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Auon Jordan

Policy Paper

Jordan and China: From a State Visit to Multiple Sources of Economic Power

A Political and Economic Reading of the Jordanian–Chinese Partnership and the Prospects for Investment, Diversification, and International Partnerships

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Opening Statement

Executive Director of Aoun Jordan Association

In recent years, the international system has undergone accelerating transformations that have reshaped balances of power, patterns of partnership, and national priorities in the fields of economics, security, technology, and development. At the heart of these transformations is the growing rise of the People's Republic of China as one of the most significant variables shaping the nature of the international system and the future of economic and political relations among states.

Engagement with China is no longer, for Arab countries, and Jordan in particular, an issue that can be viewed solely from a narrow economic perspective or as a binary choice between competing international powers. Rather, it has become part of a broader question concerning how small and middle-sized states can manage their international relations in a global environment characterized by multiple centers of power, intensifying geopolitical competition, and increasingly interconnected economic and security interests.

This paper, prepared by Aoun Jordan Association, emerges from our conviction that Jordan has a clear national interest in developing a deeper and more realistic reading of its relationship with China—one grounded in an understanding of international transformations as they are, while protecting Jordanian national interests and maximizing the opportunities available to the Jordanian economy and society, without falling into the binary logic of alignment or reducing foreign policy to a simple equation of "for" or "against."

The significance of this paper lies not only in the fact that it addresses a major power of growing economic and political weight, but also in its attempt to raise a more fundamental question: **How can Jordan transform its geopolitical position and diverse international relations into strategic and developmental value that benefits the state, society, and the national economy?**

Given its geographic location, political role, relative stability, and network of international and regional relations, Jordan should not view transformations in the international system merely as external pressures, but also as spaces that can be leveraged to build new partnerships, diversify sources of investment and technology, strengthen economic competitiveness, open markets for Jordanian products and services, and benefit from international experiences in infrastructure, digital transformation, energy, transportation, education, and industry.

At the same time, engagement with any international partner must be based on a careful assessment of interests and risks, as well as on the ability of state institutions to negotiate, manage partnerships, monitor their implementation, and measure their impact. The success of international relations is not measured by the number of agreements signed, but by their ability to generate real and sustainable value for the national economy, create employment opportunities, transfer knowledge and technology, strengthen institutional capacities, and expand the range of options available to Jordanian decision-makers.

It is precisely within this context that this paper has been developed. It does not begin from a predetermined position toward China, nor does it seek to advocate replacing one international partnership with another. Rather, it seeks to provide an analytical reading that helps move from managing relations with China to managing **Jordanian interests within its relationship with China**.

This distinction is fundamental. States do not build their foreign policies around a desire to join geopolitical blocs, but around their ability to define and defend their national interests and build multiple partnerships that serve those interests. From this perspective, the Jordanian–Chinese relationship can form part of a broader policy aimed at diversifying economic, investment, and technological partnerships, while preserving Jordan's historic network of international relations and its political and security constants.

The importance of this paper also derives from the need to strengthen the Jordanian public debate on China on the basis of knowledge and analysis, away from rapid impressions or reductionist interpretations that view international relations solely through the lens of competition among major powers. For Jordan, China is not merely a rising international power, just as the United States, Europe, and other international partners are not merely parties to a competitive equation. Each relationship contains areas of mutual interest and cooperation, as well as areas that require careful management of risks and differences.

Aoun Jordan Association believes that building sound public policies requires broadening the circle of debate to include researchers, experts, policymakers, the private sector, civil society, and youth, and that national institutions must develop their research and analytical tools in line with the profound transformations taking place in the world.

Accordingly, this paper represents a contribution to the national debate more than a final answer. It is an attempt to ask the right questions and create space for strategic thinking about how Jordan can position itself in a rapidly changing world, and how the Kingdom can benefit from the opportunities created by international transformations without losing its ability to protect its national interests or preserve the independence of its decision-making.

Jordan cannot afford to wait until the shape of the new international system is fully established before determining its position within it. Rather, ongoing transformations require the state and society to develop a proactive vision based on reading global trends, diversifying options, strengthening national capabilities, and transforming international relations from mere tools for crisis management into instruments for building development and competitiveness.

