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Policy Paper

Jordan on the New Regional Trade Routes

Based on a specialised roundtable convened by the Politics and Society Institute in 2026, together with the subsequent observations and technical comments contributed by researchers and experts in transport, trade, and logistics



Jordan's economy is entering a phase in which new patterns of regional trade and economic connectivity are taking shape. This shift is unfolding amid rapid geopolitical change, the reorganisation of supply chains, the growing importance of trade-route security, the expansion of land transport and connectivity networks, and changing market conditions in Iraq, Syria, and the Gulf states. Together, these developments are creating space for states' roles and positions within regional trade and investment to be redrawn.

These changes carry particular significance for Jordan. The Kingdom connects the Gulf with Iraq and the Levant, has maritime access through Aqaba and a network of land border crossings, and maintains economic and political ties with surrounding markets. These assets offer Jordan an opportunity to strengthen its role in regional trade and connectivity. Capturing that opportunity, however, depends on the Jordanian economy's ability to leverage the Kingdom's location and convert it into a sustainable economic advantage that attracts commercial activity and generates value added within Jordan.

Strategic geography alone does not guarantee economic benefit. Value arises from Jordan's capacity to transform its location into an integrated logistics hub that creates value added within the national economy, rather than simply from goods passing through the Kingdom. Jordan already possesses important foundations for this role, including a developed road network, railway projects, and the Port of Aqaba. Maximising their benefit first requires expanding storage capacity at the port, thereby reducing costs and making Aqaba more attractive to investors.

Against this background, the paper addresses a specific question: which priority interventions would enable Jordan to increase the domestic value generated by regional trade over the next three years, amid changes in global trade routes and corridor security? It examines this question through three interrelated areas: the nature of ongoing shifts in regional trade and the opportunities they create; Jordan's concrete opportunity areas within those shifts; and the implementation bottlenecks that constrain its ability to convert opportunity into actual value added. It then presents recommendations ranked by priority and feasibility.

Jordan enjoys an additional advantage in the stability it has maintained for decades, having experienced no internal conflict for more than half a century. This stability should be deployed through a unified national strategy that positions Jordan as an oasis of stability in a rapidly changing region. Stability by itself, however, is insufficient to attract investment: investors require clear, implementable opportunities and projects. Roundtable participants noted that approximately ten government projects are currently proposed in the transport and logistics sectors. Delivering their economic impact requires more effective horizontal coordination among ministries, ensuring that



these projects are coherent and mutually reinforcing rather than competing for resources and priority.

Jordan also has an advanced legal framework for public-private partnerships, but priority must now shift from the existence of legislation to its effective implementation. In Aqaba specifically, port throughput and storage capacity need to be expanded. The impact of Jordanian exports—such as potash, phosphates, garments, pharmaceuticals, and other high-value industries—should be assessed not only by export volume, but also by the share of value retained within the national economy through wages, profits, and tax revenue. The higher the domestic value-added share, the greater the contribution of trade activity to gross domestic product. This underscores the importance of linking trade corridors to industrial zones so that the movement of goods generates productive activity and value within the Kingdom.

Shifts in Regional Trade and Sources of Opportunity

Three principal dimensions intersect in this issue: security, international relations, and political economy. Their interaction is especially consequential in light of the effects of current conflicts on global trade and the resulting imperative to move from crisis management toward genuine national resilience. Tensions affecting the Strait of Hormuz and Bab al-Mandab, the gateway to the Red Sea, have had consequences extending beyond higher shipping costs and oil prices. They have exposed the fragility of global supply chains and their dependence on a limited number of strategic chokepoints. When these chokepoints are disrupted, the shock is not confined to transport; it spreads to energy markets, prices, investment, and security. For Jordan, therefore, the question extends beyond managing the consequences of crises. It concerns building durable resilience, limiting their effects on national security, and simultaneously capturing the opportunities created by changes in the international system.

