

POLICY REPORT  
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# Part 2 of 4: China's Approach on Saudi Arabia and the UAE

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NEW LINES  
INSTITUTE  
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Cover Photo: Trains on the Al Mashaaer Al Mugaddassah Metro Line wait to depart in Mecca, Saudi Arabia, in June 2024. (CRCC / Handout via Xinhua)

## 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?

To ascertain whether China's infrastructure engagement could address these deficits, this series began 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. This report, Part 2, contains 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.

## Introduction

While China is a key investment, industrial, and infrastructure player in the Middle East, its focus is overwhelmingly imbalanced toward Saudi Arabia, the UAE, Iraq, and Egypt. The question is: What can such a limited focus pose for spinoff growth that diffuses through surrounding areas?

Case studies of the countries receiving the lion's share of China's attention can answer this question. Parsing the sectoral nature, extent, and success of China's infrastructure engagement in these four countries will show whether sufficient opportunities exist for the remaining regional countries to link to this engagement to an extent that would prompt a qualitative change in the Middle East's economic connectivity.

The two leading recipients of China's infrastructure investments and contracts are Saudi Arabia and the UAE. In Saudi Arabia, China has diversified its economic ties beyond the traditional energy sector and has made significant investments in Saudi information and communication technology (ICT) infrastructure, renewable energy, high-tech zones, and broader industrial development. In the UAE, aside from the energy and real estate sectors, China has been instrumental in developing Khalifa Port, the UAE's rail network, and the Khalifa Industrial Zone (KIZAD) – projects that will shape regional economic integration and connectivity.

Policymakers could consider numerous ways to leverage China's investments and expertise to increase economic integration, such as expediting the development of the Gulf Railway Network and encouraging investment in digital and logistics infrastructure to improve cross-border ties. To further capitalize on this Chinese engagement in the pursuit of creating further connectivity dividends within and contiguous to the Gulf, policymakers aiming to leverage China's expertise and investments in rail infrastructure could accelerate the development of the Gulf Railway Network. This includes exploring options for China to advise the Gulf Cooperation Council (GCC) Railway Authority on technical, regulatory, and political coordination challenges. China's prospective involvement in the proposed bridge from Neom's coast in Saudi Arabia to Sharm el-Sheikh in Egypt also should be capitalized on to drive broader regional economic integration. This could include promoting tourism and trade facilitation measures on both ends of the bridge, as well as soliciting Chinese investment in digital and logistics infrastructure to enable seamless cross-border flows of goods, services, and people, which will build momentum toward reinvigorating the previously touted integration of bordering Jordanian and Egyptian territory with Neom, the urban development initiative that is the flagship megaproject of Saudi Vision 2030.

## INFRASTRUCTURE: TRADE

### CHINA TO UAE

**Chinese Companies:** Jebel Ali Free Zone hosts over 450 Chinese companies (11 Fortune 500 companies).

**Port Development:** Khalifa Port in Abu Dhabi is a designated hub for COSCO PORTS Shipping Company.

**Logistics Parks:** Chinese companies are set to invest over \$4 billion in logistics projects in Dubai and Abu Dhabi, including large logistics parks in Jebel Ali.

### U.S. TO UAE

**Logistics Companies:** Major U.S.-based logistics companies including DHL, FedEx, UPS, Agility Logistics, and APL Logistics have significant operations and hubs in the UAE.

### CHINA TO SAUDI ARABIA

**Industrial Zones and Smart Cities:** Chinese construction giants like China State Construction Engineering Corporation have secured multibillion-dollar contracts for building smart cities, roads, and railways. Examples include projects within the King Salman Energy Park and Jazan Economic City.

**Logistics Services:** The planned development of a Smart Food Security City in Saudi Arabia, part of 57 agreements worth \$3.7 billion signed between Saudi Arabia and China, will include integrated logistics services and agro-industrial facilities. An agro-industrial zone in Jazan is also aimed at strengthening supply chains. Joint ventures in processing and manufacturing facilities are also being pursued, with Chinese firms contributing technical expertise and supply chain integration, including in areas like packaging and cold storage.

**Free Zones:** Saudi Arabia is developing several free zones, such as those in King Abdullah Economic City, which allow Chinese businesses 100% foreign ownership with tax incentives, further facilitating Chinese investments.

### U.S. TO SAUDI ARABIA

**Major Infrastructure Projects:** U.S.-based contractors such as Hill International, Jacobs, Parsons, and AECOM are executing major infrastructure projects in Saudi Arabia, including King Salman International Airport, Qiddiya City, King Salman Park, and The Vault. These projects are expected to generate an estimated \$2 billion in U.S. services exports.

## Saudi Arabia

Saudi Arabia is the highest recipient of overall general Chinese investment and construction projects in the Middle East, and indeed received the most investment under China's Belt and Road Initiative during the first half of 2022.<sup>1</sup> This trajectory reflects how Sino-Saudi economic relations are diversifying beyond energy,<sup>2</sup> a development that became especially distinct in the landmark year of 2016, where 17 Sino-Saudi cooperative economic agreements were signed spanning an array of sectors.<sup>3</sup> This diversification of bilateral economic ties beyond petrochemicals involves noticeable developments like China's emergence as Saudi Arabia's key renewable energy partner, as well as through extensive investments in Saudi aluminum plants and high-tech zones.<sup>4</sup> A second landmark year in the relationship was 2022, when President Xi Jinping's trip to Saudi Arabia in December saw dozens of memorandums of understanding and other nonbinding agreements signed between both nations across sectors including information technology, cloud services, logistics, green energy, transportation, and construction.<sup>5</sup>

To gauge the impact of this engagement on improving regional connectivity, a key dynamic to look at is the steep rise of China's investment and infrastructure projects in Saudi Arabia's utilities sector – with this sector not even featuring in Table 1 but escalating into the third-highest recipient of Chinese investment and infrastructure projects in Table 2. In a connectivity context, the primary area to consider in this new focus is China's investment and infrastructure projects in Saudi ICT. China has signed an MOU with Saudi Arabia concerning Digital Silk Road cooperation that focuses primarily on expanding wireless phone networks and broadband coverage.<sup>6</sup> This MOU was added to during Xi's 2022 visit to the country, when both nations signed an agreement regarding deepening cooperation in e-commerce, fintech, and nationwide broadband coverage across both commercial and industrial applications.<sup>7</sup>

