Businesses Services Sector: Convention Services Sub Sector

Trade In Services Benchmarking Study

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الرؤية للإستشارات الإقتصادية والإدارية

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List of Acronyms

BOD	Board of Directors
GATS	General Agreement on Trade in Services
ICT	Information and Communication Technology
IFP	International Fairs Promotion
JEDCO	Jordan Enterprise Development Corporation
JITOA	Jordan Inbound Tour Operators Association
MIT	Ministry of Industry and Trade
NGO	Non-Governmental Organization
SOFEX	Special Operations Forces Exhibition and Conference
SWOT	Strengths, Weaknesses, Opportunities, Threats
UAE	United Arab Emirates
UN	United Nations
USAID	United States Agency for International Development
WiFi	Wireless Fidelity
WiMAX	Worldwide Interoperability for Microwave Access
WTO	World Trade Organization

1.0 Research

1.1 Previous Research

The Convention Services Sector has not been documented in any official publication. What is obvious from the onset of this study is that in addition to a lack of previous efforts to document the sector, data collection or just simple information compilation concerning convention services is not coordinated to the extent that information, statistics, governing laws and applicable taxes and attempts at regulation, are scattered amongst and are the responsibility of various government and non-governmental entities.

1.2 Current Research

Definition

The scope of the current research is defined by CPCProv 87909 for convention services and CPC Ver.1.1 859 for exhibition services. The use of Ver. 1.1 was required because the CPCProv did not include exhibition services, an important activity in the convention services sector. Under these codes, the sector is defined as:[1]

2) Convention support and tourism promotion services: Convention planning, assistance, and support services consist of a variety of convention or meeting planning and support services provided on a commission or fee basis:
    - assistance in locating meeting space
    - escorted site inspections
    - negotiating group discounts with hotels, food services, and other providers of convention services
    - preparation and presentation of destination details
    - provision of personnel and support for registration services
    - providing contact data for local market florists, photographers, and other service providers
    - Assisting attendees with arrangement of shuttle or limo service, VIP services, etc.

2) Trade fair and exhibition organization services: Trade fair and exhibition organization services include:
    - organization of economic events (trade shows or exhibitions, at regular or irregular intervals)
    - organization of scientific or cultural meetings and congresses
    - supply and setting-up of exhibition equipment associated with the organization of exhibitions

Methodology

The following methodologies were adopted during the course of the study:

- Interviews
- Phone calls
- Visits to various institutions that affect the sector (visits indicated)
- Questionnaires developed and sent to stakeholders
- Publications and desk research, Internet based research

[1] http://unstats.un.org/unsd/cr/registry/regcs.asp?Cl=9&Lg=1&Co=87909

The initiation of data collection proved to be difficult as, apart from the publications and desk research, there is little data collected on the sector in terms of internet sources or official sources. Furthermore, due to the diversity of the sector, the information had to be gathered from various government organisations, and when this proved to be insufficient, research with the private sector was embarked upon.

The government institutions that are involved in the sector either have collected or have access to no data or information or, in the best case scenario, have very limited information. According to JEDCO, the Jordan Enterprise Development Corporation, there are only 9 exhibition organisers in the country, whereas at the registry of the Chamber of Commerce documents that there are 101 firms registered as Convention Organisers, in addition to 55 individuals.

The Ministry of Industry and Trade was visited three times in order to gather the information needed with regard to restrictions on the sector (legislative and administrative) and for the number of companies that were registered in Jordan that carried out business in the sector. Beyond those items, however, there was no further information on the sector available from these sources.

The private sector was either very reluctant to disclose information, possibly to avoid regulation, or the information was not readily available. All major hotels, MICE meeting venues, and a number of organisers were approached but very few were able to provide the required information. Upon further investigation, it became evident that the information was not compiled by hotels or any other body. As there is no regulatory arm or industry association for this sub sector the information is not compiled and industry participants have not felt the necessity of doing so. Furthermore, there is no central information collection service available for the industry even though both the Jordan Tourism Board and the Ministry of Tourism have indicated the need for such a service.[2] Nevertheless, statistics were compiled from the private sector to indicate the frequency with which MICE events are held in the country as well as the number of workers in the sector, amongst other data categories.

2.0 Sector Analysis

2.1 Sector Context

Although the sector under study is Convention Services, currently the myriad of services that are associated with convention services is known as the MICE, (meetings, incentives, conferences and events) sector. Additionally for this study, the definition of convention services also includes exhibitions and events.

MICE events are held for their effectiveness as marketing tools targeting business growth, effectiveness in communication and net-working, and for promotional reasons. Both the public and private sectors have come to acknowledge and confirm that the MICE sector is a very important tool for marketing and promoting initiatives, products, and dialogue among the many providers that the sector utilizes, as well as providing a boost to the tourism sector

The sector is wide reaching across many markets. MICE events involve event owners, which encompasses the government, NGOs, associations, international organisations, commercial entities or private sector thinkers, event organisers, and the tourism sector (tour operators, hotels, airlines, and transport and car rental companies) as well as a range of service providers.

[2] National Tourism Strategy Ministry of Tourism; 2004

The sector is dynamic and has grown tremendously over the last couple of years. It makes a significant contribution to business and leisure-related tourism as it is a high-yield, all year round market. Where 10 years ago meetings were usually held by the Jordanian government, and international and multinational meetings were strictly managed by tour operators, today the number of event management companies that pitch, develop and manage these types of events is growing very rapidly due to the increase in business opportunities as well as the development of the sector that has thus allowed for sector professionals to emerge. .

Increasingly the MICE and events sector has been recognised in recent years for the important role it plays in any economy. The National Tourism Strategy[3] launched in 2004 by the Ministry of Tourism identifies 7 priority niche markets that will play a role in achieving its goal of doubling Jordan's Tourism economy by the year 2010. MICE is identified as one of these 7 markets.

The financial effect of this service sector on the economy is evident from the amount being spent on these meetings. Budgets for conventions range from US$20,000 to over US$1 million. In recent years, these amounts have been spent on events, such as the World Economic Forum at the Dead Sea, the ICT Forum, SOFEX, as well as medical conventions and others; and have, therefore, become a very important source of income through 'tourism'. A single conference can impact the economy: for example, in 2004, the International Bar Association Conference was held in New Zealand attracting lawyers from across the world; the 6 day conference garnered about 20 Million New Zealand dollars, not taking into account the average 407NZ$ spent by 65% of the delegates everyday on local tours.

2.1.1 Number of Companies

Research was conducted on the number of companies registered in Jordan at the Ministry of Industry and Trade (MIT). The research proved to be challenging to compile due to the following reasons:

1. There are no specific registration fields regarding the scope of work on the MIT registration application that covers the specific field of conventions;

2. The field of 'Exhibitions' management is not covered in the MIT registration field;

3. Some companies were found to be registered as Meeting/ Convention/ Conference organisers through a special application to the Ministry of Interior (the Ministry of Interior is addressed by the MIT in these circumstances for their agreement in allowing certain applicants to include Meeting Organisation as part of their registration application and scope of work).

Furthermore, individuals were also registered as exhibition and conference organisers, and not only companies.

Statistics at MIT and the Companies Controller Department as of January 2009 reveal the following number of participants in the sector:

[3] http://www.tourism.jo/inside/Strategy.asp

Table 1: Number of Companies by Registered Activity

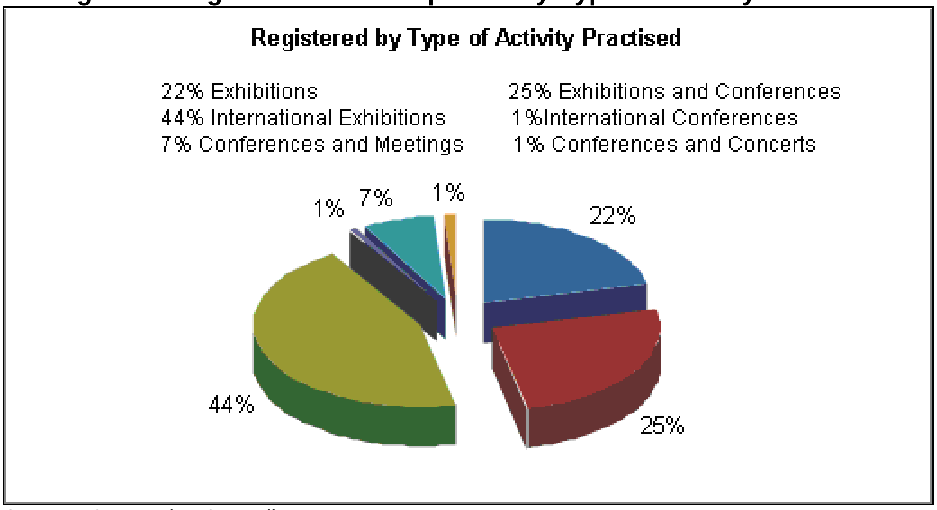
Registered exhibition organisers	271 companies
Registered exhibition organisers	717 individuals
Registered conference organisers	101 companies
Registered conference organisers	45 individuals
Registered tour operators	421 companies

Source: Companies Controller Department website

The specific number of conference organisers is obscured as there is no sector-specific registration at the Ministry of Industry and Trade; therefore companies either register under 'other services', communications, or exhibition organisers. However, some companies sought the specific registration and received approval through the Ministry of Interior to be registered as conference organisers.

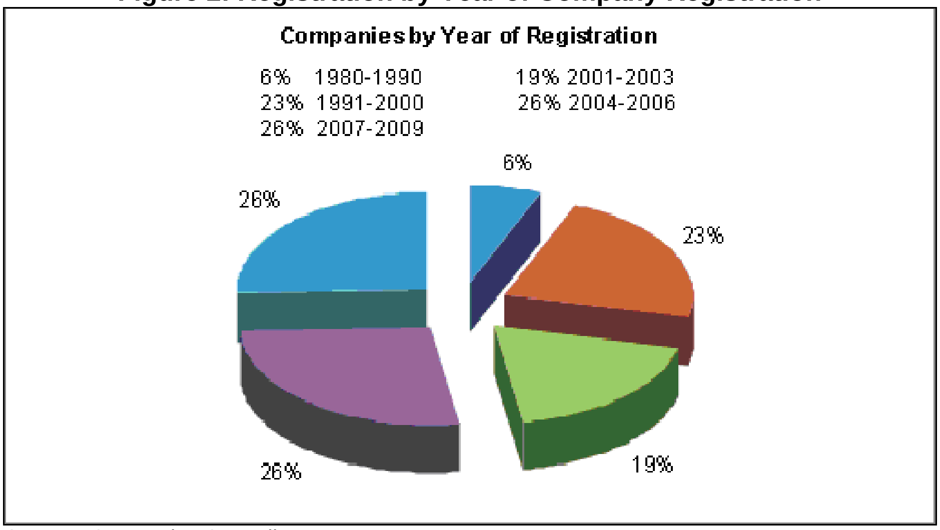
The statistical information compiled from the Ministry of Trade and Industry as well as the Companies Registrar, has been summarised as per the Pie Charts below: The following information is based on the statistics covering registered companies.

Figure 1: Registration of Companies by Type of Activity Practiced



Source: Companies Controller Department

Figure 2: Registration by Year of Company Registration

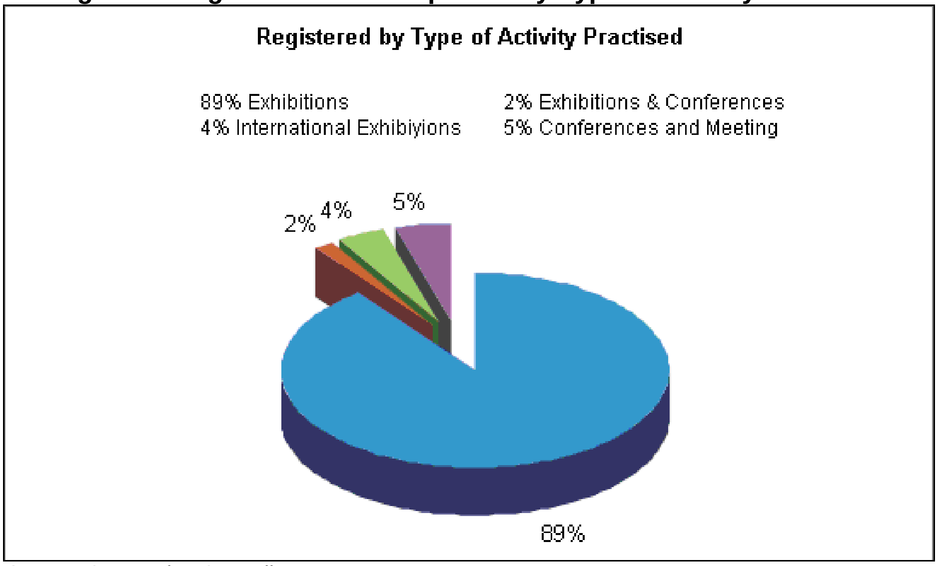


Source: Companies Controller Department

Moreover, ninety-one percent of all registered firms are Jordanians and 9% are foreign.[4]

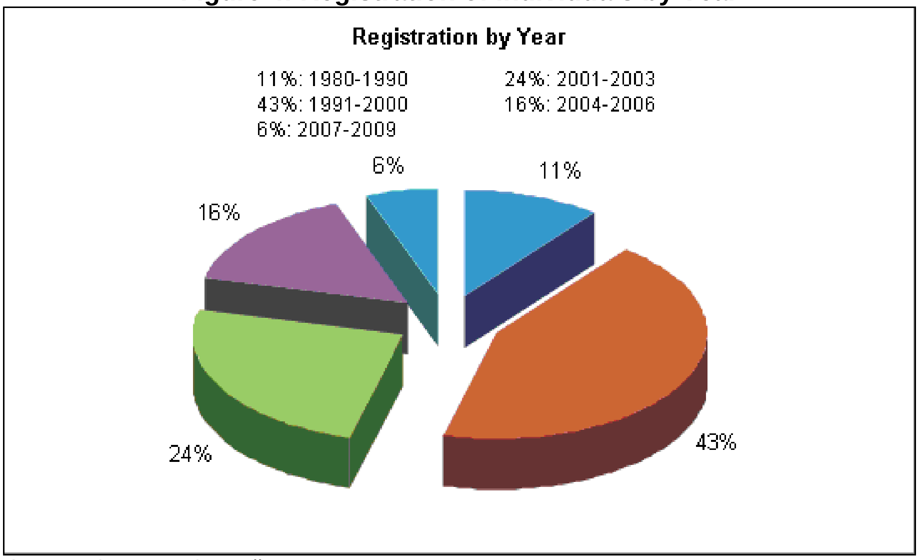
Registered Individuals
As for the analysis of the statistics compiled with regard to registered individuals and not companies, the following results were shown. It is obvious that the trend to register companies in this sector as individual registration is diminishing:

Figure 3: Registration of Companies by Type of Activity Practiced



Source: Companies Controller Department

Figure 4: Registration of individuals by Year



Source: Company Controller Department

According to Figures 2, 3, and 4 above:

- The real growth in the number of companies registered in providing MICE services significantly grew from 2004-2009

[4] Companies Controller Department

- There is very little foreign investment in the sector (less than 10% of the companies)
- Most MICE organisers register as Limited Liability companies
- The number of Exhibition organisers is very large
- There are no statistics on the total revenue and impact on economy of the sector.
- There are no statistics covering the number of employees in the MICE sector. It is known that the number of employees in the tourism sector is around 30,000 and the world-wide trend is that the turn-over of employees in this sector is amongst the highest of any sector.