The requirement is not a set of isolated projects, but an interconnected system integrating transport, customs, industry, markets, investment, and logistics. The Aqaba railway, for example, should be understood not merely as a means of transporting phosphates and potash, but as part of a broader strategic investment project linked to border crossings, logistics centres, and value chains. The central challenge is to move beyond the limited role of collecting transit fees on selected trade flows and become a regional centre for trade and logistics—with the capacity to store, secure, process, and re-export goods through a system that generates value inside the Kingdom. His Majesty King Abdullah II advanced this direction during his recent visit to China, when memoranda of understanding were signed to support manufacturing and expand the presence of Chinese companies in Jordan, alongside agreements on digital cooperation, civil aviation, and public-sector training. Jordan



cannot replace the Strait of Hormuz, but it can form part of a more flexible alternative network when strategic maritime routes are disrupted.

Data for the first seven months of 2026 illustrate the scale of this shift. Transit containers bound for Iraq through the Port of Aqaba increased by 933 per cent compared with the same period in 2025, rising from approximately 3,599 containers to more than 37,000. Total transit cargo volume at the Port of Aqaba also increased by 155 per cent during the first half of 2026, while freight traffic through the Al-Karamah Border Centre with Iraq rose by 262 per cent. The durability of this surge remains uncertain, since part of it is linked to restrictions on navigation through the Strait of Hormuz and Bab al-Mandab—in other words, to the trajectory of the regional crisis rather than to a lasting structural improvement in the competitiveness of the Jordanian corridor. This is precisely the question addressed by the paper: what share of this surge can be consolidated into a lasting gain through investment, and what share will dissipate once maritime navigation returns to its customary routes?

Jordan's position is further strengthened by the growing role of security in international trade calculations. Companies increasingly seek the safest corridor even when it carries a higher cost, making corridor security a core component in the pricing of freight movements. Given the security of its routes and its connections with neighbouring states, Jordan has a genuine competitive advantage on which it can build, provided that this latent comparative advantage is translated into physical infrastructure and effective services.

Recent experience also demonstrates that trade flows respond rapidly to differences in fees and costs, often more readily than to geography alone. Improved conditions in Syria redirected part of the meat trade towards other routes, illustrating that transit flows are more sensitive to cost and customs procedures than to the permanence of geographic location.

Jordan's Concrete Opportunity Areas

Balancing China and the United States

Expanding economic relations with China can yield significant benefits for Jordan and should complement, rather than replace, its historic relationship with the United States. Balancing international and economic relations has been central to Jordan's approach for decades. That balance should be preserved while cooperation with China expands, particularly in railways and transport. During His Majesty the King's visit to Beijing on 24 August 2026, Jordan and China signed a memorandum of understanding between Jordan's Ministry of Planning and International Cooperation and the China International Development Cooperation Agency. It provides 800 training opportunities for Jordanian public-sector employees during the current year, alongside Chinese



development-cooperation grants worth approximately USD 14.7 million. This follows broader agreements and memoranda signed roughly a decade earlier at the Jordan-China Business Forum, with an announced value of USD 7 billion. Roundtable participants estimated that the value actually realised from those agreements did not exceed half the announced amount. This assessment points to an earlier experience that warrants attention: the implementation gap between signing agreements and converting them into projects on the ground.

By contrast, the agreement signed on 8 July 2026 between Jordan's Social Security Investment Fund and the Oman Investment Authority offers a more clearly defined model: a jointly owned investment company capitalised at USD 100 million, with each party contributing USD 50 million, targeting telecommunications and information technology, agriculture and food security, pharmaceuticals, energy, mining, tourism, and logistics. The difference between the two models lies less in the amount involved than in the clarity of the structure, responsible entity, and target sectors from the moment of signature. These features should become the benchmark against which comparable initiatives are assessed before they are announced.

Syria: From Humanitarian Neighbourhood to Economic Partnership

Developments in Syria present Jordan with a direct economic opportunity, although its realisation depends on security, financing, and infrastructure readiness. Over recent years, Jordan has demonstrated its capacity to deploy its resources in support of its regional environment by hosting Syrian refugees and large numbers of Syrian students at all levels of education. Since the beginning of Syria's new phase, Jordan has also placed part of its expertise at the disposal of the new Syrian administration through advisory and training programmes that have benefited several Syrian institutions and ministries, reflecting the depth of institutional and human ties between the two countries.

In the next phase, Syria will require extensive reconstruction inputs, particularly cement and steel. This represents a direct export opportunity for Jordanian industry if accompanied by meaningful customs facilitation. Proposals also exist for a railway linking the Gulf to Türkiye through Syria and towards the Jordanian border, although damage to Syrian infrastructure continues to prevent the route from operating at full capacity. The most urgent problem, however, is procedural rather than structural: a commercial shipment may be held for several days because of a minor customs requirement, raising its cost and undermining the viability of the entire transaction. Expanding bilateral trade with Syria should therefore begin with a review of existing customs and procedural frameworks, rather than waiting for reconstruction to be completed.

