

CHINA AND THE GULF IN A CHANGING WORLD

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Sino-Gulf Institute Publication Leads



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Foreword

I have often heard it said that relations between China and the Gulf have entered their golden age and reached their peak. My own experience leads me to see the present moment differently. We are standing near the beginning of that age, with much more still waiting to be built.

Economic ties have already reached remarkable levels across trade, energy, investment, and strategic cooperation. These achievements deserve recognition, although they do not tell the whole story of the relationship. Research remains limited, academic exchange remains uneven, and opportunities for young people to participate meaningfully remain far too scarce.

I have experienced these gaps directly as an Emirati student in China and as a researcher of relations between the United Arab Emirates and China. I encountered important questions that received little attention, perspectives that rarely found a platform, and ideas that had not been sufficiently explored. The relationship was advancing quickly, while the space for young researchers and emerging voices was advancing much more slowly.

This gap is one reason why the Sino-Gulf Institute exists today. The Institute was established to bridge the knowledge gap between China and the Gulf through research, analysis, and accessible

perspectives on a relationship of growing global importance. Our work follows the relationship across diplomacy, trade, energy, finance, technology, strategic cooperation, and people-to-people exchange. The first journal therefore reflects a wider commitment to creating serious opportunities for young writers to contribute to this expanding field.

For our first publication, we deliberately chose to place young voices at its center. The contributors come from different countries, universities, disciplines, and experiences, while sharing a willingness to examine China and the Gulf from new perspectives. Their work reflects the kind of intellectual exchange that this relationship increasingly needs.

If the golden age of relations between China and the Gulf truly lies ahead, its foundations cannot be measured through economic figures alone. Its strength will also depend on the ideas we develop, the institutions we build, and the people we prepare to carry this relationship forward. Young people should not simply inherit the next chapter of relations between China and the Gulf. They should have a meaningful and lasting role in writing it.

Abdulla Alhemeiri, Founder

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The views and opinions expressed in this journal are solely those of the individual authors and do not necessarily reflect the position of the Sino-Gulf Institute.

English Contributions

Hormuz Tensions and the Chinese–GCC Energy Resilience: Analysis of Diversification and Strategic Partnership of China in Times of the Great Oil Crisis

Dominika Natalia Sówka

Abstract: This article examines how China reconciled its declared neutrality during the 2026 closure of the Strait of Hormuz with its long-standing commitment to the development and bilateral partnerships of the Gulf Cooperation Council (GCC). Taking as its case a waterway carrying roughly twenty per cent of global oil flows and around half of China's crude imports, the analysis traces Sino-Gulf energy relations from the pre-conflict period through the war-driven disruption beginning in March 2026. Drawing on investment agreements, institutional reporting and policy announcements, and reading them through the distinction between soft and hard power alongside a logic of portfolio diversification and risk hedging, the article situates Chinese conduct within the Belt and Road Initiative, the Green Silk Road and Vision 2030. It argues that Beijing sustained neutrality by substituting infrastructural, technological and financial leverage for military engagement: hydrogen-ammonia and renewable ventures, electric-vehicle and solar exports, equity stakes secured through the Silk Road Fund, pipeline and stockpiled supply from Central Asia, Africa and South America, and the self-reliance agenda of

the Fifteenth Five-Year Plan. It concludes that such preparedness allowed the China-GCC relationship to be maintained through shared solutions, while cautioning that unless the Gulf diversifies its income before Chinese self-sufficiency matures, welfare losses will follow.

Keywords: China-GCC relations, Strait of Hormuz, energy security, Belt and Road Initiative, soft power, diversification and risk hedging, Vision 2030

Introduction

The Hormuz Strait is one of the world's most valued passageways for commodity ships, transferring about 20% of global oil trade flows (Butler et al., 2026) from the Gulf Cooperation Council countries and Iran to its beneficiaries, amongst whom China is a major importer of about 50% of crude oil going through the affected area (Center on Global Energy Policy at Columbia University SIPA, 2026).

The country, however, played as one of the most neutral political members in the USA and Israeli conflict with Iran, and seemed unchallenged to the strait's eventual war-driven closure starting from March 4, 2026.

China's neutrality is suggested to have stemmed from a plethora of reasons. One of which is constituted by China's ties to Iran, with whom a deal was signed in 2021 for a 25-year comprehensive strategic partnership agreement for trade and partnership networks within the energy industry (Arab Gulf States Institute, 2025b). Iran was, however, responsible for the majority of attacks on GCC soil, bombarding their territory aiming at US bases and causing civilian casualties in the region (Amnesty International, 2026).

On the other hand, China's long-term conflict with the USA and its strategic ties to the Gulf region through the Belt and Road Initiative called for immediate involvement. That is based on the ties to the fulfilment of the Vision 2030 programme and the GCC's partnership within the oil trade.

Those great diplomatic relations and energy codependence lead to a question: How does China pivot between its neutrality and upholding of commitment to the development and bilateral partnerships of the GCC nations?

Relationship with GCC before conflict

China stands at the forefront of global production of green infrastructure, utilising the most high-tech solutions, which include renewable energy plants and sustainable urban development initiatives. Pushing the adoption of such, under the wing of the Green Silk Road Initiative, has

led to major deals, such as the mergers and cooperations amongst the biggest energy firms like Chinese Sinopec and Saudi ACWA Power to build the world's largest hydrogen-ammonia plant in Saudi Arabia on August 26, 2025 (Arab Gulf States Institute, 2025a). Furthermore, another initiative - China's Silk Road Fund - provides firms with financial incentives for growth, while requiring ownership of debt-equity instruments. Most famously, requiring a 49% stake in ACWA Power RenewCo in Saudi Arabia (Arab Gulf States Institute, 2025a), installing China's soft power in the region using collateral and partnerships. The examples show that China, leveraging its comparative assets, has offered its technological acumen to be used for the improvement of efficiency for local firms and the GCC's energy resilience in return for ownership, or as a hedge for China's power safety, strengthening economic and political ties.

Those business relationships and economic agreements present themselves as an opportunity for potential collaborations. The Chinese comparative advantage lies in technology, which has long established the country as a frontrunner in EVs. China's automobile industry exports to the Gulf countries, lowering GCC's reliance on oil, allowing them to step into the petrol-free perspective. The EVs are said to aid in achievement of the SDG11 goal (Alanazi & Alsaleh, 2025), and are becoming more accessible with Chinese manufacturers expanding across the Gulf (Raffoul &

Lahham, 2026). China itself has long been dominated by EVs, which are 80% of cars produced overall (International Energy Agency, 2025).

Despite petrol diversion, China has invested large amounts in energy cooperation in countries involved in the Belt and Road Initiative, far from sea routes, such as Kazakhstan (Schagerl & Soldo, 2023) or Turkmenistan (Xinhua, 2026a), where oil pipelines are used as delivery methods. Diverse suppliers have also been cited as coming from African (Institute of Developing Economies Japan External Trade Organization [IDE-JETRO], n.d.) or South American countries (Eshetu, 2026). Additional oil reserves had been gathered by the use of stockpiling, accounting making up for a lasting shock-cushioning large reserve, insulating market fluctuations.

Hormuz tensions

China, way before the conflict started, had established its presence in the Gulf as a soft power, supporting the area economically and forming ties, transcending military conflicts. While the US, on the other hand, starting the conflict, was holding the seemingly upper hand, using its military power to put economic pressure on the geographic area, using power to provide security guarantees and causing political disruption (Britannica, 2026). The key element of energy diplomacy for China was the introduction

of infrastructural and financial support, creating a shared vision among the key players of the oil trade. All to indicate the lesser need for military action from China's side. Given that the US focused on catering to hard power and military action to assert dominance amongst key players of the oil industry, the conflict was not only concentrated between the USA-Israel and Iran, yet spread with attacks to the whole region.

However, a major counterargument to China being 'only a holder of soft power' are the reasons standing behind its financial leverage. The help could be seen as a way of making the 'economic debtor' industrially interdependent and coerced into strategic investments and deals. Its positioning using industry as collateral stipulates a high level of risk management, therefore hedging the harmful nature of the conflict, making it seemingly neutral.

Actions throughout the conflict

China has been diversifying its portfolio with commissioning additional power plants in South Africa, building the largest single-capacity power station on February 10, 2026 (GAMKO, 2026). It has also been reported that amidst the conflict, the country has also been making green energy deals, with Serbia building a large-scale wind power plant project reported on June, 24th (Huaxia, 2026).

Furthermore, beyond outside-Gulf ventures, China has also issued the "15th

Five-Year Plan" for years 2026 to 2030 on June 25, 2026, calling for clean, low-carbon, majorly self-reliant and controllable power generation on a national scale, driven by the call for independence and faster improvement using complex high-tech energy infrastructure (Xinhua, 2026b). Suggesting its pivot towards domestic supply and demand dynamics, rather than reliance on foreign goods. The announcement of the plan, as well as accelerating renewable energy portfolio-creation may have intensely underlined China's perspective on the Hormuz conflict, alluding to the idea of partial disconnection and creation of its own venture beyond oil.

Significance for old partnerships

China's shift to self-reliance could be a major concern for its partners, signifying divergence from initial relationships. However, the aforesaid agreements are largely uprooted in major exports of technology like EVs and solar panels needed for the GCC to diversify their reliance on oil and trade after the crisis. Chinese banks support industries across Asia, allowing for additional capital and supporting foreign businesses. Meanwhile, China keeps its presence as a major exporter of its comparatively advantageous assets in electronics and machinery, continuing to collaborate with major firms across GCC and up-keeping its geopolitical influence as the Gulf's soft power. The GCC, on the other hand,

provides the crude material and supports diplomatic terms and energy security. The largest importer of their goods being the connector amongst the diversified, puzzled but interconnected world.