Within this framework, Aoun Jordan Association views this paper as part of its responsibility to contribute to the development of knowledge and public policy and to strengthen national dialogue on issues affecting Jordan's future and its position in the region and the world.

We hope this study will contribute to enriching the discussion among governmental, academic, economic, and civil society institutions, open the door to more specialized studies on the opportunities for Jordanian–Chinese cooperation, and help build a clearer, more realistic, and more proactive Jordanian approach to transformations in the international system.

What Jordan needs is not to choose between major powers, but to possess the capacity to choose partnerships that serve its national interests.

It is from this perspective that this paper is presented.

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Executive Summary

The visit of His Majesty King Abdullah II to the People's Republic of China comes at an international and regional moment whose significance extends beyond the framework of traditional bilateral relations. The global economy is undergoing broad restructuring driven by geopolitical competition, the reorganization of supply chains, and the growing importance of technology, energy, critical minerals, and economic security. In this context, the visit to China should not be viewed as an isolated diplomatic stop, nor as a shift from West to East, but rather as an opportunity to redefine Jordan's position within a more diversified network of economic and investment partnerships.

Jordanian economic indicators reveal the importance of this transformation. Jordanian national exports increased by 9.9% during 2025 to approximately JOD 9.624 billion, while imports and the trade deficit continued to rise, confirming that the economic challenge is not simply about increasing trade, but about changing its structure and strengthening the productive and export capacity of the national economy (Department of Statistics, 2026). (DOS Website)

International investment reports also confirm that competition for investment has become increasingly linked to strategic sectors and the development of productive and technological capabilities, rather than the volume of financial flows alone. The World Investment Report 2026, issued by UNCTAD, points to the continued importance of investment amid an unsettled international environment, with growing significance attached to sectors related to infrastructure, energy, technology, and value chains (UNCTAD, 2026). (mop.gov.jo)

This paper concludes that Jordan's national interest lies in moving from the question:

How do we balance between China and the United States?

to a more precise question:

How do we transform Jordan's multiple relationships into multiple sources of economic power?

The paper proposes a model based on complementary allocation of roles:

1. **China:** manufacturing, technology, energy, minerals, and supply chains.
2. **United States:** advanced technology, investment, markets, and strategic partnerships.
3. **European Union:** trade, standards, the green economy, and investment.
4. **Gulf:** capital, energy, markets, and long-term investment.
5. **Jordan:** production, human capital, location, services, and regional connectivity.

The paper emphasizes that the success of the China visit should not be measured by the number of memoranda of understanding or the value of announced investments, but by five principal indicators:

1. The number of quality jobs created.
2. The volume of new exports.
3. The amount of technology and skills transferred.
4. The scale of investment in research and development.
5. The percentage of local content in new projects.

First: Introduction and Methodology

2-1 The Problem

Small and middle-sized states today face a more complex international environment than in previous decades. Trade and investment are no longer economic files separate from foreign policy and national security. Rather, technology, data, energy, minerals, and supply chains have become part of a broader concept of **economic security**.

For Jordan, these transformations create both opportunities and risks. On the one hand, international competition among major powers creates an opportunity to attract investment and diversify partners. On the other hand, the absence of a strategy may turn the economy into merely a market for competition among investors and states, without building a genuine domestic productive base.

This paper therefore proceeds from a fundamental premise:

Multiple partnerships do not automatically translate into multiple sources of power unless the state possesses a clear economic policy defining what it wants from each partner.

2-1 Research Question

How can Jordan transform its relations with China, particularly the Royal visit, into investment, production, technology, and exports, while maintaining a balance among its partnerships with the United States, Europe, and the Gulf?

3-1 Methodology

The paper relies on:

1. Jordanian official sources.
2. Economic data from the Department of Statistics.
3. Economic Modernisation Vision documents and its Executive Program.
4. World Bank and International Monetary Fund data.
5. UNCTAD and international trade reports.
6. Official Chinese sources.
7. Comparison with Egypt, Morocco, Türkiye, and the Gulf.
8. Geo-economic analysis of the international environment.