Regional Connectivity Corridors: Where Does Jordan Stand?



Beyond Syria, Jordan faces several major regional trade routes that require careful strategic assessment: China's Belt and Road Initiative, the India-Middle East-Europe Economic Corridor, and Iraq's Development Road, which connects the Gulf to Türkiye through Iraqi territory. The fundamental issue for Jordan is not merely whether it can benefit from these corridors, but how much flexibility it retains in choosing among them. Early commitment to a single route may constrain its capacity to reassess its options later. This consideration carries greater weight amid intensifying US-China competition and the geopolitical implications of Israel's expanding role in regional connectivity, particularly within IMEC. These implications should be evaluated in light of their long-term strategic effect on Jordan's regional position. The equation is further complicated by Jordan's constrained room for manoeuvre, given its reliance on foreign aid, debt, and international financing programmes. The appropriate response is therefore to diversify options and distribute risk rather than adopt a single-track position towards any corridor.

The India-Middle East-Europe Economic Corridor is gaining renewed momentum ahead of the Jordan-EU Investment Conference, scheduled for 19 November 2026 at the King Hussein bin Talal Convention Centre at the Dead Sea. The conference will address investment and economic cooperation with Europe and represents a practical step towards translating the Jordan-EU Strategic and Comprehensive Partnership into concrete investments and projects. It will also test whether IMEC can move from the political declaration launched on the margins of the G20 Summit in September 2023 to an operational pathway, after the war in Gaza and tensions affecting navigation in the Red Sea slowed its progress over the past two years. For Jordan, the conference's outcomes will provide a direct indication of the Kingdom's prospective place in the corridor. If the principal route is consolidated around the sea-land connection between Gulf ports, Israel, and the Mediterranean, Jordan's potential role will remain marginal and complementary. If discussions open the way for alternative or supplementary routes through Jordan, the Kingdom will need to engage early in shaping the corridor's technical and legislative arrangements rather than wait for its design to be completed without Jordanian participation.

Jordan's Regional Connectivity Options

Route	Potential Jordanian role	Required infrastructure	Expected demand	Political dependence	Implementation risks
Belt and Road Initiative (China)	A manufacturing and re-export node through Aqaba and rail links towards Iraq and the Gulf	Aqaba-Amman rail link; dry ports; modernised free and industrial zones	Linked to Chinese investment appetite and growth in Iraq and demand for re-exports	Depends on Beijing's prioritisation of Jordan relative to more advanced Gulf partnership corridors	Chinese financing conditions; competition from Gulf ports; limited domestic industrial capacity
India-Middle East-Europe	A potential secondary link in	Legislative and customs	Linked to growth in India-Gulf	Linked to regional	High political sensitivity and



Route	Potential Jordanian role	Required infrastructure	Expected demand	Political dependence	Implementation risks
Economic Corridor	a combined land-sea alternative to the Suez Canal	modernisation of land links compatible with the corridor's final route	trade and companies search for alternatives to the Suez Canal	normalisation processes and Israel's growing role within the system	continued uncertainty over the corridor's final route
Iraq Development Road	A limited feeder role through Al-Karamah, outside the principal Iraq-Türkiye route	Expanded capacity at the Al-Karamah crossing and on the Amman-Baghdad road	Linked more to the pace of Iraqi reconstruction and consumer-goods imports than to the corridor itself	Linked to Iraqi political stability and relations between Baghdad and Erbil	Risk of Jordan's role being entirely marginalised unless a clear feeder agreement is secured with Baghdad
Gulf-Jordan-Syria Corridor	A gateway connecting the Gulf to Syria, Lebanon, and Türkiye through the Jaber-Nasib system	Modernisation of the Jaber crossing and a rail extension towards Daraa and Damascus	Linked to the pace of Syrian reconstruction and normalisation of Gulf relations with Syria	Linked to Syria's political transition and the course of sanctions relief	Damaged Syrian infrastructure and the need for trade-linked reconstruction finance

Implementation Bottlenecks

Legislation and Customs Procedures

The world is increasingly seeking land-based alternatives to traditional maritime corridors in order to reduce exposure to disruptions at strategic chokepoints such as the Strait of Hormuz and Bab al-Mandab. This effort reflects a sustained search for alternatives capable of preventing global trade from grinding to a halt in the event of a future closure of the Strait of Hormuz, rather than a temporary response to a passing crisis. Some Jordanian legislation and customs procedures, however, continue to evolve more slowly than the surrounding regional environment, limiting the Kingdom's ability to capture the full benefit of renewed trade with Syria and expanding trade with Iraq.