Implications for the GCC

The significance of investments in countries outside of the Gulf is not a direct threat, yet it is rather a testament to the growth of the Belt and Road Initiative, as the diversification allows for hedging for risk. Besides, the risk-factor allowance for renewable energy has been a key driver for global welfare and affordability of energy and lowering prices (Kuo, 2026).

However, China, after having announced its "15th Five-year Plan" denotes its commitment for quick progression of their plan for self-reliance, meaning pushing away from the need for oil imports. That, on a par with income diversification from the GCC, would imply that change needs to be done seamlessly and simultaneously. If the Gulf does not diversify its income before China succeeds with their plan, it will mean welfare losses. The strategic influence of China is retained as the 'safety net' of the region, having two superpowers competing over assets of the same area, given the US-China balance of relatively soft and hard power.

China's influence goes way further than impacting the two areas. Collaboration between the GCC and China sparks growth opportunities, using the newest

technologies to improve efficiency and own operations, sparking opportunities for faster diversification from oil. However, often it appears the foreign appliances used are prone to less flexibility and more conditions than domestic ones, inciting GCC businesses to keep up with their Chinese counterparts, as seen via incentives like Khalifa Fund or Hub71.

Conclusion

The way China pivots between its neutrality and up-keeping of commitment to the development and bilateral loyalty of the GCC nations is rooted in strategic business relationships and bilateral exchange. China keeps its neutrality by avoiding military conflict, focusing on supporting areas of interest and forming long-term bonds to cater to its own interests via external partnerships. The countries, including those of the GCC providing commodities, gain diplomatic support, inimitable acumen and efficient progression in their goals to then gather nationwide welfare. Joint initiatives, such as the Belt and Road, diversify risk and are a benefit in the situations of worldwide crisis. China, throughout the Hormuz crisis, was well prepared and, through the use of shared solutions, was able to maintain the relationship with the GCC.

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Diplomacy and the Reshaping of the China–Gulf Relationship: Historical Evolution and the Foundations of a New Diplomatic Partnership

Albert Jose Mendez Perdomo

Abstract: This article examines how diplomacy, rather than energy trade alone, has reshaped relations between the People's Republic of China and the member states of the Gulf Cooperation Council over the past four decades. Situating that question historically, it traces the evolution of engagement from Cold War distance and late normalisation, through the creation of the China–Arab States Cooperation Forum in 2004 and the protracted China–GCC Free Trade Agreement negotiations, to the December 2022 Riyadh summits and the March 2023 Saudi–Iranian rapprochement brokered in Beijing. The analysis proceeds as a qualitative, historically grounded reading of China's partnership diplomacy, its Five Principles of Peaceful Coexistence and doctrine of non-interference, and the Belt and Road, Global Development and Global Security Initiatives, set alongside scholarship on Gulf strategic hedging. It argues that Beijing has converted economic interdependence into a comprehensive strategic partnership resting on institutional engagement, political trust and pragmatic cooperation, pursuing influence without assuming the security responsibilities long associated with the United States, while Gulf governments

have embraced that partnership to diversify their international relationships and preserve strategic autonomy. The article concludes that China's regional weight remains diplomatic, economic and technological rather than military, and that its durability will depend on sustaining balanced neutrality amid intensifying great-power competition and persistent regional instability.

Keywords: China–Gulf relations, Gulf Cooperation Council (GCC), partnership diplomacy, strategic hedging, Belt and Road Initiative (BRI), Saudi–Iran rapprochement, non-interference

Introduction

The diplomatic relationship between the People's Republic of China and the member states of the Gulf Cooperation Council (GCC) has undergone a profound transformation over the past four decades. Once characterized by limited political engagement and modest commercial interaction, China–Gulf relations have evolved into one of the most significant partnerships shaping the geopolitical landscape of the twenty-first century. While energy cooperation initially served as the principal driver of engagement, diplomacy has increasingly become the

foundation upon which broader political, economic, technological, and security cooperation is built. Through strategic partnerships, multilateral dialogue, and a foreign policy emphasizing sovereignty and non-interference, China has established itself as a central diplomatic actor in the Gulf without assuming the traditional security responsibilities long associated with the United States.

The growing importance of diplomacy reflects broader changes in both regional and international politics. The Gulf monarchies have sought to diversify their foreign partnerships in response to an increasingly uncertain international environment, while China has expanded its global diplomatic ambitions through initiatives such as the Belt and Road Initiative (BRI) and the Global Security Initiative (GSI). Rather than pursuing exclusive alliances, both sides have adopted pragmatic diplomatic strategies centered on mutual economic development, political consultation, and institutional cooperation. This approach has enabled Gulf states to maintain close security ties with Washington while simultaneously deepening political and economic engagement with Beijing (Fulton, 2021).

China's successful facilitation of the restoration of diplomatic relations between Saudi Arabia and Iran in March 2023 illustrated this transformation. Although Beijing has traditionally avoided direct

involvement in Middle Eastern political disputes, its role in hosting negotiations between two of the region's principal rivals demonstrated a growing willingness to contribute diplomatically to regional stability when its strategic interests align with opportunities for constructive engagement (Alterman, 2023). The agreement did not replace existing regional security structures but highlighted China's emergence as a credible diplomatic broker capable of facilitating dialogue among competing regional powers.

This essay argues that diplomacy has fundamentally reshaped the China–Gulf relationship by transforming economic interdependence into a comprehensive strategic partnership characterized by institutional engagement, political trust, and pragmatic cooperation. Rather than challenging the existing international order through military competition, China has pursued influence through sustained diplomatic engagement, strategic partnerships, and respect for national sovereignty. Simultaneously, Gulf states have embraced this diplomatic relationship as part of broader strategies designed to diversify international partnerships while preserving strategic autonomy in an increasingly multipolar world.

Historical Evolution of China–Gulf Diplomacy

Modern diplomatic relations between China and the Gulf developed relatively

late compared to Beijing's relationships with many other regions. During much of the Cold War, ideological differences, limited trade, and geopolitical divisions constrained political engagement between China and the Arab monarchies. Several Gulf states maintained diplomatic recognition of the Republic of China (Taiwan) until the 1970s and 1980s, while Beijing's revolutionary foreign policy offered limited incentives for closer political cooperation with conservative monarchies.

The normalization of diplomatic relations accelerated during China's economic reforms under Deng Xiaoping. As China's modernization generated rapidly growing energy demand, the Gulf emerged as a strategically important region capable of supplying long-term oil and natural gas imports. Saudi Arabia established diplomatic relations with China in 1990, completing Beijing's diplomatic recognition among all GCC member states and marking an important milestone in bilateral relations (Fulton, 2021).

Unlike many Western powers, China approached the Gulf without a colonial legacy or history of military intervention. Beijing consistently emphasized the Five Principles of Peaceful Coexistence—mutual respect for sovereignty, mutual non-aggression, non-interference in internal affairs, equality and mutual benefit, and peaceful coexistence. These principles resonated strongly with Gulf

governments, which frequently expressed concerns regarding external intervention and regime security. China's diplomatic messaging therefore complemented Gulf leaders' preference for political partnerships that respected domestic governance structures while avoiding public criticism of internal political affairs.

Economic cooperation quickly reinforced diplomatic engagement. Throughout the 1990s and early 2000s, China's growing dependence on imported energy significantly expanded bilateral trade. The Gulf supplied increasing volumes of crude oil essential to sustaining China's industrialization, while Chinese companies participated in infrastructure development across the region. This mutual economic dependence gradually encouraged more frequent diplomatic exchanges, ministerial meetings, and institutional dialogue.

The establishment of the China–Arab States Cooperation Forum (CASCF) in 2004 represented one of the earliest efforts to institutionalize China's diplomatic engagement with the broader Arab world. The forum created regular mechanisms for consultation across political, economic, cultural, and security issues, reflecting Beijing's preference for multilateral diplomacy rather than exclusive bilateral alliances. Although CASCF encompasses all members of the Arab League, the Gulf states rapidly became its most economically significant participants

because of their energy resources and investment capacity.

China further expanded institutional diplomacy through negotiations with the Gulf Cooperation Council on a China–GCC Free Trade Agreement. Although negotiations progressed slowly over many years, they reinforced sustained diplomatic engagement between both sides. Regular ministerial meetings created opportunities to discuss not only trade, but also regional security, investment policy, technological cooperation, and people-to-people exchanges. According to Jonathan Fulton (2019), these diplomatic mechanisms helped transform the relationship from transactional energy cooperation into a broader strategic partnership built upon political consultation and mutual confidence.

Strategic Partnership Diplomacy

One defining characteristic of China's foreign policy is its extensive use of strategic partnerships rather than formal military alliances. Unlike alliance systems that often involve collective defence commitments, China's partnership diplomacy emphasizes flexible political cooperation tailored to the interests of individual states. This approach has proven particularly attractive to Gulf governments, which seek diversified international relationships without becoming exclusively aligned with any single major power.

China has established comprehensive strategic partnerships with several Gulf countries, including Saudi Arabia and the United Arab Emirates. These partnerships provide institutional frameworks for cooperation across diplomacy, investment, infrastructure, education, scientific research, and emerging technologies. Importantly, they do not require exclusive political alignment or security commitments. Instead, they facilitate regular high-level consultations while allowing both parties considerable diplomatic flexibility (Fulton, 2019).

The comprehensive strategic partnership between China and Saudi Arabia illustrates this evolving diplomatic model. High-level visits by President Xi Jinping and Saudi leaders have produced numerous agreements spanning energy cooperation, digital infrastructure, renewable energy, logistics, artificial intelligence, and cultural exchange. During President Xi's visit to Riyadh in December 2022, China simultaneously participated in the China–Saudi Summit, the China–GCC Summit, and the China–Arab States Summit, demonstrating Beijing's effort to institutionalize diplomacy at multiple regional levels rather than relying solely on bilateral engagement.

