

PART III

COMPETITION AND CONFLICT

CHAPTER 5: CHINA AND THE MIDDLE EAST

Abstract

The Middle East is a region of strategic importance to China due to its energy resources, location astride key trade routes, and possible receptivity to Chinese efforts to construct an alternative, illiberal world order. As China has deepened its trade and investment interests in the Middle East over the past decade, it has also built a variety of diplomatic partnerships and sought to present itself as a neutral arbiter of regional disputes while expanding its military activity in the region. Chinese engagement with the Middle East is selective and transactional, focused on advancing its own interests; Beijing appears to have little desire to play a significant role in advancing regional security or to meaningfully contribute to a resolution of ongoing disputes, including the recent Israel-Hamas war. Instead, China appears content for the moment to free-ride on the U.S. and allied regional security infrastructure—including, most recently, the defense of maritime shipping from Houthi attacks—while blaming the United States for promoting instability. China also works to undermine U.S. ties with key Middle Eastern partners while supporting adversarial countries like Iran. Chinese strategists likely also assess that the turmoil in the Middle East deflects a portion of U.S. attention and resources away from the Indo-Pacific. In the short run, China benefits from its relationships in the Middle East focused on energy trade and securing infrastructure contracts for its state-owned enterprises. In the long term, Beijing aims to expand market share for renewable energy and high-value exports, gain supporters in its bid for global leadership, and potentially establish new outposts capable of supporting its military for increased power projection. China's involvement in the Middle East thus presents U.S. policymakers with an array of economic, normative, and geopolitical challenges.

Key Findings

- China's engagement with the Middle East has expanded during the tenure of General Secretary of the Chinese Communist Party (CCP) Xi Jinping and is driven partly by deepening strategic rivalry with the United States. In contrast to the Indo-Pacific, where China clearly seeks to displace the United States and consolidate a position as the dominant power, the Middle East is a region Chinese leaders view as a source of intractable security challenges and value primarily for its resources and eco-

nomic potential. While China does not have the willingness and ability to replace the United States as a major contributor to regional security, it is nonetheless eager to instrumentalize the region in its efforts to construct a new, illiberal world order at the United States' expense. China offers the region's autocratic governments a vision of a new regional security architecture under the Global Security Initiative and is deepening its diplomatic relations with U.S. partners and adversaries alike to erode Washington's influence.

- Beijing's reaction to the Israel-Hamas war has illustrated both the limits of its diplomatic influence in the Middle East and its willingness to exploit regional tensions for geopolitical gain. China has played no significant role in the U.S.- and Arab-facilitated negotiations between Israel and Hamas, having lost its credibility as a neutral actor by refusing to directly condemn the terrorist group for the October 7th attacks. It has not contributed to coalition efforts to protect maritime shipping from Houthi attacks, and in contravention of international maritime law and norms it has declined to use its naval ships deployed in the region to respond to distress signals from non-Chinese vessels. Rather, Beijing has sought to appeal to Arab states and burnish its image as the self-declared leader of what it calls the "Global South" by portraying itself as an ardent supporter of Palestinian national liberation and condemning Israel and the United States as oppressors.
- China is the largest trading partner for many countries in the region, with growth in total trade and direct investment between China and the Middle East outpacing that of China with the rest of the world over the past five years. While China benefits from infrastructure contracts and expanding market share for its exports to the region, its principle economic objective remains securing steady flows of energy resources, with between 40 and 50 percent of China's total imported energy coming from the region.
- China and Iran have a similar interest in opposing the U.S.-led rules-based international order, but the relationship is to a large degree one of convenience. Just as it is using Russia's diplomatic isolation to extract favorable terms on energy deals, China is opportunistically leveraging its consumption market to purchase discounted oil from Iran while going to great lengths to avoid the appearance of sanctionable transactions through the use of smaller purchases and shell companies.
- China's military activities in the Middle East advance its economic interests while allowing the People's Liberation Army (PLA) to gain operational experience and lay the foundation for a more robust future military presence.
- China is emerging as a global competitor in niche sectors of the Middle Eastern arms market. China is crucial to the development of the Iranian drone industry. Although the U.S. Department of the Treasury and the Department of Commerce have placed sanctions on a number of Chinese companies, Chinese

actors are crucial to supplying components that enable Iran to build drones, which it sells to Russia and to its Middle Eastern proxies such as the Houthis. China continues to either directly or indirectly provide regional actors with technologies that contravene its voluntary but non-binding commitment to adhere to the Missile Technology Control Regime (MTCR). This includes Chinese state-owned enterprises and non-state actors' continued occasional and covert role in supplying Iran's ballistic missile program.

- The Gulf is emerging as a new arena in U.S.-China technology competition, with concerns that close ties between sanctioned Chinese entities and technology firms in the region may be facilitating transfer of leading-edge technology subject to U.S. export controls. Countries and companies in the Gulf may be compelled to choose between technology infrastructure and partnerships with China's tech ecosystem or those with the United States and its allies. Increased deployment of Chinese-made surveillance technology is also a point of concern given its potential to enhance suppression tactics commonly used by authoritarian governments.

Recommendations

The Commission recommends:

- Congress direct the Office of the Director of National Intelligence to produce and provide to the U.S. Department of the Treasury within six months a detailed study of Chinese purchases of Iranian oil over the span of the last five years. The study shall include analysis of China's use of transshipment points and shell companies as methods to insulate itself from sanctions. Congress should further direct that within six months of receipt of the study, the Treasury Department must make a determination if sanctionable activity is occurring and report its findings to Congress.
- Congress direct the U.S. member on the International Maritime Organization (IMO) Council to use their voice and vote to require China to abide by its treaty obligations under the IMO conventions, including by upholding safety regulations on the use of Automatic Identification System transponders.

Introduction

In March 2023, media reporting claimed that China had successfully brokered an agreement between Iran and Saudi Arabia to restore diplomatic relations, ending a seven-year dispute between bitter rivals and fueling speculation that Beijing could someday replace the United States as chief peacemaker and predominant power in the Middle East.¹ Chinese officials were quick to hail their role in the talks, portraying the deal as a model for resolving "hotspot issues" and a major victory for General Secretary Xi's Global Security Initiative.² The events set in motion by Hamas's attack on Israel in October 2023 shattered this narrative, however, revealing China's unwillingness to involve itself in a high-stakes regional crisis or bear the costs of contributing to security for the wider region.

This chapter evaluates the nature and extent of China's engagement with Middle Eastern countries.* It first examines China's objectives toward and views of the region before surveying China's engagement with Middle Eastern partners in the diplomatic, economic, technology, and military realms. It concludes with implications for the United States. This chapter draws on the Commission's April 2024 hearing on "China and the Middle East," consultations with experts, and open source research and analysis.

China's Diplomatic Activities in the Middle East: Wide, Varied, and Designed to Enhance Beijing's Influence

China's economic engagement with the Middle East region has been growing since the opening-up and reform era of the late 1970s, but the diplomatic and security aspects of its engagement have deepened significantly over the past decade. During the Mao era, China supported the national liberation movements of Arab countries, as well as the Palestinian cause, but ties were limited as China turned largely inward in the 1960s and 1970s.³ In the late 1970s, Deng Xiaoping's reforms laid the foundation for expanding economic relations with Middle Eastern countries, with total two-way goods trade between China and the region rising from \$3 billion in 1992 to \$444.2 billion in 2023.⁴ Xi has expanded China's footprint in the region during his tenure, particularly by recruiting Middle Eastern states as partners for his signature initiatives. For example, 21 Arab states, along with the Arab League, have formally signed onto the Belt and Road Initiative (BRI), 17 Arab states have endorsed Xi's Global Development Initiative, 15 have become members of the Asian Infrastructure Investment Bank, and 14 have participated in the China-Arab Cooperation Initiative for Data Security.^{†5} In his written testimony before the Commission, Jonathan Fulton, an associate professor at Zayed University and nonresident senior fellow at the Atlantic Council, assessed that "all in all, Chinese diplomacy has been highly active and quite successful laying the groundwork for a deeper presence in the Middle East."⁶

China has developed a broad and systematic diplomatic approach to the Middle East, utilizing a variety of bilateral and multilateral formats for engagement.⁷ Beijing defines its diplomatic relationships using different types of partnerships, which Chinese scholar Xiang Haoyu, a research fellow at the Ministry of Foreign Affairs-affiliated think tank China Institute of International Studies, asserts can be flexibly adapted to the counterpart country's conditions and needs (see Table 1).⁸ China has bilateral diplomatic relations with all Middle Eastern countries, which include comprehensive strategic partnerships at the top level of the

*Although the "Middle East" is a broad term often used to encompass North Africa, the Caucasus, and South and Central Asia, this chapter will primarily, but not exclusively, focus on China's relations with the following countries: Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, Turkey, the United Arab Emirates, and Yemen.

†Xi's first diplomatic tour of the region took place in January 2016; he arrived first in Saudi Arabia and then traveled to Egypt and Iran. During the visit, China inked Comprehensive Strategic Partnership agreements with both Iran and Saudi Arabia. Jonathan Fulton, "Friends with Benefits: China's Partnership Diplomacy in the Gulf," *Project on Middle East Political Science*, March 2019.

diplomatic hierarchy, followed by strategic partnerships, friendly cooperative partnerships, and an “innovative comprehensive partnership” with Israel exclusively.⁹ At the multilateral level, China uses the China-Arab States Cooperation Forum (CASCF), made up of Arab League members, and the Forum on China-Africa Cooperation, which includes nine Arab League members, to map out cooperation priorities with regular ministerial-level meetings as well as sub-ministerial-level, issue-specific working groups.¹⁰ China also plays an influential role in BRICS and the Shanghai Cooperation Organization (SCO), which have both admitted Middle Eastern states as members in recent years.*¹¹ (For more on China’s activities in BRICS and the SCO in 2024, see Chapter 2, “U.S.-China Security and Foreign Affairs (Year in Review).”)

Table 1: Types of China’s Diplomatic Partnerships in the Middle East

Type of Diplomatic Partnership	Scope	Partners
Comprehensive Strategic Partnership	Close cooperation in a wide range of areas and coordination on regional and international affairs	Egypt, Iran, Saudi Arabia, the United Arab Emirates (UAE), Bahrain
Strategic Partnership	Coordination on regional and international affairs, including military	Iraq, Jordan, Kuwait, Oman, Palestinian Authority, Qatar, Syria, Turkey
Friendly Cooperative Partnership	Lowest tier, focused on strengthening cooperation on bilateral issues including trade	Lebanon, Yemen
Innovative Comprehensive Partnership	Technology-focused	Israel

Source: Various.¹²

China also conducts diplomatic engagement on specific regional issues through the appointment of special envoys. Beijing appointed its first special envoy on the Middle East Issue focused on Israel and Palestine in 2002 and a special envoy on the Syrian issue in 2016.¹³ Dr. Fulton assesses that the envoys are designed to present China “as an actor with influence and interest in these issues, although the impact of each has been marginal.”¹⁴ For example, in October 2023, Special Envoy Zhai Jun embarked on a tour aimed at promoting peace talks between Israel and Hamas.¹⁵ Dr. Fulton said the visit was intended primarily to “demonstrate China’s solidarity with Arab causes” and promote an alternative vision for the region from that offered by the United States.¹⁶ As of this writing, however, neither the envoy nor China’s mediation efforts have contributed to any substantive progress on talks between the two sides.¹⁷

*According to Dr. Fulton’s written testimony before the Commission, BRICS expanded for the first time in 2023 to include Saudi Arabia, Egypt, Iran, the UAE, and Ethiopia, providing the organization with a presence in the Middle East and North Africa (MENA) and Horn regions, while the SCO admitted Iran in the same year. Bahrain, Egypt, Kuwait, Qatar, Saudi Arabia, and the UAE are all dialogue partners of the SCO but are still not full members. Jonathan Fulton, written testimony before the U.S.-China Economic and Security Review Commission, *Hearing on China and the Middle East*, April 19, 2024, 3.

China's Interests in and Views of the Middle East

China has varied economic and strategic interests in the Middle East. In terms of economic goals, China seeks access to resources and markets across the region, buying energy, increasing trade, and winning infrastructure construction contracts.¹⁸ According to written testimony before the Commission by Dawn C. Murphy, an associate professor at the U.S. National War College, Beijing's broader diplomatic aims in the region include ensuring silence or supportive statements from Arab states on Beijing's actions in Xinjiang and Hong Kong, garnering support for China's stance on Taiwan and the South China Sea, and promoting Xi's signature initiatives like BRI, the Global Development Initiative, and the Global Security Initiative.¹⁹ China views the Middle East as part of a broader vision of a new global order that is led by China and safe for illiberal, authoritarian regimes like itself.²⁰ China's engagement with Middle Eastern countries is illustrative of its broader effort to counterbalance the United States and position itself as the leader of a new world order based on its state-centered, authoritarian, self-proclaimed alternative to Western liberalism.²¹

China has sought to appeal to Middle Eastern governments on the basis of its values, which are framed as promoting sovereignty, territorial integrity, self-determination, and noninterference in the domestic affairs of states rather than the liberal norms of democracy, free markets, human rights, and international institutions.²² According to Dr. Fulton, by making these non-democratic values the normative framework of its global initiatives, China has created an attractive option for "governments and societies long frustrated by the inconsistent promotion of liberal values from the west, or by those that reject liberalism altogether."²³ For example, China's reaction to the Israel-Hamas war—and in particular its support of the Palestinian cause and condemnation of Israel as an extension of the United States—has also been designed to reinforce its identity as the leader of what it refers to as the "Global South."²⁴ (For more on China's usage of the term "Global South," see Chapter 2, "Security and Foreign Affairs (Year in Review)")

However, China does not appear to wish to take up the U.S. role of major security contributor or build a network of alliances in the Middle East.²⁵ According to Yun Sun, director of the China Program at the Stimson Center, China instead envisions a new system in the Middle East that would "displace U.S. dominance without replacing it."²⁶ China views the Middle East as an arena of strategic competition with the United States, where its increased engagement will facilitate the rise of an illiberal world order and accelerate the decline of U.S. influence. Jon B. Alterman, director of the Middle East Program at the Center for Strategic and International Studies, asserts that Beijing is seeking to "peel the region away from the United States."²⁷ At the same time, Dr. Alterman notes that China's "spectacular absence" of diplomatic engagement on Arab and Israeli issues, Red Sea navigation, and other issues where Beijing has equities "is a sign that China's not replacing [the United States] in the Middle East and doesn't want to play a larger role."²⁸ Dr. Fulton articulates that China's economic interests in the region have not required a corresponding political or security role, and Beijing has

shown no indication that it will do so, instead benefiting from the “U.S. security architecture that underpins the region’s fragile status quo.”²⁹

Finally, China continues to view the Middle East as a source of instability and intractable security challenges, which it is not necessarily willing or able to resolve. Chinese experts and analysts assess the region as one of frequent crises, including conflict between Israel and its neighbors, terrorism, political movements for democratization such as the Arab Spring, and potential threats to China’s energy imports.³⁰ China has also blamed the United States for the region’s security problems, most recently asserting that Washington’s support for Israel in its war with Hamas has been a destabilizing force.³¹

Consistent with these interests and concerns, Chinese diplomatic activities in the Middle East can be divided into three lines of effort that will be explored in the following pages. The first is advancing Chinese global leadership. The second is undermining U.S. relations with key Middle Eastern partners, notably Saudi Arabia and the UAE. The third is supporting U.S. adversaries, with a particular focus on Iran.

Building Middle Eastern Support for Chinese Global Leadership

The Middle East has become an important arena for the CCP to advance its vision of a new China-led global order. A major aspect of this effort is China’s increasing efforts to portray itself as a neutral mediator in regional conflicts. In addition, China is heavily promoting Xi’s three major initiatives—the Global Development, Global Security, and Global Civilization Initiatives—as the framework for implementing this bid for global leadership. Finally, China engages the Middle East through multinational Beijing-led venues such as the CASCF.

China Attempts to Paint Itself as a Responsible, Neutral Party in Mediation Efforts

Beijing’s push to position itself as a conflict mediator in the Middle East is part of a larger strategy to portray itself as a global leader, although the effectiveness of these efforts is debatable.³² According to Dr. Murphy, China’s efforts to mediate disputes in the region are not new, but Beijing has recently shown a “willingness to publicize its behavior” and may encroach on the United States’ regional interests.³³ China’s role in the Saudi Arabia-Iran rapprochement could be seen as a significant win for China, but according to Dr. Fulton, most of the groundwork was already laid before Beijing’s involvement, and the rapprochement itself was the result of domestic political and economic pressures within Saudi Arabia and Iran.*³⁴

* China’s hosting of the final round of negotiations emerged from Xi’s December 2022 state visit to Riyadh and a subsequent visit by Iranian President Ebrahim Raisi to Beijing in February 2023, although Oman and Iraq had played a major role in prior rounds of negotiation, hosting five previous rounds of talks. *The National*, “Years of Secretive Talks behind Saudi-Iran Rapprochement,” March 10, 2023; Jonathan Fulton, “Iran’s Economic Future Is Uncertain. It’s No Surprise Why Raisi Visited China,” *Atlantic Council*, February 22, 2023; Maziar Motamedi, “Iran, Saudi Arabia Hold Fifth Round of Talks in Baghdad,” *Al-Jazeera*, April 23, 2022.