Before expanding the Port of Aqaba's throughput capacity—the recommendation most frequently advanced in discussions of this issue—it is essential to identify the actual bottleneck. Does it lie at the berths, in storage yards, in clearance procedures, or at truck exit points? Each bottleneck entails a different cost and intervention. Expanding berths will not resolve delays caused by customs clearance, just as digitising clearance procedures will not remedy a shortage of handling-yard capacity. Available indicators suggest that some delays in Aqaba arise from the number of entities supervising different stages of cargo movement rather than from physical capacity alone. A focused diagnostic study is therefore required before any major investment decision on expansion is adopted.



At the land borders, roundtable participants reported that Jordan operates approximately eleven crossings, eight of which still require substantial development. Some are limited to passenger traffic and lack the readiness needed to function as advanced commercial crossings. The Jaber crossing, paired with the Nasib crossing on the Syrian side, represents the most urgent test of this challenge. It continues to depend heavily on manual inspection procedures that cause cargo congestion and truck delays. Unless its capacity keeps pace with the trade volumes expected as conditions in Syria improve, Jordan may lose part of that traffic to alternative routes. Public-private partnership experience in this field remains limited and has yet to attract high-quality investment beyond a small number of projects related to railways and the dry port.

Global investors now seek an integrated logistics hub rather than a corridor that merely reduces time and distance. Jordan must therefore lower the cost of using the Kingdom as a regional corridor while strengthening private-sector partnerships in storage and logistics. Expanded storage capacity could subsequently create opportunities for related industrial activities, although this progression is not automatic. It depends on the type of goods stored, demand, energy and financing costs, rules of origin in target markets, and the local availability of complementary industrial inputs. Where these conditions are present, storage can evolve from a low-value service into a platform for broader economic activity. Meanwhile, the Council of Ministers extended for an additional six months the exemption from customs duties and taxes arising from higher maritime freight charges, covering all imported goods and both general and special sales taxes.

Sectoral Supply Chains: From General Diagnosis to Commodity-Level Analysis

Supply chains are among the principal sources of vulnerability amid regional and international change, but addressing them requires precise sectoral analysis rather than treating them as a single system exposed to identical challenges. Food supply chains differ from those for minerals or construction materials, while each sector has distinct requirements for storage, transport, inventory levels, and available alternatives. In most cases, the core problem does not necessarily lie in the supply chain or transport management itself, but in the economic, legislative, and customs system governing the movement of goods and the speed with which existing frameworks are implemented. Commodity-specific studies are therefore needed: the throughput required at Aqaba freight terminals for potash and phosphate exports; the specific customs procedures facing cement and steel inputs destined for Syria's reconstruction market; and the adequacy of strategic wheat and petroleum-product stocks under scenarios of maritime corridor disruption. These studies should cover legislation, costs, transport routes, delivery times, inventory levels, and the readiness of roads and border crossings, enabling the resilience of each individual chain to



disruption to be assessed rather than relying on a general assessment of the economy as a whole.

Alongside sectoral studies, Jordan needs an investment policy directed specifically towards value chains rather than storage and transport in isolation. There is a fundamental difference between adding a warehouse or container yard to a transit corridor and adding a complete production stage to an existing value chain: between a phosphate warehouse used solely for storage and a compound-fertiliser plant that transforms raw phosphate and potash into a higher-value final product before export; between a pharmaceutical transit station and a packaging, labelling, and quality-certification facility that builds on Jordan's established pharmaceutical industry and exports to regional markets; and between a textile freight yard and a manufacturing facility that complies with rules of origin qualifying products for preferential access to US and European markets, rather than limiting activity to primary assembly. In the latter two cases, Jordan already has an industrial base on which to build.

