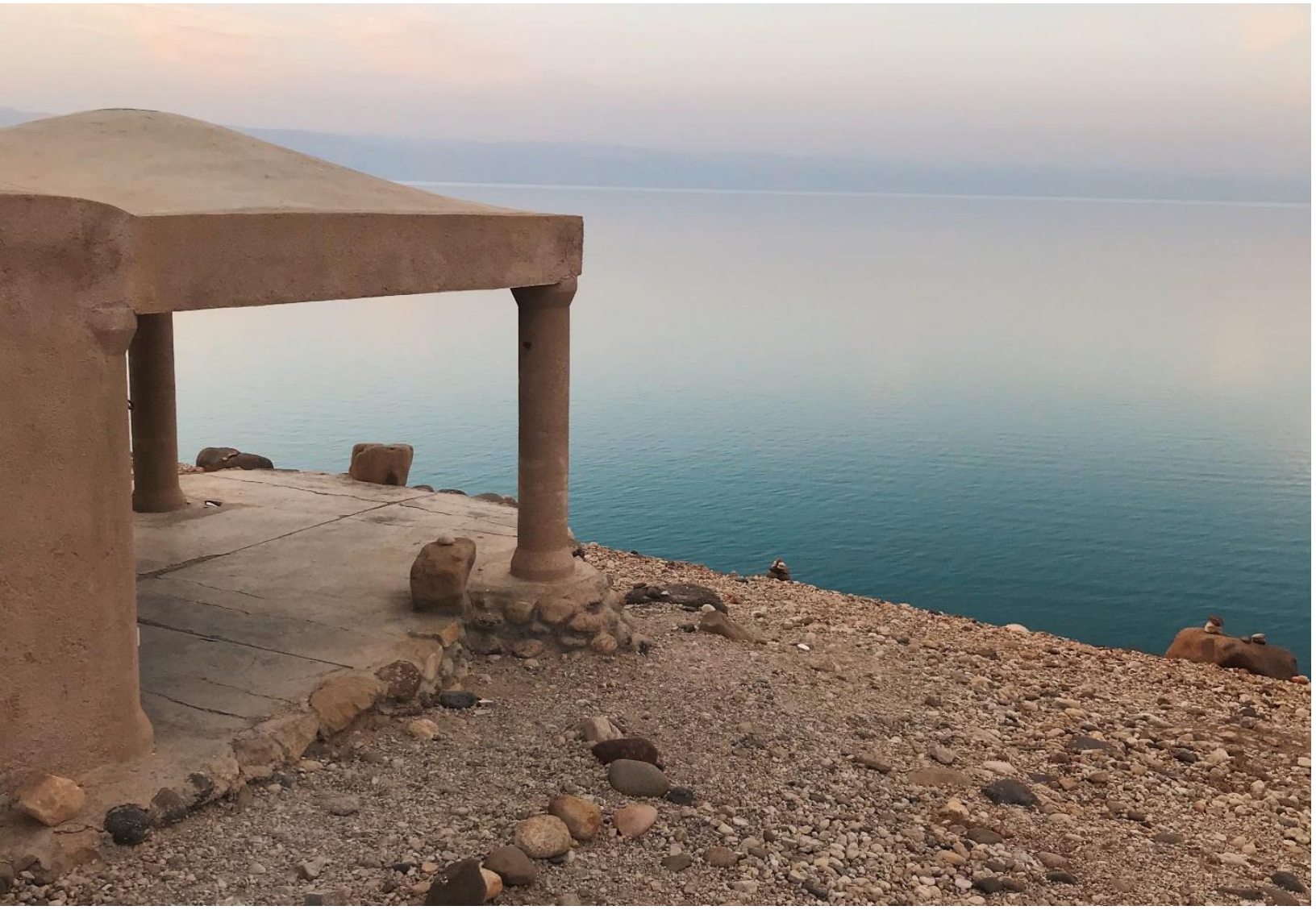
Jordan
Country Profile



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Regional Activity Centre for Sustainable Consumption and Production

1. Introduction

The Kingdom of Jordan is modern, business-friendly and one of the most stable locations for SMEs and Entrepreneurs in the Levant region.

