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The Connectivity Implications of China's Infrastructure-Building in the Middle East (Part 1 of 4)

Are Chinese Projects Regional Enough to Mend the Economic Gaps?

By Nicholas Lyall

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COVER: A deputy minister of Economic Affairs for the United Arab Emirates visits the exhibition hall at the 21st China-ASEAN Expo in Nanning, China, on Sept. 23, 2024. (Photo by Costfoto/NurPhoto via Getty Images)

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Executive Summary

A key barrier to Middle Eastern economic growth is the lack of economic connectivity that exists among the region’s states, and between them and the rest of the world. Since the onset of the Belt and Road Initiative, China has emerged as an increasingly key provider of physical and digital infrastructure in the Middle East. Accordingly, could the nature and quantity of China’s infrastructure engagement in the region herald a tangible improvement in the Middle East’s economic connectivity? Four key deficits characterize the region’s lack of connectivity:

- Insufficient border facilities, customs efficiency, and logistical capacities
- Insufficient information and communications technology (ICT) infrastructure
- A lack of integration among national energy systems
- Insufficient maritime port efficiency

To ascertain whether China’s infrastructure engagement could address these deficits, this series begins by looking at connectivity and integration deficits as key barriers to Middle Eastern economic growth and introducing the general nature of China’s investment and infrastructure engagement in the Middle East, and its imbalanced character that focuses on a few select regional countries. Part 2 will contain two case studies on the highest and second-highest focus countries of this Chinese engagement, Saudi Arabia and the UAE. Part 3 will do the same for Iraq, Egypt and Oman. Finally, Part 4 will use these case studies to analyze how Chinese engagement could address the Middle East’s connectivity deficits on a regional level.

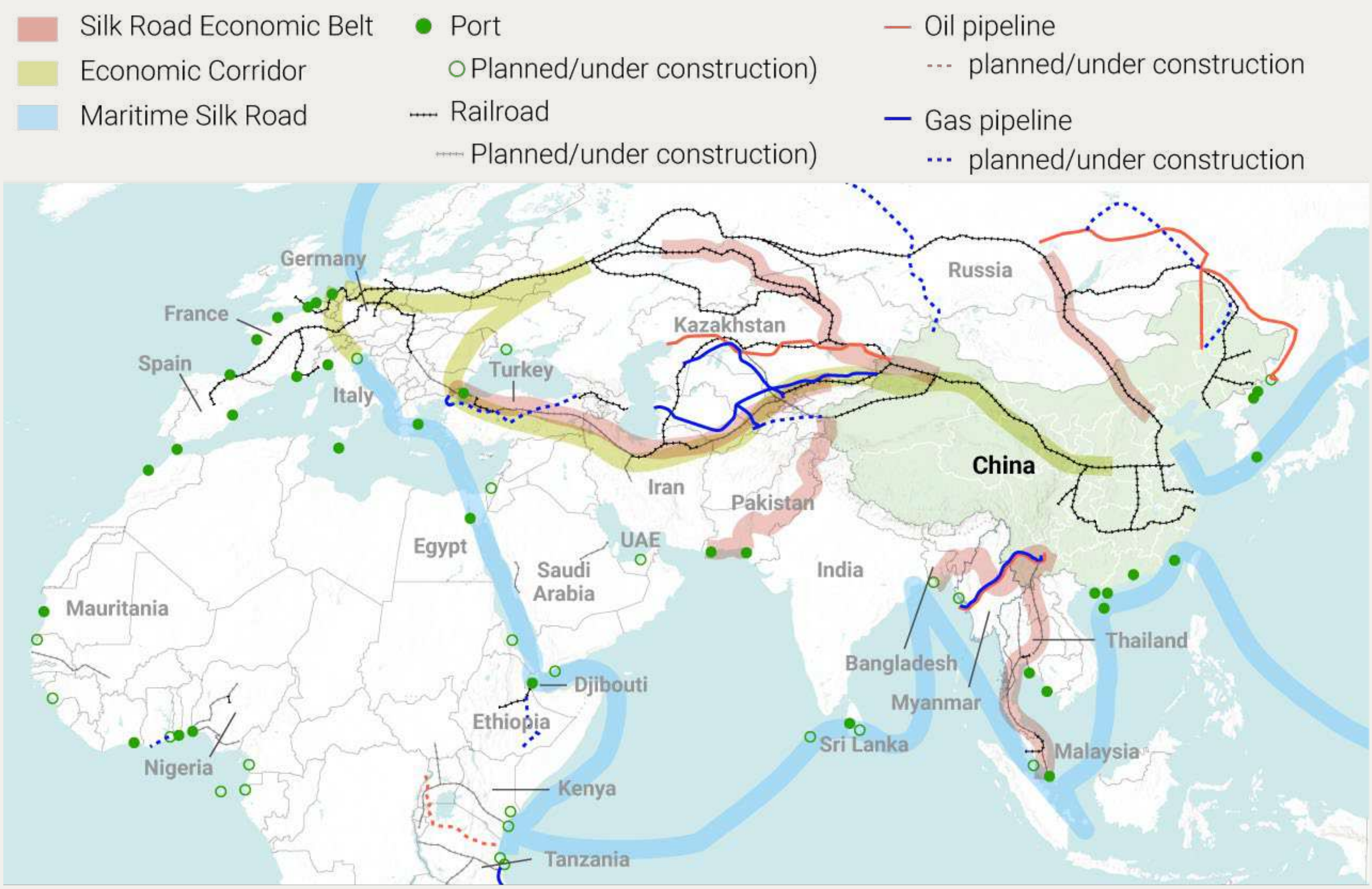
Chinese Vice Commerce Minister and International Trade Representative Ling Ji speaks at the “Invest in China” Middle East promotional event in Abu Dhabi on Dec. 11, 2024. The event included 40 Chinese companies specializing in new energy, advanced manufacturing, biopharmaceuticals, and information technology. (Wen Xinnian /Xinhua via Getty Images)