This multilayered diplomatic architecture reflects China's broader vision of multipolar international relations. Beijing frequently emphasizes that international governance should accommodate multiple

centres of influence while respecting national sovereignty. Gulf governments have generally welcomed this perspective because it complements their own efforts to expand strategic autonomy amid intensifying competition between the United States and China. Rather than choosing between competing powers, Gulf states increasingly pursue what scholars describe as "strategic hedging"—maintaining strong relationships with multiple major powers simultaneously (Fulton, 2021).

Diplomatic engagement has therefore become far more than an extension of economic cooperation. Instead, it functions as an independent pillar of the China–Gulf relationship, facilitating dialogue on regional security, technological standards, infrastructure connectivity, educational exchange, and international governance. The institutionalization of diplomacy has strengthened mutual political trust while creating mechanisms capable of managing disagreements without fundamentally disrupting broader cooperation. As a result, China and the Gulf states have constructed a relationship distinguished less by formal alliances than by sustained political consultation, pragmatic problem-solving, and long-term strategic planning, setting the stage for an increasingly influential partnership within the evolving international order.

China's Diplomatic Vision and the Gulf

China's diplomatic engagement with the Gulf has evolved beyond traditional bilateral relations into a comprehensive strategy that reflects Beijing's broader vision of international order. Rather than relying on military alliances or ideological partnerships, China has promoted a model centered on economic cooperation, political consultation, and respect for national sovereignty. This diplomatic philosophy has resonated strongly with Gulf states, whose foreign policies increasingly emphasize strategic diversification and balanced engagement with multiple global powers. As a result, diplomacy has become the principal mechanism through which China has expanded its influence in the Gulf while avoiding direct confrontation with existing regional security arrangements.

A defining feature of China's approach is the principle of non-interference in the domestic affairs of sovereign states. Since the establishment of diplomatic relations with Gulf countries, Beijing has consistently avoided public criticism of domestic political systems or internal governance issues. Instead, Chinese leaders emphasize mutual respect, equality, and shared development. This approach differs from the foreign policies of many Western governments, which have frequently linked diplomatic engagement to governance reforms, democratization, or

human rights concerns. For Gulf governments, China's position offers a partnership that prioritizes political stability and economic development without attaching ideological conditions to cooperation (Fulton, 2021).

China's diplomatic strategy also reflects its aspiration to promote a more multipolar international system. Chinese policymakers argue that global governance should not be dominated by a single power but instead should accommodate multiple centers of influence capable of cooperating through dialogue and international institutions. This perspective has become increasingly attractive to Gulf states seeking greater strategic autonomy amid intensifying competition between the United States and China. Rather than replacing Washington as their principal security partner, Gulf governments have expanded diplomatic engagement with Beijing to diversify their international relationships and reduce dependence on any single external actor (Gurol-Haller, 2023).

The announcement of the Belt and Road Initiative (BRI) in 2013 significantly accelerated this diplomatic transformation. While often described primarily as an infrastructure and investment program, the BRI also functions as a diplomatic framework through which China strengthens long-term political relationships. The Gulf occupies a central geographic position within the initiative,

linking Asia, Africa, and Europe through maritime trade routes and logistical corridors. Consequently, Beijing has prioritized diplomatic engagement with Gulf governments to facilitate cooperation on ports, industrial zones, transportation infrastructure, telecommunications, renewable energy, and financial connectivity.

The diplomatic significance of the BRI extends beyond physical infrastructure. Major projects require sustained political coordination, regulatory cooperation, and high-level dialogue, encouraging regular interaction between Chinese and Gulf officials. Joint commissions, ministerial meetings, and investment forums have become institutionalized mechanisms through which broader political relationships are strengthened. This process has transformed infrastructure cooperation into a foundation for comprehensive diplomatic engagement, expanding discussions to include technology governance, educational exchange, public health, environmental sustainability, and regional security.

China's diplomatic vision has also been reinforced through newer global initiatives proposed by President Xi Jinping. The Global Development Initiative (GDI), announced in 2021, emphasizes poverty reduction, sustainable development, food security, climate resilience, and international cooperation. Although global in scope, many of its objectives align

closely with the economic diversification strategies pursued by Gulf governments under programs such as Saudi Arabia's Vision 2030 and similar national development agendas in the United Arab Emirates and Qatar. Shared priorities have created additional opportunities for diplomatic collaboration beyond traditional energy relations.

Similarly, the Global Security Initiative (GSI), introduced in 2022, reflects Beijing's effort to present an alternative framework for international security cooperation. The initiative emphasizes dialogue, political consultation, conflict prevention, and respect for national sovereignty rather than military alliances or coercive intervention. While the GSI remains relatively new and its long-term influence remains uncertain, its principles correspond closely with China's diplomatic messaging in the Gulf. Beijing presents itself as a facilitator of dialogue rather than a military guarantor, arguing that sustainable regional stability should emerge through negotiations and mutual confidence-building rather than external intervention.

China–GCC Institutional Diplomacy

The institutionalization of diplomatic relations between China and the Gulf Cooperation Council represents one of the most significant developments in contemporary China–Gulf relations. Although bilateral partnerships remain

important, both sides increasingly recognize the value of regional institutions capable of coordinating policy across multiple sectors. Institutional diplomacy has therefore become an essential mechanism for expanding political dialogue while supporting long-term economic and strategic cooperation.

China formally established relations with the GCC shortly after the organization's creation in 1981, but engagement accelerated considerably during the early twenty-first century. Negotiations toward a China–GCC Free Trade Agreement began in 2004, reflecting the growing importance of bilateral commerce and investment. Although negotiations have experienced periods of delay, they have provided an enduring platform for regular diplomatic engagement. Ministerial meetings have enabled officials to discuss not only trade liberalization but also customs cooperation, digital commerce, energy security, investment regulation, and regional political developments.

The December 2022 China–GCC Summit in Riyadh represented a milestone in institutional diplomacy. For the first time, President Xi Jinping met collectively with leaders of all six GCC member states under a formal summit framework dedicated exclusively to China–GCC cooperation. The summit produced a joint statement emphasizing expanded collaboration across energy, finance, digital technology, infrastructure development,

artificial intelligence, environmental protection, public health, education, and cultural exchange. Rather than announcing a military alliance or exclusive geopolitical bloc, both sides reaffirmed their commitment to comprehensive strategic cooperation based upon mutual benefit and respect for sovereignty (Ministry of Foreign Affairs of the People's Republic of China, 2022).

The summit also demonstrated the increasingly sophisticated nature of China–Gulf diplomacy. Rather than focusing exclusively on energy exports, discussions reflected the diversification of Gulf economies and China's own transition toward advanced manufacturing, digital innovation, and renewable technologies. Cooperation increasingly encompasses emerging sectors such as cloud computing, smart cities, electric vehicles, green hydrogen, and financial technology. Diplomatic institutions therefore facilitate policy coordination across a far broader range of issues than was conceivable only two decades earlier.

Institutional diplomacy has also expanded through the China–Arab States Cooperation Forum (CASCF), established in 2004. Although the forum includes all members of the Arab League, Gulf countries have assumed a particularly prominent role due to their economic significance and strategic location. CASCF organizes regular ministerial conferences, expert meetings, business forums,

academic exchanges, and cultural initiatives that reinforce political dialogue while encouraging cooperation between governmental and non-governmental actors. These activities contribute to mutual understanding and strengthen diplomatic relationships beyond traditional state-to-state interactions.

Scholars frequently describe this approach as strategic hedging; whereby smaller and middle powers avoid excessive dependence on any single external actor. The Gulf monarchies continue to rely heavily on the United States for defence cooperation, advanced military capabilities, and regional deterrence. At the same time, they increasingly view China as an indispensable economic partner, technology investor, and diplomatic interlocutor. Beijing, for its part, has accepted this arrangement, recognizing that attempting to replace the United States militarily would be both costly and unnecessary. Instead, China has concentrated on expanding diplomatic influence through economic interdependence, institutional engagement, and political trust, thereby reshaping the regional diplomatic landscape without fundamentally altering its existing security architecture.

The Saudi–Iran Rapprochement and China's Emerging Diplomatic Role

The restoration of diplomatic relations between Saudi Arabia and Iran in March

2023 marked a watershed moment in Middle Eastern diplomacy and significantly elevated China's international diplomatic profile. After seven years of severed relations, officials from both countries announced in Beijing that they had agreed to reopen embassies, restore diplomatic ties, and implement previous security cooperation agreements. While Iraq and Oman had hosted earlier rounds of dialogue between the two regional rivals, China's decision to facilitate the final negotiations demonstrated Beijing's increasing willingness to play a constructive political role in the Gulf when opportunities aligned with its broader strategic interests (Alterman, 2023).

China's involvement represented a notable departure from its traditionally cautious diplomatic posture in the Middle East. For decades, Beijing largely avoided direct mediation in regional conflicts, preferring instead to maintain productive relations with all parties while emphasizing economic cooperation. This policy allowed China to cultivate close partnerships simultaneously with Saudi Arabia, Iran, the United Arab Emirates, Qatar, and other regional actors despite their competing geopolitical interests.

Several factors explain why China was able to assume this diplomatic role. First, Beijing enjoys significant economic relationships with both Saudi Arabia and Iran. Saudi Arabia remains one of China's largest suppliers of crude oil, while Iran

occupies an important position within China's broader regional strategy despite international sanctions. Because China maintains substantial commercial ties with both governments, it possesses incentives to encourage regional stability and reduce tensions that could threaten energy markets or disrupt international trade.

Second, China's diplomatic credibility stems partly from its longstanding emphasis on political neutrality and non-interference. Unlike external powers that have participated directly in regional conflicts or military interventions, Beijing presents itself as a partner primarily interested in economic development and peaceful coexistence. Although some observers question whether complete neutrality is possible for any major power, China's reputation for avoiding ideological confrontation has contributed to its acceptance as a diplomatic facilitator by multiple governments across the Middle East (Gurol-Haller, 2023).