The number of tour operators registered at the Ministry of Industry and Trade are 393. Tour operators historically have been the pioneers in the MICE sector and a large number of such agencies have pursued this line of business in addition to the tradition tour operator services.

As there is no specific application for MICE organisers at the Ministry of Industry and Trade; the number of organisers is therefore unidentifiable. However, according to a number of phone interviews made with venue owners and operators as to the largest and most frequent users of their facilities for MICE events (repeat business providers), the companies that were mentioned include:

- iJordan
- Lawrence
- Discovery
- Al Oula for Events
- Petra Travel
- Dahlan
- O2
- Arab Organisers

Amongst the most prominent names of tour operators that operate under the dual functionality of tour operator and MICE organiser are:

- Discovery
- Petra Travel
- Lawrence Tours
- Dakkak Travel
- International Traders
- Dahlan
- UTA
- Karma House
- Abercrombie & Kent

Tour operators are the primary recipients of MICE requests coming from outside Jordan due to their access to certain markets.

Another database provider is the MICE directory compiled by the Jordan Inbound Tour Operator Association (JITOA). When scrutinised, this database is definitely a good attempt at such a compilation but is under no means comprehensive.

Table 2: Destination Management Companies as per the MICE directory

COMAPNY	OFFICE LOCATION
Abercrombie & Kent Jordan	Amman
Atlas Travel & Tourist Agency	Amman
Creative Tours	Amman
Dakkak Tours International	Amman
Discovery Travel & Tourism	Amman
Green Meadows Travel & Tourism	Amman, Aqaba
International Traders	Amman, Aqaba
Jordan Select Tours	Amman
Karma House Travel & Tourism	Amman
Nebo Tours	Amman
Pan East DMC	Amman
Petra Tours	Amman
Travel One	Amman
Dahlan Tours & Travel	Amman, Aqaba, Jerash, Maan, Dead Sea, Wadi Rum, Wadi Mousa (Petra)
Pella Tours	Amman

Source: JITOA's MICE directory

Table 3: Event Producers as per the MICE directory

COMPANY	OFFICE LOCATION
Events UnLimited	
International Traders	Amman, Aqaba
Petra Tours	Amman
PRO4 Total Events Solutions	Amman
Expo Rama Establishment	Amman
ExpoJordan	Amman
ExspoSun	Amman
ICMD - Aim for Results	Amman
iJordan	Amman
Kahhaleh Expo Hotec Establishment	Amman
Lawrence Tours and & Events	Amman
Mahmoud Abu Shindi Establishment	Amman
Mazar for Tourist Investment	Amman
Middle East Exhibition Co.	Amman
Special Day	Amman
The golden Jordanian Group	Amman
The Technical Consultancy Center	Amman, Irbid, Mafraq
Union Expo Trading Co.	Amman, Aqaba
Universal Exhibitions Corporation	Amman

Source: JITOA's MICE directory

Another location to obtain listings is the Jordan Enterprise Development Corporation (JEDCO) which is interested in exhibition organisers and therefore provides such a listing on their website. It acknowledges the following companies as active organisers of exhibitions:

- B-Design And Marketing Co
- D4 Expos
- Events Unlimited

- Expo Jordan
- Gulf International Co
- International Promotion Company
- Red Circle Expo
- International Fairs Promotion (IFP)
- Technical Centre For Exhibition And Conference

These are the most prominent exhibition organisers in Jordan and those identified have created annual exhibitions that serve both the local community as well as regional and international ones. JEDCO does not make any reference to any other exhibition organiser/owner in addition to the ones given above.

It is also worth mentioning that IFP, B-Design and Events Unlimited create a number of exhibitions. IFP is Lebanese company that opened a branch in Jordan and created a number of successful annual exhibitions and conferences. Events Unlimited also partnered with a Lebanese firm to create the Jordan International Hospitality Forum.

2.1.2 Concentration

Over the past 5 years, a number of firms have come to dominate the industry. This information was compiled from venues by asking them to list the 5 most repetitive event management companies that conduct work on their premises. The five noted are:

- iJordan
- Lawrence
- Karma House
- Al Oula for Events
- Arab Organisers

2.1.3 International Participation

A number of international organisers have entered the Jordanian market to organise events in Jordan. These include Publicis Graphics (international – based in Switzerland) that organises the World Economic Forum at the Dead Sea, as well as companies such as Reed Travel that organised a tourism conference in 2006, also at the Dead Sea. Regional public relations, advertising and marketing agencies have also organised events on behalf of their clients in Jordan, whereas some agencies prefer to refer the business to local event management agencies. Unfortunately, there is no available database listing all international (non-Jordanian) event management companies that have worked in Jordan.

For exhibitions to be held outside of Jordan, JEDCO regulates the participation of Jordanian companies exhibiting services/products outside Jordan and organises such activities.

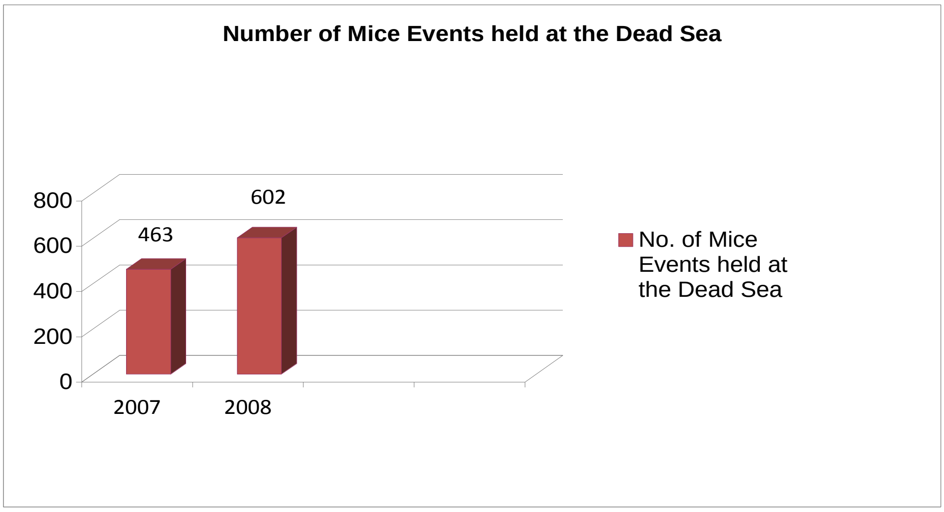
2.1.4 Sector Activity

MICE events are primarily held in Amman, the Dead Sea and Aqaba; however, both the government and event organisers are working to increase the number of events held at Petra. Between the primary three locations, MICE events are concentrated at the Dead Sea and Amman's five star hotels.

The Dead Sea as a destination has attracted MICE events from the onset of the concept due to its unique location. With the opening of the Movenpick Dead Sea Convention Center, venues in Amman started losing a large number of MICE events to the Dead Sea. This move was supplemented by the opening of the King Hussein Bin Talal Convention Centre in May 2005, which led to more high quality, international and prestigious events making their way to the Dead Sea.

Statistics taken from the 3 major Hotels at the Dead Sea (Kempinski Ishtar, Movenpick Dead Sea Resort & Spa, Marriott Dead Sea) as depicted in Figure below that the number of MICE events is on the rise. Furthermore, with the opening of new hotels along the Dead Sea, more MICE events will take place to accommodate demand: in certain months of the year the Dead Sea is current fully booked.

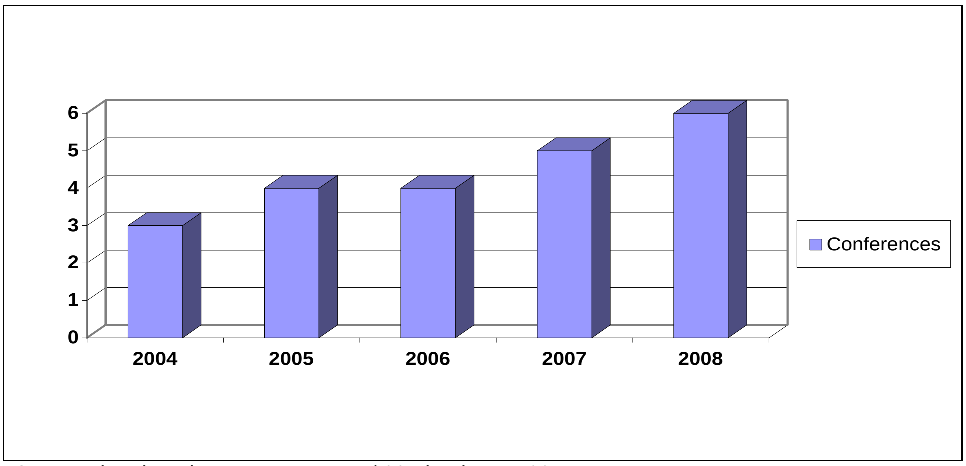
Figure 5: Number of Mice Events held at the Dead Sea



Source: Data Compiled from Dead Sea Hotels (Kempinski Ishtar, Movenpick Dead Sea Resort & Spa, Marriott Dead Sea)

Because data is difficult to obtain, information from a event management company is given below to exemplify trends in the industry. According to iJordan, a nine year old event management company that manages all types of events for local, regional and international clients, the number of events that it has organised over the years grew substantially from year to year. The number of Conferences managed by iJordan increased between 2004 and 2008[5] as shown in Figure below.

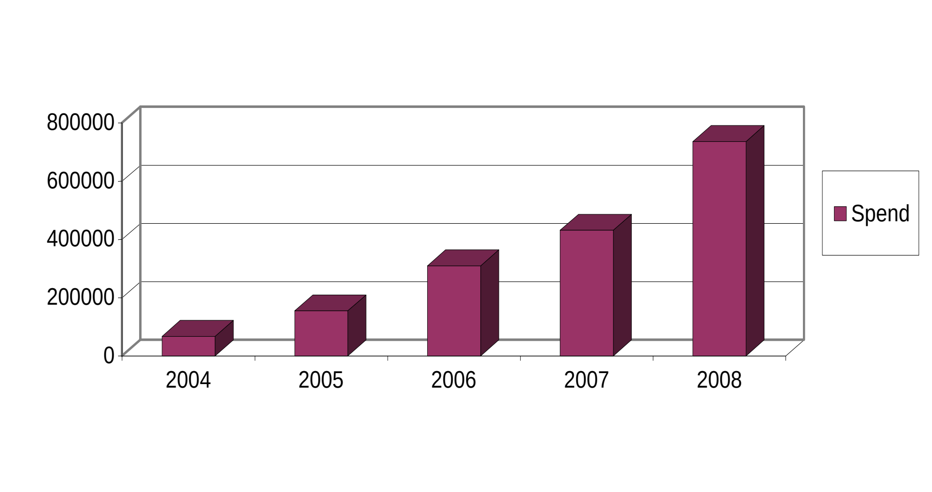
Figure 6: Number of conferences managed by iJordan 2004 - 2008



Source: iJordan Finance Department/ 22nd February 09.

iJordan also indicated the amount spent (in Jordanian Dinars) by conference owners on the events it handled during that period, is shown in Figure below:[6]

Figure 7: The Amount Spent (in JD) by Conference Owners on Events



Source: iJordan Finance Department/ 22nd February 09

2.1.5 Venues - Exhibition Centres

Until the last 10 years, no focused investments were made on meeting facilities to support the MICE industry in Jordan. MICE events were held in 5 and 4 star hotels as well as locations such as universities, Sport City and the Royal Cultural Centre. Zara EXPO (part of the Grand Hyatt Amman), was established in 2001 as a leading venue for exhibitions, conferences and meetings. In 2005, the King Hussein Bin Talal Convention Center was opened in the Dead Sea, hosting major events such as the World Economic Forum. Furthermore Jordan has an abundance of historical sites in good condition that have served as meeting and incentives destinations.