The paper distinguishes between:

1. Documented facts and data.
2. Analysis and conclusions.
3. Future scenarios.
4. Proposed recommendations.

Second: The Royal Visit to China: Significance and the Geo-Economic Context

The visit of His Majesty King Abdullah II to China cannot be read separately from the broader international context. China has become a central actor in international trade, manufacturing, technology, and supply chains, while the United States and the European Union are redefining their industrial, technological, and security policies.

In this context, Jordan's expansion of its economic relations with China does not necessarily imply political or strategic realignment. Rather, it can form part of a policy of partnership diversification.

2-1 Political Significance

Jordan has a long history of strategic relations with the United States, the European Union, and the Gulf states. At the same time, expanding cooperation with China provides Jordanian foreign policy with additional economic space.

Therefore, the more accurate reading of the visit is not: **Washington or Beijing?**

Rather: **How can Jordan benefit from the rise of Asia without losing its Western and Gulf partnerships?**

2-2 Economic Significance

China is particularly important to Jordan in several sectors:

1. Manufacturing.
2. Infrastructure.
3. Technology.
4. Energy.
5. Mining and minerals.
6. Supply chains.
7. E-commerce.

8. Artificial intelligence and robotics.

However, the principal challenge is that China's industrial strength could, in the absence of a clear Jordanian policy, lead to an increase in imports rather than an increase in domestic production.

Hence, the strategic question should be: **How do we move from importing Chinese products to producing part of those products or their value chains inside Jordan?**

Third: Jordan and China: From Trade Exchange to Productive Partnership

3-1 The Imbalance Problem

Jordanian data indicate continued growth in foreign trade, with national exports increasing by 9.9% in 2025. However, the continued trade deficit demonstrates that export growth alone is insufficient and that the economy requires a broader expansion of its productive base (Department of Statistics, 2026). (DOS Website)

The Department of Statistics provides a detailed database of foreign trade by country, commodity, and month, making it possible to develop a more precise analysis of the Jordanian–Chinese trade relationship when preparing the final statistical version of the paper (Department of Statistics, 2026). (DOS Website)

2-3 From Trade to Production

The objective should not be to reduce Chinese imports in general, because some of these imports enter production or provide competitively priced consumption goods. What is required is to build a new layer within the relationship, including:

1. Joint manufacturing.
2. Advanced assembly.

3. Engineering industries.
4. Digital services.
5. Development centers.
6. Vocational and technological training.
7. Linking Chinese investment to Arab and Western markets.
8. Relocating part of supply chains to Jordan.

3-3 The Investment Question

The Jordanian government should ask every potential investor a clear question:

What will you produce in Jordan, and what will you export from Jordan?

Additional questions should then be asked:

- How many quality jobs will you create?
- What skills will you transfer?
- What percentage will be local content?
- Will the Jordanian private sector participate?
- Will there be a research and development center?
- What markets will be targeted?

At this point, investment incentives become linked to performance rather than merely to the announced volume of capital.

Fourth: The Jordanian Economy and Investment Prospects

1-4 Growth and Stability

The International Monetary Fund indicates that the Jordanian economy continues to achieve growth while simultaneously facing challenges related to the labor market, regional pressures, and the need to accelerate structural reforms (IMF, 2026).

At the same time, the World Bank, in its assessments of the Jordanian economy, emphasizes the need for growth that is more capable of creating employment opportunities, particularly amid persistently high unemployment and low female economic participation (World Bank, 2026).

2-4 Foreign Trade

Jordanian national exports reached approximately JOD 9.624 billion in 2025 following growth of 9.9%, according to the Department of Statistics, indicating the ability of some export-oriented sectors to expand. (DOS Website)

However, continued increases in imports and the trade deficit require a policy based on:

1. Increasing domestic production.
2. Expanding the export base.
3. Attracting productive investment.
4. Increasing value added.
5. Reducing dependence on imports in sectors that can be produced domestically.

3-4 Economic Modernisation Vision

The Economic Modernisation Vision provides an important national framework for moving toward a more productive economy capable of creating employment opportunities. The Executive Program for 2026–2029 also represents an important phase in translating the vision into implementable projects and reforms (Ministry of Planning and International Cooperation, 2026). (mop.gov.jo)

However, the challenge lies not merely in having a strategy, but in linking economic diplomacy and foreign investment to these priorities.