The agreement also reflected broader geopolitical trends rather than a sudden transformation in China's foreign policy. Gulf governments have increasingly diversified their international partnerships in response to shifting global power dynamics, while China has expanded its diplomatic presence through initiatives promoting dialogue and multilateral cooperation. The Beijing negotiations therefore emerged from years of gradually

strengthening political relationships rather than an isolated diplomatic initiative.

Nevertheless, analysts caution against overstating China's achievement. The normalization agreement did not resolve the underlying strategic competition between Saudi Arabia and Iran, nor did it eliminate disagreements regarding Yemen, regional proxy conflicts, or broader questions of regional influence. Instead, it created a framework through which diplomatic communication could resume, and tensions could be managed more effectively. As Alterman (2023) argues, China's success lay less in resolving longstanding disputes than in providing an acceptable venue and political environment in which both parties could formalize decisions already supported by extensive prior negotiations.

The diplomatic significance of the agreement therefore extends beyond the immediate restoration of bilateral relations. It demonstrated that China possesses growing diplomatic capital within the Gulf and that regional governments increasingly view Beijing as a credible participant in political dialogue. At the same time, China carefully avoided assuming responsibility for enforcing the agreement or replacing existing regional security structures. This restraint reflects Beijing's broader preference for facilitating diplomacy while minimizing long-term military or security commitments.

Challenges and Limitations

Despite the remarkable expansion of China–Gulf diplomacy, the relationship continues to face important constraints that limit Beijing's regional influence. The most significant challenge is the continued dominance of the United States as the Gulf's principal security provider. American military bases, defence agreements, intelligence cooperation, and advanced weapons systems remain central components of Gulf security architecture. China has shown little indication that it intends to replace these commitments, recognizing both the financial costs and political risks associated with assuming comparable responsibilities.

Consequently, China's influence remains strongest in diplomacy, trade, investment, infrastructure, and technology rather than hard security. Gulf governments similarly distinguish between their economic partnerships with China and their longstanding defence relationships with the United States. This division allows them to benefit from both relationships while avoiding an exclusive alignment with either major power.

China must also balance relationships among regional rivals whose interests do not always align. Maintaining productive diplomatic ties simultaneously with Saudi Arabia, Iran, Israel, Qatar, and the United Arab Emirates requires careful political management. Any perception that Beijing

Favors one actor over another could undermine the balanced diplomacy that has become one of its principal regional advantages.

Finally, uncertainty surrounds the long-term implementation of China's newer diplomatic initiatives, including the Global Security Initiative. Although these proposals emphasize dialogue, mutual respect, and cooperative security, many governments continue to seek greater clarity regarding their practical application. Future developments will determine whether these initiatives evolve into durable diplomatic institutions or remain primarily conceptual frameworks guiding China's foreign policy rhetoric.

Prospects

The future of China–Gulf diplomacy will largely depend on the ability of both sides to adapt to an increasingly complex international environment characterized by geopolitical competition, technological transformation, and evolving patterns of economic interdependence. Although the relationship originated from mutual interests in energy security and trade, it has expanded into a multidimensional partnership encompassing diplomacy, finance, infrastructure, digital technology, renewable energy, education, and cultural exchange. As both China and the Gulf states pursue ambitious national development strategies, diplomatic

cooperation is likely to become even more institutionalized over the coming decade.

One of the strongest drivers of future cooperation is economic diversification. Gulf governments have adopted long-term development programs aimed at reducing dependence on hydrocarbon revenues while investing heavily in advanced manufacturing, logistics, artificial intelligence, tourism, renewable energy, and knowledge-based industries. China's technological capabilities, manufacturing expertise, and investment capacity position it as an attractive partner in achieving these objectives. Consequently, diplomatic engagement will continue to facilitate agreements extending beyond traditional oil exports toward broader economic modernization.

Climate change and energy transition also create opportunities for expanded diplomatic cooperation. Although oil and natural gas will remain important components of the bilateral relationship for the foreseeable future, both China and Gulf countries have increased investments in renewable energy, hydrogen production, carbon capture technologies, and sustainable infrastructure. China has emerged as a global leader in solar panel manufacturing, electric vehicles, and battery technology, while Gulf governments have announced ambitious plans to become major producers of clean energy. Diplomatic institutions provide mechanisms through which these

complementary interests can be translated into long-term partnerships supporting global climate objectives.

At the multilateral level, China and Gulf states are likely to increase coordination within international organizations addressing global economic governance, sustainable development, and international finance. China's growing participation in institutions such as the Shanghai Cooperation Organisation and the BRICS grouping, together with the accession of several Gulf states to expanded multilateral forums, reflects a broader trend toward diversified international engagement. Although these institutions do not replace existing global organizations, they provide additional venues through which China and Gulf governments can coordinate positions on issues including development financing, trade governance, climate policy, and regional stability.

Several uncertainties will shape the future trajectory of China–Gulf diplomacy. Strategic competition between China and the United States is expected to remain a defining feature of international politics, potentially complicating diplomatic decision-making for Gulf governments. While Gulf states have thus far successfully pursued strategic hedging, future crises could generate stronger pressure to align more closely with one major power or the other. Maintaining balanced relationships will therefore require increasingly sophisticated

diplomacy capable of preserving national autonomy without undermining existing partnerships.

Regional instability also remains an enduring concern. Conflicts in Yemen, tensions surrounding Iran's regional activities, maritime security in the Persian Gulf, and broader geopolitical rivalries continue to threaten regional stability. Although China has demonstrated its capacity to facilitate diplomatic dialogue, it has shown limited willingness to assume direct responsibility for regional security. Consequently, the long-term success of China's diplomatic strategy will depend upon its ability to contribute constructively to conflict prevention while maintaining the neutrality that has become one of its principal diplomatic strengths.

Conclusion

The transformation of China–Gulf relations represent one of the most significant developments in contemporary international diplomacy. What began as a relationship primarily centred on energy trade has evolved into a comprehensive strategic partnership supported by regular political consultation, institutional cooperation, and expanding diplomatic engagement. Through a foreign policy emphasizing sovereignty, non-interference, mutual development, and pragmatic cooperation, China has established itself as an influential diplomatic actor across the Gulf without relying upon military

alliances or extensive security commitments.

China's partnership diplomacy has proven particularly attractive to Gulf governments seeking to diversify their international relationships while preserving strategic autonomy. Rather than replacing traditional alliances, Beijing has complemented existing regional diplomatic structures by providing additional opportunities for economic cooperation, technological collaboration, and political dialogue. The institutionalization of relations through mechanisms such as the China–GCC Summit and the China–Arab States Cooperation Forum demonstrates that diplomacy has become a permanent and increasingly sophisticated component of bilateral engagement.

The 2023 restoration of diplomatic relations between Saudi Arabia and Iran further illustrated China's growing political influence. Although Beijing did not resolve the underlying causes of regional rivalry, its successful facilitation of negotiations demonstrated that it possesses the diplomatic credibility necessary to encourage dialogue among competing regional actors.

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From the US–Israel War on Iran to the MoU: Rethinking China–Gulf Cooperation in a Changing Regional Order

Haoren Fang

Abstract: This article examines how the 2026 war involving the United States, Israel and Iran, and the interim Memorandum of Understanding (MoU) concluded in Islamabad in June 2026, reshape the strategic calculus underpinning China-Gulf cooperation. Taking the conflict and its immediate aftermath as its case, the analysis is framed around China's long-standing strategy of balanced engagement with competing regional actors, reading policy statements, shipping and oil export data, and the secondary literature on Beijing's partnership diplomacy against the conduct of the war itself. It identifies an asymmetry at the heart of that strategy: while the Gulf states remain important economic, technological and diplomatic partners, Iran demonstrated a distinctive capacity to shape the regional environment upon which Chinese interests depend, sharply reducing traffic through the Strait of Hormuz, extending uncertainty into the Bab el-Mandeb corridor, and contributing to a decline of approximately 61 percent in the oil exports of eight major Middle Eastern producers. Neither Gulf governments nor their external security partners proved able to neutralise this leverage, exposing the limits of military responses and endangering the stable environment on which Gulf

diversification agendas rest. The article argues that this shared vulnerability creates grounds for deeper China-Gulf cooperation, and concludes that durable stability depends less on deterrence than on constructing an inclusive regional order that incorporates rather than isolates Iran.

Keywords: China-Gulf relations, Iran, balancing strategy, regional security order, Strait of Hormuz, Gulf Cooperation Council (GCC), economic diversification

1. Introduction

Although the June 2026 Islamabad Memorandum of Understanding (MoU) between the United States and Iran temporarily halted hostilities and established a framework for further negotiations (Reuters, 2026), the recent conflict involving the United States, Israel and Iran revealed important features of the region's evolving strategic landscape.

For China, these developments carry implications that extend beyond the outcome of the conflict itself. Over the past two decades, Beijing has expanded its diplomatic, economic, and political engagement across the Middle East while seeking to maintain productive relations with a diverse range of regional actors. A central feature of this approach has been the pursuit of balanced relations with both

Iran and Saudi Arabia, two states that occupy particularly important positions in China's regional strategy (Houghton, 2022).

However, the recent conflict highlighted an important asymmetry. While Gulf states remain important economic, technological and diplomatic partners for China, Iran demonstrated a unique capacity to challenge the existing regional order and affect the strategic environment upon which China's Middle East strategy depends. This asymmetry has implications not only for China's regional strategy but also for the Gulf states' long-term strategic relevance within Beijing's evolving approach to the Middle East. As the conflict demonstrated, maintaining regional stability is no longer solely a security issue, it has become a strategic challenge that both China and the Gulf states must address together.

2. China's Balancing Strategy

A defining characteristic of China's Middle East policy has been its emphasis on maintaining constructive relations with a wide range of regional actors, including states that are often in competition with one another (Fulton, 2019). Unlike the United States, which has traditionally developed formal security partnerships with selected regional allies, Beijing has generally sought to avoid taking sides in regional rivalries and instead prioritized broad diplomatic engagement, economic

cooperation and energy security (Garlick & Havlová, 2020).