Currently, most exhibition centers are located in Amman. They are:

- Amman International Motor Show
- Amman International Fair Hall
- Royal Convention Centre / Meridian Hotel
- Zara Expo Amman
- 5 Star Hotel Meeting Rooms

According to JITOA's MICE directory, the following are venues that should be considered by meeting organisers:

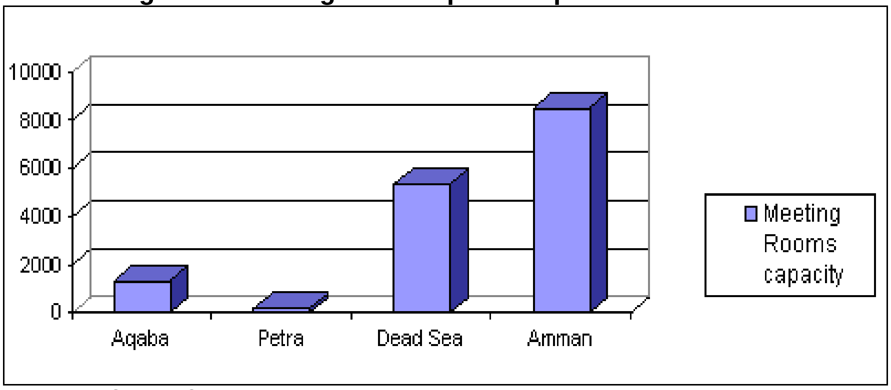
Table 4: Venues that should be considered by meeting organisers

VENUE	LOCATION
Amman International Motor Show (AIMS)	Amman
King Hussein Bin Talal Convention Center	Dead Sea
Municipality of Greater Amman– City Hall	Amman
Zara Expo, Managed by Grand Hyatt Amman	Amman

Source: JITOA's MICE directory

The largest individual venue in terms of capacity is the King Hussein Bin Talal Convention Centre at the Dead Sea. Figure 8 below shows the meeting room capacities per site in Jordan

Figure 8: Meeting room capacities per site in Jordan



Source: JITOA's MICE directory

2.2 Driving forces affecting the sector

2.2.1 Trends in the market

Innovation

A number of important conferences and exhibitions have been created in Jordan over recent years that show a high degree of innovation in the sector. These are innovations as it has become obvious that MICE organisers have become sophisticated enough to identify market needs and fill in the loopholes and the gaps and create successful events. Exhibition organisers have been able to identify an innovative business idea and implement it in the market. Property Link, created by B-design and Marketing, was the perfect marketing tool for the flourishing real estate business. Rebuild Iraq, created by IFP, was an incredible exhibition that brought in a large number of visitors and exhibitors from outside the country.

Technological development

MICE organisers have become more reliant on the use of email and this has become a primary method of communication. There has been a significant increase in the amount of technology used for meetings; these include on-line registration, video conferencing, voting systems, internet access through Cyber Cafes and Business lounges (wireless/WIFI WiMAX). The use of e-marketing has also become more popular with advertising on major websites including Facebook as well. Surprisingly enough, most MICE organisers in Jordan do not use event management software to enhance their services, even though software use is a world-wide trend.

Costing structure

A variety of pricing strategies are used among Jordanian MICE organisers for organising MICE events. These include 1) fees as a percentage of cost, 2) commissions, 3) fixed project fees, and 4) time-spent fees.

Most organisers participate in a preferred vendor program which has developed in a smaller circle of vendors being used for the supply chain in Jordan. For example, there are a large number of audio visual providers in Jordan, however sophisticated audio visual requirements have been provided by a select number of companies. The same applies to branding companies where the choice of vendors is even more limited and the event management companies usually go back to a sole provider.

Levels of productivity
Although there is no objective measurement of productivity in the sector, industry participants believe that the level of productivity in Jordan is high. According to interview respondents there is a sufficient number of professional and experienced companies that can cater to local plus international requests for MICE events.

2.2.2 Markets (international and national)

Prices
Jordan is considered an expensive destination for MICE events. Hotel rooms are expensive; transportation is expensive and the services that come along with the MICE sector are also expensive. Furthermore, the drop in demand for hotel rooms in 2009 will probably lead to the majority of hotels raising their prices.

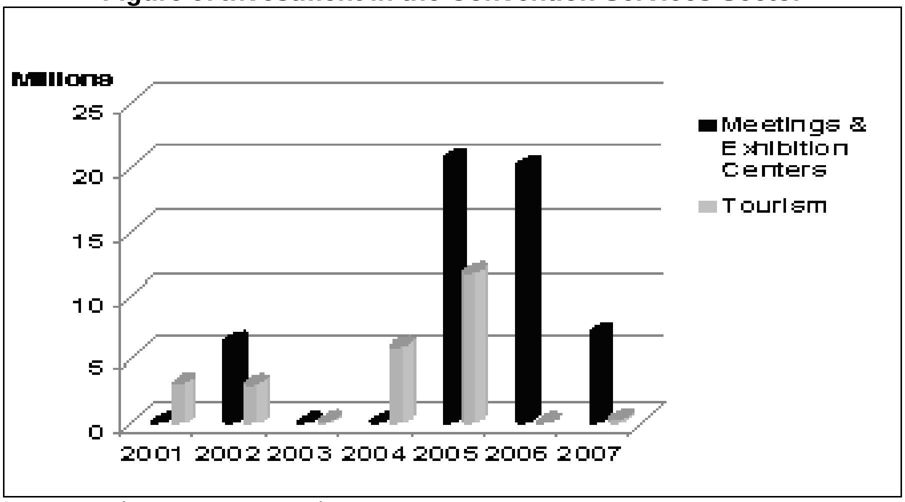
When compared to Sharm El Sheikh, Jordan becomes very expensive and therefore less of an option when it comes to international MICE owners that want to hold their events in exotic destinations such as Jordan.

Local organisers price differently. Where international standards include fees for management, fees for managing the 3rd party vendors and the 3rd party vendor costs, a dominant custom in the Jordanian market is the marking up of vendor fees to increase profitability.

According to industry participants, no informal cartel-like arrangements exist in Jordan. Prices are set by each company separately and there is no interference from the government

2.2.3 Investment trends
There is little foreign investment in Jordanian MICE, exhibition and events companies (less than 10% of registered companies at the Ministry of Industry and Trade). However, recent local investment activity has been recorded by the Jordan Investment Board as new projects applied to benefit from the Investment Promotion Law.

Figure 9: Investment in the Convention Services Sector



Source: Jordan Investment Board

2.2.4 Implication of trends

Current trends indicate that Jordanian companies still have an edge in growing further in Jordan without facing strict competition. This growth will allow companies to reach a stage where they can export their services to foreign countries.

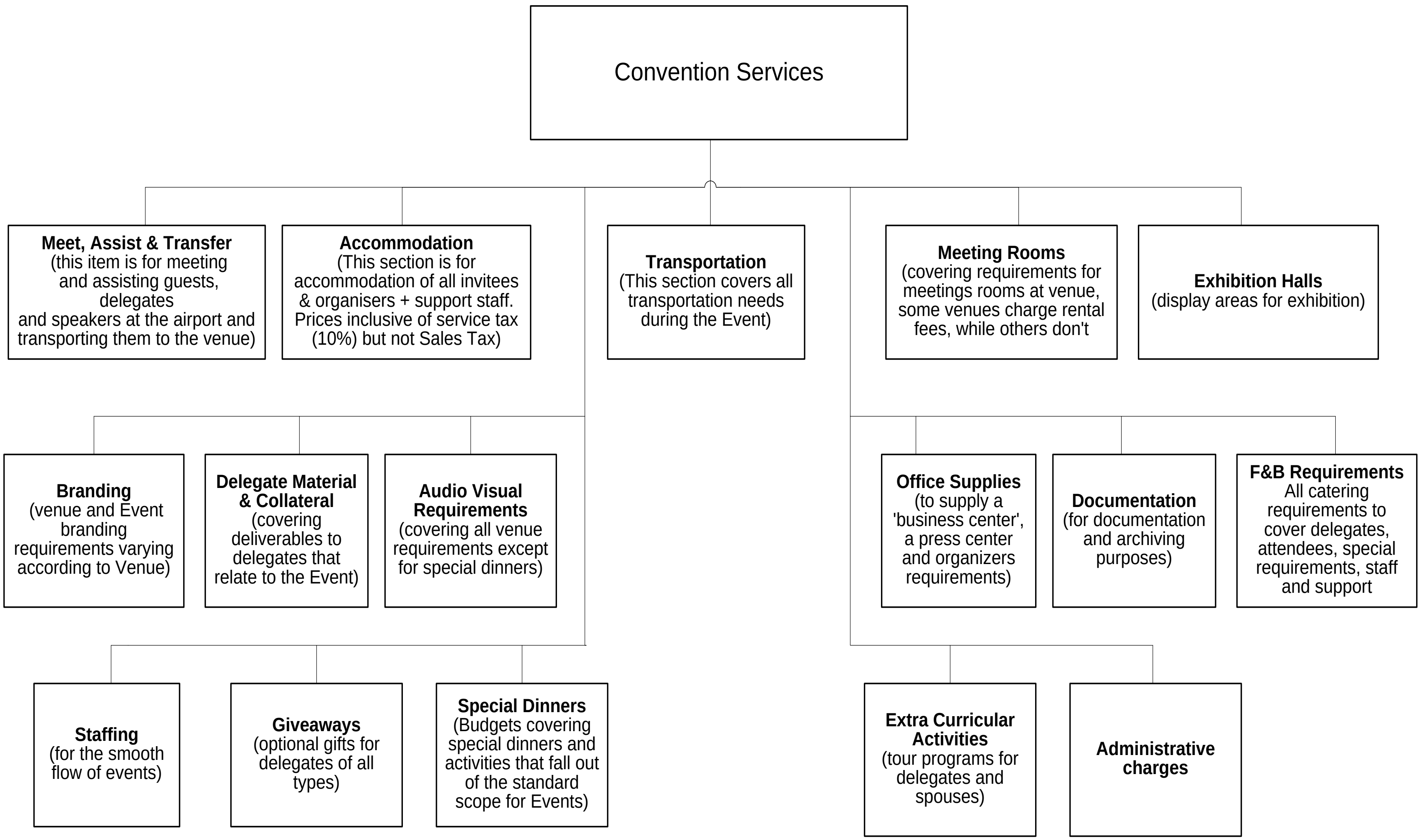
2.3 Identification of specific cluster linkage opportunities

With the increase in hotels and the increase in MICE meeting centres, Jordan will be able to look at larger international MICE events to host. This will lead to the evolvement of cluster linkage opportunities as per the value chain below

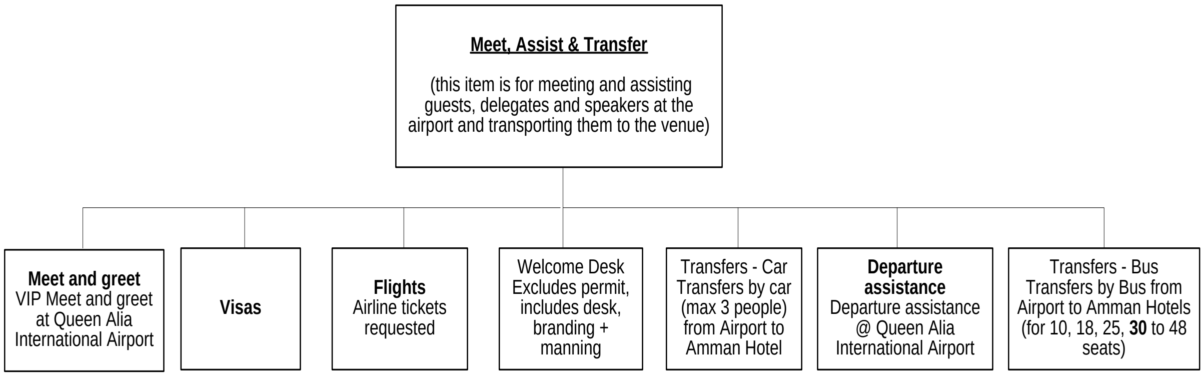
2.3.1 Value chain context

The MICE industry involves a large number of different service providers that constantly support the industry in its development. These services serve as cluster linkages to the MICE industry. While in theory a MICE event could be held with the simple use of a hotel and its facilities and possibly a tour operator, MICE events held in Jordan have become much more sophisticated and diverse over the past few years. Figure depicts the scope of activities offered by MICE organizers in Jordan. Figure is a representative view of an MICE event; events can be larger in scope or smaller. A breakdown of each activity that has linkages outside the hotel or venue of the conference is provided to investigate the value-added effects of each activity. It is the function of the MICE organizer to solicit, organize and coordinate all of the services and activities show in Figure 10 below.

Figure 10: A Breakdown of Convention Services



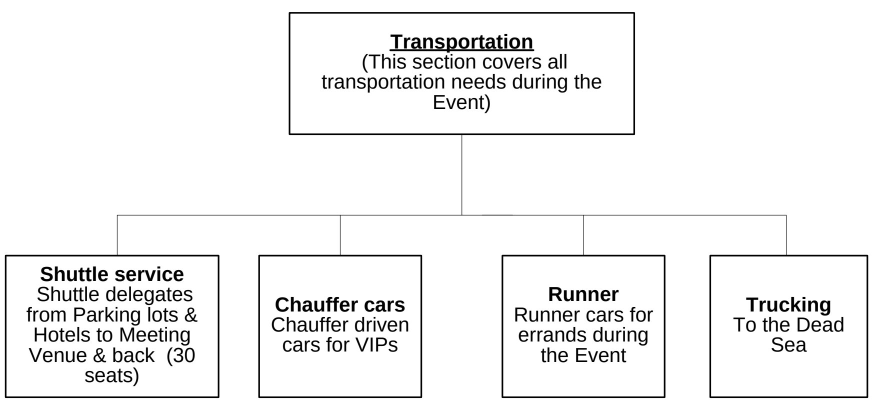
Meet, Assist and Transfer



Linkages for this category primarily include tour operators, airlines, and car and bus rental companies. Meet and Greet service is available as a service from all tour operators. There is only one company, Marhaba, which performs this service at the airport. Flight requests are provide by tour operators and/or the airlines themselves. Tour operators also provide and operate the Welcome Desk service. In terms of transfers and departure transportation during the conference, cars are rented either from tour operators or car rental companies; while buses can be rented from tour operators or bus rental companies.

Accommodation
Hotels are booked directly by MICE organizers or through tour operators. As shown thus far, the importance of tour operators within the MICE function is paramount.

Transportation



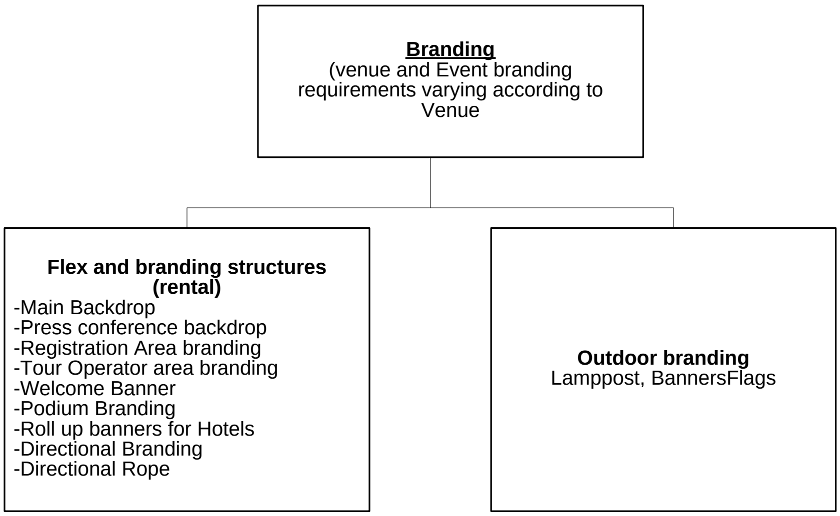
Shuttle service, chauffer cars, runner cars are all booked and rented from car rental companies and tour operators. Trucks are rented directly through owners and operators.