Fifth: Jordan in Regional Competition

5-1 Competitive Comparison

Area of Jordanian Competition	Main Advantage	Country/Region
Specialized sectors, services, relative speed, gateway to the Levant and Gulf	Large market, broad labor base, industry and ports	Egypt
Technology, pharmaceuticals, services, connectivity between Asia and Arab markets	Proximity to Europe, export-oriented manufacturing	Morocco
Specialized industries, advanced services, and more flexible projects	Broad industrial base	Türkiye
Production, skills development, services, and complementary regional markets	Capital and large-scale projects	Gulf

2-5 Why Jordan?

Jordan cannot compete on the basis of scale. It should therefore stop attempting to present itself as a smaller version of larger economies.

Jordan's potential advantages lie in:

1. Location.
2. Human capital.
3. Relative stability.
4. International relations network.

5. Trade agreements.
6. The ability to connect different markets.
7. Flexibility of medium-sized and specialized projects.

Therefore, the official investment question should be: **Why Jordan rather than Egypt, Morocco, Türkiye, or the Gulf?**

If investment policy cannot answer this question clearly, financial incentives alone will not be sufficient.

Sixth: Jordan between China, the United States, Europe, and the Gulf

6-1 Allocation of Roles

Partner	Proposed Economic Role
China	Manufacturing, energy, minerals, technology, supply chains
United States	Investment, advanced technology, innovation, and markets
European Union	Trade, standards, the green economy, and investment
Gulf	Capital, energy, markets, and long-term investment
Jordan	Production, skills, services, location, and regional connectivity

6-2 Principle of Complementarity

Jordan does not need to replace one partner with another.

Rather, it can build a single project that combines, for example:

1. Chinese technology or equipment.
2. Gulf financing.
3. Jordanian production.

4. European standards or markets.
5. Advanced American technology or commercial partnership.

This model is stronger than traditional bilateral projects because it reduces dependence on a single source of financing, technology, or market.

Seventh: Strategic Sectors of the Jordanian Economy

7-1 Advanced Manufacturing

Jordan should focus on industries that combine:

1. High value added.
2. Export opportunities.
3. Potential for technology transfer.
4. Capacity to employ skilled human capital.

These include:

1. Pharmaceutical industries.
2. Engineering industries.
3. Specialized components.
4. Advanced food processing.
5. Advanced industrial assembly.

7-2 Energy

Renewable energy, storage, and smart grids can constitute a major area of cooperation with multiple partners.

The idea is not to view energy merely as a service, but as:

an investment, industrial, and technological sector.

7-3 Mining and Minerals

Jordan possesses important resources in phosphate, potash, and others.

The objective should be: **moving from exporting raw materials toward greater processing, manufacturing, and value addition.**

7-4 Technology and Artificial Intelligence

Jordanian policy needs to focus on:

1. Development centers.
2. Digital services.
3. Artificial intelligence solutions.
4. Cybersecurity.
5. Exportable government and commercial applications.
6. Specialized training.

7-5 Logistics

Jordan can leverage its location in:

1. Warehousing.
2. Distribution.
3. Logistics services.
4. Regional supply chains.
5. Industries located close to markets.

Eighth: Economic Security and Foreign Investment Management

Foreign investments cannot all be treated in the same manner.

Policy Proposed	Sectors/Areas	Sensitivity Level	Circle
Encourage diversification, competition, and investment, while benefiting from diverse partners, markets, and sources of investment and technology.	1. Tourism 2. Food 3. Manufacturing industries 4. Agriculture	Low-sensitivity sectors	First Circle
Conduct an economic and security review proportionate to the level of risk, balancing investment attraction with the protection of national strategic interests.	1. Artificial intelligence 2. Data centers 3. Telecommunications 4. Digital technology 5. Critical minerals	Strategic sectors	Second Circle
Do not allow strategic monopolization by any single partner; diversify sources of supply and partnerships, and ensure the state's ability to maintain alternatives and retain control over sectors of sovereign importance.	Infrastructure or services where excessive external dependence could affect: • National security • Decision-making independence • Data security • Continuity of essential services	Sovereign sectors	Third Circle