Within this broader strategy, Iran and Saudi Arabia occupy particularly important positions. According to the Ministry of Foreign Affairs of the People's Republic of China, Saudi Arabia is China's largest trading partner in the Middle East. As the custodian of Islam's two holiest sites and a leading political and economic actor in the Gulf, Riyadh possesses considerable religious, diplomatic and political influence across the region. At the same time, China and Saudi Arabia have significantly expanded cooperation in trade, investment, technology, infrastructure development and industrial modernization, particularly within the framework of Saudi Vision 2030 and China's Belt and Road Initiative (Almutairi, 2024). Meanwhile, Iran occupies a distinct geopolitical position. As one of the region's largest states and the leading Shia power in the Middle East, Tehran maintains extensive political and security networks across several key regional nodes (IISS, 2018). Although China's relations with other Gulf states have continued to deepen, relations with both Riyadh and Tehran remain central to Beijing's efforts to maintain a balanced regional strategy and engage with the Middle East's most influential powers.

3. What the War Showed

However, the recent conflict demonstrated that Iran's significance within the Middle East can not be measured solely in energy or diplomatic terms. More importantly, it revealed Tehran's capacity to influence the broader regional environment in ways few Middle Eastern states can match. Throughout the conflict, Iran demonstrated an ability to generate strategic consequences, compelling responses from regional governments, global powers and international markets. More importantly, neither regional nor extra-regional powers proved capable of neutralizing or countering this strategic leverage in the short term.

One of the clearest examples was Iran's ability to disrupt maritime trade routes that underpin the Middle East's economic connectivity. During the conflict, shipping traffic through the Strait of Hormuz fell dramatically. According to Reuters, approximately 120 commercial vessels transited the Strait of Hormuz each day before the conflict. During the height of the crisis, traffic fell dramatically before partially recovering to only 25 vessels on 18 June following the ceasefire agreement (Saul, 2026). At the same time, Tehran's partnership with the Houthis created additional uncertainty around maritime traffic in the Bab el-Mandeb Strait, extending the conflict's effects beyond the Persian Gulf and into the Red Sea corridor.

Since November 2023, Houthis have carried out more than 100 attacks against commercial vessels (Saul, 2025). These attacks forced many major shipping companies to reroute vessels around the Cape of Good Hope, significantly disrupting one of the world's most important maritime trade routes. The conflict also highlighted Iran's long-range strike capabilities. Iranian missile and drone strikes, together with concerns over further escalation, forced several Gulf producers to curtail output. According to Reuters, oil exports from eight major Middle Eastern producers fell from 25.13 million barrels per day before the conflict to 9.71 million barrels per day during the height of the crisis, representing a decline of approximately 61 percent. UAE output declined by more than half, while Saudi production fell by around 20 percent (Ghaddar & Lawler, 2026). Regardless of the military outcome, Tehran demonstrated an ability to threaten critical infrastructure and economic assets across the region. Such capabilities have significant implications for foreign investment, industrial development and economic diversification efforts throughout the Gulf. The conflict prompted concerns that prolonged instability could force Gulf governments to reassess investment priorities and future financial commitments (England & Kerr, 2026). For states seeking to attract international capital and expand non-oil sectors, the prospect of regional

escalation introduces significant political, strategic and economic risks (IEA, 2026).

4. What Gulf States Need to Consider

Over the past decades, Gulf states have become indispensable partners in the Middle East for external countries through energy exports, investment opportunities, technological cooperation and infrastructure development. The World Bank has also highlighted that many Gulf governments continue to implement structural reforms to promote diversification and improve the investment climate (World Bank, 2025). Initiatives such as Saudi Vision 2030, the UAE's ambition to consolidate its position as a global financial and business hub, and similar projects across the Gulf all depend upon a stable and predictable regional environment capable of attracting long-term international capital and sustaining investor confidence.

However, the recent conflict highlighted a difficult reality for the Gulf states. While the Gulf states have close security partnerships with the United States, the war demonstrated that military operations have not been sufficient to eliminate the structural risks posed by regional confrontation (Guzansky & Tira, 2026). Neither Gulf governments nor their external partners were able to prevent the disruption of maritime trade routes, attacks against strategic infrastructure and broader economic instability once hostilities

between the United States, Israel and Iran escalated. These risks inevitably extend beyond the Gulf itself, affecting external actors, including China, that seek to expand long-term economic and strategic engagement with the region. In this case, long-term regional instability risks would slow economic diversification, reduce investor confidence and ultimately delay the implementation of long-term development strategies across the Gulf.

From this perspective, the challenge facing the Gulf states extends beyond strengthening military capabilities. More fundamentally, a strategic question for Gulf governments is how to balance, manage, and even reduce the coercive leverage that Iran has demonstrated it can exercise over the regional security environment. Unless this structural challenge can be addressed, future conflicts between Iran, the United States and Israel are likely to continue generating strategic uncertainty that threatens both regional and global stability, further undermining the long-term development ambitions of the Gulf states.

5. What China Needs to Consider

As mentioned previously, Beijing's Middle East strategy has long been characterized by a strategy of maintaining balanced relations with multiple regional actors (Garlick & Havlová, 2020). However, the recent conflict demonstrated that this balancing strategy is increasingly

challenged by the asymmetric influence exercised by different regional actors.

While China and Iran continue to enjoy a close strategic partnership, the conflict also revealed an emerging dynamic that Beijing cannot ignore. Iran's demonstrated ability to shape the regional security environment may increase the strategic costs for Beijing of overlooking Iran's role in the regional order. This creates incentives for Tehran to leverage its unique strategic position to encourage greater Chinese diplomatic resources, economic investment, political support and strategic attention. The more Iran can influence the regional environment upon which China's Middle East strategy depends, the more Beijing will be compelled to devote additional strategic attention and resources to preserving its relationship with Tehran. In other words, Iran may try to undermine China's balancing policy in the Middle East, leaving China with no choice but to bet on Iran.

Over time, this dynamic could place increasing pressure on China's long-standing strategy of maintaining balanced relations with both Iran and the Gulf states. Rather than compelling China to make an immediate choice between competing regional partners, it gradually raises the strategic costs of strict neutrality by increasing Iran's relative importance in Beijing's regional calculations. Managing this emerging asymmetry may become one

of the most difficult challenges confronting China's Middle East policy.

6. A Shared Interest in Regional Stability

While the June 2026 MoU temporarily halted hostilities, it did not remove the underlying dynamics that continue to make regional escalation possible. For both China and the Gulf states, this dilemma exposes new strategic challenges and also creates opportunities for deeper China-Gulf cooperation. Given China's balanced relations with both Iran and the Gulf states, Beijing is uniquely positioned to facilitate communication, reduce strategic mistrust and encourage practical cooperation among regional actors. Beijing's successful experience has also shown its ability to facilitate dialogue between regional rivals. In March 2023, China hosted talks in Beijing that resulted in the restoration of diplomatic relations between Saudi Arabia and Iran after seven years of estrangement. The agreement illustrated China's growing diplomatic credibility with both sides and showed that Beijing can provide an alternative platform for regional dialogue based on political communication rather than military alignment.

Building upon this experience, Gulf states could work more closely with China to promote a more inclusive regional security framework that incorporates rather than isolates Iran. This framework complements existing security partnerships by

addressing a dimension of regional security that military cooperation alone has so far been unable to resolve. By expanding dialogue, economic interdependence and institutional cooperation, China could help reduce incentives for coercive behaviour while creating greater mutual stakes in regional stability.

For China, such an approach would also allow Beijing to preserve the balanced regional strategy that has served its interests while reducing the likelihood that Iran's unique coercive capabilities could repeatedly disrupt the regional environment upon which that strategy depends. Rather than forcing China to choose between Iran and its Gulf partners, a more inclusive regional order would enable Beijing to sustain constructive relations with both sides while encouraging all regional actors to regard stability as a shared strategic interest.

Ultimately, sustainable regional stability is unlikely to be achieved through deterrence alone. It will instead depend upon constructing an inclusive regional order in which China, the Gulf states and Iran all have incentives to preserve stability rather than undermine it.

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Where Is the China–GCC Free Trade Agreement?

Alex Gintz

(Editorial note: This article is adapted from a previously published piece in *The Asia Cable*, a publication the author co-founded.)

Abstract: This article examines why the free trade agreement (FTA) between China and the Gulf Cooperation Council (GCC), first announced in 2004, remains unconcluded after more than two decades of negotiation. Taking Chinese Foreign Minister Wang Yi's December 2025 appeal to the United Arab Emirates to help secure an “early conclusion” as its point of departure, the commentary traces the negotiation from its inception through repeated near-agreements, suspensions, and external shocks including the 2017–2021 GCC diplomatic crisis and the COVID-19 pandemic. It proceeds through a political-economy reading of the residual sticking points: China's protection of its domestic hydrocarbon producers, Gulf anxieties over Beijing's proposed duty-free export lists and unfinished economic diversification, and the divergence of interests among Saudi Arabia, the UAE and Qatar that renders collective GCC action difficult and bilateral arrangements more attractive. The article argues that the impasse reflects not a deficit of political interest—evidenced by comprehensive strategic partnerships and Belt and Road alignment—but the domestic trade-offs

liberalisation would demand, compounded by the Gulf states' continued strategic alignment with Washington and their existing trade surplus with China. It concludes that, absent official readout language on protections for sensitive sectors or mechanisms for country-specific trade concerns, the agreement will remain an ambitious but elusive objective rather than an imminent outcome.