The Israel-Hamas War and the Limits of China's Mediation Diplomacy

In the decade leading up to the current conflict between Hamas and Israel, Beijing sought to balance its relations with both sides and paint itself as a neutral party, but ultimately it demonstrated its limited approach through hollow rhetoric. In 2013, China offered a proposal for a two-state solution during nearly simultaneous separate meetings with Israeli Prime Minister Benjamin Netanyahu and Palestinian President Mahmoud Abbas in Beijing.³⁵ At the time, Yitzhak Shichor, a professor of political science and Asian studies at the University of Haifa, criticized China's vague proposal,³⁶ asserting that "it's not really a plan, just a collection of slogans trying to satisfy everybody."³⁷ During 2017, China again met with President Abbas and hosted the first Palestinian-Israeli Peace Symposium since 2006.³⁸ In 2021, Foreign Minister Wang Yi raised a repackaged peace plan at the UN and during state visits to Middle Eastern countries, which continued to be used as a high-profile and rhetorical framing opportunity rather than an actionable proposal.³⁹ In April 2023, just a month after China's efforts to broker a peace deal between Saudi Arabia and Iran, then Chinese Foreign Minister Qin Gang held two separate phone calls with his Israeli and Palestinian counterparts offering to facilitate peace talks between the two sides.⁴⁰ In a further attempt to boost Beijing's standing in the region, China signed a strategic partnership agreement with Palestinian Authority President Mahmoud Abbas during a June 2023 meeting, which included an economic and technological cooperation pact, a deal on mutual visa exemption for diplomatic passports, and the establishment of a diplomatic friendship between the Chinese city of Wuhan and Ramallah.⁴¹ At a time of comparatively strained relations between Israel and the United States, Prime Minister Netanyahu announced during a June 2023 meeting with U.S. members of Congress that China had invited him to travel to Beijing.⁴² The trip, originally planned for October 2023, was canceled after the outbreak of war in Gaza.⁴³

Beijing's response to Hamas's October 7th terrorist attack damaged over a decade of relationship-building with Israel and exposed its cynical use of the conflict to align itself with Arab countries at the expense of Israel and its people.⁴⁴ Moreover, Beijing's response to the attack has also been intended to burnish its image as the self-declared leader of low- and middle-income countries—countries it increasingly refers to as the "Global South"—and further its rivalry with the United States.⁴⁵ Dr. Fulton argues that Beijing's response to events since the October 7th Hamas terrorist attack have made China appear transactional and self-interested rather than evoking an image of a responsible extra-regional power.⁴⁶ On October 8th, China's foreign ministry initially issued a statement that called on "relevant parties to remain calm, exercise restraint and immediately end the hostilities," failing to place the onus of responsibility on Hamas for the attacks.⁴⁷ The following day, Chinese foreign ministry spokesperson Mao Ning expressed sympathy for the victims but still failed to condemn Hamas.*⁴⁸ Spokesperson

*On October 13th, Israel's foreign ministry expressed "deep disappointment" to China's envoy to the Middle East over Beijing's lack of a clear and unequivocal condemnation of Hamas. *Re-*

Mao's initial statement was made at the same time a U.S. bipartisan congressional delegation of six senators met with Xi in Beijing, during which time the delegation urged China to issue a stronger condemnation of the attack.⁴⁹ Minister Wang called for solidarity among Muslim countries in a call to the Iranian foreign minister just days later.*⁵⁰ Wang said in an October 15th call with his Saudi counterpart that Israel's actions in Gaza went "beyond the scope of self-defense," criticizing the actions as "collective punishment."⁵¹ On October 23, 2023, Wang Yi spoke separately with high-level diplomats from Israel and the Palestinian Authority, reportedly stating that Israel's "reasonable security concerns" could only be addressed through a political settlement and expressing sympathy for the people of Palestine while failing to condemn Hamas by name.†⁵² In November 2023, China convened a special meeting of BRICS, attended by Xi, to discuss the Israel-Hamas war.‡⁵³ During the March 2024 National People's Congress and Chinese People's Political Consultative Conference, also known as the Two Sessions, Minister Wang told a reporter that China supported full UN membership for Palestine, taking a subtle jab at the United States by calling for "individual Security Council members to refrain from placing obstacles in its way."⁵⁴ Dr. Murphy asserts that Beijing has utilized its presence in the UN Security Council (UNSC) to further this aim, stating that "it is likely Beijing's position on the Israel-Hamas war and its UNSC voting on this issue will positively resonate with the Arab World, the Muslim-majority world, and many countries in the Global South more broadly."⁵⁵

In subsequent months, China has focused on promoting intra-Palestinian unity and has also held meetings with Israel that do not appear to have created any discernible outcomes for advancing a resolution to the conflict.⁵⁶ In March 2024, Chinese diplomat Wang Kejian made a multi-stop trip to the Middle East, meeting with representatives from the Israeli Foreign Ministry and Palestinian Authority, followed by a meeting in Qatar with Hamas political chairman Ismail Haniyeh (since killed while in Iran).⁵⁷ In April 2024, China hosted Hamas and Fatah officials, two rival factions, for talks aimed at intra-Palestinian reconciliation, a follow-up to meetings

uters, "Israel Says 'Deeply Disappointed' Over Lack of China Condemnation of Hamas Attack," October 13, 2023.

*China condemned Israel's April 2024 strike on the Iranian Embassy in Damascus but not Iran's missile and drone attacks—its first direct attack on Israel from Iranian soil—with Minister Wang Yi stating in a call with his Iranian counterpart that Iran's attack was a limited act of self-defense. *Xinhua*, "Chinese, Iranian FMs Hold Phone Talks on Israel-Iran Tensions," April 16, 2024; China's Ministry of Foreign Affairs, *Wang Yi Has a Phone Call with Foreign Minister of Iran Hossein Amir-Abdollahian*, April 15, 2024; *Wall Street Journal*, "Iran's Direct Attack on Israel Is a First," April 15, 2024.

†On October 8, 2024, following the one-year anniversary of the Hamas terrorist attack, a foreign ministry spokesperson again paid lip service to Israel's "reasonable security concerns" without mentioning Hamas or acknowledging its role in the conflict. China's Ministry of Foreign Affairs, *Foreign Ministry Spokesperson Mao Ning's Regular Press Conference on October 8, 2024*, October 8, 2024.

‡The virtual meeting was chaired by President Cyril Ramaphosa of South Africa and attended by Brazilian President Luiz Inácio Lula da Silva, Russian President Vladimir Putin, Crown Prince of Saudi Arabia Mohammed bin Salman, Egyptian President Abdel Fattah el-Sisi, Iranian President Ebrahim Raisi, President Sheikh Mohamed bin Zayed Al Nahyan of the UAE, Ethiopian Prime Minister Abiy Ahmed Ali, the foreign ministers of Argentina and India, and Chinese Foreign Minister Wang Yi and Director of the CCP General Office Cai Qi. China's Embassy in the United States of America, *Xi Jinping Attends the Extraordinary Joint Meeting of BRICS Leaders and Leaders of Invited BRICS Members on the Situation in the Middle East with Particular Reference to Gaza*, November 22, 2023.

between the two in Russia in February.⁵⁸ That same month, Zhai Jun, China's Special Envoy on the Middle East Issue, met with Israeli Ambassador to China Irit Ben-Abba Vitale to discuss the conflict; then, in June 2024, the two exchanged views on China-Israel relations and "international and regional issues of mutual interest and concern."⁵⁹ Further rounds of talks between Palestinian factions were held in Beijing in July 2024, in which 14 groups signed what was dubbed the "Beijing Declaration," agreeing to recognize unity under the framework of the Palestine Liberation Organization, a nationalist umbrella organization composed of disparate factions that represents the Palestinians at international fora.⁶⁰ However, experts doubt that this reconciliation in preparation for the post-war rebuilding of Gaza represents the end of the rivals' deep divisions given the statement's lack of a follow-up plan.⁶¹

Beijing Cultivates Middle Eastern Support for Chinese Initiatives and Global Leadership

China is utilizing Xi's foreign policy frameworks—the Global Security Initiative, the Global Development Initiative, and the Global Civilization Initiative—in diplomacy with Middle Eastern countries to cultivate support for Chinese leadership in matters of security, development, and culture.⁶² Beijing has worked to attach the initiatives to various projects in order to advance their implementation across the Middle East. It is not clear how effective these initiatives have been in the region; Dr. Fulton says that although the three initiatives have been appearing in joint communiqués across the region and have been cited by local actors as useful contributions from China, they do not appear to be widely understood yet, and many local governments are not aware of them.⁶³

Global Security Initiative

The Global Security Initiative was first introduced by Xi in an April 2022 speech at the Boao Forum and described as a proposal to address "deficits in peace, development, security, and governance" through adherence to six core concepts and principles that reflect China's preferences for regime security and state sovereignty.*⁶⁴ According to M. Taylor Fravel, a professor of political science at the Massachusetts Institute of Technology, China is utilizing the initiative to criticize and discredit the United States and its alliances, opening up space for Chinese-led alternatives.⁶⁵ Sheena Chestnut Greitens, an associate professor at the University of Texas at Austin, sees the Global Security Initiative as the externalization of Xi's Comprehensive National Security Concept and an effort to "create new forms of global security governance that bypass or reduce the importance of the U.S. alliance system, thereby blunting Washington's ability to contain China or foment 'color revolutions' inside it."⁶⁶ (For more on the Comprehensive National Security Concept,

*These six principles are commitment to: (1) the vision of common, comprehensive, cooperative, and sustainable security; (2) respecting the sovereignty and territorial integrity of all countries; (3) abiding by the purposes and principles of the UN Charter; (4) taking the legitimate security concerns of all countries seriously; (5) peacefully resolving differences and disputes between countries through dialogue and consultation; and (6) maintaining security in both traditional and non-traditional domains. China's Ministry of Foreign Affairs, *The Global Security Initiative Concept Paper*, February 21, 2023.

see Chapter 7, “China’s New Measures for Control, Mobilization, and Resilience.”)

The Global Security Initiative lists the establishment of a “new security framework” in the Middle East among its priorities for international cooperation.*⁶⁷ Minister Wang reportedly introduced the concept during the second China-led Middle East Security Forum in September 2022.⁶⁸ Minister Wang describes the new security architecture as emphasizing the leading role of Middle Eastern countries in regional security affairs, abiding by the UN Charter, and focusing on Israel-Palestine peace talks.⁶⁹ According to Dr. Fravel, the framework could be interpreted as an effort to undermine U.S. leadership in the region, given its emphasis on resisting outside interference and sanctions.⁷⁰ Beijing presented the March 2023 normalization of relations between Iran and Saudi Arabia in Beijing as a model for resolving “hotspot issues”† and a major victory for the Global Security Initiative, crediting it with a “wave of reconciliation” across the region.⁷¹

Global Development Initiative

The Global Development Initiative is China’s development framework that Beijing claims aims to unite countries under the concepts of common development and “win-win cooperation.”⁷² This initiative focuses on smaller-scale development projects‡ implemented by the Ministry of Foreign Affairs in partnership with existing and newly established multinational institutions, in contrast to BRI’s large state-owned enterprise-driven infrastructure projects, but together they act as drivers of China’s “South-South cooperation” strategy.§⁷³ According to Chen Yunnan, a research fellow at the London-based Overseas Development Institute, a global affairs think tank, the Global Development Initiative is “conveniently free of the negative optics and baggage that the BRI has accumulated over the years with its spotty environmental record and especially, the polemical

*The Global Security Initiative is frequently mentioned during China’s diplomatic meetings and has been written into numerous bilateral and multilateral documents. Xi also promoted the initiative during his second major diplomatic tour of the Middle East in December 2022, mentioning it in speeches given at the first China-Gulf Cooperation Council and China-Arab States Summits. China Institute of International Studies, “Report on the Implementation of the Global Security Initiative,” July 2024, 10. China’s Ministry of Foreign Affairs, *Building on Past Achievements and Jointly Creating a Brighter Future of China-GCC Relations*, December 9, 2022; China’s Ministry of Foreign Affairs, *Carrying Forward the Spirit of China-Arab Friendship and Jointly Building a China-Arab Community with a Shared Future in the New Era*, December 9, 2022; Saudi Press Agency, “Riyadh Declaration - The First Arab-China Summit,” December 9, 2022; China’s Ministry of Foreign Affairs, *Carrying Forward Our Millennia-Old Friendship and Jointly Creating a Better Future*, December 8, 2022.

†Xi stated in June 2024 that international hotspot issues include Ukraine, the Israel-Hamas conflict, the Korean Peninsula, Iran, Myanmar, and Afghanistan at an event in Beijing celebrating the 70th anniversary of the “Five Principles of Peaceful Coexistence.” Shi Jiangtao, “China’s Xi Jinping Calls on Nations to Unite against ‘Iron Curtains of Confrontation,’” *South China Morning Post*, June 28, 2024.

‡According to Manoj Kewalramani, a fellow in China studies and chair of the Indo-Pacific Studies Programme at the Takshashila Institution, Global Development Initiative projects cover domains including poverty reduction, food security, pandemic and vaccines, climate change, industrialization, the digital economy, digital connectivity, and development finance. Manoj Kewalramani, “China as a Rising Norm Entrepreneur: Examining the GDI, GSI and GCI,” *Trends in Southeast Asia 2:2024* (January 2024).

§China often uses the term “South-South cooperation” to refer to its engagement with developing countries. According to China’s Ministry of Foreign Affairs, “South-South cooperation” is “an important component of Deng Xiaoping Theory” that is necessary for developing countries to support and “enhance solidarity” with one another. China’s Ministry of Foreign Affairs, *A “Dialogue of the Century” on South-South Cooperation*, August 29, 2022.

accusations of predatory lending and debt traps that it has been unable to shake.”⁷⁴

Since the Global Development Initiative was announced in 2021, 17 Arab countries have endorsed it and 12 Arab states have joined the initiative’s “Group of Friends.”⁷⁵ A June 2023 progress report on the initiative, published by the State Council-affiliated Center for International Knowledge on Development, said that the China-led Global Clean Energy Cooperation Partnership—which has encouraged participation by members of the Arab League, the SCO, BRICS, and others to make a joint effort in the development of green and low-carbon energy—will be developed under the Global Development Initiative framework, without providing further details on how the initiative will enhance or change the partnership.⁷⁶ During a May 2024 speech, Minister Wang said China has initiated 30 development cooperation projects involving Arab countries under the Global Development Initiative.*⁷⁷

Global Civilization Initiative

The Global Civilization Initiative is a Chinese framework intended to combat Western countries’ promotion of “universal values” by advocating for the respect of a “diversity of civilizations.”⁷⁸ The Global Civilization Initiative, launched in March 2023, is intended to create an alternative framework to liberal values and norms.†⁷⁹ During Xi’s March 2023 speech announcing the initiative to the Chinese Communist Party High-Level Dialogue with Political Parties, he stated that countries must “refrain from imposing their own values or models on others.”⁸⁰ According to R. Evan Ellis, a research professor at the U.S. Army War College Strategic Studies Institute, “By promoting the relativism of values and arguing against calling out bad behavior and seeking to stop it, the concept appeals to regimes that desire to do what they wish.”⁸¹

While the initiative remains somewhat nebulous, an official readout from the July 2023 China-Arab States Political Parties Dialogue suggests it will take the form of exchanges and cooperation between local governments, think tanks, universities, nongovernmental organizations, and media entities.⁸² The readout also stated that the CCP is “willing to invite” 200 leaders of Arab political parties, political organizations, and think tank and media representatives to visit China for exchanges every year, but it did not outline specific details regarding which countries will be invited, what kinds of activities they will participate in, or how long the CCP will carry out the exchanges.⁸³ In May 2024, Xi announced that China would establish

*The first batch of Global Development Initiative projects, published in 2022, listed projects involving Middle Eastern countries that focus on issues such as pandemic response, poverty reduction, green development, and food security and are sponsored by the China International Development Cooperation Agency, China’s Ministry of Commerce, and various UN organizations. Wang Yi has stated that a total of 45 development cooperation or aid projects were “underway or under consideration” in the region. China’s Ministry of Foreign Affairs, *Let Us Take Real Action to Build a China-Arab Community with a Shared Future*, May 30, 2024; China’s Ministry of Foreign Affairs, *List of First-Batch Projects of GDI Project Pool*, September 21, 2022.

†According to R. Evan Ellis, a research professor of Latin American studies at the U.S. Army War College Strategic Studies Institute, “The emphasis on ‘civilizations’ arguably prioritizes China, as well as other states with linkages to ancient empires, including Beijing’s current illiberal partners Russia and Iran (Persia), and Global South countries China is courting (Egypt and Turkey) while deprivileging the voice of the United States as a relatively new and heterogeneous actor in ‘civilizational’ terms.” R. Evan Ellis, “The Trouble with China’s Global Civilization Initiative,” *Diplomat*, June 1, 2023.

a China-Arab Center of the Global Civilization Initiative and work with Arab countries to “achieve the goal of 10 million two-way visits of tourists in the next five years.”⁸⁴ If these exchanges come to fruition, this may indicate that Beijing sees the Middle East as a key region for expanding the use of the Global Civilization Initiative as a new brand and tool for greater soft power influence.