Jordan was able to maintain an average yearly GDP growth of 2.4[1] between 2011 and 2019, despite shouldering the impact of a massive influx of Syrian refugees since the start of the conflict in Syria (2011). The current number of Syrian refugees in Jordan is around 1.3 million and accounts for over 10% of the Kingdom's population[2].

Finally, unemployment rate in Jordan is around 18.6% (16.5% among men and 26.8% among women).

Quick Fact[3]	
Population	10.3 millions[4]
GDP per capita	4,278 USD
10-year average annual GDP growth	2.2 %
Ecological footprint	2.1 gha/capita[5]
Renewable energy consumption share	3.2%
Unemployment rate	18.6%
Global Gender Gap Index 0-1 (gender parity)	0.6

Water in Jordan

Jordan is one of the most water-stressed countries in the world[6]. Accessing adequate quantities of water in Jordan is a daily challenge due to recurring droughts, overconsumption of water, inefficiencies in distribution and low naturally occurring water resources. Climate change is exacerbating this situation, linked to a decrease of 20% in annual precipitation over the last few decades and severe water shortages[7].

[1] World Bank national accounts data and OECD National Accounts data files. World Bank. https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=JO
[2] 10 Facts About the Syrian Refugee Crisis in Jordan. World Food Program USA. https://www.wfpusa.org/articles/10-facts-about-the-syrian-refugee-crisis-in-jordan/
[3] The Global Competitiveness Report 2019. World Economic Forum. http://www3.weforum.org/docs/WEF_TheGlobalCompetitivenessReport2019.pdf
[4] Jordan in figures 2018. Department of statistics. http://dosweb.dos.gov.jo/products/jordan-in-figure2018
[5] CO2 emissions (metric tons per capita): Jordan. World Bank. https://data.worldbank.org/indicator/EN.ATM.CO2E.PC?locations=JO
[6] Ministry of Water and Irrigation (MWI). Water Reallocation Policy 2016; MWI: Amman, Jordan, 2017. http://extwprlegs1.fao.org/docs/pdf/jor159136.pdf
[7] International Water management Institute (IWMI), Groundwater Governance in Jordan: The case of Azraq Basin, 2017 https://horizon.documentation.ird.fr/exl-doc/pleins_textes/divers18-06/010072982.pdf

Nevertheless, Jordanians are more and more conscious about the problem of water scarcity and its short- and long-term impacts. Therefore, initiatives related to water usage reduction or optimizations have regular support from the government and a praising from the population.

2. Policy and regulatory framework

From a policy perspective, one of the key frameworks impacting the circular economy in Jordan is the National Energy Efficiency Action Plan (NEEAP).

Launched in 2012, NEEAP is an umbrella of policies aiming to increase national energy efficiency and encourage renewable energy initiatives. NEEAP includes six main Sectorial Targets with their corresponding measures: The Residential Sector, The Industrial Sector, The Commercial Sector, Water Pumping, Street Lighting, and Development & Free Zones (DFZC).

NEEAP allows households and business to produce clean electricity and sell it back to the grid.

NEEAP encourages private-sector investment in renewable energy and contains guidelines on implementation of renewable energies and energy-efficiency measures. Moreover, it exempts all eco-friendly systems and equipment for renewable energy projects from customs duties and sales tax.

Nonetheless, **an exhaustive list of products exempted from tax does not exist**, and clear criteria to benefit from this tax exemption have not been established. Therefore, some items like solar panels can be easily exempted from tax, while more complex or non-traditional components or items for circular economy projects require complex procedures and are often not exempted.

NEEAP also set the foundations of the Jordan Renewable Energy and Energy Efficiency Fund (JREEEF) that provides grants for energy projects and guarantees investors' funding requirements. REEF is financed by national and international institutions, has a legal identity and is financially and administratively independent.

Both national and foreign private companies are allowed to apply for the Fund's support when setting up renewable energy projects. It provides renewable energy subsidies to privately operated and owned facilities; interest-rate subsidies on commercial loans, a public equity fund to support the deployment of private investment in the sector, a renewable energy guarantee facility to ease credit access for energy efficiency and renewable energy project developers, research, technical cooperation grants for targeted programs, and feasibility studies[8].