Meeting Rooms
Meeting rooms are provided from the venues or hotels.

Exhibitions
Exhibition booths are either rented from companies that are specialized and have booth units plus the accessories that go with the booths, or tailor made. If tailor made, specialized

companies are employed that work with designers, carpenters, metal workers, as well as interior designers. Other accessories, such as parquet for the booth floors, trees as accessories and furniture, are also involved

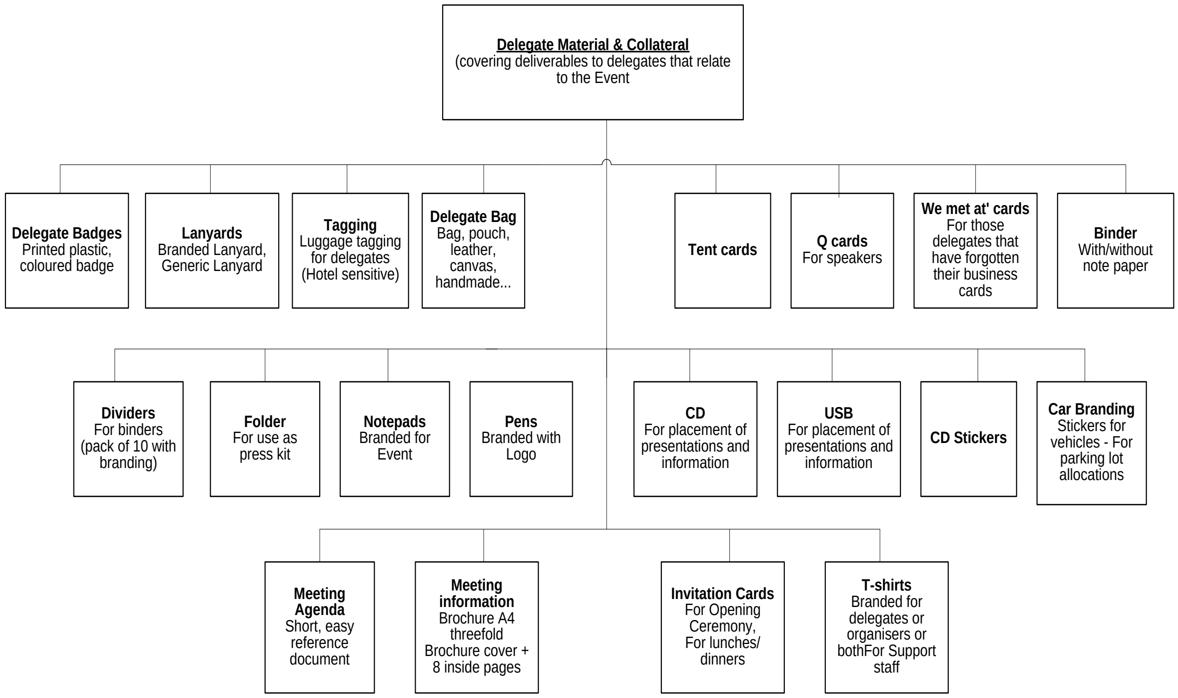
Branding.



Branding is the act of giving the conference a theme or slogan. Creation of the items which are part of the branding process, as shown above, involves builders, metal workers, carpenters, print factories and designers to develop the total package.

Delegate Materials

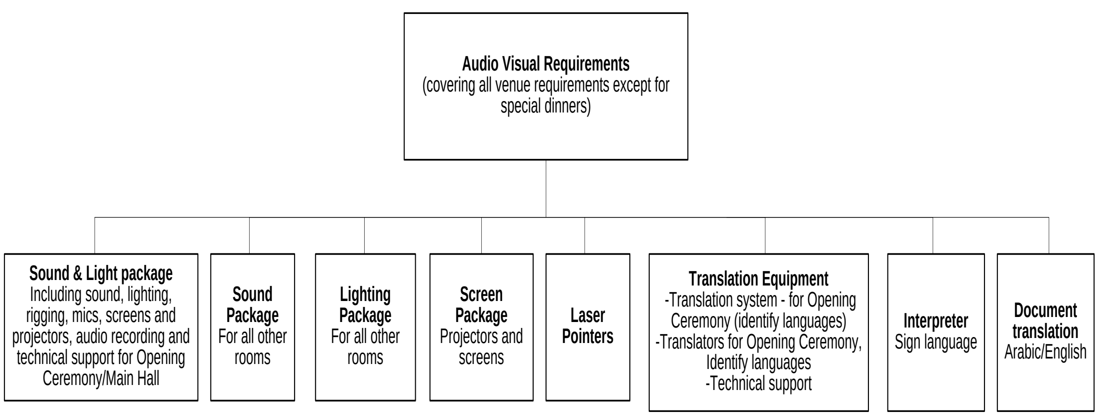
Materials that delegates are given throughout the conference are varied as shown below. Spread effects include the use of designers to design the materials, agents that supply plastic cards, service providers that print on plastic cards, print shops, agents that bring promotional material from around the world to provide delegate bags for example; the bag is then branded in Jordan through the use of local handicrafts people. Pens are brought from agents that work on promotional material from around the world. The same applies for USBS and T-shirts, although t-shirts can also be locally made. Branding all occurs in Jordan. All print material is printed by print shops in Jordan.



Audio Visual (AV) Services

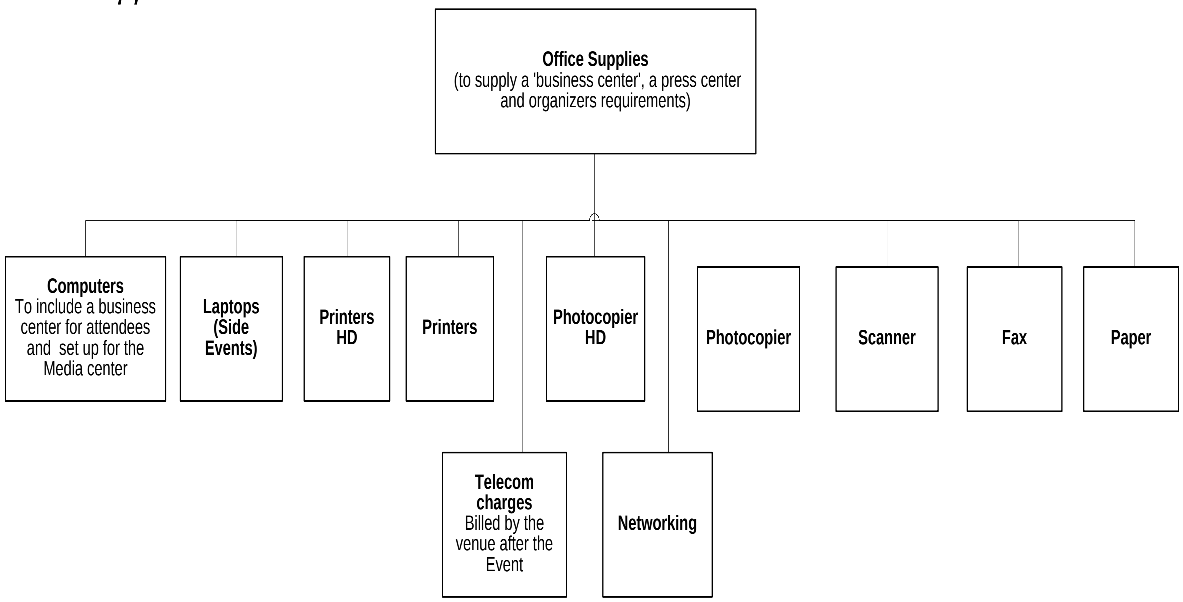
All AV requirements are provided by AV companies that offer the services shown below. These companies employ 5-20 people each, have invested money and brought equipment from various technical companies around the world. They also create technical know-how.

Once on site and in the process of setting up, companies may engage other companies to supply equipment should there be a shortage (if event is very large). Also some companies are specialized in translation, for example, or voting systems. Furthermore, during set-ups, such companies have to increase the number of part time labour & technical know how staff in order to deliver their services on time.



Furthermore, some services such as translation also require translators to be part of the equation and therefore offer another linkage to other business services

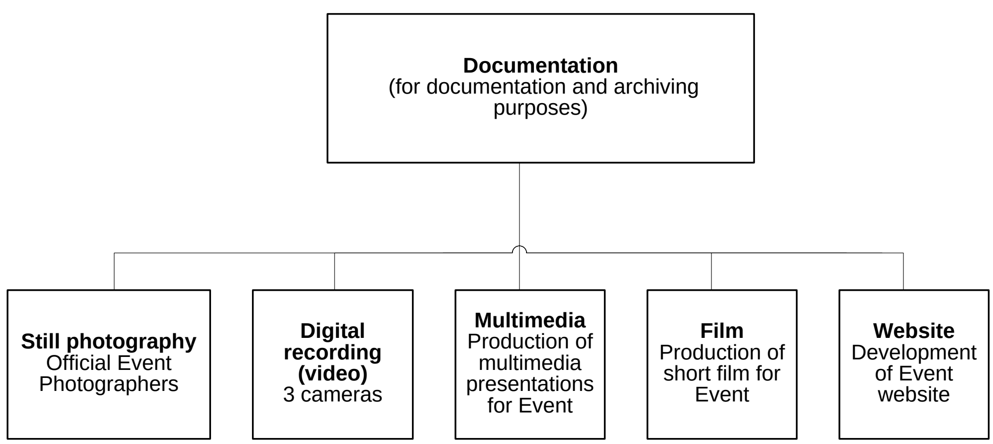
Office supplies



Office supplies are either provided directly by the organizer if the event is small or by an office supplies provider if it is a larger conference. These companies are not AV companies, but another service that deals primarily with the conference industry. Sometimes complete office support and on site help is required.

Documentation

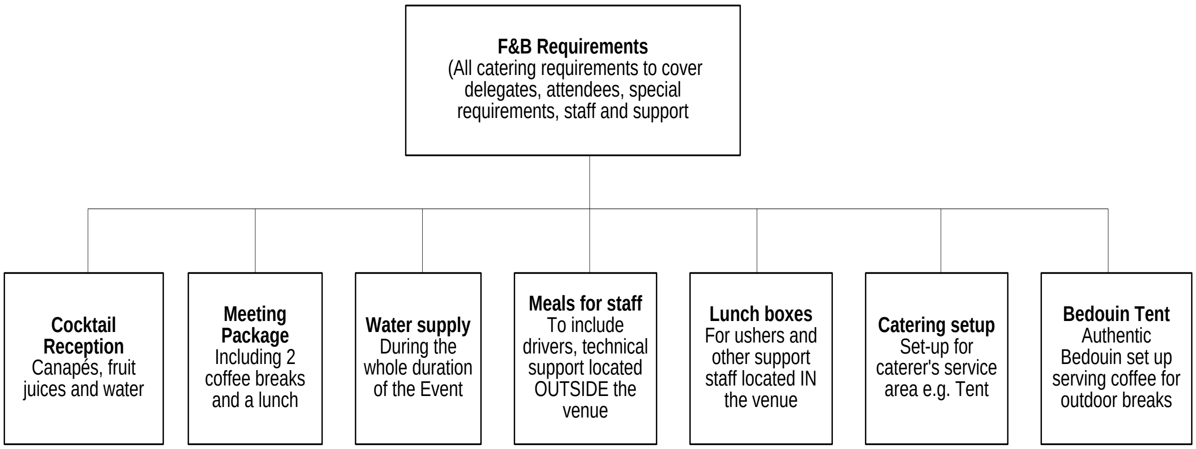
Photography and video is provided by companies specialized in one or the other, sometimes both. Levels of digital recording is available, for example instead of normal standards, equipment rented from TV stations is brought in for the event.



Film production is another sector that has directly impacted the sector in that the sector has constantly required film/corporate documentaries to start or end or demonstrate a message for the meeting.

Website development companies have also had their share in that most conferences and meetings now have an online presence that contains all details about the meeting

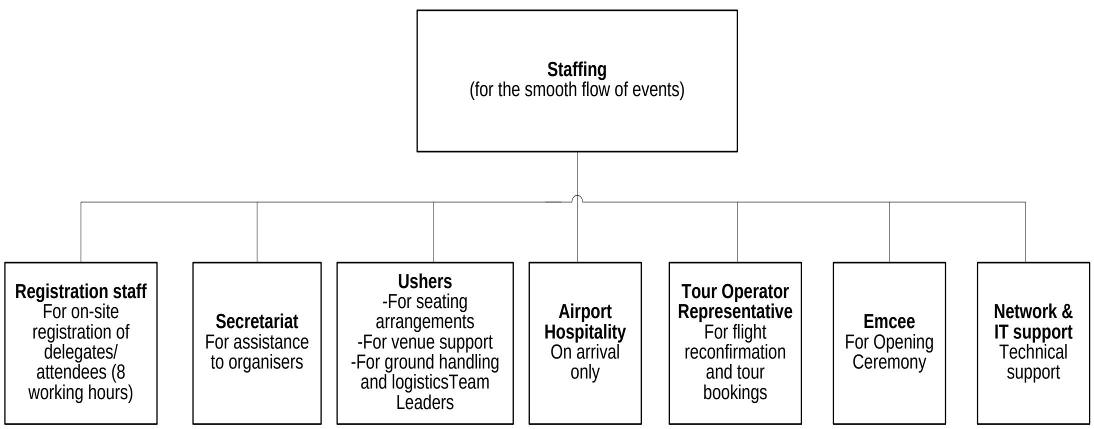
Food and Beverage (all catering requirements)



Food and beverage service (F&B) is provided either by the hotel where the meeting is held or a caterer. Props used as decorations for dinner and other F& B functions, such as Bedouin tents are supplied by companies that cater to the MICE industry. As well, the film industry provides props for events ranging from tents to costumes to local entertainment.