Huawei has been a leading Chinese entity within this ICT investment. In 2019, the company signed an MOU with Saudi Telecom Company (STC) in 2019 to collaborate on spreading 5G network services and infrastructure across Saudi Arabia, building on Huawei's preexisting recurring annual investments of \$20 million in Saudi ICT innovation efforts and \$500 million in local procurement growth efforts.<sup>8</sup> Huawei also featured prominently during Xi's December 2022 trip, with the company being part of an agreement between Riyadh and Beijing not only covering data centers and cloud computing but also the construction of high-tech complexes across various Saudi cities.<sup>9</sup> This was followed up by an MOU between Huawei and Saudi telecom company Zain in March 2023 regarding the construction of a 5.5G network for public and private customers

- 1 Asharq Al Awsat. (2022, July 26). Saudi Arabia Receives Largest Share of China's BRI Investments. Asharq Al Awsat. <https://english.aawsat.com/home/article/3780171/saudi-arabia-receives-largest-share-chinas-bri-investments>
- 2 Al-Tamimi, N. (2017). How the new Silk Road could lead directly to Riyadh. Arab News. <https://www.arabnews.com/node/1150631>
- 3 Al-Tamimi, N. (2018). China's 'Rise' in the Gulf: A Saudi Perspective. In M. Al-Rasheed (Ed.), *Salman's Legacy: The Dilemmas of a New Era in Saudi Arabia* (p. 254). C Hurst & Co.
- 4 Chaziza, M. (2020, August 18). Saudi Arabia's Nuclear Program and China. Middle East Institute. <https://www.mei.edu/publications/saudi-arabias-nuclear-program-and-china>; Mogielnicki, R. (2020, June 10). China Strengthens its Presence in Gulf Renewable Energy. Arab Gulf States Institute in Washington. <https://agsiw.org/china-strengthens-its-presence-in-gulf-renewable-energy/>; Scobell, A., & Nader, A. (2016). China in the Middle East: The Wary Dragon (pp. 37-39). Rand Corporation; Kenderline, T., & Lan, P. (2018). China's Middle East investment policy. *Eurasian Geography and Economics*, 59(5-6), 565.
- 5 Figueroa, W. (2022, December 10). Xi Jinping's Trip to Riyadh Is About More Than Saudi-US Relations. *The Diplomat*. <https://thediplomat.com/2022/12/xi-jinpings-trip-to-riyadh-is-about-more-than-saudi-us-relations/>
- 6 Triolo, P., Allison, K., Brown, C., & Creemers, R. (2020). The Digital Silk Road: Expanding China's Digital Footprint. Eurasia Group; Kurlantzick, J. (2020, December 17). China's Digital Silk Road Initiative: A Boon for Developing Countries or a Danger to Freedom? *The Diplomat*. <https://thediplomat.com/2020/12/chinas-digital-silk-road-initiative-a-boon-for-developing-countries-or-a-danger-to-freedom/>
- 7 Foster, S. (2023, April 14). Huawei eyes Saudi Arabia as its regional hub. *Asia Times*. <https://asiatimes.com/2023/04/huawei-eyes-saudi-arabia-as-its-regional-hub/>
- 8 CXO. (2019, February 26). STC signs 5G deal with Huawei. CXO Insight Middle East. <https://www.cxoinsightme.com/news/stc-signs-5g-deal-with-huawei/>; Telecom Review. (2019, March 20). Huawei signs 5 MoUs with Saudi ministries to develop ICT infrastructure. <https://www.telecomreview.com/index.php/articles/telecom-vendors/2936-huawei-signs-5-mous-with-saudi-ministries-to-develop-ict-infrastructure>
- 9 Foster, S. (2023, April 14). Huawei eyes Saudi Arabia as its regional hub. *Asia Times*. <https://asiatimes.com/2023/04/huawei-eyes-saudi-arabia-as-its-regional-hub/>.

Data extracted and collated from AEI China Global Investment Tracker (this dataset only began tracking at the beginning of 2005)

### Chinese investments and construction contracts ( $\geq$ \$100 million) in Saudi Arabia in the 8 ½ years (September 2005 – March 2013) before the BRI

Year	(\$ millions)	Sectors	Subsectors
2005	\$1,100	Real estate, Chemicals	Construction, Other
2007	\$2,770	Metals, Chemicals, Logistics	Aluminum, Other
2008	\$1,170	Chemicals, Other	Education, Other
2009	\$4,230	Transport, Energy, Real estate, Other	Rail, Shipping, Oil, Education, Construction
2010	\$340	Real estate	Construction
2011	\$4,320	Energy, Agriculture, Chemicals, Real estate	Oil, Construction, Other
2012	\$1,830	Energy, Real estate, Logistics, Utilities, Transport	Oil, Construction, Shipping, Other
2013	\$890	Utilities, Transport	Shipping, Other
Total	\$16,480	Energy = 4 (\$5,610) Transport = 5 (\$2,380) Metals = 2 (\$2,190) Real estate = 7 (\$1,860) Chemicals = 4 (\$1,390) Education = 2 (\$1,140) Logistics = 2 (\$390) Agriculture = 1 (\$200)	Construction = 7 (\$1,860) Aluminum = 2 (\$1,200) Education = 2 (\$1,140) Rail = 2 (1,550) Shipping = 3 (\$830) Oil = 4 (\$5,610) Other = 9 (\$4,290)

Data extrapolated from the AEI China Global Investment Tracker. At the time of writing (October 2024), the latest data available was until July 2024 – i.e. 10 ¾ years after the onset of the BRI.