Keywords: China-GCC relations, free trade agreement (FTA), economic diversification, Belt and Road Initiative (BRI), energy security, Gulf political economy, trade negotiations

Speaking in Abu Dhabi on December 12, 2025, Chinese Foreign Minister Wang Yi urged his Emirati counterpart, Sheikh Abdullah bin Zayed Al Nahyan, to help in “advancing negotiations for an early conclusion” to the long-stalled free trade agreement (FTA) between China and the Gulf Cooperation Council (GCC) (Dang, 2025). Since 2004, the China–GCC trade deal has nearly closed more than once, then stalled again over market access and domestic protection. External shocks, including the 2017–2021 GCC diplomatic crisis and the COVID-19 pandemic, have made matters worse. Wang's remarks suggest impatience on China's part and a recognition that Abu Dhabi, with its outsized diplomatic reach and centrality in Gulf politics, may be better positioned than

Riyadh to break the impasse. Whether that hope is well placed is another matter.

From Conception to (Almost) Execution

At the time of its announcement in 2004, China was the Gulf Cooperation Council's (GCC) third-largest trading partner, with trade between China and the bloc projected to exceed \$20 billion that year (AFP, 2004). By 2020, China had replaced the European Union (EU) as the GCC's largest trading partner, with exchanges valued at over \$161 billion (Tang, 2022). China, a net importer of energy since 1993, has become heavily reliant on hydrocarbon exports from the Middle East to fuel its rapid economic development and modernization. The Gulf countries, economically and politically stable compared to many others in the region, have become crucial partners for China in this regard.

What's more, as the Gulf countries seek to diversify their economies away from rentier models supported by hydrocarbon exports, they have emerged as an attractive destination for Chinese exports and partnerships. The Middle East at large received an oversized flow of Belt and Road Initiative (BRI) construction engagement in 2024 (Nedopil, 2025, p. 4) on the back of a 360% increase in Chinese investments into the region (Nedopil, 2022, p. 9), despite a significant reduction in China's foreign investments at the global level from the 13th Five-Year Plan

(2016-2020) to the 14th Five-Year Plan (2021-2025) (Emirates Policy Center, 2022).

National development strategies in the Gulf, such as Saudi Vision 2030 and Kuwait Vision 2035, call for the development of sectors such as healthcare, tourism and hospitality, finance, and retail, among others. Gulf leaders, like Saudi Crown Prince Mohammed bin Salman, have not been shy about their eagerness to align their own national development endeavors with China's BRI and the benefits therein (National Development and Reform Commission of the People's Republic of China, 2022). China and the GCC countries have consistently affirmed their enthusiasm to cooperate and expand bilateral ties, which now include Comprehensive Strategic Partnerships (CSP) with Saudi Arabia, the United Arab Emirates (UAE), and Bahrain. Qatar, Oman, and Kuwait enjoy Strategic Partnerships, the second-highest designation in China's diplomatic repertoire.

This agreement is not stopping short due to a lack of interest from either side. Following a suspension of talks in 2009, the two parties, in January 2016, stated their ambitious intent to hash out the agreement within that same year (Xing, 2016). Clearly, that did not play out as planned. In January 2024, Saudi newspaper Asharq Al-Awsat quoted China's ambassador to the Kingdom as

saying terms were 90% settled, though more “flexibility on both sides” was needed (Habtör, 2024). With that in mind, what is the remaining 10% that has proven so difficult to wrap up that the process has dragged on for 21 years?

Trade-Offs of Free Trade

At the simplest level of analysis, FTAs look to lower barriers to trade, such as tariffs, and facilitate economic exchanges that align with a growing relationship between the involved parties. In a less-than-nuanced, somewhat generic imagining of the proposed agreement, this would involve a surge in GCC firms entering the Chinese economy and vice versa. The implications of this, however, have left both sides feeling hesitant about opening their economies to one another.

The expansion of GCC access to the Chinese energy market would, naturally, mean higher levels of competition facing China’s domestic hydrocarbon industry. There is a clear theme of China’s desire to protect these domestic producers being cited as a major roadblock for the proposed FTA. In reaction to China’s insistence on protecting its domestic producers by maintaining tariffs on GCC hydrocarbon imports, the GCC has “unilaterally stalled” negotiations in the past (Villalta Puig & Tung Ho Yee, 2017, p. 132). While China can seek energy security from Russian crude oil or Australian liquefied natural gas (LNG), the GCC countries remain critical

suppliers and indispensable to Chinese energy security.

Gulf leaders are likewise concerned for the long-term well-being of their domestic industries. Talks once again stalled in May 2024 when Saudi Arabia expressed worry over China’s proposed list of duty-free exports (Cornwell, 2024). This concern, in totality, is as much to do with troubles in domestic diversification as it is to do with Chinese demands. Across the GCC, progress in diversifying economies away from a reliance on energy exports has been far from linear (Sweidan, 2025, p. 18).

While the UAE, for example, has positioned itself as a regional hub for trade destined for the Middle East, Europe, Africa, and Asia — and even imports more goods from China than it exports (Fulton, 2020) — the trend across the GCC remains a major reliance on hydrocarbon exports. As Gulf states continue looking to reduce their reliance on energy sales, protecting domestic industries will be critical to developing properly diverse economies. As U.S. tariffs tighten around the world, Gulf leaders have to weigh whether Chinese exports blocked elsewhere will be redirected into GCC markets. Such an influx of Chinese goods could undermine local companies and bring about a slowdown in regional localization (China Studies Unit, 2025).

GCC Collective Action

Assuming terms could be reached on the above issues of contention, a path toward finalizing and implementing an agreement would be less than obvious. While the bloc can negotiate collectively and constituent interests certainly overlap in several areas, domestic concerns remain. Free trade deals are signed abroad, but they are fought over at home. Among the GCC states, there is meaningful divergence in both domestic and foreign policy priorities, and the gains from trade are clearly asymmetrical (Cabán et al., 2017).

Saudi Arabia, with by far the largest population of the GCC countries (32 million), is particularly concerned about ensuring that its citizen population is employed and can contribute to the Kingdom's economy (Callen, 2025). The UAE, whose population of 11 million consists of almost 90% foreign workers, does not share that burden of answering to a large citizenry when it comes to policies that affect the economy. As such, the UAE has emerged as a particularly liberal trade partner for outside powers such as the EU and China, with re-exports playing an outsized role in the Emirati economy (Saba & Elimam, 2025).

While it has been noted that the GCC states tend to act in unity when confronted with major crises (Al-Saif, 2025), such as the Sept. 9 Israeli strike on Doha, FTA negotiations are an area where the Gulf monarchies can afford patience. President

Trump has made clear that he places great importance on relations with the GCC countries — Saudi Arabia and Qatar in particular — and all six of them remain firmly under the American security umbrella.

In Qatar, where there is a less robust history of cooperation and solidarity with the rest of the GCC (Kabalan, 2020), the most consequential pillar of economic cooperation has been secured at the bilateral level. With deals in place, such as two 27-year agreements for China to purchase a cumulative 8 million metric tons of LNG from the small state each year ("Qatar Secures Second Major LNG Supply Deal," 2023), a bloc-wide agreement becomes less crucial from Doha's seat.

With differing interests and areas of concern held by the three major GCC powers of Saudi Arabia, the UAE, and Qatar, bilateral agreements become more attractive and attainable, even if a common interest in the conclusion of the China-GCC FTA persists among all parties involved.

Breaking the Impasse?

Meaningful progress toward the conclusion of a China-GCC FTA is less than likely in the near future. Chinese calls for Gulf partners to help accelerate the agreement are nothing new, and the one-sided nature of these statements, where China calls and the GCC countries echo, suggests China

sees the lag in concluding the talks as more frustrating than the Gulf states do. As the Gulf states remain strategically aligned with the U.S., which maintains a large military presence in the region, an aversion to aggravating Washington by agreeing to free trade terms with China may also be incentivizing the GCC states to bide their time (Aronson, 2025).

On the other hand, free trade with China is not clearly beneficial for many countries. Among the G7 states, none of which holds bilateral FTAs with China, the latter's nonmarket practices have raised concerns of overcapacity (Office of the Spokesperson, 2025), which could harm domestic industries on top of concerns about reciprocity in market access. The GCC already runs a major trade surplus with China (Martin, 2025), so a new deal raises a hard question: what do the Gulf states gain that they cannot already secure? As things stand, the Gulf states have more domestic interests to protect than they have to gain from tariff liberalization.

On the current trajectory, China will likely continue calling for accelerated China-GCC FTA negotiations through whichever high-level diplomatic channels remain available. Yet disruptions stemming from the ongoing Iran conflict expose the limits of treating summit language as evidence of imminent progress. The next China-Arab States Summit, originally set to be held this year, was postponed until further notice (Qatar News Agency, 2026), while a

second China-GCC Summit never had a publicly announced date, leaving fewer obvious venues for a major breakthrough. If future official readouts begin referring to protections for sensitive sectors or mechanisms for managing country-specific trade concerns, the agreement can be seen as having entered a different phase. Until then, however, the China-GCC FTA will remain an ambitious but elusive objective: a headline commitment that signals continued momentum in China-Gulf ties, but stops short of the domestic trade-offs required to make it real.

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Beyond Price: Building the Trust Infrastructure for Sino-Gulf Industrial Partnership

Al Azhar Al Mawali

Abstract: Chinese industrial equipment has closed the technical gap with Western equivalents faster than institutional trust across the Gulf Cooperation Council (GCC) has caught up. Price competitiveness alone will not deepen Sino-Gulf industrial ties; what is missing is a form of “trust infrastructure” comprising certification bridges, local accountability, and long-term commitment signals.

Keywords: Sino-Gulf relations, trust infrastructure, industrial equipment, Gulf Cooperation Council (GCC), Oman, technology transfer, certification and standards

For much of the past decade, the narrative surrounding Chinese industrial equipment in the Gulf has centred on a single factor: cost. Pumps, valves, electrical gear, and automation hardware manufactured in China are commonly reported to be 20 to 40 percent cheaper than Western or Japanese equivalents, even after freight and duties are included (Porsche Consulting, 2026; Roland Berger, 2026). This price differential has been sufficient to open doors into tenders, procurement shortlists, and the margins of contractors operating under thin-margin engineering, procurement, and construction (EPC) contracts. However, price alone has rarely

been sufficient to close agreements on safety-critical applications, and this is unlikely to change. The more pertinent question, roughly a decade after China's industrial push into the GCC gained momentum, concerns what happens next. The answer relates less to manufacturing capability, which has largely converged with Western standards, and more to a factor that is considerably harder to build: trust.