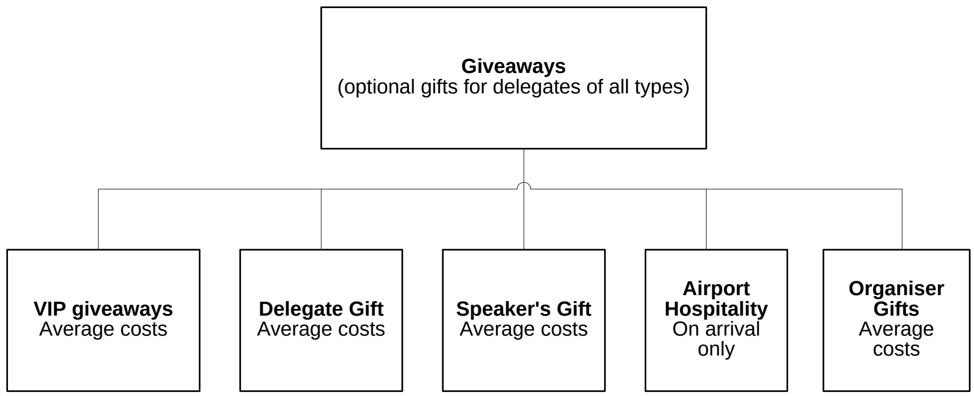
Staffing

Staff for the event is hired by the MICE organizer.



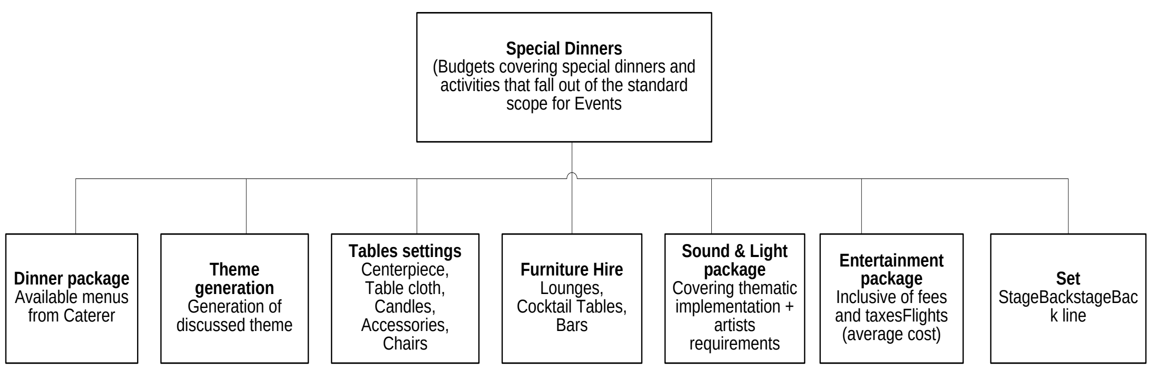
The staff is usually composed of university graduates hired specifically for the event, although there are now a number of companies that provide this service. Moderators and emcees are individuals that are contracted for the job, there is not a speaker/moderator agency operating in Jordan yet.

Giveaways



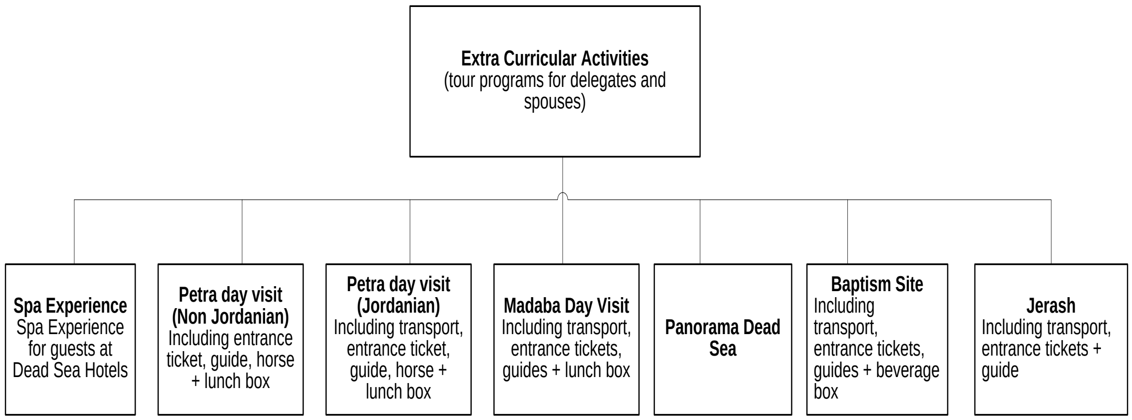
These gifts come from agents that offer promotional material from around the world. However, this item has also touched charities working locally to promote Jordanian produce, culture and heritage. The products of organizations such as the Jordan River Foundation and the Royal Society for Conservation of Nature are purchased for these events. A number of private companies, such as Jadara and Silsal, have also serviced the sector.

Special Dinners

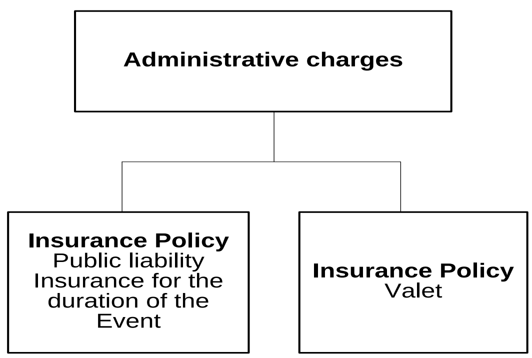


The scope of special dinners includes the venue, hotel, caterer, and companies that rent accessories for events, such as table cloths and chairs as well as furniture (these are either locally made using seamstresses (linen) or carpenters for chairs or brought from outside Jordan). It also includes AV providers. The entertainment industry has developed such that there are now companies that act as booking agents. Sets include building stages and platforms, which is also serviced by specialized companies.

Extra curricular activities
Extra curricular activities involve primarily the tour operator, bus rental companies, caterers for meals, venues, and guides.



Administrative



Coverage for the event is provided by local insurance companies. However, sometimes local companies have to purchase policies from larger international insurance companies to buy the correct kind of coverage needed for the event.

2.3.2 Identification of stakeholders in the sector who could be included in the establishment of longer working groups

Stakeholders include hotels, conference centers, general service contractors, audiovisual contractors and tour operators, Destination Management companies, NGOs, associations, international organisations, commercial entities or the private sector thinkers), event organisers, the tourism sector (hotels, airlines, transport and car rental companies) as well as a range of service providers as well as representatives from:

- MITO
- JEDCO
- Jordan Investment Board
- Jordan Tourism Board
- Ministry of Tourism
- Jordan Inbound Tour Operators Association / MICE
- Jordan Hotel Association
- The Ministry of Interior

3.0 General Business Environment

3.1 Effect of the general environment for business on the development of the sector

As demand increases for facilities, accommodation, and transportation, the pressure on these service providers becomes very evident. For example, at the Dead Sea in October 2008, the Jordan Rally, a water conference and a Zain internal convention for 650 people were all being held at the same time. A room shortage occurred and room rates were higher by 20% at the time[7]

However, due to the non-seasonality of the sector, continuous demand for accommodation and transportation means that the hotel business has become more sustainable, an issue that has been frequently raised by the Jordan Hotel Association. Therefore, the recent increase of MICE events over the last couple of years has provided the hotel, transportation, venues and other related services to the MICE sector with sustainability and continuity in production when the other source of business (mainstream tourism) is not at its peak. Therefore an increase in MICE events equates to a flourishing hotel industry.

3.2 Affect of business environment on investment

3.2.1 Domestic

The above business environment has thus meant that domestic investment has been on the rise; established event management companies are growing in terms of productivity and employees. In 2006 and 2007, iJordan had to increase its employees to 20 people due to the rise in demand, an increase of 50% from previous years. However, with the economic crisis companies are downsizing again and resorting to hiring part-timers and project managers instead of full-time employees. New companies are being established 25.5% of companies that registered at the Ministry of Industry and Trade, registered in the last 2 years.

3.2.2 International

Though international investment into the sector amounts to only 9.21% of the registered Exhibition and Conference organisers in Jordan, recent investments into the sector have become evident; established regional players such as the International Fairs Promotion (IFP) established a company in Jordan in 2004 and created REBUILD IRAQ, one of the most important Exhibitions held in Jordan to date. IFP also created the International Fair Grounds that can host the largest of exhibitions and events. Property investments are increasing (Emaar's investment in the King Hussein Bin Talal Convention Center, Dead Sea) and the Greater Amman Municipality is now tendering for a Meetings and Conference Facility in Jordan.

3.3 Driving forces affecting the sector

In 2007, the 8th Meeting for State Parties to the Mine Ban Convention was held at the Dead Sea. Through the lobbying of the National Committee for Demining and Rehabilitation and HRH Prince Mired Bin Raad, visas were granted to the delegates from member states, the UN and NGOs attending this Conference electronically through the website. This innovative process made Jordan more 'attractive' as a destination for the conference. Jordan has kept up with technological developments in the sector so that the meetings held in Jordan are all

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[7] iJordan, organiser of the Zain Convention, October 2008

on par with world standards. However, the high cost of accommodation, transportation, and catering has meant that the costing structure in Jordan is a factor in Jordan losing business to other surrounding countries.

4.0 Legislative and Regulatory Environment

4.1 Measures relating to domestic regulation

There is no official regulatory body in terms of conferences and conventions nor or any price regulation or guidelines set by the Ministry on the sector.

The MICE sector is not regulated by any single body in Jordan. On the contrary, its importance is recognised by more than one government institution including the Ministry of Industry and Trade, the Jordan Enterprise Development Corporation, the Jordan Inbound Tour Operators' Association and its MICE online Directory, the Ministry of Tourism, the Jordan Tourism Board and the Ministry of Industry and Trade.

Establishment of event management companies is not an easy task as the only category at the Ministry of Industry and Trade that related to this sector is that of Exhibition Management. Otherwise, event management companies usually register under this category as well as promotions, advertising and communication services. Some companies are registered as Conference Organisers after applying to the Ministry of Interior for permission after being referred to them by the Ministry of Industry and Trade to finalise the registration of the company. Furthermore, establishment of foreign companies with foreign owners falls under the standard restrictions and requirements of registrations by non-Jordanians.

Below are the standard registration procedures that apply to the majority of Jordan MICE organisers (as these amount to 43%).[8] As discussed above, companies that register for exhibitions register only at the MIT, however, a number of companies are registered as conference organisers through the special request to the Ministry of Interior.

[8] Forty percent are registered as a General partnership, which is A company founded by a maximum of 20 natural partners, all over 18 years of age.

Table 5: Registration Requirements for a Limited Liability Company

No:	Procedure	Time to complete:	Cost to complete:
1	Execute the company's formation contract and the memorandum and articles of association.	1 day	JOD 800
2	File registration application with the Ministry of Industry and Trade	1 day	no charge
3	Open bank account; deposit 50% of the capital	1 day	JD8, charges for issuing a certificate evidencing the depositing the 50% of the Capital.
4	Finalize the registration of the company; obtain registration certificate	1 day	JD 5 (Filing Fee), + JD 2 (Registration Certificate Fee), + 0.03% of Share Capital (Stamp Duty), + 0.02% of Share Capital (Registration Fee), + JD 15 (Fee For Publication in the Official Gazette).
5*	Register for corporate tax, salary withholding tax, and VAT	1 day (simultaneous with previous procedure)	no charge
6*	Register with the chamber of industry or chamber of commerce	1 day (simultaneous with previous procedure)	JOD 164
7	Obtain a vocational license from the municipality	8 days	JOD 200
8*	Inspection by municipality on safety and health	1 day (simultaneously with previous procedure)	no charge
9*	Register for social security	1 day (simultaneous with previous procedure)	no charge
10*	File general assembly first meeting and board of directors' minutes of meeting	1 day (simultaneous with previous procedure)	JD 30-50 (depending on whether the company would be managed by a General Manager or a Board of Directors (BOD).

Source: Companies Controller Department website

4.2 Domestic regulations at the Ministry of Trade & Industry

There is a restriction of a maximum of 50% ownership for foreigners in Jordanian registered companies as MICE and conventions fall under the services sector[9]. Furthermore, for any percentage of foreign ownership, capital has to be raised of 50,000 Jordanian Dinars and a 100,000 Jordanian Dinar deposit has to be made for a residency and other permits required for the foreign owners working at the company.

For an event management company to work outside of Jordan (in the law referred to as 'having other branches'), then it is considered an exported service may or may not be subject to income and sales tax. Sales tax is not applicable where the service is being utilised wholly outside Jordan. Income tax has a different formula whereby the income tax is less than if the service was provided in Jordan. In order to be in the positive of the status of the service, auditors recommend that providers always consult the Public Service Department at the Sales and Income Tax departments to make sure that your information is up to date.[10]

[9] Companies Controller Department

[10] According to the auditing firm of Rizk & Co

JEDCO is Jordan's official trade development and promotion organization established in 1972. JEDCO's activities cover trade development and promotion, trade fairs, trade necessary information services, and human resource development. JEDCO also provides specialized support services and advice in areas of packaging, export finance and in the implementation of trade agreements.

JEDCO's main objectives can be summarized as follows:

- Strengthening the position of Jordanian exports' in traditional markets and expanding exports of Jordanian products and services to new markets.
- Developing Jordanian exports and assisting companies in enhancing their competitive advantage to meet international standards of quality and price.
- Exploiting the use of information technology in helping Jordanian exporters.
- Establishing specialized services centres to support industrial priority sectors.
- Providing training and human resource development for companies and institutions engaged in exports.
- Establishing and enhancing co-operation between JEDCO and other trade related organizations world-wide.
- Assisting Jordanian exporters in maximizing the use of professional export support services and tools.

JEDCO restricts exhibition organisers by putting limitations on the type of exhibition you can hold and the dates/time period. According to the law published in 2005, a number of regulations were introduced:

1. All exhibitions need to be registered and approved by JEDCO
2. Applications must be presented to JEDCO 30 days prior to the EXPO
3. Any similar exhibitions (similar as deemed by JEDCO) have to be a minimum of 30 days apart (except of the EXPO is being held by a foreign company or country)
4. For EXPOs being held by Foreign countries, there must be a local registered organiser
5. Maximum duration for an EXPO is 14 days (7 days if it includes direct sale)
6. No direct sale and exhibition allowed at the one EXPO at the same time
7. The minister can ask for a bank guarantee of any amount he chooses for a duration of up to 1 year

These regulations need to be revised with an eye to increasing the competitiveness of EXPO activities.