Ninth: Future Scenarios

Outcome	Description	Scenario
Political and media momentum without productive transformation	Politically successful visit with limited economic impact	First
Higher imports and continued trade imbalance	Trade expansion without productive transformation	Second
Factories, jobs, exports, and technology transfer	Bilateral productive investment	Third
China for manufacturing, the Gulf for financing, Jordan for production, and Europe and America for markets, technology, and standards	Jordan as a multi-partnership platform	Fourth

Target Scenario

The paper considers the fourth scenario the most ambitious and sustainable.

It:

1. Reduces dependence on a single party.
2. Increases Jordan's negotiating power.
3. Links investment to exports.
4. Creates opportunities for multilateral projects.
5. Turns geographic location into an economic function.

Tenth: Recommendations and Implementation Policies

Implementation Mechanism	Recommendation	Number
Connects foreign affairs, investment, trade, technology, and economic security	Establish a National Council for Economic Diplomacy	1
Every memorandum of understanding = project + responsible entity + timeline + performance indicator	Establish an implementation unit for the outcomes of the China visit	2
Provide a precise answer to the question: Why Jordan?	Prepare a competitive investment map	3
Protect data, infrastructure, and technology	Establish a mechanism for strategic investment review	4
Jobs, exports, technology transfer, research and development, local content	Link incentives to outcomes	5
Sector, location, investment size, market, infrastructure, incentives	Prepare a national list of investment-ready projects	6
Jordan + China + Gulf + Europe or United States	Build trilateral and quadrilateral projects	7
Robotics, energy, artificial intelligence, manufacturing, and logistics	Establish a national future-skills program	8
Identify investors, build relationships, and follow up on projects	Transform embassies into investment platforms	9
Measure investment, trade, technology, risks, and export opportunities	Issue an annual report on partnership diversification	10

Eleventh: The Proposed Jordanian Model for Multiple Sources of Economic Power

What Jordan needs is not merely diversification of partner countries, but diversification of the sources of its economic power.

The model can be summarized in the following equation:

China for manufacturing and technology, the Gulf for financing, Europe for markets and standards, the United States for advanced technology and investment, and Jordan for production, human capital, and location.

However, the success of this equation is conditional upon Jordan possessing a clear project.

Jordan should not enter international negotiations carrying a general list of sectors. Rather, it should carry:

1. A list of projects.
2. Feasibility studies.
3. Specific locations.
4. Infrastructure requirements.
5. Target markets.
6. Potential local partners.
7. Clear indicators of economic return.

Twelfth: Strategic Conclusion

China represents an important opportunity for Jordan, but an opportunity does not become an outcome merely through signing agreements.

A successful agreement is one that becomes a project.

A successful project is one that creates a job, exports, and local capacity.

A successful partnership is one that increases Jordan's strength rather than replacing one dependency with another.

Therefore, this paper proposes that the measure of success for Jordanian economic policy should move from the question:

How many agreements have we signed?

to four questions:

1. **What will Jordan produce?**
2. **What will it export?**
3. **What will it learn?**
4. **Who will work?**

These are the questions that should determine the value of the China visit and the value of any future economic partnership.

Conclusion

The Jordanian–Chinese relationship today extends beyond the development of bilateral relations or the increase of trade and investment. It forms part of broader transformations in the international system, in which balances of power are changing and economic interests increasingly intersect with geopolitical, security, and technological considerations. Accordingly, the question that should govern the Jordanian debate is no longer: **Is Jordan moving closer to China or further away from it?** Rather, it has become: **How can Jordan manage its relationship with China, and with its various international partners, in a manner that maximizes its national interests and preserves the independence of its decision-making?**

This paper concludes that Jordan's interest does not lie in moving from one international axis to another, nor in viewing international relations as a zero-sum competition requiring the selection of one partner at the expense of another. Jordan's nature as a state, its geographic location, the size of its economy, and its regional challenges make **diversifying partnerships and expanding its range of options** among the most important sources of strength in its foreign and economic policy.