China Garners Support from Middle East on Repressive Uyghur Policies

Although systematic elimination of Muslim religious expression is a central part of the human rights crisis taking place in the Xinjiang Uyghur Autonomous Region (XUAR), the governments of Muslim majority countries have remained largely silent on the matter.⁸⁵ China’s efforts have been successful in garnering the support of Arab countries in the Middle East, some of which have even issued statements of support of China’s policies in the region and have cooperated in returning Uyghurs to China, where they face prohibitions on Muslim religious practices, arbitrary detention, and torture in contravention of international law.⁸⁶

Prior to the beginning of the crackdown in 2016, Uyghurs frequently traveled to the Middle East for business, for education, or to undertake the Hajj. Many Uyghurs were subsequently sent for “reeducation”* in the camps simply for traveling to one of 26 “sensitive countries,” which included Egypt, Iran, Iraq, Saudi Arabia, Syria, Turkey, and the UAE.⁸⁷ Yet, many of these countries have made statements of support for China’s policies through UN letters or during state visits.⁸⁸ Middle Eastern diplomats and journalists are given tours of the region and encouraged to repeat Chinese narratives.⁸⁹ Furthermore, some Middle Eastern countries—including Egypt, Qatar, Saudi Arabia, Syria, and the UAE—have been cooperating with the Chinese security services in locating, detaining, or providing for the refolement of Uyghurs.⁹⁰

As a country with cultural affinity for Uyghurs and other Turkic peoples, Turkey’s policies are somewhat different, and it remains home to a large Uyghur diaspora. Even so, Turkey has increased its cooperation with China in recent years, limiting information about the crisis in the media, constricting Uyghur activism, and increasing the threat of deportation.⁹¹ In June 2024, Turkish Foreign Minister Hakan Fidan made the first high-level visit to XUAR by a Turkish official since 2012, announcing greater counterterrorism cooperation and trade while avoiding overt criticism of Beijing’s human rights abuses.†⁹²

* In May 2014, Beijing launched its “Strike Hard Campaign against Violent Terrorism” in Xinjiang. According to Human Rights Watch, “Since at least 2014, the Chinese government has subjected Turkic Muslims to various crimes against humanity, including mass arbitrary detention, torture and deaths in detention, and enforced disappearances.” Human Rights Watch, “Break Their Lineage, Break Their Roots: China’s Crimes against Humanity Targeting Uyghurs and Other Turkic Muslims,” April 19, 2021.

† Foreign Minister Fidan commented during his visit that Xinjiang’s cities of Urumqi and Kashgar are “Turkic and Islamic cities,” which observers asserted could have been a subtle rejection of China’s claims over the region. The Chinese media did not react to Fidan’s comments. Arslan and Erkin Tarim, “In China, Turkish Foreign Minister Calls Urumqi and Kashgar ‘Turkic’ Cities,” *Radio Free Asia*, June 6, 2024; Kasim Kashgar, “Turkish Diplomat’s Visit to Uyghur Region in China Raises Concerns,” *Voice of America*, June 6, 2024.

China Garner Support from Middle East on Repressive Uyghur Policies—Continued

The leaders of Middle Eastern countries have evidently determined that it is not in their interest to condemn crimes against humanity taking place in XUAR against a Muslim population. Obtaining silence or support from Middle Eastern countries for Chinese policies in Xinjiang, as well as Hong Kong and Taiwan, is a high priority in China's engagement with the region, as Dr. Murphy pointed out in her testimony before the Commission.⁹³ Dr. Fulton observes that Middle Eastern countries have little incentive to jeopardize their economic interests and trade relations and that China appears to have successfully framed the issue as one similar to Middle Eastern governments' concerns about political Islam and terrorism.⁹⁴

Beijing Engages China-Arab States Cooperation Forum to Bolster Regional Legitimacy

Although China conducts diplomatic activities in a range of different multilateral institutions and platforms, the CASCFC, established in 2004, serves as China's primary multilateral coordination mechanism with the League of Arab States,* including the Gulf Cooperation Council (GCC) countries.⁹⁵ The CASCFC holds ministerial meetings every two years, and other senior officials meet on an annual basis to implement any action plans that have been developed.⁹⁶ The CASCFC is used by China for several key purposes:

- The forum emphasizes political cooperation with China, particularly China's "Five Principles of Peaceful Coexistence"† and the concept of "South-South Cooperation."⁹⁷ The Five Principles of Peaceful Coexistence "represent a very conservative interpretation of Westphalian norms of sovereignty, territorial integrity, and non-interference," Dr. Murphy said.⁹⁸ They stand in contrast to the liberal, rules-based international order's attention to human rights and democratic values, and in doing so they appeal to the region's autocratic governments.
- According to Dr. Murphy, the CASCFC "explicitly includes cooperation on key Arab political issues," such as the Middle East peace process and more recently discussion of the ongoing conflict in Gaza.⁹⁹
- China uses the forum to solicit support for various issues important to China internationally. Dr. Murphy notes that one example of this type of behavior was the inclusion of wording in the CASCFC documents supporting China's position on territorial and maritime disputes in the South China Sea in 2016.¹⁰⁰ Chi-

*The League of Arab States includes Algeria, Bahrain, Comoros, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Somalia, Sudan, Syria, Tunisia, the United Arab Emirates, and Yemen. Diplomatic Service of the European Union, *League of Arab States (LAS) and the EU*, August 3, 2021.

†The Five Principles are: mutual respect for territory and sovereignty, mutual nonaggression, mutual noninterference in internal affairs, equality and mutual benefit, and peaceful coexistence. China's Ministry of Foreign Affairs, *Build a New International Order on the Basis of the Five Principles of Peaceful Coexistence*.

na likewise has used the forum to seek statements of support from Middle Eastern states for its policies in Xinjiang, providing diplomatic cover for China's human rights abuses against Uyghurs and other Turkic peoples.¹⁰¹ (See the "China Garner Support from Middle East on Repressive Uyghur Policies" text-box above for more on these efforts.)

- China has also used the forum as a primary multilateral mechanism to coordinate economic activities with the Middle East.¹⁰²

The most recent ministerial-level meeting of CASCF was held in late May through early June 2024 and focused on issues such as further economic and technological cooperation as well as a potential ceasefire in Gaza.¹⁰³ China and the Arab states also issued a 21-point joint statement at the forum criticizing Israel and the United States, further demonstrating Beijing's one-sided actions as it has attempted to portray itself as a neutral mediator of the war.¹⁰⁴

China Expands Engagement with Key U.S. Partners in the Middle East

China is seeking to bolster its relations and influence with Arab states in order to expand economic ties and promote its vision of an alternative world order, and in the course of doing so it seeks to exploit tensions in these countries' relationships with the United States. China places a particularly high priority on its relationships with Saudi Arabia, the UAE, and Egypt, all of which have signed comprehensive strategic partnership agreements with China and hosted visits by Xi at least once—Egypt in 2016, the UAE in 2018, and Saudi Arabia in 2016 and 2022.*¹⁰⁵ Minister Wang also made stops during a six-country Middle East tour in 2021 and traveled to Egypt during a four-country tour of African countries in 2024.¹⁰⁶

China Seeks to Become Alternative Strategic Partner for Saudi Arabia

China and Saudi Arabia have shown mutual interest in deepening their relationship, as Riyadh has sought to court Beijing, and China has attempted to portray itself as an essential strategic partner to Saudi Arabia.¹⁰⁷ Dr. Alterman asserts that China has sought to do so "partly in the wake of Saudi concerns that the United States has been abandoning the Middle East as it pivots toward Asia, and partly by marketing the idea that the Chinese experience in economic growth holds lessons for Saudi Arabia's own ambitious economic diversification efforts."¹⁰⁸ Saudi Arabia's desire to draw closer to China grew following the diplomatic fallout caused by the murder of Jamal Khashoggi in 2018.¹⁰⁹ Dr. Alterman notes, however, that this motivation has dampened in recent years partly due to the Biden Administration's reassurance that the United States is not hostile toward Saudi Arabia and because China's regional diplomacy "is no substitute for the United States."¹¹⁰ Despite this more recent U.S. effort, Saudi Arabia has still pursued engagement with China, seeing BRI as a way to advance its Vision 2030 agenda.¹¹¹ Prior to

* Before Xi's 2016 visit to Saudi Arabia, Egypt, and Iran, the Ministry of Foreign Affairs published the *Arab Policy Paper*, which laid out the blueprint for cooperation in a variety of areas, emphasizing cooperation on energy, investment, and high technology. China's Ministry of Foreign Affairs, *China's Arab Policy Paper*, January 13, 2016.

Xi's 2022 visit to the country, Saudi Arabian state media said the Kingdom was keen to develop bilateral relations with China as part of its strategic plan to boost partnerships with "all influential countries and international powers."¹¹² The two sides enhanced their Comprehensive Strategic Partnership, issuing a joint declaration on economic and defense cooperation in December 2022.¹¹³ During the 2022 trip, Xi also attended the first Arab-China Summit for Cooperation and Development held in Riyadh in what the Ministry of Foreign Affairs called the "highest-level diplomatic event between China and the Arab world since the founding of the People's Republic of China."¹¹⁴

China's relations with Saudi Arabia have been rooted in economic interests, although there is also a small, somewhat limited military strand that runs through bilateral ties.¹¹⁵ Dr. Alterman notes that since the 1990s, Saudi Arabia has engaged more deeply with Chinese firms when it sought low-cost construction options amid a slumping economy, with Chinese firms building some of Saudi Arabia's most important infrastructure projects, including light rail, desalination plants, and industrial projects, as well as contributing to the country's information technology (IT) systems.¹¹⁶ Saudi Arabia occasionally sought to procure Chinese weapons and technology as alternatives to those the United States would not provide, like CSS-2 missiles in the 1980s, with China now selling Saudi Arabia drones, helping Riyadh build ballistic missiles, and being involved in domestic surveillance efforts.¹¹⁷

China-Saudi Cooperation on Ballistic Missiles

Saudi Arabia is diversifying its own arms procurement in response to Iran's growing military capabilities, including by acquiring Chinese ballistic missile technology and expertise. Although China is not a member of the Missile Technology Control Regime (MTCR), China's government nevertheless made a formal voluntary commitment in 2000 to abide by its export restrictions on ballistic missile components and technology.¹¹⁸ Despite this, China has played a key role in Saudi Arabia's missile procurement efforts.¹¹⁹ In the late 1980s, China first delivered liquid-propelled Dong Feng-3A (DF-3A) missiles to Saudi Arabia, yet the transfer was not publicly acknowledged until 2014.¹²⁰ China has reportedly also transferred additional Dong Feng-class missiles to Riyadh since 2018.*¹²¹ Although U.S. intelligence agencies have raised concerns about the transfers, the United States was reluctant to impose consequences on Saudi Arabia in 2021, a strategic partner in the region, according to the *Wall Street Journal*.¹²² The Arms Control Association asserts that although not illegal, China's assistance to Saudi Arabia "contradicts its vow to abide by the MTCR," as China is not a member of the export control regime but has pledged to adhere to its guidelines prohibiting the export of missiles capable of delivering a 500-kilogram payload more than 186 miles (300 kilometers).¹²³ In December 2021,

*Dong Feng ballistic missiles, produced by the China Aerospace Science and Industry Corporation, have a range of approximately 170 miles to 9,320 miles. The missiles have the capability to engage targets at short, medium, intermediate, and intercontinental ranges and are equipped with diverse warhead-carrying capabilities, enabling strong deterrence abilities. *Army Technology*, "Dongfeng (DF) Ballistic Missiles, China," August 15, 2022.

China-Saudi Cooperation on Ballistic Missiles—*Continued*

analysts from the James Martin Center for Nonproliferation Studies, affiliated with the Middlebury Institute of International Studies at Monterey, assessed that satellite images of a missile facility near Al-Dawadmi, Saudi Arabia, indicate the facility was likely built with Chinese assistance.¹²⁴ During the same month, reports emerged that U.S. intelligence agencies had assessed that Saudi Arabia was producing ballistic missiles domestically with Chinese assistance.¹²⁵ It remains unclear whether the missile being produced at the identified site is a Chinese design, but given China's large transfers of ballistic missile technology to Riyadh, it is certainly possible.¹²⁶

UAE Carrying Out Balancing Act between the United States and China

China views the UAE as a country where the United States is gradually losing its influence, and one with whom Beijing has an opportunity to deepen its cooperation. According to a 2020 article by Chinese scholar Tong Fei, an associate researcher at the Chinese Academy of Social Sciences' Institute of West-Asian and African Studies, as the United States has shifted its focus to Asia, Arab countries—including the UAE—have pursued alternative partners, particularly in the economic realm.¹²⁷ The UAE is home to an estimated quarter million Chinese nationals, and Chinese firms are active there in construction and other fields.¹²⁸ Dr. Tong asserts that “since adopting an eastward foreign policy, the UAE has made deepening its comprehensive strategic partnership with China a top priority in its diplomatic goals.”¹²⁹ In his testimony to the Commission, Dr. Alterman noted that “the Abu Dhabi government increasingly has sought to strike an ‘active neutrality’ posture in the world,” growing its ties with both China and Russia and confident that it is powerful enough to advance its own interests.¹³⁰

Despite the UAE's willingness to work with Beijing, Chinese experts still assess that there are challenges in their diplomatic relations that need to be overcome. Dr. Tong assesses that although the UAE hopes to take advantage of BRI, strengthen investment cooperation with China, get rid of excessive dependence on oil, and accelerate its economic diversification process, the two countries have little understanding of each other due to regional differences and separate ideologies.¹³¹ Dr. Tong argues that government officials and ordinary people in the UAE not only lack a deep understanding of China but also have doubts about Beijing's Middle East policy.¹³² Furthermore, Dr. Tong states that “some UAE elites hope that China can assume more peace and security responsibilities in the Middle East and become a force that can compete with the United States in the Middle East” but that the UAE has concerns about China's cooperation with Iran, which it views as a threat.¹³³ Dr. Tong also asserts that some within the UAE are dissatisfied with the trade deficit with China, as China has used BRI to obtain energy from the UAE but is unwilling to buy petrochemical products the UAE wants to sell to China.¹³⁴ Dr. Tong assesses that because of this, “it can be said that the mutual political trust in the coopera-

tion between the two sides is still relatively fragile.”¹³⁵ (For more on the challenges that China and the UAE’s technological cooperation face under increasing U.S. scrutiny, see the section on “China-Middle East Technology Relations” within this chapter.)

The Reach of Chinese Media in the Middle East

Over the past decade, China has dramatically increased its efforts to build what it calls “discourse power”—the ability to shape global public opinion in the way it does domestically—through its media presence in Middle Eastern countries.¹³⁶ It has been pouring resources into expanding the reach of foreign-facing media outlets in the region.¹³⁷ Chinese government-connected entities and their proxies have been holding summits, tours, and trainings with foreign journalists, encouraging them to echo Chinese narratives while also controlling local traditional and new media outlets.¹³⁸ China has become increasingly adept at utilizing local languages to communicate its preferred narratives, focusing on economic cooperation and providing positive stories on China.¹³⁹ In addition to Arabic-language versions of official media such as CGTN, overseas Chinese networks like China-Arab TV serve official narratives as well, partnering with China’s Central Propaganda Department to strengthen cooperation in film and TV production in order to “transmit China’s voice” and “promote China’s image among Arab countries.”¹⁴⁰ In 2022, the China Media Group, a Chinese state media organization, and the Saudi Ministry of Media launched a joint partnership initiative to promote relations between Arab countries and China at the Arab-Chinese Media Cooperation Forum.¹⁴¹ The initiative focuses on promoting the presence of Chinese media in Arab channels and translating Chinese television shows into Arabic for broadcast in the Palestinian Territories, Algeria, Jordan, Sudan, Iraq, and Saudi Arabia.¹⁴²

Chinese experts and state media have pushed a narrative that frames the United States’ supposedly declining influence in the region as an opportunity for Beijing to increase its engagement. For example, a July 2022 article by Tang Zhichao, a professor at the University of the Chinese Academy of Social Sciences, argued that the Obama, Trump, and Biden Administrations were “obsessed with strategic competition among major powers and implemented a policy of strategic contraction from the Middle East to achieve a shift to the Asia-Pacific region,” which he claims created a vacuum in regional power and security.¹⁴³ Dr. Tang argues in a February 2024 article that during the 30 years of the post-Cold War era, “the United States’ hegemonic position in the Middle East has gradually fallen from high to low,” which has prompted regional countries to “increasingly strengthen their strategic autonomy, providing an important opportunity for the strategic cooperation between China, Russia and Middle Eastern countries to be enhanced.”¹⁴⁴ Gao Wencheng, a Xinhua news reporter, also said in June 2023 that recently, “failure” has become a common keyword when the international media discusses the United States’ Middle East policy, claiming the United States has lost the “hearts of the people” in the region due to “wanton bullying.”¹⁴⁵

Supporting Iran and Terrorist Groups to Undermine the United States

China and Iran share strong opposition to the U.S.-led liberal international order.¹⁴⁶ As it does with other countries in the region, China takes an opportunistic approach to its relationship with Iran.¹⁴⁷ China will show solidarity with Iran to the degree that it comes at little cost to Beijing; at the same time, it takes advantage of Iran's isolated position, buying discounted oil and failing to fully deliver on promised investments.¹⁴⁸ Dr. Alterman argues that China leverages tensions between the United States and Iran, preferring "a world in which the United States is bogged down in the Middle East and alienates much of the Global South through its actions there."¹⁴⁹ China has shown support to Iran through its rhetorical, military, and economic actions, all of which serve to undermine U.S. interests in the region.

