0	4	Monitoring reports	Once per year
	Annual study (skill demanded inquiry) from tourism establishments	0	4	Monitoring reports	Once per year
SI 1.1.2: Monitoring the needs of the international tourism labor market	Number of surveys conducted by Jordanian embassies in GCC Countries	0	6	Monitoring reports	Once per year
	Number of surveys conducted by Jordanian embassies in MENA and Mediterranean countries	0	30	Monitoring reports	Twice per year
	Number of twinning relationships signed between Jordanian SSC H&T with other countries' SSC H&T	0	24	Monitoring reports	Twice per year

SI 1.1.3: Reviewing and developing tourism training and education programs	The number of developed and approved training and educational programs	0	12	Monitoring reports	Once per year
	Percentage of training providers offering compliant introductory training programs on operational and foundational skills	0	50%	Pre- and post-assessments	Once per year
	Percentage of training programs offering targeted advanced/ intermediate training programs focusing on technical and administrative skills necessary for specific careers	0	60%	Pre- and post-assessments	Once per year
	Percentage of training programs offering targeted digital skills courses	0	60%	Pre- and post-assessments	Once per year
	Percentage of training providers offering “English for Tourism” courses	0	75%	Pre- and post-assessments	Once per year
	Percentage of training providers focusing on intercultural communication, etiquette, empathy, openness, respect for other cultures and cultural norms	0	75%	Pre- and post-assessments	Once per year
	Percentage of training providers offering more targeted English courses that focus on specific needs such as marketing, culinary, logistics, and operations, customer service	0	50%	Pre- and post-assessments	Once per year
	Establishment of the “Selection and Accreditation Unit for Training and Education Programs” which that includes TVSDC, and HEAC as members.	0	1	Monitoring reports	Once per year
	Percentage of training programs offering modules and information discussing potential career paths	0	65%	Pre- and post-assessments	Once per year
	Percentage of training programs using modern innovative training tools, including digital platforms and on-site job shadowing	0	60%	Pre- and post-assessments	Once per year

Output 1.2: Organized domestic tourism labor market.	Sustainable integrated mechanism among stakeholders in the tourism sector.	0	1	Monitoring reports	Once per year
	Percentage of tourism professions linked to professional standards and accredited responsibilities.	0	40%	Pre- and post-assessments	Once per year
SI 1.2.1: Establishing a Joint and sustainable framework for stakeholders in the tourism sector	Establishment of the framework with its respective committee	0	1	Monitoring reports	Once
	The number of joint operations carried out between stakeholders within the approved work framework	0	1	Monitoring reports	Once per year
	Number of established continuous skills mechanism platform	0	6	Monitoring reports	Once per year
	Annual skills gap analysis to identify the skills needs of the H&T labor market, including emerging technologies, tourist trends, and tourism products	0	1	Monitoring reports	Once per year
	Number of new curricula and training programs developed to respond to the changing needs of the labor market, including the use of technology to enhance the customer experience	0	6	Monitoring reports	Once per year
	Number of H&T establishments providing inputs on skill needs, skills emerging, and skills no longer relevant	0	240	Monitoring reports	Once per year
	Number of learning resources, including digital tools, available on the platform	0	6	Monitoring reports	Once per year
	Number of training providers relying on the platform to improve the efficacy of their training programs	0	10	Monitoring reports	Once per year
SI 1.2.2: Tourism Professions Classification Guide	Percentage of increase in improved relevance and compliance of training provision to the quality of skills necessary in the market	0	65%	Pre- and post-assessments	Once per year
	Percentage of employers' satisfaction with the performance of new employees in the sector	0	65%	Pre- and post-assessments	Once per year
	Number of drafted career pathways / occupational standards developed featuring the skills and qualifications needed	12	100	Monitoring reports	Once per year

	Number of drafted career paths / occupational standards mapped with potential employees and shared with them	12	100	Monitoring reports	Once per year
	Number of drafted career paths / occupational standards shared with training providers	12	100	Monitoring reports	Once per year
	Percentage of flexibility within the career paths/ occupational standards to enable horizontal mobility	12	100	Monitoring reports	Once per year
Output 1.3: Increasing number of participants and graduates in tourism training and education programs by governorate, social category, specialization, and special categories.	Percentage of female graduates.	-	20% increase	Pre- and post-assessments	Once per year
	Percentage of graduates with disabilities.	-	10% increase	Pre- and post-assessments	Once per year
	Percentage of graduates by governorate.	-	20% increase	Pre- and post-assessments	Once per year
	Percentage of graduates by specialization.	-	15% increase	Pre- and post-assessments	Once per year
SI 1.3.1 Developing and Enacting a Policy to Encourage Enrollment in the Local and Foreign Tourism Labor Market	Percentage increase of Jordanian workers in H&T sector	-	10% increase	Pre- and post-assessments	Once per year
	Percentage increase in female participation in the H&T sector	14%	25%	Pre- and post-assessments	Once per year
	Percentage increase of H&T workers by governorate	-	10% increase	Pre- and post-assessments	Once per year
	Percentage of female graduates.	-	10% increase	Pre- and post-assessments	Once per year
	Percentage of graduates with disabilities	-	10% increase	Pre- and post-assessments	Once per year
	Percentage of graduates by governorate	-	20% increase	Pre- and post-assessments	Once per year
	Percentage of graduates by specialization.	-	15% increase	Pre- and post-assessments	Once per year
SI 1.3.2: Designing a Digitized Map for Tourism Training and Education Providers within the platform "SiyahaJobs"	Number of H&T Training and Education providers featured on the digitized map	0	35	Monitoring reports	Once per year
	Number of university students engaging in the website/platform	0	500	Monitoring reports	Once per year
	Percentage of beneficiaries from access mechanisms to training and education providers	0	35%	Pre- and post-assessments	Once per year