NEEAP also established a **net-metering scheme** for small renewable energy systems (rooftops) with fixed purchase prices for excess power. The relevant directive allows the consumers to install, use and connect renewable energy systems (solar, wind, bio-energy, geothermal, small hydro) to the grid if their expected generation does not exceed their average monthly consumption for the previous year. A reference price list record is used to calculate a ceiling for electricity purchase prices from renewable energy sources.

Another important milestone in Jordan's environmental policies was reached in 2015, when Jordan's Ministry of Environment developed its SCP National Strategy and Action Plan 2016 - 2025 with the involvement and support of stakeholders and partners (including SwitchMed). This strategy and action plan translates into strategic objectives and identifies operational objectives and specific actions for three selected priority areas: Agriculture/Food Production, Transport, and Waste Management[9].

[8] Case Study on Policy Reforms to Promote Renewable Energy in Jordan. ESCWA.
[9] Jordan's SCP National Strategy and Action Plan. Switchmed. https://switchmed.eu/wp-content/uploads/2020/04/01.-SCP-NAP-Jordan.pdf

On the 6th of July 2020, the Ministry of Environment launched the Green Growth National Action Plan 2021-2025 (GG-NAP). Developed by the Ministry of Environment with the support of the Global Green Growth Institute (GGGI), the GG-NAP is a multi-sector implementation plan that will support Jordan's economic growth objectives through six sectors: Energy, Waste, Water, Transport, Agriculture and Tourism.

Green Growth National Action Plan: Energy sector

In the last decade, the electricity sector has witnessed significant growth in Jordan, with the installed capacity of combined cycle increased by around 70% and the share of renewable energy installed capacity risen to around 10%. Until 2015, the electricity sector in Jordan was dominated by conventional energy sources, but with the implementation of several utility-scale PV and wind projects, the share of renewable energy in the electricity mix is above 10%[10]. The country expects to be able to achieve renewables of 35% of total installed capacity by 2023[11].

The Energy Sector Green Growth National Action Plan 2020-2030 aims to secure clean energy self-sufficiency. GG-NAP recognizes energy as critical infrastructure and service sector required for other economic sectors to function. Therefore, GG-NAP considers investing in sustainable energy a critical green growth enabler[12].

The Energy Sector GG-NAP 2021-2025 has been developed with this aim in mind, and would lead to the following transformational impacts:

- Supports Jordan's objectives to achieve a cleaner energy mix through renewable energy and a reduction in national GHG emissions of 14%.
- Promotes the revitalization of the energy services market and the pursuit of energy sector innovation as a driver of future economic growth and employment.
- Increases the readiness of key national institutions to attract climate finance.
- Emphasizes the importance of achieving energy efficiency through green building and construction, electric transport, and appliances[13].

Twelve priority actions were identified to achieve green growth through the energy sector, including:

- 4 investment preparation and demonstration actions: These projects are at various levels of readiness: some require feasibility analysis, while others are investment-ready. Many are suitable candidates for public-private partnerships or direct private sector investment, and others are opportunities to leverage climate finance.

- 8 enabling policy and institutional reform actions: Given current gaps in available fiscal resources, these actions intend to attract investment by address policy barriers and capacity gaps that lead to higher costs, risk levels or uncertainty in decision making. These include programs to support innovation, institutional reform and coordination[14].

Green Growth National Action Plan: Waste sector

The GG-NAP developed for the Waste sector translates Jordan's green growth vision into concrete implementable actions to support environmental and climate targets, while also achieving sustainable economic growth objectives[15]. Over 50% of the waste generated by

[10] Energy Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.
[11] NEPCO Annual Report 2018. NREAP 2018-2023
[12] Energy Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.
[13] Energy Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.
[14] Energy Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.
[15] Waste Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.

households in Jordan is food waste[16], and the recycling rate for municipal waste is low (7%), even when compared with the average of 10% across the GCC states for instance[17]. Other types of waste, such as hazardous waste, medical waste, construction and demolition waste and electronic waste are also generated in substantial or growing volumes in Jordan, with inadequate treatment and disposal means and generally weak enforcement regimes. In terms of the environmental impact, landfilled waste is an important component of Jordan's GHG emissions profile, contributing 10% of GHG emissions[18], a figure that is expected to grow with the population[19].