### Chinese investments and construction contracts ( $\geq$ \$100 million) in Saudi Arabia in the 10 ¾ years (October 2013– July 2024) since the BRI

Year	(\$ millions)	Sector	Subsector
2013	\$3,680	Real estate, Energy	Construction, Oil
2014	\$3,230	Transport, Chemicals, Energy, Utilities, Real estate	Shipping, Oil, Construction
2015	\$3,310	Chemicals, Real estate, Energy, Utilities, Agriculture	Construction, Oil, Gas, Other
2016	\$1,480	Real estate	Construction, Autos, Oil, Gas, Other
2017	\$1,720	Energy, Utilities, Energy	Gas, Oil, Other
2018	\$2,230	Energy, Chemicals, Technology, Transport	Gas, Oil, Shipping, Other
2019	\$5,570	Energy, Real estate, Industry, Utilities, Transport	Oil, Gas, Construction, Alternative, Rail
2020	\$1,650	Utilities, Energy	Oil, Other
2021	\$2,690	Real estate, Logistics, Energy, Utilities	Construction, Oil, Alternative, Gas
2022	\$8,580	Energy, Technology, Transport, Real estate, Industry	Alternative, Gas, Autos, Rail, Construction
2023	\$6,810	Energy, Metals, Real estate, Logistics, Transport, Technology, Chemicals	Gas, Steel, Construction, Oil, Shipping, Telecom, Alternative
2024	\$9,740	Energy, Real estate, Entertainment	Gas, Construction
Total	\$50,690	Energy = 50 (\$30,630) Real estate = 12 (\$6,690) Utilities = 7 (\$4,290) Transport = 7 (\$2,910) Chemicals = 5 (\$1,440) Industry = 2 (\$1,210) Entertainment = 1 (\$1,140) Logistics = 2 (\$1080) Technology = 3 (\$660) Metals = 1 (\$440) Agriculture = 1 (\$200)	Construction = 12 (\$6,270) Oil = 14 (\$7,450) Shipping = 3 (\$1,290) Gas = 17 (\$15,040) Autos = 2 (\$1,140) Alternative = 8 (\$3,450) Rail = 2 (\$480) Steel = 1 (\$440) Telecom = 1 (\$400)



Customers in a Huawei store in Shanghai, China, on June 15, 2025. (CFOTO / Future Publishing via Getty Images)

as well as commercial cloud computing and business support, among other aspects.<sup>10</sup>

Huawei's actual realized investments and projects have been significant, too. For instance, the company has supplied Dawiyat Integrated Telecommunications & Information Technology Company with a prefabricated modular data center in November 2020 as well as signing a contract in October 2021 to equip the Red Sea Project with a 1,300 megawatt-hour battery energy storage facility and 400 megawatts of photovoltaic capacity.<sup>11</sup> Furthermore, Huawei and STC, also announced in November 2022 that their SuperLink single antenna 10 gigabyte-per-second project in Dammam had successfully operated for six months, enabling the deployment of high-bandwidth 5G services to the eastern reaches of the country.<sup>12</sup>

STC subsidiary Center3 also signed a deal with Huawei in April 2023 whereby Huawei would leverage Center3's hosting and data services to spread cloud services across Saudi Arabia and potentially regionally.<sup>13</sup> Following this, Huawei opened a cloud data center in Riyadh in September 2023, part of a \$400 million investment in Saudi's cloud capacity by the company over the next five years. The center will support Saudi government services as well as enable the expansion of AI applications and large language models in Arabic – steps that will play important roles in the development of Saudi's digital economy.<sup>14</sup>

Aside from the abovementioned focus of China employing its telecoms infrastructure capacity, namely through Huawei, to develop the Saudi e-commerce industry and the country's digital connectivity, the other key *planned* pillar of the aforementioned BRI-Saudi Vision 2030 integration, at least according to earlier discussions, is the utilization of Chinese transport and logistical infrastructure capacity to help Saudi Arabia develop transportation and logistical hubs along its international borders with eight other nations to spur market integration and economic growth.<sup>15</sup> The planned Chinese emphasis being given to Saudi Arabia as a regional hub is significant and particularly relates to the key projects of the Saudi-Egyptian causeway bridge, the Red Sea Project, and the Neom Special Economic Zone, the latter of which, at least according to the original plan, was envisaged to also traverse Egyptian and Jordanian territory.<sup>16</sup> Success in this endeavor of developing Saudi Arabia, alongside Egypt, into the central regional economic hub and conduit – an endeavor aimed to leverage Saudi Arabia's geostrategic qualities of bordering eight nations and sitting in the center of the two key waterways of the Red Sea and Persian Gulf – would herald notable market development, market access, and trade flow improvements.<sup>17</sup> Indeed, the future economic development of Saudi Arabia's Red Sea coast is likely to depend on the success of Jazan City for Primary and Downstream Industries (JCPDI), an industrial project under Vision 2030 whose construction Chinese firms are slowly beginning to engage in.

The China Road and Bridge Corporation (CRBC) finished the construction of the JCPDI commercial port in 2019 and officially opened it in 2022, announcing CRBC's ongoing operational plans for "driving the implementation of Chinese standards, Chinese technology and Chinese equipment in the field of port construction in Saudi Arabia" as part of the 15-year operational lease CRBC

<sup>10</sup> *Ibid.*

<sup>11</sup> *Ibid.*

<sup>12</sup> *Ibid.*

<sup>13</sup> MarketScreener. (2023, May 4). Saudi Telecom: Center3 Signed A Strategic Deal With Huawei To Build Huawei Cloud Region in Saudi Arabia. MarketScreener. <https://www.marketscreener.com/quote/stock/SAUDI-TELECOM-COMPANY-6497838/news/Saudi-Telecom-Center3-Signed-A-Strategic-Deal-With-Huawei-To-Build-Huawei-Cloud-Region-in-Saudi-Ar-43433772/>

<sup>14</sup> Reuters. (2023, September 4). China's Huawei opens cloud data centre in Saudi Arabia in regional push. [https://www.reuters.com/technology/chinas-huawei-opens-cloud-data-centre-saudi-arabia-regional-push-2023-09-04/?utm\\_source=Sailthru&utm\\_medium=Newsletter&utm\\_campaign=Technology-Roundup&utm\\_term=090423](https://www.reuters.com/technology/chinas-huawei-opens-cloud-data-centre-saudi-arabia-regional-push-2023-09-04/?utm_source=Sailthru&utm_medium=Newsletter&utm_campaign=Technology-Roundup&utm_term=090423)

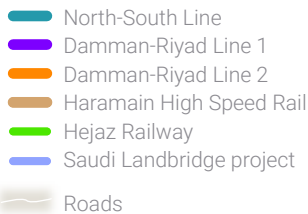
<sup>15</sup> Foley, S. (2020). Saudi Arabia's Relations with Asia. Asia Society. <https://asiasociety.org/asias-new-pivot/saudi-arabia>

<sup>16</sup> Al Sudairi, M. (2020). The People's Republic in the Red Sea: A Holistic Analysis of China's Discursive and Material Footprint in the Region. King Faisal Center for Research and Islamic Studies; Foster, S. (2023). Huawei eyes Saudi Arabia as its regional hub. Asia Times. <https://asiatimes.com/2023/04/huawei-eyes-saudi-arabia-as-its-regional-hub/>.