Introduction

The consensus holds that one of the leading retardants of Middle Eastern economic growth is the strong economic dislocation and lack of integration and connectivity among the region's states, and between the region and the rest of the world.[1] Accordingly, numerous Middle Eastern nations struggle to access economies of scale and leverage comparative advantages, among numerous other economic maladies. China emerged as a key foreign investor and project contractor in the infrastructure space in the Middle East. Therefore, could this Chinese engagement become a catalyst ameliorating some of these abovementioned connectivity deficits, thus elevating Middle Eastern growth? There exists some promising potential at present for enhancing economic connectivity across the Middle East through Chinese projects that are either in progress or completed (as opposed to those merely proposed through memorandums of understanding or other aspirational agreements). However, it seems improbable that China's future involvement in physical connectivity infrastructure will significantly expand beyond current levels, thus limiting its transformative impact in the longer term.

The well-publicized aim of China's Belt and Road Initiative (BRI) is to facilitate connectivity among countries and regions. Indeed, the China Arab States Cooperation Forum (CASCF) has become a vehicle dedicated to push toward facilitating connectivity in the Middle East and North Africa as an important pillar of the BRI.[2] Accordingly, China is less focused on Middle Eastern regional connectivity than it is on fostering a limited number of economic hubs through

China's Belt and Road Initiative



Source: Mercator Institute for China Studies, ESRI which it can offshore its industrial overcapacity in certain sectors and/or pursue energy security-related projects. An initial analysis of the available data reveals a notably imbalanced Chinese investment and infrastructure focus on the Middle East's major traditional economic hubs. However, the question then becomes whether such a limited focus can yet pose prospects for spinoff growth that diffuses through surrounding areas that are not a notable focus for China.