4.3 Professional Qualifications

There are no restrictions or regulations for meeting organisers. Organisers can be individuals as well and are not required to be registered as a company. Membership in associations is available to companies and individuals. These include:

- Jordan Inbound Tour Operators Association (JITOA)
- Jordan Tourism Board
- MICE Directory (JITOA and USAID project)

5.0 GATS/Restrictiveness Measures

5.1 GATS commitments on the sector/sub sector

According to JEDCO and the Ministry of Trade, there are no restrictions/commitments on the sector by the GATS agreement or any other bilateral and international agreements that may regulate/restrict Jordanian companies or foreign companies working in the Convention Services sector in Jordan. The GATS/WTO commitments are unbound except as indicated in the horizontal section. There is still the national equity limitation of 50% on foreign investment.

Table 6: GATS Commitments Convention Services

Sector	**Mode**	**Limitations on Market Access**	**Mode**	**Limitations on National Treatment**
Convention services (CPC 87909)	1)	Unbound	1)	Unbound
	2)	None	2)	None
	3)	Subject to 50% foreign equity limitation.	3)	None
	4)	Unbound, except as indicated in the horizontal section.	4)	Unbound, except as indicated in the horizontal section.

Source: JEDCO and the Ministry of Trade

5.2 Analysis of legislative and administrative restrictions sub-sector according to the WTO/GATS four modes of supply

Cross border: There are no cross border restrictions. Event management companies in the MICE sector have been organizing meetings of various sizes in Jordan. The King Hussein Bin Talal Convention Centre has been witness to the growing MICE sector and has hosted international organisers and international events, including the World Economic Forum that is organised by the International Agency Publicis Graphics. Jordanian companies are not known to have ventured outside Jordan to organise MICE events in the region or internationally. If such activities have been conducted, however small a percent, they have been conducted with no knowledge of the government or other stakeholders.

JEDCO on the other hand does regulate cross border activities in its capacity as a regulator of exhibitions. The regulation is limited though, and should a company that does not require the help or assistance of JEDCO want to practice outside Jordan, there is nothing that can stop it from doing so.

Consumption abroad: There are no restrictions on this mode except if there are any restrictions from the receiving country. Therefore Jordanian companies can export their services to other countries. It then lies on the receiving country to impose any regulatory measures.

Temporary Entry of People / Movement of natural persons; temporary entry of people: No restrictions apply except for horizontal restrictions such as those placed by the Ministry of Interior regarding visas and restricted countries that need prior approvals before entry to Jordan. Existing labour laws with regard to certain nationalities and work permits may be applicable.

Establishment / Commercial presence**:** Commercial presence is allowed and encouraged; however, there is a limitation on foreign ownership as per the horizontal commitments.

5.3 Other restrictiveness measures if applicable

No significant barriers are found in Jordan. This in turn allows for more competition to grow in the country for outside competitors. Specifically, there are no limits either by numerical quota or economic needs on the following:

- Number of service suppliers
- Total value of service transactions
- Total number of services operations (i.e. quantity of output)
- Total number of people
- Type of legal entity

As mentioned above, there is a restriction of a maximum of 50% ownership for foreign companies registered in Jordan registered companies as MICE and conventions fall under the services sector[11]. Furthermore, for any percentage of foreign ownership, the capital raised is 50,000 Jordanian Dinars and a 100,000 Jordanian Dinar deposit has to be made for a residency and other permits required for the foreign owners working at the company

Other market restriction measures do rule competitiveness, for example JEDCO rules and regulations concerning the exhibition calendar in Jordan. Any company wishing to hold an exhibition needs to apply to JEDCO at least a month before the event and provide the information it requires (an application form exists). JEDCO reviews the submitted information and decides whether it will grant the organiser the permit to hold the event or not. JEDCO can stop an exhibition from taking place at the same time as another registered exhibition if they are marketing services/products of the same nature. JEDCO can apply a one month rule to these exhibitions therefore not allowing 'similar' exhibitions from taking place at the same time. JEDCO has the authority to define what constitutes 'same nature'.

6.0 Benchmarking

6.1 Benchmarking against international standards

There are no international standards that MICE organisers abide by in Jordan. However, JITOA has the below listing as part of its application form to be listed on the MICE directory:

Table 7: Professional Certifications Re MICE directory Listings

Destination Management Certified Professional (DMCP)
Certified Association Executive (CAE)
Certified Special Event Professional (CSEP)
Certified Meeting Professional (CMP)
Certified Destination Management Executive (CDME)
Certified Exhibit Manager (CEM)
Certified Meeting Manager (CMM)
Certified Incentive Travel Executive (CITE)
Professional Congress Organizer (PCO)
Certified Professional Catering Executive (CPCE)

Source: Ernest & Young Middle East Hotel Benchmark Survey MICE directory

[11] Companies Controller Department

6.2 Benchmark the competition from neighbouring countries

Competition from neighbouring countries can be restricted to the following:

- Lebanon
- Egypt – Sharm El Sheikh
- Cyprus
- UAE

Competition is very strong when it comes to accommodation and it is price in the region, with Sharm El Sheikh being extremely competitive; Jordan has not been able to keep up.

Table 8: Benchmark the competition from neighbouring countries

City	Occupancy			Average Room Rate			Rooms Yield		
	July 2008	2007	2006	July 2008	2007	2006	July 2008	2007	2006
	%			US$			US$		
Cairo	70%	77%	70%	128	127	103	90	99	73
Sharm El Sheikh	82%	76%	59%	57	56	47	47	43	28
Amman	71%	59%	52%	132	119	104	94	72	55
Beirut	69%	47%	27%	177	158	133	122	75	37
Dubai	78%	82%	86%	161	230	204	127	189	176
Abu Dhabi	72%	81%	78%	233	224	223	170	182	174

Source: Ernest & Young Middle East Hotel Benchmark Survey

Jordan has been very competitive with regards to the unique locations it offers its visitors and the Dead Sea has proved to be an extremely attractive location for international MICE events.

The UAE has become extremely competitive because of the luxury it provides its guests as well as the financial support it can offer through readily available sponsorship money.

6.2.1 Competitive strengths

Jordanian MICE capabilities have proved to be very high and extremely competitive in terms of international standards. High profile meetings such as the World Economic Forum that takes place at the Dead Sea definitely has a role in lifting the bar and confirming that Jordan is capable of producing such events. Competition to Jordan is twofold; cost and location. With regard to location Jordan has numerous advantages. However, financial incentives such as tax exemptions would definitely grow the sector further in Jordan. Furthermore, regulation of hotel room and transportation prices may be necessary in order for Jordan to be a competitor in the market as Jordan has lost pitches on cost in the past.

Beyond venues in the Capital and outside it (such as the Dead Sea), make Jordan an attractive location, meeting related services, such as audio visual requirements, office supplies, exhibition supplies, branding, print services, temporary staff, logistics including Airport meet & greet services + limo services are all available in Jordan, with ever-growing numbers of vendors and ever-increasing expertise.

According to the 2nd Middle East Meetings Industry Research Report 2008, the most important factors (in order) that suppliers believe influences their clients' decisions to hold events in the region are:

- Location
- Quality of Accommodation
- Quality of Service
- Quality of Meeting facilities
- Cost
- Security/safety
- Availability of venues/hotel rooms
- Weather
- Time of year
- Travel time

Table 9: Competitive Scores- Factors Deciding Destinations

Service	**Jordan**	**Lebanon**	**Egypt**	**UAE**
Location	4	2	1	3
Quality of Accommodation	2	3	1	4
Quality of Service	2	3	1	4
Quality of Meeting facilities	3	2	1	4
Cost	3	2	4	1
Security/safety	3	1	2	4
Availability of venues/hotel rooms	3	4	2	1
Weather	4	3	2	1
Time of year	2	3	1	4
Travel time	3	2	1	4
Competitive Score	29	25	16	30

Source: 2nd Middle East Meetings Industry Research Report 2008

The competitive score listed above shows that Jordan comes in second to the UAE in its competitiveness in attracting international MICE events.

6.2.2 Competitive weaknesses

However, as meetings are very much connected with travel and the arrival of delegates to Jordan from neighbouring countries and the world, the cost of travel has been one reason why Jordan has not been chosen as an ideal location for meetings, as well as its relative 'inaccessibility' in travel. Delegates have to transfer in order to arrive to Jordan

Cost of hotels and food is another impediment for the competitiveness of Jordan. Neighbouring countries offer much cheaper accommodation and F&B packages than Jordan. Furthermore, the number of rooms available is not always sufficient especially for larger events.

As per the table below, it becomes obvious that the competitive edge of Jordan becomes less as we look closer at the numbers in comparison to its direct neighbours. Sharm El Sheikh recently built a convention centre (which hosts the World Economic Forum every other year, on loan from Jordan) and therefore serves as a direct competitor to Jordan. The hotel rates in Jordan have been constantly on the rise since 2006, and though they remain very competitive when compared to the UAE which has taken a lot of business not only from Jordan, but from the whole region, the standards of accommodation facilities and services outweighs what Jordan can offer.

Table 10: Comparative Hotel Data

City	**Occupancy**			**Average Room Rate**			**Rooms Yield**		
	July 2008	**2007**	**2006**	**July 2008**	**2007**	**2006**	**July 2008**	**2007**	**2006**
	%			**US$**			**US$**		
Cairo	70%	77%	70%	128	127	103	90	99	73
Sharm El Sheikh	82%	76%	59%	57	56	47	47	43	28
Amman	71%	59%	52%	132	119	104	94	72	55
Beirut	69%	47%	27%	177	158	133	122	75	37
Dubai	78%	82%	86%	161	230	204	127	189	176
Abu Dhabi	72%	81%	78%	233	224	223	170	182	174

Source: Ernest & Young Middle East Hotel Benchmark Survey

6.2.3 Potential for growth

The sector is growing and its importance and impact on the economy is significant. It will grow with the introduction of new event organisers, new venues, more hotels and the enhancement of related services. The demand for exotic destinations such as Jordan for MICE events is on the rise. When the King Hussein Convention Centre was established in 2005, it enhanced the MICE sector at the Dead Sea and itself attracted an increased number of events.

As mentioned above, according to the 2nd Middle East Meetings Industry Research Report 2008, the most important factors (in order) that suppliers believe influences their clients' decisions to hold events in the region are:

1. Location
2. Quality of Accommodation
3. Quality of Service
4. Quality of Meeting facilities
5. Cost
6. Security/safety
7. Availability of venues/hotel rooms
8. Weather
9. Time of year
10. Travel time

IFP is a successful Lebanese company that has established offices all over the Middle East. In the 2006 it opened offices in Jordan and produced a very successful exhibition and conference, REBUILD IRAQ. The first year of operation it partnered with a Jordanian counterpart; the second year it established its own existence as IFP Jordan and held the exhibition and conference on its own. The Jordanian government and the Mayor of Amman encouraged, assisted and provided a number of privileges to IFP to encourage its establishment. IFP now owns and operates the Amman Exhibition Park.

Out of the above, 1, 3, 4, 6, 8 are the most relevant to Jordan. Jordan has a number of unique locations that serve as venues for MICE events as well as the extra-curricular activities that make any MICE event more successful. Quality of service is very high when we address the issue of event management companies as well as the services and products that come hand in hand with it. The quality of meeting facilities in Jordan has been an extremely important influence in choosing Jordan as a destination as the quality of these facilities is of high international standards. Jordan is a safe and secure destination and the weather in Jordan is always attractive.
Therefore, the competitive trends against Jordan for MICE events are that:

- Lebanon provides excellent service as well as a rich extra-curricular program.
- The UAE provides luxury, accessibility and sponsorship money (where applicable).
- Egypt provides extremely low costs for accommodation.

Furthermore, a new face of competition in Jordan has been the organisation of MICE events by non local, regional PR/advertising companies or even event management companies. This type of competition comes primarily from the UAE. MEED of the UAE, an experienced conference organiser, has organised events outside the UAE including the tourism conference held at the Dead Sea in 2006.

7.0 SWOT Analysis

7.1 SWOT Analysis table format

Strength	Weakness
Presence of Meeting Facilities	Expensive in terms of hotel rates
Presence of Professional Organizers	Transport Infrastructure in insufficient
Past record to host world class events	Accommodation shortages in peak seasons
Active support of the sector by King Abdullah II and the Government of Jordan	No Convention Bureau
	Lack of up-to date software use by conference organizers
	Taxes on events
Opportunities	**Threats**
Large global events	More popular sites such as Dubai and Lebanon
	Less expensive venues such as Sharm El Sheikh
	Perception of Political Instability
	Economic Crisis limits visitor potential from the Gulf, Europe and North America

7.1.1 Strengths

- Meeting facilities (The King Hussein Bin Talal Convention Centre) of International Standards
- Professional organizers; organisers with the experience and skill set to carry out MICE events.
- Past record as host to world class events

7.1.2 Weaknesses

- Expensive; Jordan unfortunately has expensive hotel rates compared to that of the region, which makes hosting MICE events in Jordan less attractive
- Transportation infrastructure inefficient; there is no systematic public transportation system in Jordan that enables the MICE sector to utilise. Shuttle buses have to be arranged for should a conference be held at the Dead Sea.
- Insufficient number of hotel rooms in peak seasons
- Non-existence of a 'Convention Bureau' that would promote Jordan as a MICE destination
- For the MICE industry, if the event is to include a performance of some sort, taxes and permits amount to 35% of the value of the contract.

7.1.3 Opportunities

- Large global events that are held around the world

7.1.4 Threats

- Primary Competitor is Dubai/UAE
- Levant area competition comes in the form of highly competitive pricing from Egypt, specifically Sharm El Sheikh where they have also built a convention Centre. Lebanon was a competitor but in view of its recent political instability (since 2006), business has been redirected towards Jordan.
- Competition from the region such as Sharm El Sheikh/Egypt and the UAE
- Potential political instability in the region or the perception of instability on the part of visitors from other regions.