Attracting this type of investment requires two complementary instruments. The first is investment incentives expressly conditional on domestic value-added criteria, as set out in Recommendation 2, rather than general incentives awarded regardless of where an activity sits within the value chain. The second is blended finance combining private-sector partnership with regional capital governed by clear conditions, following the model established by the joint investment fund with Oman in defining the structure, responsible entity, and target sectors from the moment of signature. Without such conditionality, new investment may gravitate towards the easiest and least valuable links in the chain—storage and handling—while leaving higher-value manufacturing, packaging, and quality-certification activities to competing markets better prepared to attract them.

In parallel, Jordan should strengthen industry and related services, particularly for essential goods whose supply disruption could generate wide economic effects. Import and export routes, sources, and markets should also be diversified to reduce dependence on any single route or supplier. This requires a transition from managing goods flows once crises occur to deploying modern strategic inventory-management tools that maintain safe stock levels in Jordan and Syria in line with demand. Such stocks would form the foundation of a logistics support system capable of storing goods and distributing them efficiently to domestic and external markets.

Recommendations

The following recommendations rest on two principles: every intervention should advance the objective of maximising the domestic value generated by regional trade,



and each should be measurable through a specific performance indicator rather than framed merely as a desirable general direction.

1. Adopt a Unified National Strategy to Move from a Transit State to an Integrated Regional Hub

This recommendation calls for a unified national strategy that uses stability and geographic location as the basis for transforming Jordan from a transit corridor into a regional centre for trade, logistics, storage, manufacturing, and re-export. Lead entity: Prime Ministry, in coordination with the Ministry of Investment. Partners: the ministries of Transport, Industry and Trade, and Finance, and the Aqaba Special Economic Zone Authority. Instrument: a binding strategy document incorporated into the Economic Modernisation Vision, with a periodic monitoring mechanism. Timeline: one year to adopt the document and begin implementation. Outcome indicator: the number of projects included in the strategy and actually implemented within two years of its adoption.

2. Maximise Domestic Value and Link Corridors to Industry

Link trade corridors to industrial and production zones and develop storage, distribution, insurance, and re-export services, thereby enabling the Jordanian economy to retain a larger share of the value generated by trade through wages, profits, tax revenue, and employment. Lead entity: Ministry of Industry and Trade. Partners: chambers of industry and commerce and the investment authority. Instrument: investment incentives conditional on domestic value-added criteria. Timeline: an initial two-year phase targeting storage linked to potash and phosphates and inputs for Syrian reconstruction. Outcome indicator: the domestic value-added share of targeted exports compared with a predetermined baseline. This also entails directing investment specifically towards production stages within existing value chains, rather than storage and handling in isolation, through blended financing that combines private-sector partnerships with clearly conditioned regional capital, following the model of the joint investment fund with Oman.

3. Diagnose and Address Bottlenecks in Aqaba and at the Jaber Crossing

Conduct a precise diagnosis of bottlenecks at the Port of Aqaba—berths, storage yards, clearance, or truck exits—before approving expansion decisions. In parallel, modernise infrastructure at the Jaber crossing and shift from manual inspection to digital screening and clearance systems. Lead entities: Aqaba Special Economic Zone Authority and Jordan Customs Department. Partners: Land Transport Regulatory Commission and Ministry of Interior. Instrument: an independent diagnostic study followed by targeted investment. Timeline: six months for diagnosis and two years for initial implementation. Outcome indicator: reduction in transit time and the average number of days trucks remain congested, measured against a documented baseline.



4. Activate Public-Private Partnerships and Improve Government Coordination

Translate the existing legal framework for public-private partnerships into implementable investment projects in transport, railways, ports, storage, and industrial zones, supported by a permanent mechanism for horizontal coordination among the relevant ministries. Lead entity: Public-Private Partnership Unit at the Ministry of Investment. Partners: relevant economic ministries. Instrument: a permanent ministerial coordination committee chaired at a senior level. Timeline: continuous, with quarterly review. Outcome indicator: the annual number of partnership projects progressing from planning to contracting.