Policymakers should closely monitor the spillover effects of China's engagement to determine how it can benefit the broader region. There is a need to evaluate how China's "industrial park-port interconnection" framework aligns with regional development goals and whether it can better address broader connectivity issues. Engaging with China to encourage a more balanced investment approach across the region is crucial, potentially addressing connectivity and integration deficits identified as key barriers to Middle Eastern economic growth. Exploring how China's Industrial Capacity Cooperation policy can be utilized more broadly could promote economic development beyond current focus countries. In pursuit of these recommendations, regional organizations like the Islamic Development Bank (IsDB), United Nations Economic and Social Commission for Western Asia (UNESCWA), and Arab Industrial Development, Standardization and Mining Organization (AIDSMO) could play key roles in assessing needs, developing proposals, and facilitating cooperation. Presenting a regionwide connectivity master plan to China through the China-Arab States Cooperation Forum and similar organizations could encourage more balanced investment and enhance regional integration.

For the purposes of this report, the delineation of "Middle East" used by the author is more accurately understood as the "Mashreq" minus Sudan: Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Oman, the Palestinian Territories, Qatar, Saudi Arabia, Syria, the United Arab Emirates (UAE) and Yemen. The nations in this geographical delineation are nearly all largely dependent on the economic corridors and trade routes either side of the Arabian Peninsula (i.e., the Red Sea/Suez Canal and the Persian Gulf) which the BRI is targeting as key conduits. With access to the Mediterranean, Lebanon and Syria are not dependent on these corridors, but their development prospects are nonetheless critically affected by their contiguous Mashreq countries (Syria in the case of Lebanon, and Iraq and Jordan in the case of Syria), thus justifying their inclusion.

Barriers to Middle Eastern Economic Growth

Barring dynamics like the persistent conflict and state fragility that afflicts the region, a lack of connectivity and economic integration is one of the central causes of the Middle East's failing to develop its economic potential. The following key areas have been outlined as central leverage points that, if improved and integrated in a regional sense, will be necessary for the Middle East to improve its growth trajectory:

1. Overcoming the insufficient border facilities and logistical capacities that severely hamper cross-border trade movements and improving the low customs efficiency between Middle Eastern states that stifles trade. While it is true the region's states suffer from acutely insufficient rail infrastructure, until the border facilities and logistics capacity issue is addressed, the practical effects of rail infrastructure improvements would be negligible, as the quantity of goods that could easily move across borders would not have increased. [3]
2. Expanding and enhancing ICT infrastructure to enable complex supply chain integration; facilitate regional and global trade cooperation through utilizing the web to make more services tradeable;[4] and access economies of scale, distant markets, and outsourcing opportunities more easily
3. Integrating energy systems, such as electricity grids
4. Strengthening maritime port efficiency[5]

These deficient areas combine to result in insufficiently powered (figuratively and literally) economies, limited intraregional trade, disincentives for business activity or expansion, low competitiveness of Middle Eastern economies, and supply-chain inefficiencies.[6]

Accordingly, if BRI investment and infrastructure projects in the region fail to address, indirectly or directly, these maladies related to lack of integration, then the most that could likely be hoped for would be isolated cases of economic growth and development in the countries (or even the regions of countries) in which the projects or investments occur. Alternatively, a set of targeted utilities and transport infrastructure projects attacking these integration deficits could result in productivity enhancement, improved integration with global value chains, higher trade, and elevated regional and global market access for the region's economies.[7] Therefore, what are the discernible prospects of China's current investment and project contract engagement in the Middle East for comprehensive versus imbalanced or isolated regional growth? To address that question requires establishing the data trends for where China's engagement is occurring across the Middle East to determine whether there is a balanced spread.