The waste sector illustrates the challenges and opportunities of shifting to more resource-efficient urbanization and, ultimately, a more circular economy. Therefore, the Waste Sector GG-NAP has been developed with this aim in mind, and would lead to the following transformational impacts:

- Increases diversion of waste away from landfills, through the reduce, recycle and reuse approach;
- Builds a 'virtuous cycle' a sustainable business model which offsets the cost on waste management for urban areas
- Encourages private sector investment and job creation in the circular economy through innovation, market development and public-private dialogue
- Mainstreams critical waste streams into sector priorities, including construction and demolition waste, e-waste, hazardous waste

The Waste Sector GG-NAP also identifies 16 priority actions to achieve green growth through the waste sector, including:

- 7 investment preparation and demonstration actions: these projects are at various levels of readiness: some require feasibility analysis, while others are investment-ready. Many are suitable candidates for public-private partnerships or direct private sector investment, and others are opportunities to leverage climate finance.
- 9 enabling policy and institutional reform actions: Given current gaps in available fiscal resources, these actions intend to attract investment by address policy barriers and capacity gaps that lead to higher costs, risk levels or uncertainty in decision making. These include programs to support innovation, institutional reform and coordination.

The implementation of these actions will require a mix of public, private sector and donor support for implementation. Waste Sector GG-NAP also sets climate change targets and aims to build resilience to catastrophic events such as the COVID-19 pandemic.

Green Growth National Action Plan: Water sector

As mentioned previously, extreme water scarcity is one of the Jordan's greatest challenges. Water scarcity threatens Jordan's economic growth potential, environmental sustainability and social development.

Jordan is one of the most water scarce countries in the world[20], as a result of low naturally occurring water resources, recurring droughts, overconsumption of water, and inefficiencies in distribution. Climate change is exacerbating this situation, linked to a decrease of 20% in annual

[16] SWEEPNet, GIZ (2014) Country Report on the Solid Waste Management in Jordan.
[17] Based on statistics consolidated by Statista: https://www.statista.com/statistics/516456/rate-of-recycling-worldwide-by-key-country
[18] United Nations Climate Change. https://www4.unfccc.int/sites/ndcstaging/PublishedDocuments/Jordan%20First/Jordan%20INDCs%20Final.pdf
[19] Waste Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.
[20] Ministry of Water and Irrigation (MWI). Water Reallocation Policy 2016; MWI: Amman, Jordan, 2017.

precipitation over the last few decades and severe water shortages. Water pollution, limited surface water supplies, and over abstraction have all taken a toll on ecosystem services[21].

The current National Water Strategy 2016-2025[22] and the Water Sector Capital Investment Plan[23] have set the pace for national efforts to manage water and recognize the need for critical reforms and a shift towards more sustainable water planning, allocation and demand management. The green growth approach promotes testing and innovation, market-based or decentralized approaches to create opportunities from these challenges – including green jobs, improved sector financial sustainability, and resilience to climate change, and long-term economic growth. The water sector's performance is closely linked to that of other sectors. For example, addressing inefficiencies in water pumping can reduce energy consumption at pumping stations. Implementation of water efficiency technologies on farms and installation of water harvesting at large scale can reduce the pressure on water networks[24].

The Water Sector Green Growth National Action Plan 2021-2025 has been developed with these aims in mind, and would lead to the following transformational impacts[25]:

- Address key challenges related to both supply and demand side management, through implementation of infrastructure and building community stewardship of resources.
- Introduce incentives and financing mechanisms to reduce the overall cost of water resource management on public resources.
- Increase access to water and sanitation for vulnerable members of society, including school children and displaced persons.
- Increase the capacity of public sector decision makers to use incentive structures, data and policy innovations in water sector management.