Strategic Objective/ Outcome 2: Sustainable growth in employment opportunities for Jordanians in the domestic and international tourism labor market.	Percentage of employment of Jordanians in the domestic tourism sector annually.	-	10% (total)	Pre- and post-assessments	Once per year
	Percentage of employment of Jordanians in the international tourism sector annually.	-	5% (total)	Pre- and post-assessments	Once per year
Output 2.1: Accurate and up-to-date periodic data on the domestic and international tourism labor market.	Effective Tourism Labor Market Information System (TLMIS).	0	1	Monitoring reports	Once
SI 2.1.1: Developing a Hospitality and Tourism Labor Market Information System:	Establishment of a LMIS	0	1	Monitoring reports	Once
	Datapoints supplied by local H&T tourism establishments	0	300	Monitoring reports	Once per year
	Datapoints supplied by International H&T tourism establishments	0	100	Monitoring reports	Once per year
	Number of H&T training and education providers as beneficiaries to the LMIS	0	60%	Pre- and post-assessments	Once per year
	Number of establishments using this LMIS beneficiaries	0	300	Monitoring reports	Once per year
Output 2.2: Increasing numbers of Jordanians in the domestic and international tourism labor market.	Percentage of replacing foreign workers with Jordanians in the tourism labor market.	-	10% replacement	Pre- and post-assessments	Once per year
	Percentage of Jordanian workforce to total foreign workforce in tourism labor markets.	-	5% increase	Pre- and post-assessments	Once per year
	Percentage of growth in the number of small tourism projects by governorate.	-	10% growth	Pre- and post-assessments	Once per year
	Number of Jordanians enrolled in the local H&T labor market	-	10% growth	Pre- and post-assessments	Once per year
	Number of Jordanians enrolled in the foreign H&T labor market	-	5% increase	Pre- and post-assessments	Once per year
	Number of women enrolled in H&T labor market	-	10% increase	Pre- and post-assessments	Once per year
	Number of young Jordanians enrolled in H&T labor market	-	10% increase	Pre- and post-assessments	Once per year
	Number of people with disabilities enrolled in H&T labor market	-	5%	Pre- and post-assessments	Once per year
	Percentage of youth and women who reach out to inquire about employment within the H&T sector among those reached	0	5%	Social media analytics	Once per year

SI 2.2.1: Internal and external marketing program for Jordanian tourism competencies:	Number of women enrolled in tourism training programs	-	10% increase	Pre- and post-assessments	Once per year
	Number of young Jordanians enrolled in tourism training programs	-	10% increase	Pre- and post-assessments	Once per year
	Number of people with disabilities enrolled in tourism training programs	-	10% increase	Pre- and post-assessments	Once per year
	Percentage of youth and women who reach out to inquire about employment within the H&T sector among those reached	0	5%	Social media analytics	Once per year
	Percentage of Syrian refugees joining the tourism labor market.	-	10% increase	Pre- and post-assessments	Once per year
Output 2.3: Competent government and private sector administrations and personnel capable of managing the growth of the tourism labor market.	Percentage of employees benefiting from capacity-building programs in government institutions.	0	20%	Pre- and post-assessments	Once per year
	Percentage of employees benefiting from capacity-building programs in tourism establishments.	0	20%	Pre- and post-assessments	Once per year
	Number of accredited programs for institutional capacity building	0	3	Monitoring reports	Once per year
	Number of beneficiaries of the capacity building program in the targeted institutions and entities	0	10	Pre- and post-assessments	Once per year
	Number of staff members undergoing mentorship or capacity building with local or international experts	0	10	Pre- and post-assessments	Once per year
	Number of staff members engaging in exchange opportunities	0	10	Pre- and post-assessments	Once per year
SI 2.3.2: Workplace Training Guide (Entrepreneurial Training)	Number of tourism establishments providing periodic training for current staff	0	200	Monitoring reports	Once per year
	Number of university students engaging in on-site training/ job shadowing	0	500	Monitoring reports	Once per year
	Development and adoption of an executive training guide	0	6	Monitoring reports	Once per year

Table 39: Strategic Initiatives KPIs