> Independent assessment of the 2006 Bahrain Grand Prix event reveals that in total the event accounted for about 3% of Bahrain's Gross Domestic Product generating a total gross income of $394 million for the Kingdom's businesses and traders, becoming the single biggest source of income to travel and tourism sector, which employs 38,000 people. As a source of employment in itself, the Gulf Air Bahrain Grand Prix has an enormous impact on a population of 670,000. The number of temporary staff recruited to fill temporary jobs at the Bahrain International Circuit to cover the Grand Prix period is 505. A further 2,000 outside contractors are employed to ensure that the Grand Prix and all other supporting public and media events run smoothly and are well promoted.
>
> The headline figure of US$394 million comprises many different streams of revenue. Among these figures are those of the 2000 travelling staff and drivers from the Formula One teams, support race teams and organisers who spent a total of US$3.9 million on such essentials as accommodation, subsistence, logistics and transport. For example, expenditure by overseas visitors to Bahrain totalled US$284 million outside the circuit, which can be broken down as follows:
>
> - US$81,000,000 in accommodation and subsistence
> - US$21,000,000 in travel
> - US$109,000,000 in retail outlets
> - US$73,000,000 on entertainment
>
> Source:
> http://www.ameinfo.com/115960.html

8.0 Opportunity Scan

8.1 Identify sectors, sub sectors or clusters with employment generation potential and potential to increase national income

The MICE sector includes tourism and its by-products as sub-sectors as well as a number of clusters as identified below. Employment generation obviously increases with the increase of the number of MICE events taking place. It should also be worth mentioning here that part-time employment is very popular in MICE events, and certain events require a large number of these. iJordan is quoted as using 400 support staff employed over 2 days for an event they held.

The increase in the number of MICE events will obviously increase national income due to all the cluster linkages involved, as given below:

- Audio visual companies and their services and expertise
- Translation services
- Catering services
- Printing services
- Transportation (from airports and inside the city)
- Flights
- Hotel rooms
- Temporary staff
- Event management services

8.2 Identify investment prospects, joint ventures and export potential should be identifies and considered

Meeting facilities are available in Amman and the Dead Sea, but Amman needs more 'mature' facilities and the Dead Sea needs additional hotel rooms. Aqaba and Petra can potentially accommodate more meetings, leading to an increased number of employment opportunities and an increased number of events being held overall. The Municipality of Amman has ventured into the building of an exhibition and meeting centre in Amman. This should also increase the number of meetings and jobs accordingly.

Example of spending during a conference in October 2008 (excluding venue rental, Hotel rooms, catering requirements, AV expenditure and flights) which shows the cross-over of the different services. All the components below are part of the opportunities this sector can provide

Table 11: Conference costs per type of service provided

No	Category	Item	Description	Quantity	Unit cost	Occurrence/ days	Total Cost
1	**Exhibition Halls** (display areas for exhibition) - price includes furniture	Booth rental	Shell Scheme, for 3x3 booth (216m2)	22	495	1	10890
			Booth equipment (Plasma screens + DVD equipment)	22	175	1	3850
			Booth furniture rentals				
		Other requirements	CD players	2	50	1	
2	**Delegate Material & Collateral**	Delegate Badges	Printed plastic coloured badge	580	1.5	1	870
		Pouch	For maps	800	0.4	1	320
		Crew badges	For organizers, support staff and technical crew	320	1.5	1	480
3	**Office equipment & stationary**	Stationary		1	2257	1	2257
		Production Room					
		Misc stationary	Card, toner for printer				
4	**Documentation** (for documentation and archiving purposes)	Still photography	For airport & functional meetings	1	120	7	840
		Still Photography	For Plenary & breakouts			1	4000
		Dinner pictures	In tent, 500 printed copies A5	500	3	1	
		Photo shoot	Including 600 printed copies on A4	600	5	1	3000
5	**Misc requirements at the venue**	Water supply	During set-up	300	0.3	3	270
		Lunch boxes	For support staff located IN the venue				
		Catering Tent	For lunches	1	1500	2	3000
		Bedouin Tent	For 1st dinner, 1st day and 2nd day	1	750	1	750
		Camels		10	45	2	900
		Parade	For closing ceremony	1	350	1	350
		Plasma Screen	to create box shape in the centre	4	400	2	3200
		Plenary Hall set-up	Plan B set up inside Hall in case of Rain	1	900	1	900
6	**Administrative charges**	Insurance Policy	Public liability Insurance for the duration of the Event	1	1750	1	1750
		Gratuities		1			
7	**Stages**	Photo shoot	Levelled platforms	1	7000	1	7000
		Rostra camera platforms	For Philadelphia Hall + dinner areas	4	150	1	600
		Control desk flat age	Structure to hide desk	2	500	1	1000
		Bar	Zain's bar - with maintenance cost	1	3500	1	3500
8	**Total 3rd party costs**					**49727**	
9	**Sales Tax**					**7956.32**	
10	**Grand total**					**57683.32**	

Table 12: Cocktail Reception and Dinners

No	Category	Item	Description	Quantity	Unit cost	Occurrences / days	Total Cost
1	**Cocktail Reception**	Thematic settings	Cushions	86	5	1	430
			Sari Cushions (rent)	60	3.5	1	210
			Coloured pebbles	1	100	1	100
			Fabric on trees	16	40	1	640
			Candle blocks	70	20	1	1400
2	**Arabian Dinner 1st Night**	Argeeleh	Quote based on 200 per night, with 5 heads each + support staff	200	6	1	1200
		Theme generation	Satin implementation on trussing & gazebos	1	2500	1	2500
			Gazebos (rental)	6	300	1	1800
		Tables settings	1st Centrepiece (glass) small size	72	17	1	1224
			2nd Centrepiece (glass) Small size	12	17	1	204
			Table cloth (with underlay)	60	27	1	1620
			Candles + cleaning + refill	600	2.5	1	1500
		Furniture Hire	Lounges(to seat 60 pax)	60	15	1	900
			Tables	100	15	1	1500
			Chairs	600	3	1	1800
			Costumes	1	296.5	1	0
			Fountains (rental)	1	500	1	500
3	**Music Hall 2nd Night**	Argeeleh	Quote based on 200 per night, with 5 heads each + support staff	200	6	1	1200
		Theme generation	Velvet curtain on stage front trussing	1	2500	1	2500
		Furniture Hire	Lounges (to seat 500 pax)	500	15	1	7500
			Big Lampshades(rental)	15	100	1	1500
			Stools	60	10	1	600
			Bars (to seat 60 pax)	10	150	1	1500
4	**Others (misc)**	Labour	Brought in for the 2nd night due to the bad weather time restraint	30	25	1	750
			Gas Lighters	20	1	1	20
		DJ	Music for all 3 evening events	1	450	3	1350
		Stage for fountain	platform for the fountain to sit on	1	250	1	
		Stage for dinner	Lower terrace entertainment stage	1	5000	1	5000
5	**Total 3rd party costs**						**39448**
6	**Sales Tax**						**6311.68**
7	**Grand total**						**45759.68**

Table 13: Branding

No	Category	Item	Description	Quantity	Unit cost	Occurances / days	Total Cost
1	**Branding** (venue and Event branding requirements varying according to Venue)	Branding requirements as per branding team	Reception Desk at A	1	2700	1	2700
			Reception Desk at B	1	2600	1	2600
			Reception Desk at the C	1	2660	1	2660
			Reception Desk at the D	1	2700	1	2700
			Bus stop	4	800	1	3200
			Paintings at the X	63	100	1	6300
			X banners	24	50	1	1200
			Airport welcome sign	8	50	1	400
			Directional signage at the A	1	650	1	650
			Entrance Tower X	3	1200	1	3600
			Directional signage at the X	13	400	1	5200
			Lobby towers@ X	4	900	1	3600
			Backdrop for Interview Room	1	1500	1	1500
		Outdoor branding	Material in colours for wrapping trees	11	100	1	1100
			Bus branding	132			
		Other branding reqs	Posters (A3)	200	0.8	1	160
		Delegates	Stickers for welcome pack for t-shirt sizes identification S/M/L/xL/xxL	600		1	0
			Screen at Help desk X	1	400	2	
			Rubber bands for luggage tagging		4.75		
2	**Plenary Hall**	Hall	Stage	1	5000	1	5000
			Moon Effect	1	20000	1	20000
			Earth structure	1	2000	1	2000
			Man on the moon (di cuts)	4	150	1	600
			Moon walk stickers	200	1.2	1	240
			Parade	1	2400	1	2400
			High definition images	1		1	0
3	**Total 3rd party costs**						**67810**
4	**Sales Tax**						**10849.6**
5	**Grand total**						**78659.6**

Table 14: Meet and Greet and Transportation services

No	Category	Item	Description	Quantity	Unit cost	Occurrences / days	Total Cost
1	**Meet, Assist & Transfer** (this item is for meeting and assisting guests, delegates and speakers at the airport and transporting them to the venue)	Meet and greet	VIP Meet and greet at Queen Alia International Airport	500	5	1	2500
		Visas		600	10	1	6000
		Flights	Guest speaker	1	8894	1	8894
		Departure assistance	Departure assistance @ Queen Alia International Airport	600	5	1	3000
		Transfers - Car	Transfers by car (max 3 people) from Airport to Dead Sea Hotel & vice versa	50	50	2	5000
		Transfers - Bus	Transfers by Bus from Airport to Dead Sea Hotels and vice versa for 30 seat bus	10	312	2	6240
		Transfers - Bus	Transfers by Bus from Airport to Dead Sea Hotels and vice versa for 50 seat bus	10	460	1	4600
		Transfers	From Amman to Dead Sea including Hyatt shuttle	4	495	4	7920
		Luggage Truck		10	150	2	3000
		Coffee break at airport		1	3300	3	9900
2	**Transportation** (This section covers all transportation needs during the Event)	Shuttle service	Shuttling delegates from Parking lots and Hotels to the Meeting Venue & back (30 seats shuttle)	10	355	3	10650
		Shuttle service	1 bus to serve as shuttling for 2 days prior to conference	1	355	2	710
		Chauffer cars	Chauffer driven cars for VIPs	15	160	4	9600
		Chauffer cars	Chauffer driven cars for VIPs				
		Runner	Runner cars for errands during the Event	2	90	8	1440
		Van	For team members	1	150	8	1200
		Trucking	To the Dead Sea	4	400	2	3200
3	**Staffing** (for the smooth flow of events)	Tour Operator Representative	For flight reconfirmation and tour bookings at the X	2	200	2	800
		Tour Operator Representative	For flight reconfirmation and tour bookings on the 26th of October at the Hotels	3	200	3	1800
4	**Total 3rd party costs**						86454
5	**Sales Tax**						13832.64
6	**Grand total**						100286.64

A thriving MICE industry will contribute directly to employment opportunities as it is very much labour intensive. It accounts for the sustainability of jobs or a specific number of jobs in the hotel and transport industries and as it is less seasonal than tourism strictly speaking. Furthermore the MICE industry contributes to the growth of conference-related professions through direct suppliers and intermediaries. Exact data on the MICE sector is not available; however the MICE sector has always been composed of smaller companies that rely heavily on outsourcing and part-time employment to maintain sustainability in their work.

According to the Ministry of Tourism, the tourism sector employed 36,406 people in 2008. This number includes hotels, restaurants and travel agencies. This is an increase from 22,110 in 2003. Travel agencies which are one of the service providers for the MICE sector amounted to 3,625 employees in 2008. For a fruitful MICE sector, the whole tourism sector needs to develop. The Siyaha project [12]has embarked on a number of training and capacity building projects for the benefit of the tourism sector as a whole.

8.3 Identify trade in services potential a/c to the standard WTO/GATS Modes 1-4

8.3.1 Potential for Inward Investment (MODE 3)

The commercial presence of a company in a country other than its domestic market is not being pursued by MICE companies in Jordan

Off-shoring (Mode 2)
A service consumed abroad; there are no signs of this being done.

Exporting Services (Mode 1)
There is also no indication that Jordanian companies are Provision of a service across a national border; there are no signs of this being done

9.0 Constraints to Development

9.1 Constraints for the sector including but not limited to technical, educational, institutional, human skills both in terms of sector growth and trade in services

- Space, with more and bigger MICE events, there is a need for larger venues and more rooms for accommodation
- Joining efforts; the establishment of a Convention or MICE bureau would mean the consolidated efforts for enticing bigger and better events for Jordan
- At the moment, MICE events come from one of two directions: The individual or organization coming up with a concept or initiative and implementing it or NGOs/Public sector or civil society coming up with a concept or initiative and asking MICE organizers to implement it. There is no entity that works as a think tank to introduce concepts and initiatives and create MICE events out of them. There is no consolidated effort on that front.
- JEDCO needs to be re-evaluated in terms of how it can service the sector and not hinder its growth
- Another point worth considering touches upon the MICE sector, but is more applicable to the Concert and Festivals sector, mainly that of taxes; the ministry of Finance levies an abnormally high tax on public events (including concerts) which amounts to 35% on the

[12] Siyaha Project is a USAID project that tackles issues on tourism in Jordan

value of the artists’ contract, as well as 36% on each ticket sold. For the MICE industry, if the event is to include a performance of some sort, taxes and permits amount to 35% of the value of the contract.

9.2 Related policy factors

It is therefore evident from the above that this sector is a very important one that the Government Jordan and investors should pay specific attention. Being a heavily service sector oriented country, the knowledge, professionalism and human resources to build and excel in this sector is present. Coupled with our unique locations that will attract business (such as the Dead Sea and Petra), a real effort should be made by the sector to create a professional board to assist the work of service providers, and a real effort by the government to facilitate the process (visa applications)

9.3 Specific recommendations for remedial action

1) The establishment of a MICE bureau to promote Jordan as a destination.
A serious call for a MICE or Conventions Bureau should be supported and encouraged. The body should not act as a regulator, but as a strong marketing body which can lobby for the very large events that take place around the world and ‘pitch’ for them to be held in Jordan. Simple guidelines can also be introduced to *properly* create membership, it will also mean that the sector can combine forces when necessary as well.

2) Membership/database development with regard to individuals and organizations working in it to maintain professional standard

3) Data collection to document sector activities.
At the moment, a number of entities that ‘touch’ upon the MICE sector but there is no body that records what is going on in the sector. Even the number of meetings held in the country over the past year has not been documented. There is a strong need for data collection and database development for the sector.