<sup>17</sup> *Ibid.*



## Rail Infrastructure of Saudi Arabia



Source: Railway map of Saudi Arabia  
(Maximilian Dörrbecker)

obtained alongside Hong Kong's Hutchison Ports.<sup>18</sup> As the first modern port in Saudi Arabia's southwest, it should not only drive the growth of the JCPDI industrial park but also better connect this previously underserved part of the country with regional maritime commerce.

Aside from the port project, a Saudi-Chinese conglomerate, Saudi Silk Road Industrial Services, was established in 2016 to facilitate Chinese industrial services and investment into JCPDI's industrial park. So far, however, the only Chinese investments into the park since have been Pan-Asia PET Resin Co from Guangzhou undertaking a \$3.8 billion project to construct a petrochemicals plant and Hangzhou Jinjiang investing \$1 billion into an aluminum refinery.<sup>19</sup> It is still early days in terms of realizing dividends from the better connectivity provided to the Jazan region by virtue of the port project. However, the announcement in June 2024 that Chinese shipping company NewNew Line signed on to connect Saudi's Jeddah Port with Tianjin, Qingdao, Shanghai, and Guangzhou as well as the Egyptian port city Damietta, shows that Chinese interest in Saudi ports on the Red Sea is developing.<sup>20</sup>

Neom, if it materializes according to its original plan, could be a definitive vehicle for regional integration. The original plan for the Neom Special Economic Zone to be positioned across Saudi, Jordanian and Egyptian territory<sup>21</sup> could establish genuine competitive advantage for the three countries due to the zone's combined proximity to the Suez passageway as

18 CCCC. (2022, September 19). Commercial port of Jazan Economic City in Saudi Arabia put into operation. CCCC. [https://en.ccccltd.cn/xwzx/ztbd/202209/120220923\\_199570.html](https://en.ccccltd.cn/xwzx/ztbd/202209/120220923_199570.html)

19 Li, W. (2017, June 27). Pan-Asia's Saudi project to break ground next March. China Daily. [http://www.chinadaily.com.cn/business/2017-06/27/content\\_29896950.htm](http://www.chinadaily.com.cn/business/2017-06/27/content_29896950.htm); Fulton, J. (2019, July 29). China's Gulf Investments Reveal Regional Strategy. Arab Gulf States Institute in Washington. <https://agsi.w.org/chinas-gulf-investments-reveal-regional-strategy/>; Gulf Industry. (2022, December 1). Jazan City attracts mega investment agreements. Gulf Industry. [https://gulfindustryonline.com/Article/18367/Jazan\\_City\\_attracts\\_mega\\_investment\\_agreements#](https://gulfindustryonline.com/Article/18367/Jazan_City_attracts_mega_investment_agreements#); China's CHEC won a \$650 million contract in November 2022 to construct a seawater cooling system in JCPDI, but this isn't a project that will be able to either boost connectivity or to be leveraged for economic gain by the increased connectivity of the JCPDI port.

20 Arab News. (2024, June 30). New shipping service connects Jeddah Islamic Port to 4 cities in China, 1 in Egypt. Arab News. <https://www.arabnews.com/node/2540651/business-economy>

21 Arab News. (2018, March 6). Egypt signs \$10bn deal with Saudi Arabia to support Neom project. Arab News. <https://www.arabnews.com/node/1259986/amp>; Chapman, S. (2020, May 16). Saudi Arabia and Egypt to finance \$10bn into NEOM mega city. Construction Digital. <https://constructiondigital.com/construction-projects/saudi-arabia-and-egypt-to-finance-dollar10bn-into-neom-mega-city>

well as its bridging of Asia and Africa, therefore increasing the chances of it attracting diverse international investment.<sup>22</sup> Plans for Neom to include vast new-age IT infrastructure as well as new ports, airports and roads – with China propositioned to be a key actor across these projects – herald significant prospects for cross-border economic integration, especially due to the Neom Special Economic Zone's planned positioning across three countries.<sup>23</sup> However, aside from Huawei being named as a core infrastructure provider of Neom's development<sup>24</sup> and China Railway Construction Corporation completing nearly 10 kilometers (6.2 miles) of tunnelling in Neom in May 2024,<sup>25</sup> the extent of China's engagement is yet to be as extensive as initially heralded.<sup>26</sup>

Nonetheless, there are two upcoming Chinese projects in the Neom zone, both heralding substantial connectivity dividends. First, a Chinese-Saudi-Egyptian consortium was contracted in 2024 to construct the first terminal and the marine services area in the Port of Neom, scheduled to open at some point in 2025.<sup>27</sup>

Second and more notably, China Civil Engineering Construction Corporation has signed on to construct a highly ambitious 50-kilometer bridge that will link Neom with Sharm el-Sheikh, Egypt, the first bridge of its kind linking Africa with the Arabian Peninsula.<sup>28</sup> There has been no initial progress of this project following its announcement, however, most likely due to the continuity of Multinational Force & Observers (MFO) mission on the island of Tiran, situated in the waters between Neom and Sharm el-Sheikh, which prevented economic activity from progressing in that locale. But seeing as this MFO mission was disbanded in late 2022, projects like the bridge should now be able to move forward.<sup>29</sup> Indeed, the fact that the Saudi government has recently made an official offer to buy the Egyptian seaside resort destination of Ras Ghamila in the Sharm el-Sheikh area from the Egyptian government – an offer that is being viewed favorably by Egyptian officials given the country's economic crisis – to connect Neom to the popular Egyptian tourist region seems to portend that the bridge project might be actioned before long.<sup>30</sup> The project would be a significantly encouraging project for regional integration – especially seeing as it will essentially bypass the Sinai Peninsula, which has become too dangerous to be relied on as a trade conduit.