The Gap That Price Cannot Close

Chinese manufacturing has closed the technical gap with Western industrial equipment more quickly than the institutional trust of most GCC operators has caught up. An examination of vendor-qualification processes at major national oil companies and utilities across the region shows that approved vendor lists remain dominated by companies with track records spanning four to five decades, including Emerson, Schneider Electric, Honeywell, and Yokogawa. These are not merely established brands; they represent decades of installed base, extensive failure data, and generations of engineers trained on their systems who have built careers around their reliability. A Chinese original equipment manufacturer (OEM) with genuinely competitive technology must still answer a question that no datasheet

can resolve: what happens when something fails in an operating facility, and who bears accountability for it?

This constitutes the principal trade barrier, and it is neither tariffs, shipping routes, nor price. It is the absence of what may be termed trust infrastructure: certification bridges, local accountability structures, and long-term commitment signals that convert a cost advantage into durable market share.

The Maturity Curve

Sino-Gulf industrial relations currently occupy a position between two distinct stages of a longer maturity curve. Understanding where a given relationship sits on this curve explains much of how it should be structured.

The first stage is transactional sourcing. This is the tier-based structure familiar to procurement professionals: Tier 1 Chinese manufacturers with export-grade quality systems and multinational clientele; Tier 2 suppliers offering meaningful cost savings with more variable quality control; and Tier 3 suppliers competing primarily on price for commodity applications. Transactions at this stage are conducted at arm's length, with buyers managing risk through inspection, sampling, and diversification of suppliers rather than through relationship depth. This is a legitimate and often necessary stage, and it remains where the majority of Sino-Gulf industrial commerce currently resides.

The second stage is the reseller and OEM bridge model, in which more sophisticated GCC entities have begun to operate. At this stage, a local company does not merely import and mark up Chinese equipment; it absorbs risk that Chinese OEMs are not yet positioned to absorb themselves, providing local warranty support, spare parts inventory, technical service, and pre-qualification assistance. It becomes the accountable party in the event of failure, performing a function analogous to that of Tier 1 companies when they repackage Tier 2 components under their own brand: the value generated is risk-bearing rather than manufacturing. A GCC reseller performing this role effectively functions not as a pass-through distributor but as a trust broker, converting Chinese cost advantage into a proposition that a conservative Gulf operator can approve.

The third stage, which the region has only begun to reach, involves genuine co-investment: joint ventures, technology transfer, and localized manufacturing that connect Chinese industrial capability directly to Gulf economic diversification programmes. This is where Saudi Vision 2030 (Kingdom of Saudi Arabia, n.d.), Oman Vision 2040 (Oman Vision 2040 Implementation Follow Up Unit, n.d.) and China's own manufacturing overcapacity find genuine complementarity. China requires export markets and diversified manufacturing footprints as domestic growth moderates, while the Gulf requires industrial depth and technology transfer to

diversify away from hydrocarbon dependence. Neither objective is achieved through arbitrage alone.

Why the Window Matters

A disciplined approach to this relationship must begin with recognising that the second stage is not a permanent equilibrium. Chinese OEMs that achieve substantial volume in a market have historically moved toward direct operations rather than continuing to pay a reseller's margin, following a path broadly similar to that taken by European and American vendors decades earlier once Gulf volumes justified direct presence. GCC entities currently occupying the trust-broker role have a genuinely limited window in which to convert that position into something more durable, whether through co-investment, joint local manufacturing, or a distribution relationship valuable enough to the OEM that direct market entry appears less attractive than continued partnership.

This is not cause for pessimism but for deliberate strategy. The Gulf entities that will matter most in this relationship a decade from now are unlikely to be those that captured the widest arbitrage margin in the first year. They are more likely to be those that used the reseller and bridge-building stage to develop capabilities a Chinese OEM cannot easily replicate independently: deep relationships with end-user engineering teams, certification

and testing capability recognised by regulators, and a demonstrated record of in-country accountability.

Oman as a Case in Point

Oman provides a useful illustration of this framework, as examples of all three stages already exist within the country. At the upper end of the curve, the China-Oman (Duqm) Industrial Park, a \$10.7 billion, fifty-year investment led by the Chinese consortium Oman Wanfang (Oman Observer, 2017), and Daleel Petroleum, a two-decade-old joint venture between Mezon Petrogas and the China National Petroleum Corporation that has grown into one of Oman's leading oil producers (ABGI, 2024), represent genuine stage-three partnerships: capital-intensive, state-aligned, and structured for the long term. Huawei's development into an established supplier within Oman's telecommunications sector illustrates the trust-building process in miniature. By the company's own account, it had been selling into the Omani market for more than ten years before opening its first standalone retail presence there (China Daily, 2019).

The location of the remaining gap is instructive. Oman's stage-three activity is concentrated in capital and infrastructure, including refineries, upstream concessions, industrial parks, and sovereign-fund-backed ventures, and is largely negotiated on a government-to-government basis or through major state-linked entities.

Chinese investment in Oman has been reported at over \$6.6 billion, with approximately three-quarters concentrated in the energy and petrochemicals sector (ABGI, 2024). Stage-two activity, the reseller and bridge-broker layer specific to industrial equipment such as pumps, valves, automation, and instrumentation, remains comparatively underdeveloped. In other words, the country-level relationship has outpaced company-level trust infrastructure. Political and capital-level trust between Muscat and Beijing is well established, but the technical and commercial bridge layer that would allow mid-market Chinese industrial equipment to flow confidently into Omani operating facilities remains underbuilt. This gap does not represent a weakness in the relationship; rather, it constitutes meaningful commercial whitespace, and GCC entities prepared to build this layer deliberately, rather than treating it as incidental to a headline joint venture, retain a genuine opportunity.

Requirements for Deeper Partnership

If the objective is to genuinely deepen Sino-Gulf industrial ties rather than to extract short-term cost savings, three developments need to occur in parallel, corresponding directly to the maturity curve outlined above.

First, GCC industrial entities must continue investing in the trust infrastructure that price competitiveness

alone cannot provide: local testing capability, certification bridging between Chinese and international standards, and technical teams sufficiently credible that Gulf operators cease treating Chinese origin as a proxy for risk. Second, Chinese OEMs serious about the region must signal long-term commitment rather than treating local partners as a temporary bridge to direct market entry; exclusivity terms, joint investment, and technology-sharing arrangements serve as credible signals in a manner that transactional distribution agreements do not. Third, and arguably most consequential, both sides require policy and institutional frameworks, including government-to-government cooperation, recognised mutual certification, and diversification programmes that explicitly welcome Chinese industrial partnership as more than a cost proposition, in order to make stage-three co-investment the expected outcome rather than the exception.

The commercial case for Sino-Gulf industrial partnership has rarely been stronger, given complementary economic trajectories, a narrowing technology gap, and a shared incentive to diversify trade relationships within an increasingly fragmented global economy. What is missing is not opportunity, but the trust infrastructure required to convert that opportunity into partnership capable of outlasting the next price cycle. The companies and countries that build this infrastructure first will not merely win the

current wave of tenders; they will set the terms for the next stage of the relationship.

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Saudi Vision 2030 and the Belt and Road Convergence

Nouha Saïd El Messaoudi

Abstract: Due to abundant energy resources, the Gulf has always been an important region for global powers, such as the United States and the European Union. However China has developed a growing interest in the region. The Non-Interference policy of China is helping deepen the cooperation with the Gulf Cooperation Council (GCC) states since it focuses on cooperation and foreign policy with no intervention in domestic politics. While Beijing's influence is growing, other powers -India and Russia- are increasing their involvement in the region in the ways they are best able to, nevertheless the U.S. remains present through its military bases, but with less involvement than in the past. The Sino-Saudi relations constitute one of the most significant dimensions of the Chinese engagement with the GCC, playing a pivotal role in shaping broader cooperation.

Keywords: China, Saudi Arabia, Non-interference.

Introduction

The Gulf region is now emerging as an important power, due to what it offers to the international community in the energy level, and the amount of investment occurring daily in there (Ulrichsen, 2010). China came up with a completely different

and distinctive agenda for the region and aimed to boost its trade, security engagement, cooperation and also revive the silk road – ancient trade route linking China with the West- under the framework of the Belt and Road initiative – a global infrastructure development strategy launched by President Xi Jinping in 2013- , this approach was welcomed widely by the Gulf states that expanded the nature of their business with China in the past few years (Mhalhal, 2019). To have a better understanding of the Chinese presence in the Gulf region, the aim is to assess the Sino-Saudi relations, and area of cooperation. Furthermore, the topic is relevant since the Gulf is currently experiencing geopolitical shifts.

1. Overview of bilateral relations

Since the establishment of diplomatic relations in 1990, the Sino–Saudi relations have consistently developed, but the pace accelerated after Saudi Arabia joined the Belt and Road Initiative (BRI) in 2016. Political engagement deepened through high-level visits, Mohamed Bin Salman (MBS) visit to Beijing in 2017 as a return to Xi's visit in 2016, followed by another trip to Riyadh in 2022. Xi's visit resulted in the signing of a comprehensive strategic partnership agreement and deals exceeding USD 30 billion. China is Saudi Arabia's largest trading partner since 2013, and the primary crude oil importer. This bilateral

cooperation expands beyond hydrocarbons to include investments in various fields, such as renewable energy, green hydrogen, infrastructure, and technology. Cultural diplomacy is also an important element, with both sides prioritizing people-to-people exchanges and heritage projects additionally, Saudi Arabia's accession to BRICS highlights the multilateral expansion of this partnership, even if its membership is currently on hold, shows Riyadh interest in initiatives led by China (Quamar, 2025).