4) Government involvement should be restricted. JEDCO regulations severely hamper the number of exhibitions and their involvement in the sector is viewed as negative by sector participants.

5) The involvement of various entities in the sector should be streamlined and coordinated. The entities that are in some way involved in the MICE sector are numerous:

- Ministry of Industry and Trade
- Jordan Enterprise Development Corporation
- Jordan Investment Board
- Jordan Tourism Board
- Ministry of Tourism
- Jordan Inbound Tour Operators Association / MICE
- Jordan Hotel Association
- The Ministry of Interior

Annex 1: **CPC Code**

I. Convention Services CPCprov code <u>87909</u>

Convention services is included in CPCprov Subclass: 87909 - Other business services n.e.c: services generally provided to businesses, not elsewhere classified. Demonstration and exhibition services are also included in this subclass. The elements of convention services are not delineated in CPCprov, or in CPC version 1 and version 1.1. However proposed inclusion of Convention Services under subsection 6785 in forthcoming versions of the code list the following services:

Proposed inclusions:
6785 Convention support and tourism promotion services

67851 Convention planning, assistance, and support services – This subclass a variety of convention or meeting planning and support services provided on a commission or fee basis:

- assistance in locating meeting space
- escorted site inspections
- negotiating group discounts with hotels, food services, and other providers of convention services
- preparation and presentation of destination details
- provision of personnel and support for registration services
- providing contact data for local market florists, photographers, and other service providers
- assisting attendees with arrangement of shuttle or limo service, VIP services, etc.

II. Exhibition Services CPC Ver.1.1 code <u>859</u>

Exhibition Services are delineated in Version 1.1 as:Group: <u>859</u> – Other support services

Class: <u>8597</u> – Trade fair and exhibition organization services

Subclass: 85970 – Trade fair and exhibition organization services

This subclass includes:

- organization of economic events (trade shows or exhibitions, at regular or irregular intervals)
- organization of scientific or cultural meetings and congresses
- supply and setting-up of exhibition equipment associated with the organization of exhibitions

UNSTATS CPCProv:
http://unstats.un.org/unsd/cr/registry/regcs.asp?Cl=9&Lg=1&Co=87909

UNSTATS CPC Version 1.1:
http://unstats.un.org/unsd/cr/registry/regcs.asp?Cl=3&Lg=1&Co=8597

Annex 2: Questionnaire

Convention Services Sub Sector

<u>Note:</u> Unless specified, please give information for the latest year available and indicate which year. If insufficient space is provided, please attach additional information on separate sheets.
Please report all monetary values in their reported currencies.

Within this section of the questionnaire, two concepts will be frequently encountered: **commercial presence** and **cross-border supply**. They are alternative modes of supply and are defined by the WTO in the context of the GATS schedules of commitments. To avoid confusion, a preliminary discussion of the two concepts is necessary. Foreign suppliers provide services according to the <u>"cross-border"</u> mode if they <u>operate from their own country without establishing a local branch or subsidiary or acquiring shares in a firm located in the country to which the service is destined</u>. The "<u>commercial presence</u>" mode of supply means exactly the contrary, i.e<u>. the foreign firms establish locally in the country where they want to supply the service and open a branch, subsidiary or participate to the capital of a local firm</u> (the share can go up to 100%).

A. Market Access

Commercial presence

1. Are there policy restrictions to new entry (refer only to commercially-established[13] operators)?

Service type	Entry by any firm	If yes, total number of firms allowed	Entry by firms with foreign participation[14]	If yes, number of firms with foreign participation allowed
---	☐No☐Yes		☐No☐Yes	
---	☐No☐Yes		☐No☐Yes	
---	☐No☐Yes		☐No☐Yes	
---	☐No☐Yes		☐No☐Yes	
---	☐No☐Yes		☐No☐Yes	

2. If entry is restricted, what are the reasons provided by the government?

Use the definitions below to fill in the table:

1—To give incumbent operators time to prepare for competition. If so, please specify time given.
2—To increase government revenue from privatization or license fees
3—Exclusive rights believed necessary to attract (strategic) investment. If so, please specify time given
4—It is believed that market can sustain only a limited number of operators
5—Strategic activity reserved to the state.
6—To protect the industry.

	Reasons

[13] The term commercially-established refers to locally-established operators.
[14] This category also includes branches and subsidiaries of foreign suppliers.

Service (Give reasons for each service or sub-sector)	1	2	3	4	5	6	Other (describe in brief)
--							
--							
--							
--							
--							

Cross-border supply

3. Are there restrictions on cross-border entry of foreign service providers on the ------ market?

☐ No ☐ Yes

If yes, what are the instruments used to implement restrictions?

☐ Bilateral agreements specifically related to the sector or agreements where the sector is mentioned therein
☐ Other: ____

4. If entry is restricted, what are the reasons provided by the government?

To prepare incumbent operator (s) for competition:	☐
Market is believed to sustain a limited number of operator (s)	☐
To protect the regulated rail industry Others (explain)	☐

5. Bilateral ….. Agreements

Type of bilateral agreements	Number of signed bilateral agreements	Number of operational agreements
---		

Others (please elaborate)		

6. Please fill in the following information referring to clauses in <u>operational</u> bilateral agreements:

a) Tariff clauses in bilateral agreements

	Total number of bilateral road agreements
--	

--	
--	
Other mechanism of setting tariffs (please describe in brief)	

b) Capacity clauses imposed on foreign companies

	Total number of bilateral agreements
No capacity constraints	
Capacity constraints	

c) Number of foreign companies

	Total number of bilateral agreements
No number constraints	
Number constraints	

d) Modes of delivery specification for the foreign companies

	Total number of bilateral agreements
Routes not specified	
Routes specified	

B. Ownership

7. Is private ownership in the provision of services through commercial establishment allowed?

Services	Existing operators	Maximum private equity permitted (%)	New entrants	Maximum private equity permitted (%)
	☐No☐Yes		☐No☐Yes	
	☐No☐Yes		☐No☐Yes	
	☐No☐Yes		☐No☐Yes	
	☐No☐Yes		☐No☐Yes	
	☐No☐Yes		☐No☐Yes	

8. Does government (national, state or provincial) hold equity stakes in a national business company?

Services	Government equity participation	Equity participation (%)	Name of company
	☐No☐Yes		
	☐No☐Yes		
	☐No☐Yes		
	☐No☐Yes		
	☐No☐Yes		

8.1 If yes, are there any statutory or other legal limits to the number or proportion of shares that can be acquired by foreign investors in those companies?

Services	Foreign equity participation	Foreign Equity participation (% or number)	Name of company
	☐No☐Yes		
	☐No☐Yes		
	☐No☐Yes		
	☐No☐Yes		
	☐No☐Yes		

8.2 If yes, are there any legal constraints to the sale of the equity held by the government in publicly controlled companies?

	Legal constraints
	☐No☐Yes
	☐No☐Yes
	☐No☐Yes
	☐No☐Yes
	☐No☐Yes

9. Is owner-operators allowed in the in any of the service markets?

Name	Year first offered services	Designated to provide international services	Market share		Is the firm federal, state or provincial?
			National	International	
		☐ No ☐ Yes			
		☐ No ☐ Yes			
		☐ No ☐ Yes			
		☐ No ☐ Yes			
		☐ No ☐ Yes			
		☐ No ☐ Yes			

C. Market Structure

10. Please list below the characteristics of all commercially-established companies operating in Jordan.

Name	Year company first offered services	Designated to provide international services	Market share		Is the firm federal, state or provincial?	Owners of capital and their respective shares (domestic/foreign)
			Nat-ional	Inter-national		
		☐ No ☐ Yes				
		☐ No ☐ Yes				
		☐ No ☐ Yes				
		☐ No ☐ Yes				
		☐ No ☐ Yes				
		☐ No ☐ Yes				

11. Do providers participate in informal cartel? ☐ No ☐ Yes If yes, please describe.

12. Please indicate the total number of foreign companies providing services cross-border:

Services

13. Please list the characteristics of the 6 most important commercially-established operators for the following services:

Name of firm	Year of service commencement	Market share	Owners of capital and their respective shares (domestic/foreign)

D. Regulation

14. Institutional status of sector regulator		
	For providers	
When was the regulator established?		
Is the regulator an institutionally independent agency?[15]	☐ No ☐ Yes	
How is the sector regulator financed?		
License and other fees (%)		
State budget (%)		
Other _________________ (%)		
How many technical and economic professionals are employed?		

15. What are the main requirements of companies to operate in the sector?

Type of service	Requirements

16. Price regulation

a) Does the government or regulatory agency regulate tariffs?

On … ☐ No ☐ Yes

On …. ☐ No ☐ Yes

b) If yes to a), please explain

c) If no to a) how are abuse of monopoly power (cartel) and/or predatory pricing dealt with?

d) Does the government or regulatory agency provide pricing guidelines tor some services?
Service… ☐ No ☐ Yes
Service … ☐ No ☐ Yes
etc

e) Are professional bodies or representative of trade and commercial interests involved in specifying or enforcing pricing guidelines or regulations?
On service tariff ☐ No ☐ Yes
On service ☐ No ☐ Yes

17. Regulation on entry of new business

17.1 Licenses

[15] "Institutionally independent" means that the regulator is not part of the ministry and is not linked to the operating entity.

a) If the number of providers is not restricted by policy, specify the main conditions new entrants must fulfill

Service	Payment of license or permit fee (indicate amount in local currency)	Obtainment of concession, or franchise by a level of government	Other (describe in brief)

b) If the number of providers is limited by policy, through what mechanism are licenses or concessions allocated?

Service	Competitive tender	First come, first served	Public hearings	Other discretionary mechanism	Other (describe in brief)

c) Who does issue license?

Service	Government	Regulatory agency	Other (describe in brief)

d) Does the regulator, through licenses or otherwise, have any power to limit industry capacity? ☐ No ☐ Yes

If the answer is "No", are any of the following constraints in place? ❑ ❑

a) complete prohibition ❑ ❑

b) limitations ❑ ❑

c) domestic requirements for government (public procurement) ❑ ❑

d) restrictions on foreign firms ❑ ❑

e) other (please specify) ______________________________

17.2 Registration

a) Is registration in any register required in order to establish a new business?
☐ No ☐ Yes

b) In order to operate nationally, does an operator need to notify any level of government or regulatory agency and wait for approval before the operator start business? ☐ No ☐ Yes

If establishing a business in national services is subject to either of the procedures in a) or b) of the previous question, please answer the following questions:

a) are criteria other than technical and financial fitness and compliance with public safety requirements considered in decisions on entry of new operators?

b) does an authorisation to operate cover the entire country?

c) is the authorisation to operate limited in duration?

d) are authorisations to operate transferable?

17.3 Do above entry regulations apply to an owner-operator? ☐ No ☐ Yes

17.4 Does an authorization (license, permit, concession or franchise) to operate extent to the entire territory of the country? ☐ No ☐ Yes

17.5 Is the authorization transferable? ☐ No ☐ Yes

17.6 What is the average amount of time that the responsible agency may take to reach a decision about a complete authorization? _______________

17.7 How many agencies are involved in examining the authorization?

18. Discrimination between foreign companies and domestic ones.

a) Do foreign firms have the same right to operate in the domestic market as domestic firms?
☐ No ☐ Yes

b) If no, are any of the following constraints in place:
i) complete prohibition ☐ No ☐ Yes
ii) limitations ☐ No ☐ Yes
iii) restrictions on the possibility for foreign firms to operate
☐ No ☐ Yes
iv) Others:

c) Do foreign companies have social obligations without adequate compensation?
☐ No ☐ Yes

d) Does the government provide subsidies to domestic companies?
i) Bus ☐ No ☐ Yes
ii) Truck ☐ No ☐ Yes

e) Are there any regulations setting conditions for operation periods?

f) Do regulations prevent or constrain any value added services: specify below

a) ….

b) …..

c) …..

d)

g) Within the last five years, have laws or regulations removed restrictions on certain services:

a) …

b)

19. Public consultation and transparency

a) Which of the following are consulted in advance of regulatory decisions?

☐ Service providers
☐ Consumer groups
☐ User industries
☐ Other: ____________________

b) How are laws and regulatory decisions made public?

☐ Published on the regulator's website
☐ Published in an official gazette
☐ Other: ____________________

E. Past and Future Changes in Policy

22. Please indicate major changes in market access policies, ownership rules, and regulation since 1990. (e.g., domestic liberalization, implementation of free trade agreements, joining of regional trade agreements, privatization etc.) Please attach copies of laws and regulations, if possible.

Area of policy change (market access, ownership or regulation)	Year of change	Description of change

23. Please indicate announced or anticipated changes in the same areas.

Area of policy change (market access, ownership or regulation)	Anticipated date	Description of change

F. Regional Integration Agreements

24. Please indicate if there are any preferential arrangements affecting …. services, and list the preferential measures.

Name of agreement	Partner country(s) in agreement	Date of entry into force	Preferential measures

G. Employment

25. Main indicators (for the years 1990-2007). How many people are employed by the main national companies?

How many people are directly employed in the provision of services? _________
What share of the total labor force is directly employed in the provision of services? __________
What share of workers is employed by foreign-owned operators providing … services? __________
What is the annual average wage in this sector?________

If available, please attach time series data on these employment indicators them separately. If time-series data from 1990 to 2005 is not available, please collect indicators for the years 1990, 1995, 2000 and 2005.

H. Investment

26. Investment indicators (for the years 1990-2005)			
Service	Total amount of investment	Total amount of foreign direct investment	Total stock of foreign direct investment
If time-series data from 1990 to 2005 is not available, please collect indicators for the years 1990, 1995, 2000, 2005 and 2007.			

I. Prices

27. Please fill in the table below. If time series data are available, please attach them separately (preferably electronically).

Service	Price (in local currency)	Date	Comments

J. Quality and Access to Services

28. Please fill in the following indicators of quality and access to services.

Indicator	Value	Date	Comments

K. Innovations

29. Do ….companies adopt the following technological innovations?

Innovations	If yes, how many companies out of ten major ones adopt it?
☐ Technological ….related innovations.	
☐ Improved computer systems and administrative controls	
☐ Improved …. systems	
☐ Improved facilities	
☐ Internet	

Please, provide the name and contact information of the respondent of this questionnaire, or of a specialist from whom we can obtain clarifications if necessary.

Name____

Telephone____

Fax____

E-mail address:____

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