Outside of Neom, a key development to monitor is China's impending leadership of the Saudi Landbridge project, a significant infrastructure initiative aimed at constructing a new 950-kilometer railway line between Riyadh and Jeddah, part of a larger plan to turn Saudi Arabia into a global logistics hub connecting the Red Sea with the Persian Gulf.<sup>31</sup> The Saudi China Landbridge Consortium (SLCC), which includes the Saudi Railway Company (SAR) and the China Civil Engineering Construction Company (CCECC), along with Al Ayuni as

22 Oxford Business Group. (2018, January 28). Development plans for West Saudi Arabian cities unveiled. Oxford Business Group. <https://oxfordbusinessgroup.com/analysis/large-scale-ambitions-extensive-development-plans-unveiled-western-saudi-cities>

23 The Business Year. (2018). City of the Future. <https://www.thebusinessyear.com/saudi-arabia-2018-19/city-of-the-future/focus>

24 Mingas, M. (2020, July 29). Huawei-supplied STC wins 5G contract for Saudi mega-city. Capacity Media. <https://www.capacitymedia.com/articles/3826056/huawei-supplied-stc-wins-5g-contract-for-saudi-mega-city>

25 Neom Directory and News. (2024, May 20). China Railway Construction Corporation completes adit tunnel project in first for Chinese firms at NEOM. Neom Directory and News. <https://neom.directory/neom-news/china-railway-construction-corporation-completes-adit-tunnel-project-in-first-for-chinese-firms-at-neom>

26 Nolan, B. (2024, April 22). Saudi Arabia wants China to help fund its struggling \$500 billion Neom megaproject. Investors may not be too excited. Business Insider. <https://www.businessinsider.com/saudi-arabia-neom-roadshow-china-investor-interest-funding-2024-4>

27 Zawya. (2024, July 29). Egypt-Saudi-China venture wins EPC contract for Port of NEOM. Zawya. <https://www.zawya.com/en/projects/construction/egypt-saudi-china-venture-wins-epc-contract-for-port-of-neom-ekzyrouf>

28 METenders. (n.d.). King Salman Causeway Project - METenders. [https://metenders.com/project\\_cms/project/king-salman-causeway-project](https://metenders.com/project_cms/project/king-salman-causeway-project)

29 Foreman, C. (2023, February 8). The region's most ambitious causeway projects. MEED. <https://www.meed.com/the-regions-most-ambitious-causeway-projects>

30 Naguib, S. (2024, May 13). Ras Ghamila: Saudi Arabia offers to buy Egyptian premium Red Sea area using deposits. Middle East Eye. <https://www.middleeasteye.net/news/ras-ghamila-saudi-arabia-offers-buy-premium-red-sea-area-using-central-bank-deposits>

31 Smith, K. (2023, December 7). Consortium selected for Saudi Landbridge project management contract. International Railway Journal. <https://www.railjournal.com/regions/middle-east/consortium-selected-for-saudi-landbridge-project-management-contract/>; Systra. (n.d.). Saudi Landbridge. Systra. <https://www.systra.com/arabia/project/saudi-landbridge/>



## INFRASTRUCTURE: PETROCHEMICAL

### CHINA TO UAE

#### ADNOC-Rongsheng Petrochemical FA:

This partnership, formed in 2019, explores refined product sales and downstream investment opportunities in China and the UAE for liquefied natural gas.

**Pipelines:** China Petroleum Pipeline Engineering Company, a subsidiary of the China National Petroleum Corporation (CNPC), won a \$514 million contract for pipelines for ADNOC's Ruwais LNG project.

**Onshore Concession:** ADNOC awarded CNPC an 8% interest in the ADCO onshore oil concession in 2017, a \$1.77 billion sign-up bonus.

**Borouge 4 Project:** This mega petrochemical project is set to increase Borouge's polyethylene production capacity to 6.4 metric tons per year.

### U.S. TO UAE

**Oil and Gas Production:** ExxonMobil, Occidental Petroleum, and EOG Resources are partnering with ADNOC for expanded production valued at \$60 billion.

**Upper Zakum Expansion:** ExxonMobil, Inpex, Jodco are set to expand the capacity of Abu Dhabi's Upper Zakum offshore field.

**Shah Gas Field:** ADNOC and Occidental Petroleum are exploring increasing production of the Shah Gas field.

### CHINA TO SAUDI ARABIA

**Chinese Investment:** Chinese-invested petrochemical projects in Saudi Arabia amount to \$12.5 billion.

**Sinopec/Yasref Expansion:** The companies signed an agreement in April 2025 for potential expansion of the Yasref refinery complex in Yanbu.

**CNPC Cooperation:** The company signed a memorandum of understanding with Saudi Aramco in 2022 on investment projects and services in Saudi Arabia.

**COOEC Offshore EPC:** The Chinese company renewed a long-term agreement with Saudi Aramco for offshore engineering, procurement, and construction.

### U.S. TO SAUDI ARABIA

**SAMREF Upgrade:** Aramco and Exxon-Mobil signed a memorandum of understanding in May 2025 to evaluate a major upgrade of the SAMREF refinery in Yanbu to turn it into an integrated petrochemicals complex.

**Energy Infrastructure Development:** The U.S. Department of Energy and Saudi Ministry of Energy signed a cooperation agreement on petroleum refining and refined products trading.

a local partner, was formed in 2018 to execute the project.<sup>32</sup> While significant delays have been experienced since this 2018 signing, negotiations concerning the financing structure of this \$7 billion project are at the finish line, with construction expected to start imminently.<sup>33</sup>

## The United Arab Emirates

The UAE is the other focus of Chinese investment and project contracts in the Middle East, specifically its energy and real estate sectors. Key projects in these fields include the China State Construction Engineering Corporation's ongoing construction of Dubai's Motor City residential development, a Chinese-Saudi consortium's construction and operation of two major extensions to the Mohammed bin Rashid Al Maktoum Solar Park, and China's investment and construction leadership of Dubai's Hassyan clean coal power plant.<sup>34</sup>

While the energy and real estate sectors still dominate China's investment and infrastructure attention, the transport sector has seen a noticeably steep rise in the amount of this Chinese attention. This is important because Chinese projects in the UAE with more direct implications for enhancing regional integration largely pertain to China's rail, port and industrial zone engagement.