Beijing Props Up Tehran with Rhetorical and Diplomatic Support

China has played a significant role in easing Iran's diplomatic isolation in recent years, particularly through its efforts to shield Iran from further sanctions over its nuclear program. China vocally criticized the re-imposition of sanctions by the United States in 2018 after the United States withdrew from the Joint Comprehensive Plan of Action.¹⁵⁰ It has stated opposition to sanctions on Iran and condemned the United States' Iran policy, with Xi stating during a February 2023 meeting with then Iranian President Ebrahim Raisi that China "opposes external forces interfering in Iran's internal affairs and undermining Iran's security and stability."¹⁵¹ A likely motivation was that the 2018 sanctions dampened the potential for Chinese trade and investment with Iran despite continued engagement by China's more risk-tolerant companies.¹⁵²

China has also eased Iran's isolation by drawing it into China-led multilateral institutions, with Iran finally achieving its longstanding goal of joining the SCO in 2023.*¹⁵³ In 2010, the SCO introduced a membership criteria preventing states with UN sanctions from joining—a move some assess was aimed at preventing Iran's accession.¹⁵⁴ Despite these initial impediments, Iran's Supreme National Security Council announced in August 2021 that the "political obstacles" to accession were resolved through dialogue with Russia, according to Nicole Grajewski, a fellow at the Carnegie Endowment for International Peace.¹⁵⁵ In addition to smoothing out its differences with Tajikistan, Dr. Grajewski said, Iran mustered enough support from China to back its accession.†¹⁵⁶ Presently, Iran is the

*Iran first applied for full membership in the SCO in 2008 and became an observer state in 2005. The SCO is mainly a platform for security cooperation, conducting military exercises, and fighting what China calls the "three evils of terrorism, separatism and extremism," serving as what scholar Nicole Bayat Grajewski calls a "regime-preservation network" to help coordinate internal repression. While the organization is presently little more than a "talking shop," according to Dr. Fulton, it could become a "a key platform for institutionalizing authoritarian cooperation and resilience." Jonathan Fulton, "Iran Joining the SCO Isn't Surprising. But Beijing's Promotion of Illiberal Norms in Eurasia Should Get More Attention," *Atlantic Council*, July 13, 2023; Nicole Bayat Grajewski, "Iran and the SCO: The Quest for Legitimacy and Regime Preservation," *Middle East Policy* 30:2 (Summer 2023).

†Then Iranian Foreign Minister Hossein Amir-Abdollahian thanked his Chinese counterpart, Wang Yi, for supporting the country's membership bid in September 2021. Nicole Grajewski,

only Middle Eastern country to have full membership in the SCO, opening up potential closer coordination with China and Russia.*¹⁵⁷

Iran's accession into the BRICS organization † on January 1, 2024, represents another instance of entrance into alternative multinational institutions, having received some rhetorical support from Beijing. While Russia was the original organizer, BRICS has become a high-profile vehicle of China's "South-South" Cooperation strategy, with Minister Wang calling on it to "oppose attempts to instigate a new Cold War" at the June 2024 ministerial meeting in Russia.¹⁵⁸ In July 2023, Chang Hua, China's then ambassador to Iran, said in an interview with Iranian media that "China supports Iran's membership in the BRICS organization.... Although the agreement of other BRICS members is necessary, we support Iran's aspiration to join the organization."¹⁵⁹ General Secretary Xi met with then President Raisi on the sidelines of the BRICS Summit in August 2023, saying China "stood ready to strengthen cooperation with Iran on BRICS and other multilateral platforms."¹⁶⁰ Although BRICS membership may serve to further align Iran with China and Russia, other members of the organization might have concerns about the possibility of being drawn into an anti-U.S. bloc.

China's Transfer of Dual-Use Technology to Iran and Its Terrorist Groups Threatens U.S. National Security Interests

China's transfer of dual-use technologies and components to Iran and its terrorist proxies—including parts used in armed drones and ballistic missiles—undermines U.S. national security interests and stability in the region.‡ In 2023 and 2024, the Treasury Department placed sanctions on networks of Chinese suppliers and Hong Kong front companies selling components to the Iranian ballistic missile and unmanned aerial vehicle (UAV) programs, including the producers of the Shahed drone used by Russia in Ukraine and in attacks on shipping in the Red Sea.¹⁶¹ The Department of Commerce's Bureau of Industry and Security has also placed Chinese and Hong Kong companies on the Entity List in 2023 and 2024 for supplying dual-use components for Iran's UAV industry.¹⁶² U.S. Assistant Secretary of State for Near Eastern Affairs Barbara Leaf testified in 2022 that Iranian proxies are using Chinese UAVs, and the Chinese government is not attempting to curtail the sales.¹⁶³ According to

*"Iranian Membership in the Shanghai Cooperation Organization: Motivations and Implications," *Washington Institute for Near East Policy*, September 15, 2021.

† Full members of the SCO include: China, India, Iran, Kazakhstan, Kyrgyzstan, Pakistan, Russia, Tajikistan, and Uzbekistan. Observer states include Afghanistan, Belarus, and Mongolia. Dialogue partners include Armenia, Azerbaijan, Bahrain, Cambodia, Egypt, Kuwait, Maldives, Myanmar, Nepal, Saudi Arabia, Sri Lanka, Turkey, the UAE, and Qatar. Shanghai Cooperation Organization, "General Information," January 9, 2017.

‡ The intergovernmental organization originally comprised Brazil, Russia, India, China, and South Africa, with Iran entering alongside Egypt, Ethiopia, and the UAE in January 2024. Russia organized and hosted the first summit in 2009, with meetings held annually going forward. The organization is now sometimes referred to as BRICS+. Marc Jütten and Dorothee Falkenberg, "Expansion of BRICS: A Quest for Greater Global Influence?" *European Parliamentary Research Service*, March 2024.

§ According to a 2024 U.S. Department of Justice press release, four Chinese nationals were indicted and charged with several crimes for illegally exporting and smuggling U.S.-origin electronic components used in UAVs and ballistic missiles to Iran. U.S. Department of Justice, *Chinese Nationals Charged with Illegally Exporting U.S.-Origin Electronic Components to Iran and Iranian Military Affiliates*, January 31, 2024.

Iranian media reports, China has supplied Iran with access to the BeiDou satellite navigation system, a rival to the U.S. GPS system, which could bolster drone and missile performance and targeting through its advanced navigation and communication system.*¹⁶⁴

Chinese military equipment and components have allegedly been obtained by Hamas and the Houthis, highlighting the potential danger of Chinese products supporting the operations of non-state actors in the region. After October 2023, the Associated Press and the Israel Defense Forces reported that Hamas was using China-origin weapons in Gaza.¹⁶⁵ Although China claims it does not sell weapons to non-state actors, reports indicate the Chinese-made weapons may have been sold elsewhere in the Middle East and then smuggled to Hamas terrorists.¹⁶⁶ An investigation by Israeli Defense Forces found that Hamas has obtained advanced weapons and technology made in China, including cartridges and rifle sights for M16 assault rifles, automatic grenade launchers, and communication devices.¹⁶⁷

Chinese components have also appeared in weapons used by Iran and its Houthi proxies in attacks on Saudi Arabia. Drones used in a September 2019 attack on two Saudi Aramco facilities claimed by the Houthis but attributed to Iran by the United States and a UN investigation were later revealed to be Shahed 131 drones, which utilize motors resembling the MDR-208 single rotor UAV engine, made by Beijing MicroPilot UAV Flight Control Systems, a Chinese company.†¹⁶⁸ Iran has supplied these and other UAVs and missiles to the Houthis for their attacks on targets across the Middle East.¹⁶⁹ While one Chinese military blogger has speculated that the Houthi rebels were potentially using Chinese missile technology previously shared with Iran, to date there has been no public evidence that the Chinese government is directly transferring weapons to the Houthis.¹⁷⁰ However there is evidence that weapons used by Houthi rebels contain Chinese-made parts.‡¹⁷¹ Furthermore, in June 2024, the Treasury Department announced that Ali Abd-al-Wahhab Muhammad al-Wazir, a China-based Houthi-affiliated individual, played a “key role in procuring materials that enable Houthi forces to manufacture advanced conventional weapons inside Yemen.”¹⁷² He utilized his China-based company, Guangzhou Tasneem Trading Company Limited (Guangzhou Tasneem), a subsidiary of Hong Kong-based Tasneem Trading Company Limited, to obtain these items and ship them to Yemen.¹⁷³

*A 2015 Iranian media report stated that BeiDou was establishing ground stations in Iran and had signed an MOU with Iran Electronics Industries, a state-owned company owned by Iran's Ministry of Defense and subject to U.S. sanctions. *Mehr News Agency*, “Chinese BeiDou BDS to Transfer Satellite Tech. to Iran,” October 18, 2015; U.S. Department of the Treasury, *Treasury Designates Iranian Military Firms*, September 17, 2008.

†The Ukrainian military claims Russia is also sourcing engines from Beijing MicroPilot UAV Flight Control Systems for its Iranian Shahed attack drones. The *Wall Street Journal* reports that Russia has launched more than 4,000 Iranian Shahed drones. Benoit Faucon et al., “The Russian Drone Plant That Could Shape the War in Ukraine,” *Wall Street Journal*, May 28, 2024.

‡The UN panel report that identified the Chinese-origin components also identified UAV and missile components sourced from Iran, Japan, Belarus, Germany, and the Czech Republic via a network of intermediaries. Farzin Nadimi, “The UN Exposes Houthi Reliance on Iranian Weapons,” *Washington Institute for Near East Policy*, February 13, 2020.

China Increases Purchases of Sanctioned Oil from Iran

China has increased imports of Iranian oil in recent years by constructing a parallel network of shippers, refineries, and financial institutions to obscure imports and bypass U.S. sanctions.¹⁷⁴ Taken in conjunction with its increased purchases of sanctioned Russian oil, China is constructing what researchers at the Atlantic Council have dubbed an “axis of evasion” that undermines U.S. sanctions, profiting in the near term from discounted energy imports while establishing an alternative trade and payment system that may buffer it from future economic sanctions.¹⁷⁵ According to estimates by the nonprofit United Against Nuclear Iran and others who track data on Iranian oil exports, China imported 1.1 million barrels per day (bpd) from Iran in 2023, up 9 percent from the year prior.¹⁷⁶ If correct, this would mean China is now responsible for purchasing nearly 90 percent of Iranian crude exports,* which would account for nearly 10 percent of total Chinese crude imports, making Iran the fourth-largest supplier to China in 2023, just behind Iraq.¹⁷⁷ Chinese customs did not report any oil imports from Iran in 2023, so it appears oil is imported through transshipment facilities in Malaysia, the UAE, and Oman and relabeled as “Middle Eastern” oil.¹⁷⁸ China is estimated to have imported 1.4 million bpd on average through the first five months of this year.¹⁷⁹

The sanctioned oil is transported by a so-called “dark fleet” of older tankers that use a variety of tactics to avoid detection, such as turning off signaling systems when making Iranian port calls, sending fake location information (known as “spoofing”), and conducting ship-to-ship transfers outside authorized transfer zones using the cover of bad weather to hide operations, a practice that heightens the risk of an environmentally costly accident.¹⁸⁰ According to testimony before the Commission by Erica Downs, senior research scholar at Columbia University’s Center on Global Energy Policy, independent refineries known as “tea-pots” purchased all the Iranian crude oil imported into China in 2023.¹⁸¹ China’s large state-owned oil companies have curtailed their involvement in purchasing and processing Iranian oil since late 2019 after the re-imposition of sanctions following the U.S. withdrawal from the Joint Comprehensive Plan of Action.¹⁸²

Congress and the Administration have taken a number of recent actions intended to address the issue. Since 2021, over 180 entities and individuals have been sanctioned for their involve-

*Iran’s estimated revenue from oil exports was \$12 billion over the first three months of the government’s fiscal year starting in March 2024. For comparison, the country’s gross domestic product in 2023 was \$401.5 billion and the government’s budget for 2024 is estimated to be \$49.2 billion, about equivalent to expected total revenue from oil exports. In other words, China’s oil purchases from Iran appear to equate to nearly 90 percent of Iran’s entire government budget, though due to associated costs oil export revenue is believed to directly fund 45.4 percent of the government’s operating budget. Given the scale of China’s oil purchases from Iran, and lack of alternative buyers due to sanctions, Beijing appears to have immense capacity to influence Tehran. There is little evidence that China has used this leverage with respect to Iran’s support for proxies in the Middle East—such as Houthi attacks on shipping (other than perhaps protecting Chinese flagged ships) and Hezbollah—or Iran’s direct attacks on Israel. *Iran International*, “Iran Faces 26% Oil Revenue Deficit Despite Surging Exports,” October 5, 2024; Dalgja Khatinoglu, “Iran’s Oil Exports Hit a 5-Year High in 2024,” *Iran International*, July 1, 2024; World Bank Group, “Iran, Islamic Rep.,” *Iran International*, “Iran’s Government Plans to Increase Taxes amid Economic Crisis,” November 11, 2023.

China Increases Purchases of Sanctioned Oil from Iran— *Continued*

ment in the trade of sanctioned Iranian oil.¹⁸³ Congress included two sanctions measures as part of the supplemental appropriations package enacted in April 2024: (1) the Stop Harboring Iranian Petroleum (SHIP) Act directs the president to sanction foreign persons involved in activity related to Iranian oil, to include refineries and port owners and operators; and (2) the Iran-China Energy Sanctions Act of 2023 expands the definition of “significant financial transactions” in the fiscal year (FY) 2012 National Defense Authorization Act to include those by Chinese financial institutions that involve Iranian oil exports, and it also directs the president to make an annual determination on whether financial institutions have engaged in such activity.¹⁸⁴

China’s Economic, Trade, and Investment Interests in the Middle East

China replaced the United States as the Middle East’s largest trade partner in 2010, and China-Middle East economic ties have deepened in the years since.¹⁸⁵ Economic relations feature prominently in China’s engagement with countries in the region, with Chinese companies increasing their physical presence in key logistical nodes of the global supply chain and seeking to shore up access to critical resources.¹⁸⁶ In January 2016, the State Council of the People’s Republic of China presented an *Arab Policy Paper* that outlined its priorities and approach to economic cooperation with key Middle Eastern countries and served as a template for policy toward most of the region.¹⁸⁷ The paper called for establishment of a “1+2+3 cooperation pattern” with energy cooperation at the core; infrastructure construction and expanding trade and investment as the “two wings”; and nuclear energy, space satellites, and new energy as “three breakthroughs” that together would be the defining elements of relationships with Arab countries.¹⁸⁸ Based on China’s behavior in the region and these expressions of its plans, it seems likely that in the short to medium term China will continue to assign top priority to ensuring steady access to the region’s energy resources and will seek to benefit from increased market access and infrastructure contracts.¹⁸⁹ In the long term, as a transition away from fossil fuels alters the region’s position in global trade, China will seek to evolve cooperation with key countries in the region to advance toward its goals of establishing emerging technologies like artificial intelligence (AI), advanced computing, and clean energy as central economic growth drivers.¹⁹⁰

Trends in Trade and Investment

China has become the largest trading partner for many countries in the region, with growth in total trade and direct investment between China and the Middle East outpacing that of China with the rest of the world over the past five years.¹⁹¹ In 2022, China was the top origin country for goods imports for ten out of 15 Middle Eastern countries, an increase from five a decade earlier and zero in 2002.¹⁹²

As an export destination for goods, China ranked first for six countries in 2022, up from three in 2012 and zero in 2002.¹⁹³

Energy Relations

Energy trade remains a mainstay of China-Middle East economic engagement, comprising roughly 85 percent of total exports from the region to China by value in recent years.¹⁹⁴ China became a net importer of crude oil in 1993; since that time, imported energy from the Middle East has provided a sizable share of the fuel China consumes.¹⁹⁵ While exports from Persian Gulf countries* to the United States and the EU have trended downward since the early 2000s, China's crude oil imports from the region have increased from about 34 million metric tons at the turn of the century to about 257 million metric tons in 2021 (see Figure 1).¹⁹⁶ The Middle East has consistently accounted for 40–50 percent of China's total oil and gas imports dating back to the mid-1990s.¹⁹⁷ China's imports of hydrocarbons from the region have continued to grow in recent years, as have two-way investments and long-term agreements to lock in consistent supply over the coming decades.¹⁹⁸ However, as China and key suppliers in the Gulf move to transition segments of their economy to clean and renewable energy, the dynamic of dependency is set to shift, where China may become a supplier of batteries, solar, and nuclear energy systems to the region and Gulf countries may find themselves in competition with Chinese firms to build out energy infrastructure in third countries.¹⁹⁹

Trade of Hydrocarbons Remains Substantial

China's rapid rise, vast population, and industrialization have made it the world's largest consumer of energy, largest producer and consumer of coal, and largest emitter of carbon dioxide from burning hydrocarbons.²⁰⁰ In 2021, coal provided the majority of China's energy for consumption (55 percent), followed by petroleum (19 percent), natural gas (9 percent), hydropower (8 percent), non-hydro renewables (7 percent), and nuclear energy (2 percent).²⁰¹ For oil and natural gas, China remains heavily reliant on imports, primarily from Russia and the Middle East.[†]²⁰² Virtually all of China's energy imports from the region are shipped through key maritime chokepoints, including the Strait of Hormuz and the Strait of Malacca, a point of concern for PLA military planners.²⁰³ (For further discussion on China's oil stockpiling and related measures, see Chapter 7, "China's New Measures for Control, Mobilization, and Resilience.")