China's Imbalanced Investment and Infrastructure Engagement

Middle Eastern economies are increasingly becoming (asymmetrically) interdependent with China. While this interdependence historically centered on energy relations, with Middle Eastern oil producers long being China's key focus for energy security, the interdependence has now expanded to cover a wider range of sectors.[8] This interdependence is being channeled through the "1+2+3" cooperation framework released by President Xi Jinping at the 2014 meeting of the China-Arab States Cooperation Forum and later codified in China's landmark 2016 Arab Policy Paper, the first white paper produced by China for the region. This framework maintains China's traditional focus on energy cooperation as the primary pillar but also focuses on the parallel pillars of infrastructure construction and trade and investment, as well as the high-tech focus areas of new energy, space, and nuclear energy.[9]

This rapidly increasing diversity of interdependence is overwhelmingly thanks to the onset of the BRI, particularly how it and the various development strategies of Middle Eastern nations – for instance, both Egypt's and Saudi Arabia's Vision 2030 programs – have been deliberately and publicly linked or integrated.[10] This integration of development strategies has become a driving logic and framework of Chinese-Middle East economic engagement,[11] with the extent of this integration meaning Chinese-Middle Eastern economic partnerships have often developed past the transactional, energy-focused relationships of the past.[12]

A further key force driving the increasing diversity and comprehensiveness of Sino-Middle Eastern economic interdependence is China's Industrial Capacity Cooperation (ICC) policy. ICC concerns China's global offshoring, including to the Middle East, of industrial production bases and excess capacity in civil nuclear, traditional, and new energy; satellites; energy infrastructure; transport; communications; construction machinery and equipment; aerospace; and marine engineering, among other sectors.[13] This excess capacity is a deliberate goal of the Chinese industrial policy of heavy state subsidization of strategic sectors, in which Beijing seeks to establish international market dominance to pursue an export-led growth strategy. In other words, China's domestic industrial policy-led development approach, and its excess industrial capacity, is being synergized with Middle Eastern economies, further highlighting the central role China could play in the region's industrial development.

China is becoming a central industrial and infrastructure partner of the Middle East, thus realizing one pillar of the cooperative framework.[14] Many Red Sea states have become increasingly reliant on China to overcome their logistical and transportational infrastructure deficits.[15] Leading examples of China's industrial and infrastructure leadership in the Arab world include the TEDA Special Economic Zone within Egypt's Suez Canal Economic Zone; the China Industrial Park in Saudi Arabia's Jazan Economic City; the China-UAE Capacity Cooperation Demonstration Park; and the Chinese Industrial Park in Duqm, Oman.[16] Additionally, China has engaged in telecommunications, pipeline, road, railway, and water supply projects, as well as significant Chinese port investment and construction in the UAE, Egypt, and Saudi Arabia.[17]

Unpacking the Trajectory of Chinese Investment in the Middle East

The juxtaposition of current data with that from before the BRI era[18] highlights the beginning of the new trajectory that China's Middle East investment and economic engagement has taken. In other words, through this packaging of the data, we can make general inferences regarding dynamics such as growing imbalances of Chinese investment and the focus of construction projects across the region.

As is evident from a comparison of the tables below, the change in trajectory caused by the BRI is significant. Most notable here is the 358% rise of investment in the UAE that pushed it from fourth-highest ranked recipient ($7.630 billion) of Chinese investment and infrastructure in the 8½ years pre-BRI to the second-highest ($34.93 billion) in the nearly 11 years post the onset of the BRI, with a large gap emerging between it and the third-highest recipient in this latter period. Egypt likewise experienced a steep increase in Chinese attention, with the $8.72 billion it received pre-BRI increasing by 111% to $18.37 billion in the same period. Saudi Arabia has maintained its position as the leading recipient of Chinese investment and infrastructure in the Middle East, with $50.69 billion in investment and construction contracts representing a 204% increase from the pre-BRI period.

While Iraq has remained one of the leading destinations of Chinese money in the region, its upward trajectory in the post-BRI period hasn't been as impressive as those of the UAE, Saudi Arabia and Egypt, with a 46% increase from $13.97 billion to $20.27 billion. A final notable mention is the case of Kuwait, whose inflow of Chinese financing has risen 367% from $2.69 billion to $12.56 billion across the two periods.

While Saudi Arabia and Iraq received notably more Chinese attention in the pre-BRI years (largely due to China's focus on those nations' hydrocarbon sectors) there was something approaching a generally even spread of Chinese investment and infrastructure focus across the region during this pre-BRI period, as

Chinese Investments and Construction Contracts Before BRI

Investments and contracts of $100 million or more in the Middle East from March 2005 to September 2013. The data is extrapolated and collated from the AEI China Global Investment Tracker (this dataset only began tracking at the beginning of 2005).