The Water sector GG-NAP identifies 19 priority actions to achieve green growth through the water sector:

- 3 investment preparation and demonstration actions: These projects are at various levels of readiness: some require feasibility analysis, while others are investment-ready. Many are suitable candidates for public-private partnerships or direct private sector investment, and others are opportunities to leverage climate finance.
- 6 enabling policy and institutional reform actions: Given current gaps in available fiscal resources, these actions intend to attract investment by address policy barriers and capacity gaps that lead to higher costs, risk levels or uncertainty in decision making. These include programs to support innovation, institutional reform and coordination[26].

[21] International Water Management Institute (IWMI), Groundwater Governance in Jordan: The case of Azraq Basin, 2017
[22] National Water Strategy 2016-2025. Ministry of Water and Irrigation. http://www.mwi.gov.jo/sites/en-us/Hot%20Issues/Strategic%20Documents%20of%20%20The%20Water%20Sector/National%20Water%20Strategy(%202016-2025)-25.2.2016.pdf
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[24] Water Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.
[25] Water Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.
[26] Water Sector: Green Growth National Action Plan 2021 – 2025. Ministry of Environment.

3. Market conditions

Specific regulations and incentives for green and/or social entrepreneurs are rare in Jordan but these entrepreneurs can benefit from the support "classic" entrepreneurs have, including:

- Access to Free Zones, Development Zones and the Aqaba Special Economic Zone: Jordan Investment Commission (JIC) oversees a number of zones, distributed across the Kingdom. Each of these zones comes with a specific incentives package catering to sector-specific needs (tax reduction / exemption, facilitated visa and residency permits for foreign investors and workers…)
- A relatively transparent financial system with high levels of access to loans and venture capital: Jordan ranks 5th in the MENA region in terms of economic freedom (behind UAE, Qatar, Israel and Bahrain)[27]
- Simplified business registration process: a business can be registered at the Companies Control Department in 1 day and for 1 dinar (with the condition of increasing the capital after 1 year). But most entrepreneurs are not aware of this process; therefore, several incubators are supporting them in business establishment and growth (Oasis 500, Queen Rania Centre for Entrepreneurship, Shamal Start, iPark…)

From an economic perspective, while the public sector represents a large portion of the workforce (39.9%), sectors like manufacturing and agriculture only represent 9.6 and 1.7% respectively[28] while representing 24 and 8% respectively in terms of GDP[29].

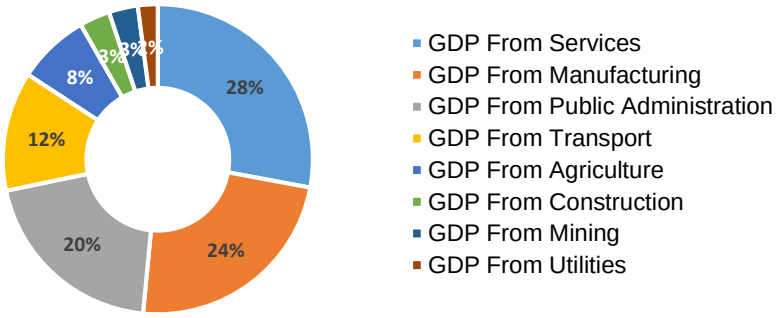

Figure 1- Jordan GDP from different sectors

4. Socio-cultural context

Jordanians lack awareness around circular economy and often limit circular economy to clean energy production, organic fruits and vegetable production and solid waste management.

A niche market exists for organic food among Jordanian's elite (mainly in Western Amman), but the main driver for this demand is a healthy lifestyle rather than eco-consciousness.