Oil Exports to Chinese Market Steadily Rise

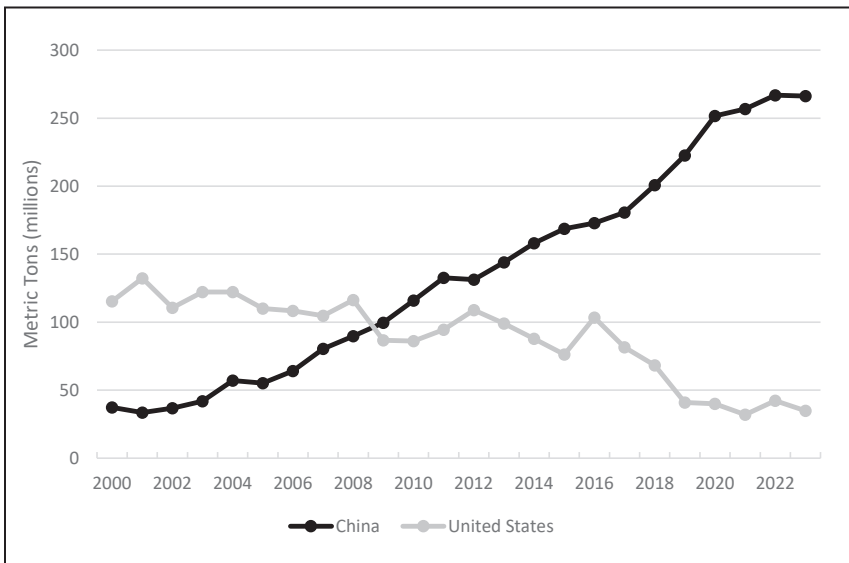
With limited domestic production capacity of its own, China relies on imported oil to power large parts of its transportation and indus-

*The Persian Gulf includes eight countries—Bahrain, Iran, Iraq, Kuwait, Saudi Arabia, Oman, Qatar, and the UAE—which together sit atop half the world's known oil reserves. Though all but Iran are members of the Arab League, the "Gulf Arab states" or "Arab Gulf" often also excludes Iraq, referring solely to the six Gulf Cooperation Council (GCC) members. RAND Corporation, "Persian Gulf Region," 2024; Simon Henderson, "Understanding the Gulf States," *Washington Institute for Near East Policy*, March 31, 2014.

†Oil and liquefied natural gas (LNG) make up the majority of imports to China from Middle Eastern countries, from 99 percent of total dollar value of imports from Iraq on the high end to 69 percent with the UAE on the low end in 2023. Erica Downs, written testimony for U.S.-China Economic and Security Review Commission, *Hearing on China and the Middle East*, April 19, 2024, 1.

trial sectors.²⁰⁴ China's imports of crude oil nearly doubled over the past decade from just over six million bpd in 2014 to 11.3 million bpd in 2023, a record high.²⁰⁵ According to Chinese customs data, flows from the Middle East over this time period increased from 3.2 million bpd in 2014 to 5.2 million bpd in 2023, 46 percent of China's total crude imports.²⁰⁶ Saudi Arabia became China's largest crude oil supplier in 2018 and remained so until Russia replaced it in 2023 due to China's substantial purchases of discounted oil subject to sanctions in other markets.²⁰⁷ In 2023, Russia supplied 19 percent of China's imported crude oil, followed by Saudi Arabia (15 percent), Iraq (11 percent), Malaysia (10 percent), and the UAE and Oman (both 7 percent).²⁰⁸ However, it is believed that a significant portion attributed to Malaysia, the UAE, and Oman is relabeled oil from Iran.²⁰⁹ For instance, Malaysia's total crude oil production in 2023 was 501,000 bpd, yet Chinese customs reported importing 1.1 million bpd, suggesting a sizable portion of the difference was oil transshipped through the country.²¹⁰

Figure 1: Crude Oil Imports from Persian Gulf Countries, 2000–2022



Source: UN Comtrade database.

Note: Persian Gulf countries include Bahrain, Kuwait, Iran, Iraq, Oman, Saudi Arabia, Qatar, and the UAE.

Saudi Arabia has sought to increase investment and joint ventures in downstream refining capacity with Chinese petrochemical companies to lock in long-term purchase contracts as global demand for traditional crude oil products like gasoline and diesel is set to decline. The Saudi government is prepared to spend \$100 billion by 2030 on downstream energy products—such as petrochemical products used in textile manufacturing—as part of the National Investment Strategy, which seeks to diversify the economy away from reliance on traditional crude oil exports, also detailed in the Saudi national plan “Vision 2030.”²¹¹ Since 2022, Saudi Arabia’s state oil

company Saudi Aramco* has embarked on a campaign to sign major investment deals in China toward achieving the stated goal of converting four million bpd[†] of crude oil to chemical products by 2030.²¹²

Table 2: Recent Announced Investment between Saudi Aramco and Chinese Partners

Date of Announcement	Chinese Company	Planned Investment	Status
April 22, 2024	Hengli Petrochemical	Aramco to take 10 percent stake in company	Negotiations ongoing
January 2, 2024	Rongsheng Petrochemical	Cross-acquisition talks: Rongsheng to acquire 50 percent stake in Aramco Jubail Refinery Co. (SASREF), and Aramco to take max 50 percent stake in Rongsheng's Ningbo Zhongjin Petrochemical complex	Negotiations ongoing
October 11, 2023	Shandong Yulong Petrochemical Co.	Aramco to take 10 percent stake in Shandong Yulong	Negotiations ongoing
September 27, 2023	Shenghong Petrochemical	Aramco to take 10 percent stake in company	Negotiations ongoing
March 27, 2023	Rongsheng Petrochemical Co.	Aramco purchased 10 percent stake for \$3.4 billion (Aramco's largest foreign acquisition ever) ²¹³	Completed in July 2023
March 11, 2023	Huajin Aramco Petrochemical Co. (HAPCO)	\$12 billion joint venture where Aramco holds a 30 percent stake	Completed in March 2023

Source: Fanny Zhang, "Saudi Aramco Eyes Stake in Hengli Petrochemical; Prowls for More China Investments," *Independent Commodity Intelligence Services*, April 23, 2024.

China Diversifies Energy Imports with Natural Gas Contracts

China has steadily increased the portion of natural gas in its energy consumption profile, and in recent years it has inked long-term contracts with top producers such as Qatar to guarantee supply over the coming decades. In 2022, Chinese consumption of natural gas stood at 364.6 billion cubic meters (bcm), the third largest behind the United States (881 bcm) and Russia (408 bcm).[‡]²¹⁴ Even though China's imports provide only a minority of the country's gas con-

*Saudi Aramco is the largest energy company in the world and one of the largest global companies overall, with a market capitalization of \$1.84 trillion. In 2023, the company reported revenue of \$440 billion and profit of \$121 billion, down from a record \$161 billion in 2022, which was the largest ever by a publicly traded company. Julie Pinkerton, "The 10 Most Valuable Companies in the World by Market Capitalization," *U.S. News*, June 12, 2024; Jon Gambrell, "Aramco Announces \$121 Billion Profit in 2023, Saudi Oil Giant's 2nd Highest on Record," *PBS News*, March 10, 2024.

[†]In 2023, Saudi Aramco had an output of 12.8 million bpd. Jon Gambrell, "Aramco Announces \$121 Billion Profit in 2023, Saudi Oil Giant's 2nd Highest on Record," *PBS News*, March 10, 2024.

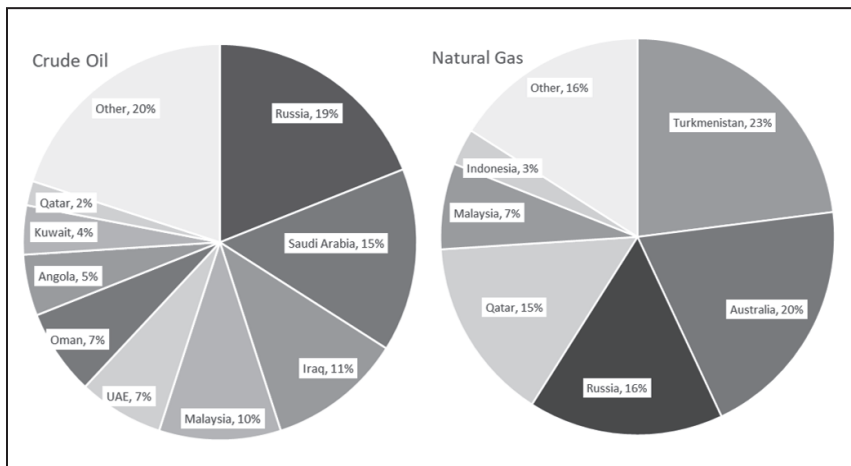
[‡]China is estimated to have the sixth-largest proven natural gas reserves in the world at 297 trillion cubic feet (tcf), behind Russia (1,321 tcf), Iran (1,134 tcf), Qatar (871 tcf), the United States (447 tcf), Turkmenistan (480 tcf), and ahead of Saudi Arabia (213 tcf). British Petroleum, "BP Statistical Review of World Energy," 2021, 34.

sumption, it topped Japan as the number one importer of liquid natural gas (LNG) in 2021, importing over 100 bcm that year before falling back to the number two slot in 2022.²¹⁵

Positioned in the Persian Gulf atop the world's largest natural gas field, Qatar is one of the top exporters of LNG, consistently supplying about 80 million metric tons to world markets annually.²¹⁶ Qatar was the second-largest source for LNG to China in 2023, supplying 16.7 million tons, or about a quarter of LNG imports.²¹⁷ According to testimony from Dr. Downs, this is set to increase following separate deals signed in late 2022 and 2023 between QatarEnergy and two Chinese state-owned energy giants, Sinopec and China National Petroleum Corporation (CNPC).²¹⁸

Gas imports from Qatar will continue to play a critical role in China's natural gas mix. With consumption projected by Chinese officials to increase, decision-makers in Beijing seek to expand domestic production capacity while maintaining a stable and diversified mix of imports from trusted suppliers.²¹⁹ The *2023 Natural Gas Development Report* issued by China's National Energy Administration (NEA), CNPC, and the State Council, among others, for the first time specified the goal of continuing to meet above 50 percent of demand with domestic supply.²²⁰ The 14th Five-Year Plan calls for national storage capacity of 55 to 60 bcm by 2025, and Chinese shipbuilders are increasing production of large LNG carriers from 7 percent of global orders in 2021 up to 30 percent in 2022.²²¹ Analysis coauthored by hearing witness Dr. Downs predicts China will seek to secure a baseline of domestic production and pipeline imports while maintaining the ability to dial up or dial down LNG imports in response to global gas prices.²²²

Figure 2: Chinese Imports of Crude Oil (2023) and Natural Gas (2022) by Source Country



Source: China's General Administration of Customs; U.S. Energy Information Administration, *China*, November 14, 2023.

Note: Imports from Iran are not reported in official statistics, though it is estimated that Iranian crude oil shipments were equivalent to those from Iraq for 2022, with large portions transhipped and attributed to Malaysia, Oman, and the UAE.

China Positions Itself on Clean Energy Investment

China has become a leading manufacturer of clean energy technologies at the same time wealthy Gulf states aim to transition their economies from dependence on fossil fuel exports, presenting natural opportunities for increased integration of Chinese companies in the region.²²³ The International Energy Agency estimates renewable energy capacity to grow by 62 gigawatts (GW) between 2023 and 2028 in the Middle East and North Africa (MENA) region, more than three times the growth during the previous five-year period.²²⁴ And an estimate by UBS Investment Bank projects total annual energy-related trade between China and the region to increase by \$423 billion by the year 2030, with renewables accounting for \$77 billion of this additional trade.²²⁵

Nuclear

Chinese construction companies have partnered with Gulf countries to build nuclear reactors. The UAE leads the region in adopting nuclear power, with its multi-reactor Barakah power plant coming partially online in 2020. The first nuclear power plant in the Arab world, it is expected to meet up to 25 percent of the country's daily energy needs once fully operational.²²⁶ In May 2023, the Emirates Nuclear Energy Corporation reached agreements with three Chinese nuclear energy companies to support its nuclear energy program, and Saudi Arabia is reportedly considering similar partnerships with China to build reactors capable of supplying 17 GWe* of nuclear capacity by 2040.²²⁷

Batteries / Electric Vehicles

Chinese automotive companies are rapidly expanding market share in the region as adoption of electric vehicles (EVs) is set to rise. The market for EVs in GCC countries is estimated to be \$4.4 billion in 2024 and is expected to grow to \$10.4 billion by 2029.²²⁸ Chinese carmakers of all types have made rapid inroads in the Gulf, going from less than 1 percent market share for new vehicle sales in 2017 to 12 percent in 2022, paving the way for expansion of EV sales as adoption rates increase.²²⁹ In the UAE, Chinese EV sales were up 92 percent year-over-year during the first five months of 2024, admittedly from a small base.²³⁰ China's lithium battery exports have also accelerated in recent years to GCC countries, increasing 26 percent year-over-year in 2022 and another 99 percent in the first three quarters of 2023.²³¹ In Israel—where the EV market is projected to grow from \$3 billion in 2023 to \$12.9 billion by 2032—Chinese EVs accounted for 68 percent of all EV sales from January to May of 2024.²³²

Saudi Arabia has staked out a path to become an EV manufacturing hub, with the country's largest sovereign wealth fund, Public Investment Fund (PIF), taking a majority ownership position in California-based luxury EV maker Lucid Motors in 2021, paving the way for opening the first manufacturing facility in the country in

*GWe is an abbreviation for "gigawatt electric," a unit of electrical output equivalent to 1,000 megawatts or 1 billion watts. In 2022, 94 operable nuclear reactors in the United States had a combined net capacity of 97.0 GWe, producing 18.6 percent of the country's electricity; China had 56 reactors with a combined net capacity of 54.4 GWe, producing 5 percent of the country's total electricity. World Nuclear Association, "Nuclear Power in the World Today," September 11 2024.

2023.²³³ The UAE has also moved to build an EV manufacturing sector through collaboration with Chinese automakers.²³⁴ In February, it was reported that Shanghai-based carmaker Nio had agreed to license its technology to Forseven, an EV startup owned and controlled by Abu Dhabi investment fund CYVN Holdings.²³⁵ CYVN Holdings became the single-largest shareholder in Nio after a \$2.2 billion dollar investment in December 2023, bringing its stake in the company to 20.1 percent.²³⁶ In July 2024, China's largest EV maker BYD agreed to a \$1 billion deal to build a manufacturing plant in Turkey that reportedly will produce 150,000 vehicles annually.²³⁷ (For more information on U.S.-China technology competition relating to battery technology, see Chapter 3, "U.S. China Competition in Emerging Technologies.")

Solar

The Middle East is set to become a sizable market for Chinese solar exports as countries scale up deployment of renewable energy. Solar photovoltaic (PV) is expected to account for 85 percent of increased renewable energy capacity in the Middle East between 2023 and 2028.²³⁸ China's Silk Road Fund has a 24 percent equity interest in the world's largest solar energy plant in Dubai, in partnership with the Dubai Electricity and Water Authority (DEWA).²³⁹

Clean Hydrogen

Nascent technology being funded by Gulf countries as part of their national transition strategies presents collaborative opportunities for Chinese companies in new energy systems. Riyadh-headquartered ACWA Power is a private company that is a major developer and operator of power generation and desalination plants across the Middle East, including solar and green hydrogen projects.²⁴⁰ The company has a number of partnerships and joint ventures with Chinese guidance funds and state-owned enterprises, including the Silk Road Fund, Power Construction Corporation of China, State Power Investment Corporation, and Bank of China.²⁴¹

Economic Statecraft

Geographically positioned at a crossroads for global trade, the Middle East has become a priority for Chinese transportation and trade infrastructure investment in recent years. Every country in the region except Israel and Jordan have signed a memorandum of understanding (MOU) to participate in BRI.²⁴² However, China's investments in the region extend beyond traditional development finance and are intended to secure access to energy resources and trade infrastructure like ports in key locations. In testimony before the Commission, Karen Young, senior research scholar at Columbia University's Center on Global Energy Policy, described China's statecraft objective as follows: "The goal for China is not to be a security umbrella, a regional alliance or solely to gain a market for exports. China is after energy resources and strategic locations for its trade and transport security, which means it is invested in certain choke points in the Middle East, Horn of Africa, and Indian Ocean."²⁴³

Port and Special Economic Zone Investments

In efforts to become a preeminent trade and logistics hub for both the European market and emerging markets in Asia and Africa, Gulf countries have been expanding port infrastructure positioned along strategic waterways. Chinese companies have been increasingly involved in construction and operation of port infrastructure throughout the region. Notable investments include:

- *Suez Canal (Egypt)*: Chinese private and state-owned companies have signed numerous deals seeking to acquire operating concessions and ownership stakes in port and industrial activity along the Suez Canal, through which 12 percent of the world's trade flows annually.²⁴⁴ The Tianjin Economic-Technological Development Area (TEDA) Suez Economic and Trade Cooperation Zone is a 176-square-mile industrial area built jointly by the governments of China and Egypt.²⁴⁵ The project was announced in 2000, undergoing significant expansion in 2016 with substantial Chinese investment after being held up as a model BRI project.²⁴⁶ Last year, Chinese companies signed deals worth more than \$8 billion to operate and manage assets in the Suez Canal Economic Zone.²⁴⁷ With respect to ports, Hong Kong-based Hutchison Ports invested more than \$1.5 billion for up to 38-year operating concessions in Egyptian ports, including operation of a terminal at Abu Qir Naval Base.²⁴⁸ Shanghai-based COSCO Shipping Lines Co. acquired a 20 percent stake in East Port Said at the north end of the canal and a 25 percent stake in a terminal at Ain Sokhna Port on the south end.²⁴⁹
- *Port of Duqm (Oman)*: Strategically positioned near the Strait of Hormuz and the Bab-al-Mandeb, this port is owned by the Government of Oman and operated by a government entity.²⁵⁰ The Chinese consortium Oman Wanfang committed to a \$3.7 billion investment over 30 years to build a Special Economic Zone.²⁵¹
- *Port of Aden (Yemen)*: China Merchants Port Holdings is one of the firms involved in operations of this port.²⁵²
- *Khalifa Port (UAE)*: In 2021, U.S. intelligence agencies warned of suspected Chinese projects to construct military facilities at this port 50 miles north of Abu Dhabi.²⁵³ The UAE maintained that the construction carried out by COSCO was commercial in nature, though it announced it would halt the project shortly thereafter following stern warnings from U.S. officials.²⁵⁴ (For more on the potential use of dual-use facilities for military purposes, see “China’s Military and Security Presence in the Region” later in this chapter.) In 2024, the China Harbor Engineering Company was awarded a contract to upgrade the Ras al Khaimah Saqr Port, another UAE port north of Dubai.²⁵⁵