The first of these was China's 2016 designation of Khalifa Port as its Middle East operations hub, leading to a \$738 million project being signed for China Ocean Shipping Company to double the port's annual capacity to 6 million shipping containers, with this enhancement also being likely to cause a domino effect whereby the greater capacity is set to attract further international investment from various sources due to the greater value proposition the port now offers.<sup>35</sup> Already, China Harbour Engineering Company won the contract in November 2022 for the development of administrative and office buildings, utilities, and other operations infrastructure for the port.<sup>36</sup>

The second of these Chinese involvements is the joint rail construction project, awarded in 2019, between China State Construction Engineering Corporation Middle East and South Korea's SK Engineering and Construction. Completed over 2021-2022, this project established two stretches of rail network. First was the 139 kilometers of rail connecting Ruwais in the UAE's more remote southwest with Ghuweifat on the UAE-Saudi border and then in turn with Saudi Arabia itself.<sup>37</sup> Second was the 424 kilometers of rail linking major industrial centers, logistics hubs, and key ports of the five emirates of Abu Dhabi, Dubai, Sharjah, Fujairah, and Ras Al Khaimah.<sup>38</sup>

This project linked to the existing rail infrastructure between Al Ruwais and Shah, meaning the UAE is now connected by commercial rail from its

32 Gulf Construction. (2024, January 1). Landbridge project back on track; PMC bidder selected. Gulf Construction. [https://gulfconstructiononline.com/Article/1627995/Landbridge\\_project\\_back\\_on\\_track\\_PMC\\_bidder\\_selected](https://gulfconstructiononline.com/Article/1627995/Landbridge_project_back_on_track_PMC_bidder_selected)

33 *Ibid.*

34 Fulton, J. (2019, July 29). China's Gulf Investments Reveal Regional Strategy. Arab Gulf States Institute in Washington. <https://agsi.org/chinas-gulf-investments-reveal-regional-strategy/>; Propsearch. (2022, December 28). Zawya. Propsearch. <https://propsearch.ae/dubai/zawya>; Zawya. (2022, September 2). Shanghai Electric completes Phase B of the Mohammed bin Rashid Al Maktoum Solar Park. Zawya. <https://www.zawya.com/en/press-release/companies-news/shanghai-electric-completes-phase-b-of-the-mohammed-bin-rashid-al-maktoum-solar-park-afulneze>; Petranek, L. (2019). Paving a Concrete Path to Globalization with China's Belt and Road Initiative Through the Middle East. Arab Studies Quarterly, 41(1), 9; Global Times. (2022, May 17). Unit 3 of the Chinese-built Hassyan clean power plant in Dubai connected to the grid for the first time. Global Times. <https://www.globaltimes.cn/page/202205/1265835.shtml>

35 HSBC. (n.d.). China-UAE Trade Corridor: New MoUs and agreements to boost Belt and Road Initiative. HSBC. <https://www.business.hsbc.ae/en-gb/ae/article/china-uae-trade-corridor>; Fulton, J. (2019, July 10). China deepens ties with UAE with industrial investment. Al-Monitor. <https://www.al-monitor.com/pulse/originals/2019/07/china-investment-uae-kizad-industrial-zone.html>

36 Zawya. (2022, November 26). China Harbour Engineering wins Khalifa Port infrastructure contract. Zawya. <https://www.zawya.com/en/business/transport-and-logistics/china-harbour-engineering-wins-khalifa-port-infrastructure-contract-hsvbtmde>

37 Xinhua. (2019, March 13). Chinese-S. Korean joint venture wins 408-mln-USD contract from UAE's Etihad Rail. Xinhua. <https://eng.yidaiyilu.gov.cn/qywx/rdxw/82417.htm>

38 Shen, X. (2022, December 1). Chinese enterprise builds transportation artery for UAE. People's Daily. <http://en.people.cn/n3/2022/1201/c90000-10178568.html>

easternmost to westernmost edges. Furthermore, this infrastructure will provide the foundation for the upcoming UAE passenger rail network, meaning Chinese enterprises will have had a leading hand in enabling the future movement of both goods and people through all stretches of the country.<sup>39</sup> As the UAE is one of the leading economic engines of the GCC, its increasing internal connection means more opportunities for the its contiguous neighbors to better access this economic dynamism.

The third key integration prospect is China's vast investment in KIZAD. The 220,000-square-meter China-UAE Industrial Capacity Cooperation Demonstration Zone in KIZAD contains 80,000 square meters of infrastructure built by the Jiangsu Provincial Overseas Cooperation and Investment Company(JOCIC).<sup>40</sup> Following the entry of more than 20 Chinese enterprises and multiple major Chinese investments in KIZAD, the East Hope Group, one of China's largest conglomerates, signed an MOU in 2019 to explore the feasibility of a \$10 billion investment that would construct 7 square kilometers of industrial facilities in the zone, including recycling plants to aluminum facilities.<sup>41</sup>

Already, we can see here how Chinese investment momentum in KIZAD is spurring spin-off investment in supporting infrastructure, supply chain, and logistics capacity that will increase potential regional integration prospects. Indeed, a 2022 delegation from JOCIC to Abu Dhabi affirmed the enterprise's aim to further facilitate expanded Chinese ICC engagement in KIZAD, outlining specifically the aim of enhancing "the UAE's position in the industrial value chain by attracting and empowering industrial investments through high-quality infrastructure and integrated services and to engage in reshaping of the global supply chain by enabling the globalization of advanced Chinese industrial capacity, which are aligned with the objectives of Abu Dhabi Economic Vision 2030 and the Chinese Belt and Road initiative."<sup>42</sup>

A recent case of this ecosystem dynamic was China's Shandong Port Group signing agreements with Abu Dhabi Ports (AD Ports) in December 2021 for the establishment of the region's first hub for tire storage and distribution as well as developing trade and shipping links between the UAE and China more broadly.<sup>43</sup> The Shandong Port Group-AD Ports agreements were preceded by Chinese tire manufacturer Roadbot signing a contract in January 2019 to build a tire plant in KIZAD and were followed by Chinese car manufacturer NWTN signing a lease deal in September 2022 with KIZAD to assemble electric vehicles in the zone.<sup>44</sup>