5. Diversify External Partnerships while Preserving Strategic Flexibility

Develop economic relations with China as a complement to the strategic relationship with the United States and follow through on signed training and investment agreements—the public-sector training memorandum with China and the joint investment fund with Oman. In parallel, conduct periodic assessments of returns and risks associated with the Belt and Road Initiative, IMEC, and Iraq's Development Road, while avoiding exclusive commitment to any single route. Lead entity: Ministry of Foreign Affairs and Expatriates, in coordination with the Ministry of Planning and International Cooperation. Instrument: an annual assessment report for each corridor submitted to the Economic Policy Council. Timeline: continuous. Outcome indicator: the proportion of announced financial commitments converted into implemented projects within three years.

6. Modernise the Customs Framework and Build Supply-Chain Resilience

Review legislation, fees, and customs procedures governing trade, investment, and transport; streamline clearance and inspection; and reduce the number of overlapping authorities. In parallel, develop a supply-chain resilience strategy covering strategic goods, import and export sources and routes, and inventory, with particular emphasis on expanding customs cooperation with Syria. Lead entity: Jordan Customs Department, in coordination with the Ministry of Industry and Trade. Instrument: a legislative and procedural package with a defined timetable. Timeline: one year to adopt the first package. Outcome indicator: average customs-clearance time and cost per shipment compared with a documented pre-implementation baseline.

These recommendations require a clear implementation sequence so that they do not compete for attention simultaneously and major investments are not undertaken before the evidence supporting them is available:

Proposed Sequence of Priorities

Priority	Intervention	Evidence of progress
Urgent (0-6 months)	Measure transit time and cost at the Jaber crossing and Port	A documented baseline and attribution of delay sources by procedure and responsible authority



Priority	Intervention	Evidence of progress
	of Aqaba and identify the actual causes of delay	
Short term (6-18 months)	Implement a defined package to streamline clearance and inspection procedures into Aqaba and Jaber	Lower clearance time and cost relative to the baseline
Medium term (1-3 years)	Pilot a storage or manufacturing activity linked to specified goods and demand (Syrian reconstruction inputs; potash (and phosphate exports	Actual commercial contracts documented financial viability, and measurable domestic value added
Long term (more than 3 years)	Assess Port of Aqaba expansion and rail connectivity on the basis of results from the preceding phases	Viability maintained under a scenario in which transit declines as maritime navigation returns to its customary routes

Conclusion

In light of the foregoing, Jordan's most viable option is to build a value-added function independent of any particular corridor or external partnership: the capacity to store, secure, process, and re-export goods so that the national economy benefits from any trade flow passing through the Kingdom, whether generated by disruption in the Strait of Hormuz, an expansion of trade with Iraq, the opening of the Syrian market, or any of the major corridors now taking shape.

Success requires, first, a precise diagnosis of actual bottlenecks before investment in expansion and, second, the conversion of signed agreements and initiatives into measurable projects rather than leaving them as announced commitments without follow-up, as occurred with part of Jordan's partnerships with China over the past decade. A third, less visible but equally important condition is to transform investment security-screening procedures from a time-consuming obstacle governed by opaque criteria into a risk-management instrument with defined decision periods and published standards. When decisions are delayed or their criteria remain unclear, opportunities simply move to markets capable of reaching timely decisions.

The first required decision is also the least costly and the most urgent in its effect: assign a single entity—not an expanded committee—to measure actual transit time and cost at the Jaber crossing and the Port of Aqaba over the next six months, and document the sources of delay by procedure and responsible authority. Without such a documented baseline, every subsequent recommendation, however precise, will lack a standard against which its success or failure can be measured.



References

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- [7] This estimate was provided by workshop participants based on their monitoring of Jordanian–Chinese partnerships. It was not independently verified against official data on the value of projects actually implemented.
- [8] Source: Al Borsa, “Jordan and the Sultanate of Oman Establish a Joint Investment Company with Capital of \$100 Million,” July 8, 2026. The agreement was signed between Jordan’s Social Security Investment Fund and the Oman Investment Authority, with equal contributions of \$50 million from each party.
- [9] This figure is based on contributions made by participants during the discussion workshop and has not been independently verified. It should be cross-checked against data from the Land Transport Regulatory Commission and Jordan Customs before being cited outside this paper.
- [10] Jaber is the border crossing on the Jordanian side, while Nasib is its counterpart on the Syrian side. Sources: CNN Arabic, December 2024; Asharq Al-Awsat, “Jordan Announces the Reopening of the Jaber Border Crossing with Syria.”
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