RMB and Alternative Payments Make Inroads, Albeit Minor

China seeks to protect itself from exposure to potential future U.S. sanctions and views energy markets and trade with countries in the Middle East as one avenue through which it might dislodge the U.S. dollar’s dominance in international finance. (For more on

China's efforts to create an alternative to the dollar-based trade and financing system, see Chapter 7, "China's New Measures for Control, Mobilization, and Resilience.") In the run-up to the 25-year strategic partnership agreement signed in 2021, the central bank of Iran listed the renminbi (RMB) as the Islamic Republic's main reserve currency.²⁵⁶ The adoption of the RMB by Iran for a substantial portion of its foreign exchange reserves and cross-border payments is unique given the imposition of harsh sanctions banning Iranian banks from the SWIFT payment system since 2018.²⁵⁷ There are currently practical limits to these efforts, however. China has pushed RMB-denominated oil contracts, cross-border payment agreements, and currency swap lines with countries in the region, most recently signing a three-year currency swap agreement with Saudi Arabia worth nearly \$7 billion.²⁵⁸ The currencies of all GCC countries except Kuwait are pegged to the dollar, and this along with China's capital controls and the decades-old oil-for-security partnership with the United States creates a strong incentive for Arab Gulf countries to continue pricing their energy exports and accruing foreign exchange reserves in dollars.²⁵⁹ According to testimony from Dr. Downs before the Commission, no country in the region besides Iran has accepted RMB for payment for energy exports, though Iraq and the UAE have both shown interest in introducing the RMB for non-oil private sector cross-border payments.²⁶⁰

BRI and Development Finance Expands, Bucking Global Trend

As China has pulled back development financing globally in recent years, in the Middle East such investment has continued and in some places increased (see also the "Digital Silk Road" section below). Between 2005 and 2022, 266 projects were initiated across the region under the umbrella of BRI, according to data collected by the International Institute for Strategic Studies.²⁶¹ With its extensive oil reserves and participation in BRI, Iraq has become a top destination for Chinese energy and infrastructure investment.²⁶² In 2021, Iraq was the top recipient of BRI funding, receiving about \$10.5 billion.²⁶³ Iraqi oil exports to China increased 47.5 percent from 2021 to 2022, and as of the start of this year, two-thirds of Iraq's current oil production is operated and overseen by Chinese companies.²⁶⁴

The United States has coordinated a program to counter China's BRI and establish alternate trade routes through the Middle East. The Partnership for Global Infrastructure and Investment (PGII) was announced at the G7 summit in Japan in May 2023.²⁶⁵ Under the auspices of this framework, the United States, India, the EU, France, Germany, Italy, Saudi Arabia, and the UAE signed an MOU five months later to build two economic corridors connecting South Asia and Europe via the Middle East, branded the India-Middle East-Europe Economic Corridor (IMEC).²⁶⁶ The proposal calls for building rail and shipping lines to connect existing infrastructure to move goods between India, the UAE, Saudi Arabia, Jordan, Israel, and Europe.²⁶⁷ Telecommunications lines, undersea cables, and a clean hydrogen pipeline are also envisioned in the proposal.²⁶⁸

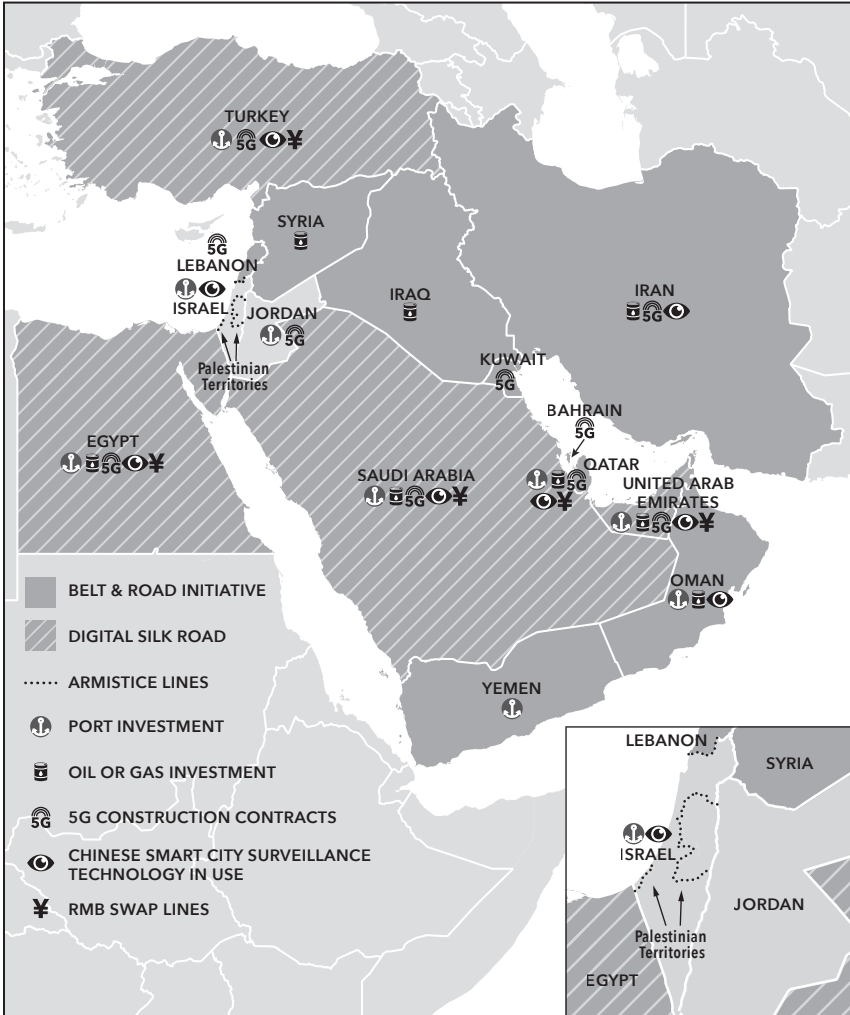
China-Middle East Technology Relations

As the technology competition between the United States and China has intensified, the Middle East is emerging as a key stakeholder and potential conduit for Chinese end users to gain access to leading-edge technology. Chinese technology companies have had market presence in the region for decades and are working to deploy telecommunications equipment and other underlying technology infrastructure across the region in both wealthy and underdeveloped countries. Emerging technologies like AI and advanced computing play a central role in the ambitious national strategies of GCC countries as they seek to diversify their economies away from reliance on fossil fuel. Countries like Saudi Arabia, the UAE, and Qatar have dedicated massive investment to build up domestic technology industry and innovation hubs. As demand for technology rises—including sensitive tech subject to U.S. export restrictions—the United States and China will be in competition for market access and network effects across the region.

Digital Silk Road

The Middle East is integral to China's Digital Silk Road (DSR), a BRI initiative that seeks to entrench Chinese technology companies in foreign markets and digital infrastructure.²⁶⁹ The notion was first presented as the "information silk road" in a 2015 white paper outlining an expanded vision of BRI that would seek to construct cross-border fiberoptic cables and telecommunication networks, intercontinental underwater cables, and satellite information channels.²⁷⁰ The DSR has since evolved to cover 5G cellular infrastructure, cloud computing and data centers, smart city technology, and e-commerce and digital payment services.²⁷¹ Consistent with its approach to BRI, China broadly defines DSR by design in order to lump a range of overseas investment projects and initiatives under the umbrella of a seemingly coherent development strategy. Mohammed Soliman, director of the Middle East Institute's Strategic Technologies and Cyber Security Program, observed, "By utilizing technology statecraft, Beijing aims to establish China's geopolitical footprint in the region without resorting to conventional military expansion."²⁷² As of late 2023, at least 17 countries have signed formal MOUs to join the DSR globally, among them Egypt, Turkey, Saudi Arabia, and the UAE.²⁷³

Figure 3: China's Economic and Technology Interests in the Middle East



Sources: Various.²⁷⁴

Note: Smart City surveillance technology encompasses a variety of surveillance technologies (such as CCTV cameras, recording and video management systems, and facial recognition) that make data from a city's core management systems available to government entities. For more see Katherine Atha et al., "China's Smart City Development," *SOS International LLC* (prepared for the U.S.-China Economic and Security Review Commission), January 2020, 61.

Huawei and Others Deeply Embed in Technology Infrastructure

Chinese telecommunications companies Huawei and ZTE have moved aggressively to expand their presence in the Middle East and developing countries more broadly since coming under scrutiny from the United States and its allies and partners over data security concerns.²⁷⁵ As of early 2023, Huawei had contracts with 11 Middle Eastern countries to build out 5G infrastructure, including Egypt, Turkey, Iran, Lebanon, Jordan, and all six GCC countries.²⁷⁶ Devel-

oping countries seeking to modernize their telecommunications networks have been attracted to the low-cost products offered by Huawei and ZTE that still perform relatively well compared to equipment from non-Chinese competitors.²⁷⁷ Huawei has been deeply involved in Egypt for decades, establishing its North African headquarters in Cairo in 1999.²⁷⁸ In 2018, Huawei and state-controlled Telecom Egypt signed a \$200 million financing agreement backed by the Bank of China and China Export & Credit Insurance Corporation (Sinosure) to fund the establishment of a national 4G network.²⁷⁹ And despite previous false starts, in 2024 Telecom Egypt secured the exclusive license from the government worth \$150 million to provide 5G services enabled by Huawei technologies.²⁸⁰ Huawei has signed similar agreements to collaborate on 5G buildout with Zain in Saudi Arabia, Etisalat in the UAE, Turk Telekom in Turkey, and VIVA in Kuwait.²⁸¹

Beyond cellular networks, Chinese firms have been involved in the construction of another critical piece of the IT infrastructure in the region: data centers. The Gulf still lags behind the United States, Europe, and Asia in terms of total data centers and data center capacity. Saudi Arabia currently has 60 data centers operating with 123 megawatts (MW) of capacity, while the UAE has 52 centers operating with 235 MW as of the end of 2023.²⁸² For comparison, as of 2022 Germany has 1,060 MW of data center capacity, China has 4,818 MW, and the United States has 17,000 MW.²⁸³ However, both Saudi Arabia and the UAE are moving to rapidly expand capacity. In late 2021, Saudi Arabia's Ministry of Communications and Information Technology set a goal of reaching 1,300 MW of data center capacity by 2030, and in the UAE another 343 MW of capacity is currently planned or under construction.²⁸⁴ Chinese companies Huawei, Lenovo, and Inspur have served as IT infrastructure providers for equipment used in data centers, and cloud service providers Alibaba and Tencent have staked out operation of data facilities in both countries.²⁸⁵ (For a discussion of total compute, including cloud services, as a key facet of U.S.-China technology competition in AI, see Chapter 3, "U.S.-China Competition in Emerging Technologies.")

Emerging Technology

The expanding collaborative regional innovation landscape around emerging technologies like AI, advanced computing, and biotechnology has increased the potential for transfer of cutting-edge, dual-use technology. Wealthy Gulf states in particular view increased technological linkages with China as an opportunity to accelerate digital initiatives posited in economic diversification plans like Saudi Arabia's Vision 2030.²⁸⁶ Gulf sovereign wealth funds have been major investors in tech startups around the world for over a decade, yet now they have set goals to develop domestic technology industries modeled on Silicon Valley as part of their national diversification strategies.²⁸⁷ China may be able to use its role as a partner in building these burgeoning ecosystems to both expand its influence in the region and evade export controls imposed by the United States and other Western countries to obtain sensitive dual-use technology.

Artificial Intelligence Opens New Front of Tech Competition

Technology partnerships between Chinese companies of concern and AI startups in the Middle East present a new vector of vulnerability of sensitive technology and data transfer.* The wealthy Arab Gulf countries have made clear their ambition to become AI leaders, allocating massive investment into planned construction of AI infrastructure and regional innovation hubs. The consultancy PwC estimates the economic contribution of AI will be 13.6 percent of gross domestic product (GDP) in the UAE and 12.4 percent in Saudi Arabia by 2030, behind only China and the United States.²⁸⁸ Of the 96 strategic goals included in Saudi Arabia's Vision 2030, some 70 percent involve using data and AI.²⁸⁹ The UAE stood up an Artificial Intelligence and Advanced Technology Council in January 2024 to guide AI policy, and the following month the country's largest listed firm, International Holding Co., appointed an AI chatbot to an observer post on its board.²⁹⁰ The sheer amount of resources—both capital and energy—required to build data processing capacity that enables cutting-edge applications of AI are only accessible to a handful of actors worldwide, yet they are two resources abundant in Saudi Arabia, the UAE, and Qatar.

Gulf Sovereign Wealth Funds Make Big Bets on AI

A frenzy of deal-making has commenced between Gulf funds and AI companies in China and elsewhere since the launch of ChatGPT-3 in November 2022. Saudi Arabia's Public Investment Fund (PIF) was the most active investor among the world's sovereign wealth funds in 2023, investing \$31.6 billion across 49 separate deals, an increase of 33 percent from 2022.²⁹¹ As of March 2024, the PIF had \$925 billion in assets under management, up from \$480 billion in 2022 and putting it on track to meet its ambitious target of \$2 trillion by 2030.²⁹² Investing in emerging technology has been a central pillar of the PIF's strategy to grow its portfolio and advance priorities outlined by Vision 2030.²⁹³ In 2017, the PIF was the top investor in the SoftBank Vision Fund—the world's largest technology venture capital fund—providing \$45 billion of the initial \$100 billion in capital alongside other investors such as Japan's SoftBank, the Emeriti sovereign wealth fund Mubadala, Apple, Foxconn, and Qualcomm.²⁹⁴ The Vision Fund has recently announced it is pivoting toward strategic investment in AI and semiconductors, with SoftBank executives pronouncing their size will enable them to create an ecosystem of AI startups that can pool resources and rapidly scale to outcompete other investors.²⁹⁵ Notable investment deals relating to China include:

- *Prosperity7 Ventures investment in Zhipu AI:* In May 2024 the *Financial Times* reported that the technology venture capital division of Saudi Aramco called Prosperity7 had invested in Chinese generative AI startup Zhipu AI.²⁹⁶ Though details of the deal were not made public by either party, Prosperity7 was reportedly a minority investor in a \$400 million funding round that valued Zhipu at roughly \$3 billion.²⁹⁷ This is the first instance of a foreign investor backing a Chinese generative AI

*For more on China's ambitions in AI and the U.S.-China competition in the space, see Chapter 3, "U.S.-China Competition in Emerging Technologies."

company endeavoring to rival industry leaders like OpenAI.²⁹⁸ According to Gregory Allen, the director of the Center for Strategic and International Studies Wadhvani Center for AI and Advanced Technologies, the deal also raises questions on whether Zhipu will be able to access advanced compute powered by leading-edge semiconductors through operations in Saudi Arabia.²⁹⁹ Founded in 2019, Zhipu AI is one of the more notable startups in generative AI and first to secure Chinese government approval for roll-out of its products, with backing from Alibaba Group and Tencent.³⁰⁰

- *Alat partnerships in AI and semiconductor industry:* Alat is a \$100 billion investment firm launched by the PIF in February 2024 with the stated mission of developing Saudi Arabia's production and manufacturing of advanced technology industries, including AI and semiconductors.³⁰¹ Since then it has announced a number of deals with Chinese companies, including a \$2 billion partnership with Lenovo to set up a regional headquarters and a new manufacturing base and a \$200 million joint venture with surveillance company Dahua to develop its first overseas manufacturing operations.³⁰² In recognition of the increasingly precarious position his firm occupies amid the intensifying U.S.-China technology competition, Alat CEO Amit Midha made clear that partnering with U.S. firms was a top priority, stating that the fund would be willing to unwind its Chinese investments if asked by U.S. officials.³⁰³

U.S. Expands Technology Transfer Restrictions to Region

Increased concern surrounding Chinese end users' ability to bypass U.S. export controls through third countries has led to an expansion of the list of restricted markets for leading-edge products. In October 2023, the Commerce Department expanded semiconductor export controls to require licenses for sale of cutting-edge NVIDIA and AMD chips to certain Middle Eastern countries, including the UAE and Saudi Arabia, consistent with prior rules to prevent Chinese military end use.³⁰⁴ In July 2023, the *Financial Times* reported the Committee on Foreign Investment in the United States (CFIUS) was investigating a planned \$3 billion investment by the Abu Dhabi sovereign wealth fund Mubadala to buy a majority stake in New York-based Fortress Investment Group over concerns of technology transfer due to close ties between the emirate and China.³⁰⁵

Group 42 Exemplifies Challenges and Possible Approach to Technological Disentanglement

One of the leading AI companies in the Middle East moved to sever ties with Chinese firms in favor of expanded access to U.S. technology following pressure from both the Administration and Congress. Founded in 2018, Group 42 (G42) serves as a central conduit through which the UAE is implementing a broad set of technology initiatives, with a portfolio that spans AI, cloud computing, genomics, and self-driving vehicles.³⁰⁶ The company is backed by the sovereign wealth fund Mubadala Investment Co.

Group 42 Exemplifies Challenges and Possible Approach to Technological Disentanglement—*Continued*

and chaired by Sheikh Tahnoon bin Zayed, national security advisor and brother to Abu Dhabi's crown prince.