A further example of this spin-off investment dynamic is the ongoing \$2.4 billion investment by Zhejiang China Commodities City Group Co Ltd. and DP World to build the new Traders Market in Dubai. Phase 1 of the market opened in June 2022, and the end result is planned to be 800,000 square meters of market in the Jebel Ali Free Zone.<sup>45</sup> Simultaneous to the signing of this agreement in 2019 was the signing of a \$1 billion agreement involving DP

39 James, E. (2024, September 2). The UAE's first passenger railway stations revealed. MEED. <https://www.meed.com/the-uaes-first-passenger-railway-stations-revealed>

40 Interesse, G. (2022, August 29). China-United Arab Emirates (UAE): Bilateral Trade and Investment Outlook. China Briefing. <https://www.china-briefing.com/news/china-united-arab-emirates-uae-bilateral-trade-investment-outlook/>

41 Saundalkar, J. (2019, May 27). East Hope Group eyes Abu Dhabi's KIZAD for potential \$10bn expansion. ME Construction News. <https://meconstructionnews.com/35104/east-hope-group-eyes-abu-dhabis-kizad-for-potential-10bn-expansion/>; Interesse, G. (2022, August 29). China-United Arab Emirates (UAE): Bilateral Trade and Investment Outlook. China Briefing. <https://www.china-briefing.com/news/china-united-arab-emirates-uae-bilateral-trade-investment-outlook/>

42 Abu Dhabi Chamber of Commerce. (2022, October 7). Abu Dhabi Chamber receives high-level delegation from Jiangsu Overseas Cooperation and Investment Company. Abu Dhabi Chamber of Commerce. <https://www.abudhabichamber.ae/Media-Centre/News/Jiangsu-Oct22>

43 Habibic, A. (2023, January 3). AD Ports bolstering shipping ties with China. Offshore Energy. <https://www.offshore-energy.biz/ad-ports-bolstering-shipping-ties-with-china/>

44 Construction Week. (2019, January 23). China tyre company Roadbot to build \$614m factory in Abu Dhabi. Construction Week. <https://www.constructionweekonline.com/projects-tenders/168867-projects-tenders-construction-kicks-off-at-kizads-22bn-roadbot-tire-project>; Arabian Business. (2022, September 7). Chinese carmaker NWTN signs lease deal with KIZAD to assemble EVs in Abu Dhabi. Arabian Business. <https://www.arabianbusiness.com/industries/transport/chinese-carmaker-nwt-n-signs-lease-deal-with-kizad-to-assemble-evs-in-abu-dhabi>

45 Boast, P., Bates, S., Bates, J., & Bates, K. (2022, November 2). CDR – Essential Intelligence: The Belt and Road Initiative 2022 (UAE). Charles Russell Speechlys. <https://www.charlesrussellspeechlys.com/en/news-and-insights/insights/construction-engineering-and-projects/2022/cdr-essential-intelligence-the-belt-and-road-initiative-2022/>

Data extracted and collated from AEI China Global Investment Tracker (this dataset only began tracking at the beginning of 2005)

### Chinese investments and construction contracts ( $\geq$ \$100 million) in the UAE in the 8 ½ years (March 2005 – September 2013) before the BRI

Year	(\$ millions)	Sector	Subsector
2006	\$300	Real estate	Construction
2007	\$650	Real estate, Transport, Tourism	Construction, Autos, Other
2008	\$3,550	Energy, Transport	Oil, Autos
2009	\$670	Real estate, Health	Construction, Other
2010	\$130	Agriculture	Other
2011	\$450	Real estate	Construction
2012	\$1,150	Real estate, Energy	Construction, Coal
2013	\$730	Transport, Health, Tourism	Aviation, Other
Totals (\$millions)	\$7,630	Energy = 2 (\$3,490) Real estate = 5 (\$2,490) Tourism = 2 (\$590) Transport = 3 (\$580) Health = 2 (\$350) Agriculture = 1 (\$130)	Construction = 5 (\$2,490) Autos = 2 (\$420) Oil = 1 (\$3,290) Coal = 1 (\$200) Aviation = 1 (\$160)

Data extrapolated from the AEI China Global Investment Tracker. At the time of writing (October 2024), the latest data available was until July 2024 – i.e. 10 ¾ years after the onset of the BRI.

### Chinese investments and construction contracts ( $\geq$ \$100 million) in the UAE in the 10 ¾ years (October 2013– July 2024) since the BRI

Year	(\$ millions)	Sector	Subsector
2014	\$640	Transport, Tourism	Autos, Aviation, Other
2015	\$760	Tourism, Energy, Transport	Oil, Autos, Other
2016	\$4,480	Real estate, Energy, Logistics, Tourism	Construction, Coal, Other
2017	\$4,450	Real estate, Energy, Transport, Tourism, Other	Construction, Oil, Autos, Industry, Property
2018	\$8,630	Real estate, Energy, Technology, Transport, Other	Consumer, Construction, Oil, Alternative, Telecom, Autos, Other
2019	\$5,880	Energy, Transport, Entertainment, Utilities, Real estate	Oil, Rail, Gas, Autos, Construction, Property, Other
2020	\$2,140	Transport, Energy, Chemicals	Rail, Alternative, Oil, Other
2021	\$1,050	Energy	Alternative, Oil
2022	\$920	Real estate, Logistics	Construction, Other
2023	\$2,440	Real estate, Energy, Utilities	Construction, Oil, Other
2024	\$540	Real estate	Construction
Total	\$34,930	Energy = 22 (\$18,450) Real estate = 22 (\$8,510) Transport = 14 (\$3,610) Utilities = 3 (\$1,290) Tourism = 5 (\$1,130) Chemicals = 1 (\$390) Industry = 1 (\$300) Entertainment = 1 (\$200) Logistics = 1 (\$140) "Consumer" = 1 (\$140) Technology = 1 (\$100)	Autos = 8 (\$1,750) Aviation = 1 (\$100) Oil = 12 (\$10,100) Construction = 20 (\$5,220) Coal = 2 (\$1,020) Industry = 1 (\$300) Property = 2 (\$290) Consumer = 1 (\$140) Alternative = 5 (\$4,590) Telecom = 1 (\$100) Rail = 5 (\$1,760) Other = 14 (\$9,560)



World, the China-Arab Investment Fund Management Co., Winland Investment Holding Co., and China Co-Op Group Ningbo Ocean Economic Development Co. to build a facility in Dubai named the Vegetable Basket, aimed to leverage the city's strategic positioning to facilitate the importation, storage, and global re-exportation of Chinese agricultural products.<sup>46</sup> Progress on the Vegetable Basket is still minimal, but if it adds to the realized progress of the Traders Market then an ecosystem of supporting infrastructure like cold storage warehouses, logistics warehouses, and wholesale retail facilities will support other local businesses and traders for minimized supply chain costs and better access to regional and global trade movements.<sup>47</sup>

## Policy Recommendations

### 1 THE GULF RAILWAY NETWORK

Leverage and expand China's rail infrastructure engagement in Saudi Arabia and the UAE to accelerate the Gulf Railway Network.