Country	▼ Cumulative size of deals (in millions USD)
Saudi Arabia	$16,650
Iraq	$13,970
Egypt	$8,720
UAE	$7,630
Syria	$4,060
Qatar	$3,970
Kuwait	$2,690
Jordan	$1,940
Yemen	$1,200
Oman	$1,030
Bahrain	$0

NOTE: No data is provided for Lebanon by this database. However, Chinese investment and project contracts in Lebanon are highly negligible.

Table: © 2025 The New Lines Institute • Source: AEI China Global Investment Tracker • Created with Datawrapper

Chinese Investments and Construction Contracts Since BRI

Investments and contracts of $100 million or more in the Middle East from October 2013 to July 2024. The data is extrapolated and collated from the AEI China Global Investment Tracker as of March 2025.

Country	▼ Cumulative size of deals (in million USD)
Saudi Arabia	$50,690
UAE	$34,930
Iraq	$20,270
Egypt	$18,370
Kuwait	$12,560
Oman	$7,260
Qatar	$6,800
Jordan	$5,290
Bahrain	$1,420
Yemen	$510
Syria	$0

NOTE: No data is provided for Lebanon by this database. However, Chinese investment and project contracts in Lebanon are highly negligible.

Table: © 2025 The New Lines Institute • Source: AEI China Global Investment Tracker • Created with Datawrapper shown in the pre-BRI data. However, this spread disappeared in the post-BRI era. Presently, there is a significant stratification between the primary-focus tier – the UAE, Saudi Arabia, Iraq, and Egypt – and the rest, with investment and infrastructure received from China either not noticeably changed or still of a clear secondary importance. In the case of Kuwait, the consistency of Chinese energy and construction contracts it has received over the past few years means it may join the top tier in years to come.[19]

The logic behind, and the existence of, this focus on Saudi Arabia, the UAE, Iraq, and Egypt is to a notable extent driven by the "industrial park-port interconnection" framework and plan announced during the 2018 CASCF. This framework codifies what China had already been pursuing in the previous couple of years: developing industrial zones in strategically located Middle Eastern nations – where China had already begun to build a strong port presence – that pose the best prospects for consolidating more dynamic, higher-capacity supply chains and business networks across the region in order to better link Asia with Africa and Europe.[20]

In terms of industrial parks, the park-port framework has delineated Egypt's TEDA Zone in Ain Sokhna, the Jazan City for Primary and Downstream Industries (JCPDI) in Saudi Arabia, the China-Oman Industrial Park in Duqm, and the Khalifa Industrial Zone Abu Dhabi (KIZAD). The delineated ports in the Middle East are Oman's Duqm Special Economic Zone Authority, Egypt's Port Said, and Abu Dhabi's Khalifa Port Free Trade Zone.[21] This park-port network represents the bulk of China's connectivity focus in the Middle East, with this focus being embodied by China's Maritime Silk Road strategy that forms "a horseshoe starting from the Gulf, continuing along the Arabian Sea, up the Red Sea, and into the Mediterranean Sea."[22]

Policy Recommendations to Pursue Better Regionalization of the Impacts of China's Imbalanced Focus:

1) Policymakers should closely monitor and assess the potential spillover effects of China's focused investments in key countries to determine whether or how they can indirectly benefit the broader region's economic integration and growth. This could include any of the Arab Monetary Fund (AMF), IsDB, UNESCWA, and/or AIDSMO pursuing tasks like:

- Developing metrics and indicators to quantify spillover effects such as changes in trade volumes, supply-chain integration, and technology transfer between the focus countries and others in the region.
- Conducting regular economic impact assessments to identify opportunities for other countries to leverage or connect to Chinese-backed projects in the focus countries.
- Create platforms for knowledge sharing between countries to disseminate lessons learned and best practices from Chinese engagement.