In November 2023, the *New York Times* first reported on concerns raised by U.S. intelligence officials over G42's extensive ties with Chinese companies, including underlying hardware provided by Huawei, cooperation with BGI on genetic sequencing, and a \$100 million stake in ByteDance carried out by its \$10 billion private equity investment arm 42XFund.³⁰⁷ High-level officials in the Administration reportedly told their Emirati counterparts that when it came to cutting-edge emerging technologies, the UAE needed to choose between partnership with the United States or China.³⁰⁸ In January 2024, the House Select Committee on the CCP called for the Commerce Department to make a determination on whether G42 and its subsidiaries should be added to the Entity List due to potential transfer of dual-use technology to Chinese military end users.³⁰⁹ Prior to the Select Committee's letter, G42's CEO said in an interview that his company cannot work with both sides, and in February it had sold holdings in Chinese companies and broken ties with hardware suppliers, including Huawei.³¹⁰

Microsoft and G42 announced a \$1.5 billion "strategic investment" agreement in April 16, 2024, following "close consultation" with both the U.S. and Emirati governments.³¹¹ The deal afforded access to Microsoft cloud services for AI applications, a seat for Microsoft Vice Chair and President Brad Smith on the board of G42, and commitments by both parties to adhere to shared standards on AI development and technology sharing in the developing world.³¹² Mr. Soliman said in testimony before the Commission that the agreement could serve as a model for engagement with the technology goals and companies of Middle East countries while establishing guardrails for U.S. technology and intellectual property in the region.³¹³ The UAE's ambassador to the United States said after the deal that the two country's governments were aligned in their vision for AI and would be "partners at the leading edge of advanced computing technologies."³¹⁴ White House technology advisor Tarun Chhabra described the deal as generally positive, saying the United States has an interest in moving countries in the Middle East away from close ties with companies like Huawei.³¹⁵

Smart Cities and Surveillance Technology

The expertise of Chinese companies in deploying low-cost surveillance technologies at scale has presented an enticing value proposition for authoritarian regimes seeking innovative ways to tighten state control. The collective term "smart cities" commonly refers to the application of digital technologies in an urban setting to collect and analyze data in order to optimize municipal management and services.³¹⁶ While smart city technology can greatly improve efficiency and accelerate development in emerging market economies, it

also raises concerns over privacy and the export globally of China's repressive mass surveillance model used in Xinjiang Province and elsewhere throughout the country.³¹⁷

Digital transformation of society has become a central pillar of the national diversification strategies of wealthy Gulf nations like Saudi Arabia, the UAE, and Qatar, who partner with a variety of foreign technology firms and providers of smart city technology.³¹⁸ According to the 2023 Smart City Index, a ranking of 141 cities along a variety of infrastructure and technology metrics, Abu Dhabi placed 13th in the world, Dubai 17th, and Riyadh 30th.³¹⁹ Projects under development like Saudi Arabia's planned futuristic city NEOM on the Red Sea intend to expand the integration of data to ease friction in daily life of residents, with city planners stating that the city will make use of 90 percent of collectible data, in comparison to current smart cities that typically utilize around 1 percent.³²⁰ Huawei has signed contracts to provide cloud services for NEOM, as has Chinese AI company SenseTime.³²¹ In early 2024, Saudi fund Alat (a subsidiary of the PIF) announced a \$200 million partnership with Dahua Technology, a leading Chinese surveillance equipment maker that was added to the Commerce Department's Entity List in 2022 for its role in surveillance of Uyghurs.³²² Elsewhere in the region, Chinese technology is being embedded in Egypt's New Administrative Capital, a planned city for 6.5 million residents under construction with sizable contribution from China State Construction Engineering Corporation (CSCEC).³²³ Furthermore, in both Qatar and the UAE, Huawei is involved in new smart city development projects.³²⁴

China's Military and Security Presence in the Middle East

China has slowly been expanding its security footprint in the Middle East. It has built a military outpost in the region, is carrying out counterpiracy activities, participating in peacekeeping operations, and conducting military exercises and port calls with regional partners. Some analysts argue that China may view dual-use ports as a potential way to expand its security options in the region, as well. Although its military presence in the region remains limited and it has shown little interest in playing a larger role in regional security, these activities allow Beijing to bolster the PLA's operational experience and its reputation as a security partner. Lastly, China is targeting customers in the Middle East arms market, particularly through the sale of drones, to establish itself as an alternative option to the United States and Russia.

PLA Activities in the Middle East Boost Operational Experience

China's military footprint in the Middle East is relatively small at present, especially compared to the United States' presence, but it enables China to gain operational experience and could lay the foundation for a larger military presence in the region in the future.³²⁵ In recent years, one of China's top military objectives in the region has been protecting its investments.³²⁶ Toward this end, China has deployed PLA assets to participate in UN peacekeeping efforts, and it has potentially begun scoping locations for formal military bases

and commercial ports where the PLA Navy can dock its ships.³²⁷ The PLA's efforts to operate more frequently in the Middle East could enhance China's efforts to project power and compete with the U.S. military on a global scale.³²⁸ At this point in time, though, Chinese military operations in the region are marginal compared to those of the United States.

China Could Expand Basing Footprint in the Future

Though there are currently no official Chinese military bases in the Middle East, a logistics facility in Djibouti already serves as a PLA military outpost, supporting regional military operations and representing a potential model for expanding its security footprint in the future.³²⁹ While the Djibouti installation is China's only official military outpost, Beijing could establish similar facilities in the future.*³³⁰ A 2022 report on China's global basing ambitions by RAND Corporation researchers Cristina L. Garafola, Stephen Watts, and Kristin J. Leuschner analyzed the desirability and feasibility of potential PLA basing and access locations, assessing that countries including Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE were likely highly desirable locations for PLA basing and access points, although the feasibility of these varied.³³¹ The U.S. Department of Defense's 2023 report on *Military and Security Developments Involving the PRC* notes that China "probably also has considered other countries as locations for PLA military logistics facilities," including the UAE.³³² Additionally, according to a 2020 study written for the Commission by the open source intelligence company Jane's, two of the 18 sites that could serve as potential overseas PLA bases are located in the Middle East (both in Oman).³³³

Some analysts have argued that whether or not it adds actual bases, China may be able to rely on access to critical infrastructure in the Middle East as a way of expanding its power projection capabilities in the region.³³⁴ Grant Rumley, the Meisel-Goldberger fellow at the Washington Institute for Near East Policy, argues that China will likely continue to augment its security presence in the Middle East through "a combination of modest military deployments and investments in critical infrastructure."³³⁵ China's 2016 National Defense Transportation Law gives the PLA legal authority to commandeer civilian facilities, such as ports, in times of crisis.³³⁶ As noted by Conor Kennedy, an assistant professor at the China Maritime Studies Institute, the 2016 law requires Chinese transportation enterprises overseas to provide logistical support for PLA forces operating overseas.³³⁷ PLA experts have discussed the importance of "strategic strongpoints," a term that "generally refers to potential dual-use overseas facilities, including foreign commercial ports over which the PRC

* China primarily uses its Djibouti base to conduct antipiracy and freedom of navigation activities that are aimed at securing trade corridors in the region. The PLA Navy has utilized Djibouti as a logistics hub for its anti-piracy missions in the Gulf of Aden since 2008, and evacuated Chinese and foreign civilians there in 2015 during a surge of violence in Yemen, after which China and Djibouti reached an agreement to build a permanent base in January 2016. Mordechai Chaziya, "China's Military Base in Djibouti," *Begin-Sadat Center for Strategic Studies*, August 2018; China's Ministry of Foreign Affairs, *Foreign Ministry Spokesperson Hong Lei's Regular Press Conference on January 21, 2016*, January 21, 2016. Sam Lagrone, "U.S. AFRICOM Commander Confirms Chinese Logistics Base in Djibouti," *U.S. Naval Institute*, November 25, 2015.

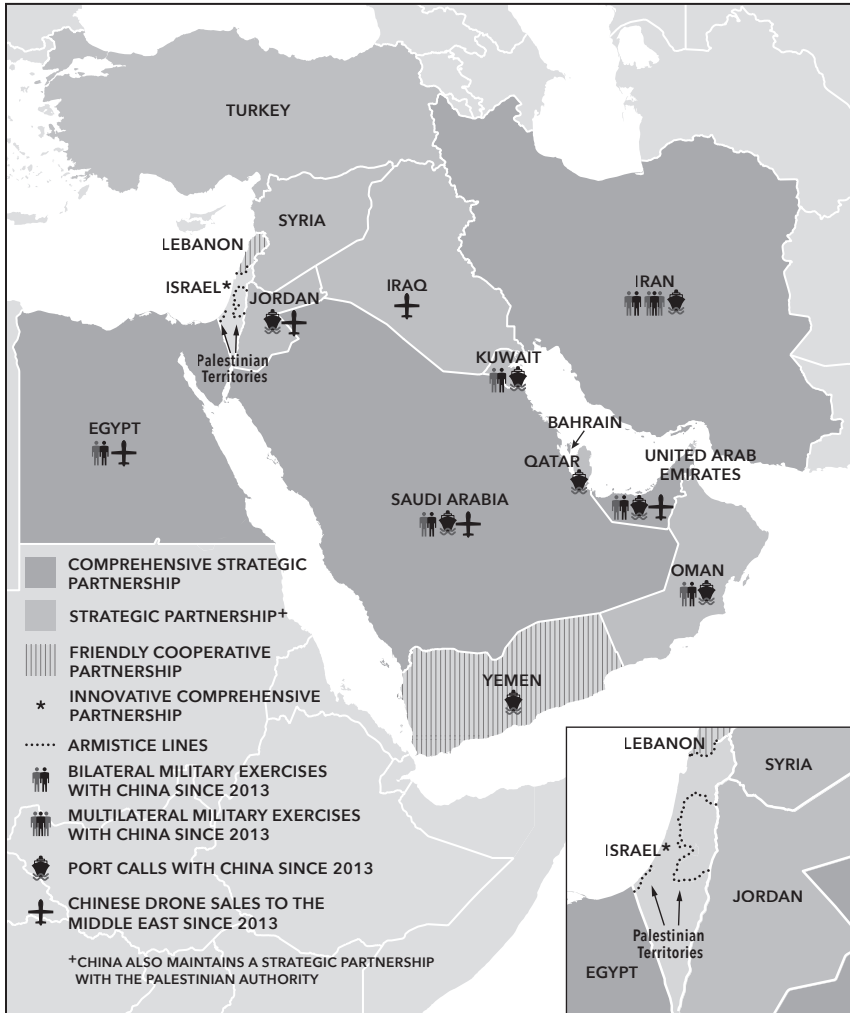
expects to exert some degree of control” and that are primarily useful for peacetime operations, “enabling PLA Navy port calls, joint exercises, and antipiracy operations in distant theaters.”³³⁸ A host country’s willingness to support the PLA’s operations is more important than Chinese law, however, as longstanding U.S. experience demonstrates significant constraints imposed by host countries, particularly during times of increased global tensions.³³⁹ In the Middle East, Chinese firms have port operating agreements with Egypt, Israel, Iraq, Kuwait, Saudi Arabia, Turkey, and the UAE.*³⁴⁰ (See “Port and Special Economic Zone Investments” above for a more detailed discussion of certain Chinese port-related investments in the region.)

Beijing Leverages Counterpiracy Task Force to Gain Experience Operating Overseas

While China has used antipiracy operations in the Middle East to protect its trade and gain operational experience, these operations do not seem connected to aforementioned regional efforts dealing with Houthi rebels. In December 2008, China responded to the rise in piracy in the Red Sea and Gulf of Aden, primarily from Somalia, by dispatching a Naval Escort Task Force (NETF), or counterpiracy task force, to the Gulf of Aden.³⁴¹ The NETF has mostly sustained the same configuration of vessels: two surface combatants and a refueling ship, although the task force has occasionally augmented its presence with other capabilities such as the Song-class diesel-electric submarine.³⁴² Since 2008, China has maintained its counterpiracy missions, gaining operational experience and escorting a number of commercial ships through the Red Sea.³⁴³ Chinese state media claims that since 2008, the PLA Navy has escorted more than 7,000 commercial ships.³⁴⁴ According to an August 2024 report by independent analyst Dennis J. Blasko, since December 2008, the PLA Navy has deployed 46 counterpiracy escort task forces to the Gulf of Aden on a UN-authorized mission.³⁴⁵ Mr. Blasko asserts that until recently, the PLA Navy had normally dispatched three task forces per year at roughly four-month intervals, but the 45th and 46th task forces departed from China on five-month intervals, potentially indicating a shift in deployment patterns.³⁴⁶ Mr. Blasko states that the more onerous requirements for its surface fleet in operations around Taiwan and the South China Sea may be forcing the PLA Navy to draw forces away from the Gulf of Aden mission, while it also may be possible that the PLA Navy is trying to keep its ships clear of waters threatened by Houthi terrorists.³⁴⁷

*According to Isaac B. Kardon, a senior fellow for China studies at the Carnegie Endowment for International Peace, Chinese firms partially owned or operated 20 ports in the Middle East and North Africa region as of February 2020. These ports may allow the PLA Navy to perform valuable military functions for logistics, intelligence, and communications without the establishment of formal PLA facilities and permissions. Isaac B. Kardon, written testimony for the U.S.-China Economic and Security Review Commission, *Hearing on China’s Military Power Projection and U.S. National Interests*, February 20, 2020, 2, 13.

Figure 4: China's Diplomatic and Military Activity in the Middle East



Source: Various.³⁴⁸

Despite the NETF's longstanding presence, the PLA Navy has ignored distress calls from commercial vessels under attack in the Red Sea in contravention of customary and international maritime law, content to free-ride on U.S.-led international counterpiracy operations.³⁴⁹ For instance, in November 2023, a Liberian-flagged vessel targeted by Iran-aligned Houthi rebels with missiles put out an SOS call in the Gulf of Aden, but the three PLA Navy vessels in the area did not respond.³⁵⁰ Despite being heavily reliant on access to and safe transit of the Red Sea for trade with Middle Eastern partners, Chinese leaders continue to avoid any outright critique of the Houthis.³⁵¹ At a January 2023 press conference in Cairo, for example, Minister Wang simply called for an end to the attacks on

civilian ships and for the resumption of smooth trade flows, without mentioning the terrorist group.³⁵² Instead, China continues to benefit from the activities of the U.S.-led task force Operation Prosperity Guardian* to safeguard shipping lanes against attacks by Houthi rebels.†³⁵³

Chinese Maritime Shipping Free-Rides on U.S.-Provided Security

The spillover from the conflict in Gaza has highlighted the limits of China's willingness to play an active security role in the region.³⁵⁴ As noted above, although China has participated in counterpiracy patrols in the Gulf of Aden since 2008, it has avoided participating in efforts to protect Red Sea shipping lanes as the threat of Houthi attacks forces ships to reroute.³⁵⁵ The fallout has been particularly harmful to Egypt, where China has billions of dollars' worth of loans and investments.³⁵⁶ While Minister Wang called for the end to the "harassment of civilian ships in the Red Sea" in January, he also said strikes on Yemen were unauthorized by the UN and that the crisis was a "spillover of the conflict in Gaza."³⁵⁷ U.S. officials have pressed China to influence Iran into discouraging Houthi attacks, with China reportedly doing so in January 2024 following meetings between U.S. Secretary of State Antony Blinken, U.S. National Security Advisor Jake Sullivan, and head of the CCP's International Department Liu Jianchao.³⁵⁸ China reportedly discussed the matter with Iran at meetings in Beijing and Tehran in January 2024.³⁵⁹ Still, China's lack of material support for the U.S. effort to keep shipping lanes safe for all commercial transits may stem from the fact that in March 2024 China and Russia reportedly made a deal with the Houthis to refrain from attacking their ships.‡³⁶⁰ Chinese ships had reportedly been signaling their identity to avoid attack in previous months, although one was struck in what was likely a mistake.³⁶¹ China has maintained a stance of neutrality between the Yemeni government and its Saudi Arabian supporters, and the Houthis and their Iranian backers.³⁶²

*China is balancing its need to protect Chinese commercial vessels with its response to the Israel-Palestine conflict. As a result, China has not joined the U.S.-led Operation Prosperity Guardian coalition to help protect commercial traffic in the Red Sea. The coalition includes Bahrain, Britain, Canada, France, Italy, the Netherlands, Norway, Seychelles, and Spain. Zhao Ziwen and Jevans Nyabiage, "Why Hasn't China Joined US-Led Naval Force against Houthi Rebel Attacks in Red Sea?" *South China Morning Post*, December 27, 2023; Phelim Kine, "Beijing Shrugs at U.S. Call for Help Protecting Red Sea Shipping," *Politico*, December 21, 2023.

†Chinese state media has attempted to undermine the credibility of the task force and question its motives. For instance, Xinhua, a state-run media outlet, claimed in a December 2023 article that "many allies are unwilling to publicly announce their joining, or even to get involved at all." The same article asserted that the task force is an attempt by the United States "to get its allies to share the escort costs, or even drag its allies into the conflict." *Xinhua*, "Awkward! United States Organizes 'Red Sea Escort,' Few Respond" (尬! 美国搞“红海护航”应者寥寥), December 30, 2023. Translation.

‡Mr. Rumley stated in his testimony before the Commission that Chinese commercial ships have been relatively safe, with only one Houthi attack taking place in March 2024. Mr. Rumley said that aside from this attack, "Chinese commercial vessels have not been purposely targeted by the Houthis since November 2023." Grant Rumley, written testimony before U.S.-China Economic and Security Review Commission, *Hearing on China and the Middle East*, April 19, 2024, 11–12; Heather Mongilio, "Chinese Tanker Hit with Houthi Missile in the Red Sea," *USNI News*, March 24, 2024.