As for the local workforce, 90.3% of Jordan's population is urban and 62% are in the 15 - 64 year-old age range[30]. Jordan's literacy rate is one of the highest in the region (97.9%[31]) and Jordan is in the world's top 10% countries in terms of "availability of scientists and engineers"[32]. Therefore,

[27] 2018 Index of Economic Freedom. The Heritage Foundation. https://www.heritage.org/index/pdf/2018/book/index_2018.pdf
[28] Jordan in figures 2018. Department of statistics. http://dosweb.dos.gov.jo/products/jordan-in-figure2018
[29] Jordan GDP from construction. Trading Economics. https://tradingeconomics.com/jordan/gdp-from-construction
[30] Jordan in figures 2018. Department of statistics. http://dosweb.dos.gov.jo/products/jordan-in-figure2018
[31] Human development data. UNDP. http://hdr.undp.org/en/data
[32] TCData360. The World Bank. 2017. https://tcdata360.worldbank.org/indicators/hd0e189de?country=JOR&indicator=607&viz=bar_chart&years=2017&indicators=944

general technical expertise exists in the labour market, but this expertise is not focused on the circular economy sectors. The educational system may not be raising enough awareness around circular economy, but a healthy lifestyle is more and more trendy, driven by seed initiatives and influencers on (social) media.

As for the entrepreneurship attractiveness, Jordan has a long history of lifetime employment in the public sector. Nevertheless, some entrepreneurs' success in the last decade (maktoob.com, sook.com, …) created an appetite for entrepreneurship among youth. But this appetite is still focused on the information and technology sector. The government and incubators / accelerators also focus their support on IT entrepreneurs.

One of the pain points of this ecosystem is the lack of creative and novel ideas: most entrepreneurs are just recycling ideas that were implemented in other part of the country (or in other countries in the middle-east) and trying to adapt them to their region.

Finally, stakeholders' conflict over ownership and/or lack of ownership may also be one of the main obstacles in promoting and implementing green and circular economy programs.

5. SWOT

For the purpose of creating a synthesis for Jordan, a SWOT analyses has been conducted to explicate Strengths, Weaknesses, Opportunities, and Threats.

Strengths are defined as factors currently enabling green and circular businesses to develop. Weaknesses are defined as factors currently preventing the development of green and circular economy businesses. Opportunities are defined as future developments that could enable green and circular economy businesses to flourish. Threats are defined as potential future developments that could threaten green and circular economy business development.

Strengths	Weaknesses
- The private sector and start-up ecosystem is dynamic in Jordan creating an appealing environment for start-ups and businesses in general (free zones, simplified business registration process…) - Jordan's National Energy Efficiency Action Plan (NEEAP) and Jordan Renewable Energy and Energy Efficiency Fund (JREEEF) encourage investment in clean energy production solutions. - Jordan's relative political and economic stability allows CE entrepreneurs and businesses to plan on the mid and long term - High literacy rate and availability of engineers and scientists in the local job market can accelerate transitions toward circular economy	- Lack of a clear legal framework and incentives to support or promote green and circular economy business can slow down and demotivate green business owners. - Lack of coordination between stakeholders and players in the circular economy sector at the national level resulting in a loss of opportunities and reduced impact. - No effective sustainable public procurement policies or national and approved eco-labelling scheme to promote green and circular economy products and services. - Youth and women are not fully incorporated in the workforce and in decision making in the public and private sectors.

Opportunities	Threats
- Services, Manufacturing, Public Administration and Transport contribute to more than 84% of the countries' GDP. Focusing efforts on improving their circularity may result in quick-wins on the environmental and economy levels. - Unemployment in Jordan is quite high, especially among women (26.8%). Focusing on job creation adapted and targeted for women in the circular economy sector may be a good opportunity for SwitchMed and other programmes. - The six sectors selected in the Green Growth National Action Plan 2021-2025 can create opportunities for circular economy initiatives in Water, Transport, Energy, Waste, Agriculture and Tourism sectors. - Scarcity of water is a real challenge for the agriculture sector in Jordan while creating untapped opportunities for modern techniques (hydroponics, aquaponics, vertical farming, …) and water optimization products and services.	- Collaboration between public and private sectors in Jordan is not common and PPPs usually need a history of trust to be effective. Networking and communication channels between private and public sectors are very rare. - Lack of monitoring, evaluation and reporting scheme for circular economy programs and other green initiatives could reduce these programmes impact. - Stakeholders conflict and ownership may be one of the main obstacles in promoting and implementing green and circular economy programs. - Lack of awareness around circular economy may limit projects to clean energy production, organic fruits / vegetables production and solid waste management initiatives.

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