2) There is a need to evaluate how China's "industrial park-port interconnection" framework aligns with regional development goals and whether it can be better leveraged to address broader connectivity issues in the Middle East. IsDB, UNESCWA and AIDSMO, among others, could collaborate to:

- Conduct a comprehensive regional infrastructure needs assessment to identify gaps that the park-port framework could address. This would require an initial detailed evaluation in each Middle Eastern country, focusing on both current infrastructure and projected needs based on economic growth forecasts. Then it would involve identifying regional patterns by analyzing the collected data to recognize common infrastructure deficits as well as unique needs in specific countries or sub-regions. It could also extend to overlaying the current and planned Chinese industrial park-port projects onto the needs assessment map to identify areas of alignment and gaps.
- Analyze how the park-port model could be adapted or expanded to benefit the countries' inland regions or Middle Eastern countries not currently part of the framework. This could involve examining the potential for dry ports and inland container depots, as well as the potential for road and rail networks that could connect inland regions and other countries to the park-port hubs.

Chinese and Arab energy experts attend a workshop on new energy storage and pumped storage technology in Cairo, Egypt, on Jan. 23, 2025. The workshop, organized by the Global Energy Interconnection Development and Cooperation Organization (GEIDCO), the United Nations Economic and Social Commission for Western Asia (UNESCWA), the Arab League, and the Regional Center for Renewable Energy and Energy Efficiency (RCREEE), discussed the development of pumped storage power station technology, the international standards in the field of new energy storage, and the prospects of new physical energy storage. (Xinhua via Getty Images)

3) Regional policymakers should consider how to engage with China to encourage a more balanced regional investment approach, potentially addressing the connectivity and integration deficits identified as key barriers to economic growth. This could include using the recommended park-port framework analysis to develop and present a regionwide connectivity master plan that highlights mutually beneficial opportunities for building on China's current engagement to expand the reach into underserved territories. Incentives or co-financing options could be offered by regional states to make projects in less-developed territories more attractive to Chinese investors. The China-Arab States Cooperation Forum would be an ideal high-profile setting at which to present these plans by making it more attractive to Beijing. The forum could give China additional narrative power for its global development aims if its connectivity engagement in the Middle East were enhanced in this manner.

4) There is space to explore how China's ICC policy can be utilized more broadly across the region to address infrastructure deficits and promote economic development beyond the current focus countries. IsDB, UNESCWA and AIDSMO, in consultation with regional governments, could:

- Identify specific industrial sectors in each country where Chinese ICC could address critical gaps or complement existing development plans.
- Develop tailored proposals for ICC projects that specifically target appropriate areas of the four key connectivity deficits (priorities could be renewable energy development, agricultural technology, and food processing; manufacturing and assembly operations; logistics and transportation infrastructure; and digital economy and ICT projects) while ensuring complementarity rather than competition among countries in attracting Chinese industrial investment.
- Explore trilateral cooperation models, where more developed regional economies partner with China to implement ICC projects in less developed regional countries. China would provide industrial expertise, technology, and

financing. The developed Middle Eastern state could offer regional knowledge, additional infrastructure, and potentially extra funding. And the less developed country would provide the opportunity. Aside from more balanced regional development and capacity building, this could also facilitate greater knowledge transfer of best practices between regional partners, risk mitigation by virtue of distributing project risks among multiple stakeholders, and enhanced regional integration through encouraging further cooperation.

Nicholas Lyall is a senior researcher and policy analyst at TRENDS Research and Advisory in Abu Dhabi, where, aside from general Middle Eastern-North African affairs, he has a particular focus on Syria and China in the Middle East. Before moving to the United Arab Emirates, Lyall spent six years in Amman, Jordan, where his work examined Middle Eastern politics and conflict systems as well as China in the Middle East for a variety of Middle Eastern, British, and Chinese organizations. Lyall completed his master's degree as a Yenching Scholar at the Yenching Academy at Peking University, where he looked at China's role in international politics and development as well as Chinese domestic politics and political economy.

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