Beijing Seeks to Use Peacekeeping Operations to Bolster Its Image as a Contributor to Regional Security

China participates in various UN peacekeeping operations that are intended to bolster its image and provide PLA personnel with overseas military experience.³⁶³ China has participated in UN peacekeeping operations for more than three decades, primarily deploying peacekeepers to African countries where China has significant investments.*³⁶⁴ In the Middle East, China maintains more than 400 peacekeepers, almost all of whom are in south Lebanon supporting the UN Interim Force in Lebanon (UNIFIL).†³⁶⁵ Chinese peacekeepers in Lebanon conduct trainings and exercises with UNIFIL, which may give them insight into the training practices of militaries from other countries and help them hone skills that could be used in operations elsewhere.³⁶⁶ For instance, in February 2023, a deputy captain within China's peacekeeping team told Chinese state media that their recent UNIFIL exercise had focused on defending their base camp, rescue operations, psychological counseling, and the resettlement of people.³⁶⁷ According to China's Ministry of Foreign Affairs, Chinese peacekeepers in Lebanon also provide medical assistance to the locals, helping to boost China's image in the country and among other UN member states.³⁶⁸ As of late June 2024, China also has five military observers in Israel who have joined the UN Truce Supervision Organization (UNTSO).³⁶⁹ The UNTSO was established in 1948 during the Arab-Israeli War as the UN's first-ever peacekeeping operation and helps maintain a ceasefire and supervise the application of the armistice agreements.‡³⁷⁰

Joint Exercises and Port Calls Help Build Operational Experience and Military Image

In recent years, China has conducted joint military exercises with and made port calls to several Middle Eastern countries, including both U.S. partners and adversarial states like Iran, in order to gain operational experience and build the PLA's image. At the first China-Arab States Summit in Riyadh in December 2022, General Secretary Xi delivered a speech to the 21 members of the Arab League in which he proposed "eight major initiatives on China-Arab practical cooperation," including an "initiative on security and stability."³⁷¹

*China had a large peacekeeping presence in the Democratic Republic of the Congo, where it has carried out mining operations, as well as South Sudan, where a Chinese oil company was part of a consortium that extracted South Sudan's oil. China has also placed peacekeeping forces in Mali and Liberia to protect critical infrastructure projects and Chinese-funded enterprises, respectively. U.S.-China Economic and Security Review Commission, *2020 Annual Report to Congress*, December 2020, 174–175.

†UNIFIL was created by the UN Security Council in March 1978 to confirm Israeli withdrawal from Lebanon and to assist the Lebanese government in restoring its effective authority in the area. In 2006, China sent its first peacekeeping contingent to UNIFIL. Comparatively, Indonesia has 1,232 peacekeepers and India has 894. The United States does not currently have any peacekeepers in Lebanon. United Nations Peacekeeping, "Troop and Police Contributions," March 31, 2024; *China Military Online*, "First Batch of 22nd Chinese Peacekeeping Force to Lebanon Sets Off," December 8, 2023; United Nations, "UNIFIL, Lebanon."

‡The United States currently has two peacekeepers at UNTSO, while Finland and Switzerland have the most, at 14 and 13 peacekeepers, respectively. United Nations Peacekeeping, "Troop and Police Contributions," September 18, 2024.

§Chinese state media said the initiative will focus on strengthening strategic dialogues between the defense departments and military forces of China and the partner countries; conducting exchanges between military units and academies; deepening cooperation on maritime security, international peacekeeping and "professional techniques"; and expanding joint exercises and training. As part of this initiative, China will train 1,500 personnel from partner countries in fields such as smart policing and cyber security law enforcement, implement the China-League

During the inaugural summit, all sides agreed to further cooperation between their militaries, including in joint exercises.³⁷² According to Mr. Rumley, some of China's exercises and port calls appear to be more symbolic than practical, while others are more sophisticated and have led to reciprocal exercises in China.³⁷³ Mr. Rumley asserts that China's exercises with Middle East partners are "designed to showcase the capabilities of the Chinese military, build up PLA experience, and improve China's image as a security partner."³⁷⁴

In recent years, China conducted several military exercises with Arab countries that seek in part to improve China's operational experience and military image:

- *UAE*: In August 2023, China and the UAE held their first joint exercise, Falcon Shield 2023, in Xinjiang.³⁷⁵ Associate professor at the Near East South Asia Center for Security Studies David Des Roches describes the joint exercise as an "unfortunate development" and suggests that the UAE is trying to demonstrate to the United States that it has alternative options for security partners.³⁷⁶ The most recent iteration of the training exercise took place in July 2024, again in Xinjiang.³⁷⁷ During both exercises, the UAE deployed its Dassault Mirage 2000-9DAD/EAD fighters, an aircraft also operated by Taiwan's air force, potentially giving the PLA Air Force an opportunity to gather information on its capabilities.³⁷⁸
- *Saudi Arabia*: China has also conducted joint naval exercises with Saudi Arabia, referred to as the Blue Sword exercises.³⁷⁹ The first edition of the Blue Sword exercises was held in 2019 near Saudi Arabia's Jeddah port, and the second edition was held in 2023 in Zhanjiang, China, at a naval brigade camp.³⁸⁰ Following the most recent event, Chinese media suggested these exercises were now "routine" and offered both countries an opportunity to learn from each other's strengths, highlighting that China's military training system is different from Saudi Arabia's Western-style training doctrine.³⁸¹ The exercises focus on counterpiracy operations, including basic training, professional training, and exercises involving simulated rescue operations.*³⁸²
- *Iran*: China has also participated in military exercises with Iran. Most recently, in March 2024, China conducted naval drills with Iran and Russia in the Gulf of Oman.³⁸³ These exercises began in 2018 and are in their sixth iteration, but the 2024 iteration was the first time other countries, including Oman, Pakistan, India, and others, have been allowed to observe.³⁸⁴ Mr. Rumley notes that China's exercise with Iran and Russia is one example of Beijing focusing on a more symbolic rather than practical operation.³⁸⁵ During the exercise, the three militaries conducted a hostage rescue drill and tactical maneuvering drills.³⁸⁶

of Arab States Cooperation Initiative on Data Security, establish a network information exchange mechanism, and strengthen exchanges and dialogues in data governance and cyber security. *Xinhua*, "Xi Proposes Eight Major Initiatives on China-Arab Practical Cooperation," *China Daily*, December 10, 2022.

*Basic training and professional training involve things like underwater searches, rappelling from helicopters, and practice shooting various weapons. Seong Hyeon Choi, "Chinese and Saudi Navies Launch Joint Counterterrorism Exercise against Backdrop of Israel-Hamas War," *South China Morning Post*, October 10, 2023.

China's Growing Role in the Middle Eastern Arms Market

Although it is a relatively small supplier of arms to the Middle East relative to the United States,* China has sought to create deeper inroads into Middle Eastern countries through the transfer of arms and dual-use technologies in order to establish itself as an alternative security partner in the region.³⁸⁷ China has attempted to compete in this market due to its relatively low-cost options, affordable services, and a lack of geopolitical conditions placed on sales, among other factors.³⁸⁸ In particular, China has stood out as an exporter of military drones to countries such as Saudi Arabia and the UAE.³⁸⁹

China Targets Middle East as Market for Arms Sales

China's sale of arms and dual-use technologies in the Middle East simultaneously serves its own commercial interests and strengthens its position as an alternative regional security partner at the United States' expense. In the last decade, China has begun to refocus arms exports to the Middle East.†³⁹⁰ Notably, China's 2016 *Arab Policy Paper* called for increased cooperation between China's military and Arab countries and to "deepen cooperation on weapons, equipment and various specialized technologies, and carry out joint military exercises."³⁹¹ General Michael Kurilla, the commander of U.S. Central Command, told the Senate Armed Services Committee in March 2023 that China's arms sales to the Middle East had increased by 80 percent over the previous ten years.³⁹² Still, China's arms sales to the region—and globally—remain low relative to the United States and other arms exporters.‡³⁹³

China markets aircraft as well as air and missile defense, anti-tank, and anti-drone systems in the region. For example, in February 2024, 36 Chinese companies, including China North Industries Corporation and China National Aero-Technology Import and Export Corporation, attended the World Defense Show in Saudi Arabia to market their services.³⁹⁴ Chinese companies displayed fighter jet models, long-range air and missile defense systems, and anti-tank systems, among other equipment.³⁹⁵ The PLA Air Force also demonstrated J-10 fighter jets—the first time China has displayed them at an international expo.³⁹⁶ No new deals were publicly announced in 2024 for Chinese fighter jet purchases, but in 2023 the UAE government signed a deal to purchase 12 Chinese L-15A advanced jet trainers.³⁹⁷ In 2022, China delivered the Silent Hunter air defense system to Saudi Arabia.³⁹⁸ This is an anti-drone weapons system intended to protect Saudi Arabia against loitering munitions and

*According to data from the Stockholm International Peace Research Institute, the United States constituted the largest share of arms export to the Middle East between 2019 and 2023, accounting for 38 percent of total exports. Pieter D. Wezeman et al., "Trends in International Arms Transfers, 2023," *Stockholm International Peace Research Institute*, March 2024, 3.

†China's arms exports to the region have varied over time; in 1986, it sent almost 95 percent of its arms exports to Middle East countries, but this percentage dropped significantly throughout the 1990s and early 2000s as China reoriented its arms sales to Asian customers. Maria Mary Pappageorgiou, "China's Growing Presence in the Middle East's Arms Race and Security Dynamics," *Springer Nature Switzerland*, 2023, 263–265; China Power Project, "How Dominant Is China in the Global Arms Trade?" *Center for Strategic and International Studies*, May 27, 2021.

‡Between 2019 and 2023, three of the top ten arms importers were in the Middle East: Saudi Arabia, Qatar, and Egypt. The United States remains the top supplier of arms to the region, followed by France, Italy, and Germany. Pieter D. Wezeman, et al., "Trends in International Arms Transfers, 2023," *Stockholm International Peace Research Institute*, March 2024, 11.

Iran-backed Houthi drones.³⁹⁹ In 2017, the UAE purchased Blue Arrow 7 anti-tank missiles from China to arm its Wing Loong-2 drone fleet.⁴⁰⁰ China delivered these purchases to the UAE in 2020, and the Stockholm International Peace Research Institute estimates there were around 500 missiles in the delivery.⁴⁰¹

China Has Emerged as the Main Supplier of Military-Grade Drones in the Middle East

China has positioned itself as the primary supplier of drones to the region, including to longstanding U.S. security partners Saudi Arabia and the UAE.⁴⁰² Maria Papageorgiou, a lecturer at the University of Exeter, testified before the Commission that between 2016 and 2020, China's arms sales to Saudi Arabia increased by 386 percent and to the UAE by 169 percent.⁴⁰³ During this period, the main types of weapons purchased from China were drones, specifically the Wing Loong-1 and the Wing Loong-2 (see Table 3 below).⁴⁰⁴ Saudi Arabia is also expected to receive the Wing Loong-10, a high-altitude drone capable of carrying several munitions, sometime in 2024.⁴⁰⁵ In April 2024, Iraq received a delivery of Caihong-5 (CH-5) unmanned aerial vehicles (UAVs).⁴⁰⁶ According to news reports, the Iraqi Army Aviation Command had expressed interest in acquiring CH-5 drones since April 2023.⁴⁰⁷ China's CH-5 drones can carry heavier payloads and have a longer range and endurance life than their predecessors (CH-4s).⁴⁰⁸ These features could allow for more effective strike missions or intelligence gathering.⁴⁰⁹

Table 3: Chinese Military-Grade UAVs Sold to Middle Eastern Countries (2010–2023)

Country	UAV Design	Manufacturer	Year Ordered	Number Ordered
Iraq	CH-4	CASC	2014	20*
Saudi Arabia	CH-4	CASC	2014*	20*
Jordan	CH-4	CASC	2015*	6*
Egypt	ASN-209	CATIC	2010*	18
UAE	CR-500	NORINCO	2019*	10*
UAE	Wing Loong-1	CADI/AVIC	2011*	25*
Saudi Arabia	Wing Loong-1	CADI/AVIC	2014*	15*
Egypt	Wing Loong-1	CADI/AVIC	2016*	10*
Egypt	Wing Loong-1	CADI/AVIC	2018	32*
Saudi Arabia	Wing Loong-2	CADI/AVIC	2017	50*
UAE	Wing Loong-2	CADI/AVIC	2017	15*
Saudi Arabia	CH-4	CASC	2017	5*
Iraq	CH-5	CASC	2023*	Unclear

Note: Values with an asterisk are estimates.

Source: Various.⁴¹⁰

Chinese military drones are more accessible to foreign militaries, as they are priced at roughly half the cost or less of their U.S. counterparts.⁴¹¹ Dr. Papageorgiou suggests that the Gulf states in particular are attracted to Chinese armed drones because of their lower cost.⁴¹² Although Chinese drones are typically of a lesser quality, the lower price point allows countries in the region to purchase them in larger quantities—an advantage in conflict zones where they can be quickly shot down.⁴¹³ Additionally, Mr. Rumley explains that regional actors are incentivized to buy Chinese armed drones because it will give them access to Chinese drone technology.⁴¹⁴ According to the U.S. Department of Defense, China entices countries in the Middle East to buy its weapons systems, especially drones, by offering flexible payment options, gifts, and donations to the purchasing country.⁴¹⁵

Implications for the United States

The Middle East continues to be a volatile region where factional and sectarian conflict can quickly spill over and threaten the security and commercial interests of the United States and its allies and partners. While China does not yet appear intent on replacing the United States as the dominant outside power in the region, it acts opportunistically to undermine U.S. influence. China's approach to the region is mixed, seeking to strike a balance between undertaking efforts that may undermine the influence of the United States while maintaining a threshold of stability necessary to ensure unabated commercial activity. China may also believe that it benefits if continued regional turmoil deflects some U.S. energy and attention away from its own immediate periphery. However, China's substantial economic and commercial interests in the region, and its reliance on key trade routes that pass through it, leave it exposed to potential disruption if a significant conflict among regional powers were to break out.

Diplomatically, the Middle East presents an opportunity for China to promote its vision of global leadership. First, China is developing deeper relations with both U.S. partners and rivals in the region. Second, Beijing uses its three initiatives, the Global Security Initiative, Global Development Initiative, and Global Civilization Initiative, to engage Arab states and to present an alternative vision that appeals to the region's autocratic governments. Lastly, China uses multilateral forums, such as the China-Arab States Cooperation Forum, to spread narratives and gain support for issues such as its human rights abuses in Xinjiang or bolster its territorial claims in the South China Sea or Taiwan.

Iran is also a crucial element of China's efforts to undermine the United States and the rules-based international order it leads. China and Iran harbor a shared sense of grievance toward the U.S.-led world order. By sustaining Iran—and, indirectly, its proxy forces throughout the region—Beijing complicates the security landscape for the United States and supports an effective counterweight to rising regional powers on the Arabian Peninsula. Chinese purchases of sanctioned Iranian crude oil have increased dramatically in recent years, to the point where China now purchases nearly 90 percent of Iranian oil and in doing so has established a network of

logistical and financial institutions to bypass U.S. and international sanctions regimes against Iran.⁴¹⁶ This evolving and increasingly sophisticated sanctions circumvention scheme is eroding the economic leverage the United States and the international community can bring to bear not only to contain Iran but also to use against other adversarial states like Russia and North Korea, who together with China are forming what researchers at the Atlantic Council have dubbed the “axis of evasion.”⁴¹⁷ However, China’s partnership with Iran has limits, as China acts exploitatively to purchase Iranian oil that cannot easily be sold to other buyers due to sanctions at below-market prices, all while signaling Beijing’s unwillingness to enmesh too deeply for fear of souring relations with Saudi Arabia, the UAE, and other important actors.⁴¹⁸

Another area of increasing concern for the United States pertains to China’s ability to acquire cutting-edge U.S. technology subject to export controls given the presence of Chinese technology companies in the region’s digital infrastructure, particularly in the Arab Gulf. Huawei, ZTE, and other companies on the Commerce Department’s Entity List have been instrumental in the buildout of telecommunications and cloud infrastructure across the region. With the rapid advent of generative AI and the ambition of Saudi Arabia, the UAE, and other wealthy Gulf states to become AI leaders, there is accelerating demand for dual-use hardware and software supplied by leading tech companies. In October 2023, the Commerce Department expanded semiconductor export controls to require licenses for sale of cutting-edge chips to certain Middle Eastern countries, including the UAE and Saudi Arabia, consistent with prior rules to prevent Chinese military end use.⁴¹⁹ Microsoft and the UAE’s leading AI firm Group 42 reached a landmark agreement in April 2024 that followed the latter’s commitment to untangle ties with Chinese tech companies, including Huawei. This case is informative regarding how best to incentivize key partners with whom the United States maintains close security relationships to effectively constrict potential conduits of technology transfer to China.

Lastly, though China maintains a modest maritime security presence in the Middle East operating out of its base in Djibouti, it has yet to forward-deploy the forces necessary to conduct military operations that could rival the U.S. security architecture in the region. It appears for now that Beijing is content to free-ride off the security that U.S. counterpiracy operations, counterterrorism operations, and broader security partnerships provide in the region. China may also be considering options for new bases in the region; for example, the U.S. Department of Defense asserted in 2023 that China has probably considered the UAE for a PLA logistics facility.⁴²⁰ This and similar port construction projects undertaken by Chinese companies in areas of strategic importance should be closely monitored, as should arms sales and increasing military ties between the PLA and countries in the region.

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