The Gulf Railway Network is a strategic 2,177-kilometer transnational rail project, conceived in 2009, that aims to connect all six GCC states. However, the project has faced prolonged delays due to conceptual, political, and financial challenges. While partially underway, with momentum growing this year, the project still has significant gaps that Chinese expertise and investment could help bridge.

On the financial side, the initial cost estimates for the full project were around \$250 billion, but no unified GCC fund was established to underwrite it. Wealthier states like the UAE and Saudi Arabia have pushed ahead independently, while fiscally constrained countries like Kuwait, Bahrain, and Oman have faced delays. Furthermore, the railway project competes with other national infrastructure priorities in the region, diverting funding away from the scheme. As such, one avenue to lessen these financial issues could be to draw on China's experience in leveraging PPP models for its domestic and international rail projects to provide insights on how to better operationalize such models in the Gulf railway, thus improving private-sector participation.

The project requires intense policy harmonization across GCC countries on issues like customs, regulations, technical standards, and border control agreements. This coordination has not kept pace with the physical construction. There remain unresolved questions around cross-border operations, cargo clearance at borders, and regulatory fast-tracking for the railway. On the political side, the 2017-2021 Qatar blockade severely disrupted regional planning and led to the suspension of Qatar's segment of the railway. Importantly, in 2023, the GCC took a tangible step to expedite the railway through establishing the GCC Railway Authority to manage the project and approving its budget. Nonetheless, there is still work to do.

If invited by the GCC, China could leverage its extensive experience in rail infrastructure to play a useful role as an advisory member of the GCC Railway Authority. This would utilize China's technical and engineering abilities, also including assistance on policy harmonization and regulatory alignment on customs, border controls, and technical standards. Gulf policymakers should push for knowledge transfer programs where local engineers and technicians learn from Chinese experts, thus building domestic capacity for maintaining and expanding the network long-term.

China's involvement in the GCC Railway Authority could also tap into its demonstrable interest in deepening its mediation engagement in the Middle

46 Al-Faham, T. (2019, April 26). Mohammed bin Rashid witnesses launch of 'Traders Market' in Dubai from Chinese capital. Emirates News Agency (WAM). <https://wam.ae/en/details/1395302758572>

47 Gulf News. (2019, April 26). Mohammad Bin Rashid announces \$3.4 billion UAE-China investment deals. Gulf News. <https://gulfnews.com/uae/mohammad-bin-rashid-announces-34-billion-uae-china-investment-deals-1.1556286724883>; Gulf News. (2021, January 6). DP World and Zhejiang China Commodity City Group (CCC) launch the first phase of Dubai Traders Market in the heart of Jafza. Gulf News. <https://gulfnews.com/business/corporate-news/dp-world-and-zhejiang-china-commodity-city-group-ccc-launch-the-first-phase-of-dubai-traders-market-in-the-heart-of-jafza-1.1609922697448>; Boast, P., Bates, S., Bates, J., & Bates, K. (2022, November 2). CDR – Essential Intelligence: The Belt and Road Initiative 2022 (UAE). Charles Russell Speechlys. <https://www.charlesrussellspeechlys.com/en/news-and-insights/insights/construction-engineering-and-projects/2022/cdr-essential-intelligence-the-belt-and-road-initiative-2022/>

## 2 NEOM ENGAGEMENT

Leverage China's engagement in Neom to overcome barriers to cross-border integration.

East. Here, China, as an external body, could look for ways to play a subtle, nonintrusive role smoothing over differences among GCC members regarding the rail project. The benefit for Beijing would be that this contribution would increase China's strategic value to the Gulf and would qualitatively improve and diversify the type of political value China offers Gulf states as a partner, all without changing China's long-held non-interference paradigm that is the cornerstone of its foreign relations.

The Neom megaproject, which was initially envisioned to span the borders of Saudi Arabia, Jordan, and Egypt, presents a unique opportunity to drive regional economic integration. While this trilateral integration aspect has seemingly lost momentum, there is an opportunity for China to reinvigorate that element through completion of the proposed bridge linking Neom to Sharm El-Sheikh in Egypt. All efforts should be made by the relevant parties to get that project over the line. And once there is certainty over its completion, local policymakers should capitalize on China's interest in the bridge's success by considering the following strategies to maximize cross-border economic linkages in building off the project:

1. Promote tourism industries and infrastructure on either end of the bridge:
  - Encourage Chinese and other parties' interest in constructing tourism infrastructure (hotels, recreation facilities, etc.) on the Neom end of the bridge in pursuit of an integrated tourism concept between Sharm el-Sheikh and the entrance point to Neom.
  - Develop integrated tourism packages that leverage attractions on both sides of the bridge.
  - Facilitate easier movement of tourists through simplified visa processes or visa-free travel arrangements.
2. Implement trade facilitation and logistics measures and infrastructure:
  - Ensure harmonization of customs procedures and documentation requirements between Saudi Arabia and Egypt and establish joint border committees to address operational issues at the bridge area and continuously improve efficiency.
  - Introduce a single-window system (a digital platform that allows parties involved in trade and transport to submit standardized information and documents through a single entry point) for cross-border Saudi-Egyptian trade to reduce bureaucracy and processing times.
  - Encourage Chinese and other party interest in investing in digital infrastructure to enable smart logistics and enable better trade flows to the inland territories. To this end, upgrade road networks on both sides of the bridge to ensure seamless connectivity.

Momentum generated by these measures in the bridge zone should then be capitalized on by the relevant parties across Jordan, Egypt, and Saudi Arabia to rebuild the trilateral cross-border integration focus of Neom.

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