In this context, the relationship with China can represent a genuine opportunity for Jordan, not only through trade and investment, but also in technology, digital transformation, energy, infrastructure, industry, tourism, agriculture, and logistics, provided that this partnership is based on clear Jordanian priorities, a careful assessment of economic returns, knowledge transfer, and local value creation, rather than on the volume of investment or financing as an end in itself.

At the same time, economic openness should not turn into strategic dependence. As partnerships move from low-sensitivity sectors into strategic and sovereign sectors, the need increases for risk assessment, partner diversification, protection of data and critical infrastructure, assurance of continuity of essential services, and preservation of the state's ability to make decisions independently.

Accordingly, the paper proposes adopting a **graduated Jordanian approach to managing international partnerships**, based on classifying sectors according to their level of sensitivity rather than adopting a uniform policy toward all foreign investments and partnerships. In low-sensitivity sectors, competition, diversification, and investment should be encouraged. In strategic sectors, partnerships should be subject to economic and security reviews proportionate to the nature of the risks. In sovereign sectors, the governing principle should be **to prevent strategic dependence or monopolization by a single external partner**.

This approach does not specifically target China. Rather, it represents a national framework that should apply to all international partners. The true criterion for Jordanian policy is not the nationality of the investor or partner state, but the nature of the sector, the scale of dependence, the level of risk, the value added, and Jordan's ability to retain alternatives.

The success of Jordanian policy toward China will also not be determined solely by what China can offer, but by what Jordan itself is capable of negotiating, investing in, and transforming into national value. Weak negotiating and institutional capacity can turn the best investment opportunities into relationships of limited impact, whereas a state possessing a clear vision, defined priorities, and institutions capable of monitoring and evaluation can transform external partnerships into instruments of development and capacity building.

Hence, the fundamental issue is not the scale of openness to China, but **the quality, conditions, and outcomes of that openness**.

In the coming phase, Jordan needs to move from dealing with opportunities on an individual basis toward building an **integrated national strategy for diversifying economic and technological partnerships**, one that identifies priority sectors, establishes clear criteria for evaluating foreign investments, strengthens the negotiating capacity of Jordanian institutions, links investment to knowledge and technology transfer, human capital development, and job creation, and establishes institutional mechanisms to monitor the actual impact of these partnerships.

At the same time, the development of Jordanian–Chinese relations should take place within the broader framework of Jordanian foreign policy, which is based on maintaining a balanced network of relations with the United States, Europe, Arab states, China, and other international powers. Diversifying partners does not mean abandoning existing partnerships, just as developing relations with China should not be interpreted as distancing Jordan from the United States or the West. Rather, it can form part of a sound policy of **strategic hedging** that gives Jordan greater room for maneuver and improves its ability to protect its interests in an increasingly competitive international environment.

Jordan, given its limited resources and continuing need for investment, markets, and technology, cannot isolate itself from major transformations in the global economy and international politics. But it can, in turn, decide **how it enters these transformations and on what terms**.

This is where the essence of the issue lies.

For a state of Jordan's size, power does not mean possessing the ability to impose its conditions on major powers. Rather, it means possessing enough **options, alternatives, and institutional capacity** to ensure that no external partner becomes an indispensable condition for the continuation of a vital sector, essential service, or strategic decision.

Accordingly, the best policy for Jordan toward China is neither a policy of alignment nor one of restraint, but rather a **policy of national interest**—one that views China as a potential partner in areas where Jordan can generate genuine value, while dealing with it, as with any other partner, according to clear rules that protect national interests when sectoral sensitivity or the level of dependence increases.

In a world moving increasingly toward multiple centers of power, Jordan's ability to succeed will not depend on choosing the strongest side, but on its ability to **expand its range of options, diversify its partnerships, maximize its geopolitical and economic value, and preserve the independence of its national decision-making**.

Accordingly, the central message of this paper can be summarized in one principle:

Jordan does not need to choose between Washington and Beijing; rather, it needs to become more capable of choosing what serves Jordan with Washington, Beijing, and all its other partners.

This is the essence of the foreign and economic policy that should accompany the coming phase: **openness without dependence, diversification without alignment, partnerships without monopolization, and the national interest above all else.**

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