In this section, I will examine the evolution of Sino-Saudi relations and interpret their trajectory through the theoretical frameworks and imaginaries outlined in this thesis.

2. Convergence of the BRI and Vision 2030

Saudi Arabia joining the BRI reshaped the nature of the Sino-Saudi relationship, particularly in diversifying the economy and attracting Chinese investments for both the government and the private sector. In an interview with the BRI portal, Abdulrahman Ahmad Al-Harbi, Ambassador of Saudi Arabia to China emphasized this convergence.

According to the Saudi Ambassador to Beijing, both countries are considered "major players of the international economy" with "ambitious development plans." He noted that "many similarities" are found in their plans and that they

complement each other, which reveal why China is a good partner. December 2022, knew the signing of a comprehensive strategic partnership on the alignment between the visions, allowing for further coordinating between Vision 2030 and the BRI. He also stated that cooperation is not only about figures of trade and investment; they contribute to a "shared success" to benefit the region as well as all peoples by peaceful co-development and respect for non-interference (BRI, 2025).

Beyond the strategic document, the Ambassador highlighted many achievements reached by the two sides. They range between trade facilitation and investments flow from private sector collaboration, and not only governmental level collaboration. This reflects how China supports the national agenda of Saudi Arabia without reinforcing its own terms and respecting its sovereignty. In the meantime, His Excellency Mr. Abdulrahman addressed culture as a "high-level theme", pointing to many initiatives that illustrate this soft power dimension. Examples were many, but he pointed at the major ones, such as the 2017 opening of the King Abdulaziz Library branch in Peking University, Saudi Arabia's 2024 approval as a Chinese tourist group destination, the launch of the Crown Prince Mohammed bin Salman Award for culture cooperation between Saudi and China, the exhibition of Al-Ula that lasted for two months in Beijing, and the inclusion of Mandarin Chinese in the public school

curriculum of Saudi, that resulted in an exchange of 300 language teachers (200 from China and 100 from Saudi). The people-to-people bond further reveals how cultural and educational diplomacy is a huge part of the Chinese foreign policy agenda and this partnership. All these initiatives fit well within the Tianxia concept discussed, which prioritizes cultural connectivity and civilizational dialogue (BRI, 2025).

The ambassador's focus on highlighting the "similarities" between the BRI and Vision 2030, and not asymmetries, such as dependence on U.S. security, shows that his remarks are constructed to strategically align with Beijing's preferred framing, meaning that his statement is more of an evidence to explain how the imaginaries mobilize in practice, rather than an assessment of the partnership between the two countries.

It is more of a diplomatic optimism, as it reflects how Chinese imaginaries actively shape the narrative of Sino-Saudi relations. By framing the cooperation as mutually beneficial, without mentioning political conditions or security tensions, his remarks clearly reproduce the non-interference imaginary. The emphasis on shared ambitions and global contributions echoes the peaceful rise and great power responsibility. The reference to cultural cooperation and civilizational exchange fits into the Tianxia framework, projecting

the relationship as inclusive and rooted in long-term connection.

3. Petroyuan

Saudi Arabia's growing interest in "Petroyuan" represents the shifting nature of Riyadh's foreign policy toward Beijing. During an interview in Hong Kong in 2023, Saudi Minister of Industry and Mineral Resources Bandar Alkhorayef stated that adoption of the yuan as a currency to pay for oil had not been judged to be "substantial to the ministry," but they were open to plans to do so adopt it one day. He emphasized that "Saudi Arabia will always try new things and is open to new ideas, and we try not to mix politics with commerce." This perspective is important because it places an emphasis on pragmatic thinking as a function of commercial imperative rather than strategic competitiveness (Goschenko, 2024).

A year later, June 2024, Saudi Arabia became a member of the mBridge project, a multiple central bank digital currency platform developed to support cross-border payments. This project is a China-dominated central bank digital currency cross-border trial, which is seen as another step towards less of the world's oil trade being done in U.S. dollars. It was initiated by the Bank for International Settlements, China's Digital Currency Institute, and central banks of China, Hong Kong, Thailand, and the UAE. It is now at its

Minimum Viable Product (Jones, 2024). The Saudi Membership will make cross-country payments quicker and cheaper using digital central bank currencies. It may reduce oil trade's dollar dependence. This move indicates that Saudi is willing to use financial systems initiated by China as an alternative economic option. At this stage Petroyuan remains a futuristic concept, particularly in the context of the petroyuan as a challenger of the petrodollar.

4. Is China an alternative hegemon in the Gulf?

The succession of global crises: the 2008 global economic crisis, COVID-19, and the Russian Ukrainian conflict, demonstrates that globalization, is by itself fragile and can't solve all problems in the world. As Professor Fadhel Kaboub argues, the world is no longer regarded as one bloc but is separated into three: a U.S. group, a Western Europe group, and an Asian group led by China. Dr. Kaboub notes, too, that the Middle East and North Africa (MENA) and other African states are excluded from these groups. Exclusion in this case presents a choice: rather than being pulled into a single predominant group, governments of these countries are free to opt for their partners. Kaboub regards China, as the better option to partner with for Middle East and North African states. From an Arab and Gulf perspective China offers an attractive model grounded in a broad multifaceted agenda that aligns perfectly with the aim of diversifying the

economy, rather than the hierarchical approach of “energy for security” (CGTN, 2022).

This approach aligns perfectly with the expanding engagement between China and Saudi Arabia particularly, and between China and the GCC generally. While the U.S. links its relations to security, military presence and political interests, China emphasizes economic development, infrastructure building, and mutual interests. China's BRI align well with what the Gulf countries desire. For Saudi, this means harmonizing the objectives of Vision 2030 of a diversified economy with Chinese investment in high-technology, infrastructure, and energy. For the bigger GCC, cooperating with China serves to diversify economies away from reliance on petrodollars and transition towards non-rentier economies.

Building on Kaboub's 2022 statement, describing the world simply in terms of three poles risks oversimplifying the complexity of the emerging order. Since then, the international system has become more layered, particularly with the accession of Saudi Arabia and the UAE to BRICS, which signals an expansion of multipolarity beyond an “Asia-led pole.” Their participation highlights that China is not acting as a leader, but rather as a central node in a wider Global South coalition of non-Western powers.

China's engagement in the region should never be framed as an attempt to replace the U.S. presence in the region, rather it is an alternative approach to the Gulf monarchies. Beijing's presence is powerful not through bases or securitization, but through investment and economic decisions that satisfy the region's needs of diversification. This sets China as a hegemon but economically not military, the thing that I gave it the term of "Tianxia-style alternative," which is about cooperation rather than intervention, with positive outcomes for all involved. It doesn't aim to offer what the U.S. offers in terms of security, but this provides GCC states with choices in a multi-power world. It is attractive because Beijing can strengthen its position in a region that many powers are interested in.

5. Conclusion

China's engagement in the GCC shows that hegemony is neither singular nor uniform. For Western countries, hegemony is often thought of as dominance and military alliances. However, China's approach shows a different logic based on economic interdependence, cultural exchange, and developmental partnership that doesn't include any aspects of hegemony. Beijing is building what could be called an economic hegemony through the Belt and Road

Initiative, energy trade, infrastructure investment, and cultural diplomacy.

However, this hegemony does not want to replace the United States in the traditional sense. The Sino-Saudi relations are the perfect lens to use when analyzing China's foreign policy with the GCC. China calls for an order based on inclusivity, mutual respect, and cultural recognition, rather than one based on hierarchy and conditionality. The focus on exchanges between people, education, and dialogue between civilizations shows that China's presence is as much cultural as it is economic. The U.S. model is based on an "energy for security," approach but China's strategy is based on a full partnership that includes trade, technology, culture, and development. This represents a distinct type of influence.

By analyzing such cooperation, we can understand why the international community does not see China as a hegemon to fight against, but as a partner that fits with their own goals for diversification and modernization. Saudi Arabia's Vision 2030 fits well with China's model of development. Saudi Arabia is willing to work together with China; they don't need to, but they do it because they see that they have common goals. The importance of this change is what it says about how we think about international relations. Western paradigms, grounded in balance-of-power dynamics and hegemonic stability, fail to comprehensively explain a model of influence predicated on infrastructure, culture, and economic interconnectedness. China's relation with

Saudi Arabia highlights the necessity to incorporate non- Western paradigms, where power is manifested through networks of development and reciprocal enrichment rather than through coercive dominance.

Thus highlights that China does not position its presence in opposition to other powers, like the United States, Russia, or the European Union, but provides an alternative that is based on cooperation as well as mutual development. To conclude, the Sino-Saudi partnership is not the rise of a new hegemon in the old mold. Instead, it is the creation of a new kind of order, one where economic hegemony is based on Tianxia inclusivity, and where influence is sought not by replacing others, but by offering a different vision of global cooperation.

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mBridge and the Gulf: Optionality, Not Realignment

Oleg Grunda

Abstract: This article examines why Saudi Arabia and the United Arab Emirates, two of Washington's closest security partners, are helping to build mBridge, the China-linked multi-central-bank digital currency platform now approaching commercial rollout. It situates their participation in a wider demand for settlement channels outside exclusively dollar-centred networks, evidenced by the RMB 470 billion the platform has reportedly processed, Macao's accession in June 2026, and record volumes on China's Cross-Border Interbank Payment System after the US and Israeli strikes on Iran. Framing Gulf involvement as hedging rather than de-dollarisation, the analysis reads mBridge as functional minilateralism: a narrow coalition solving a concrete settlement problem of cost, delay and correspondent-banking complexity, without requiring common currencies or aligned foreign policies, in contrast to the long-stalled BRICS Pay. Drawing on Russia's disconnection from SWIFT after 2022 as evidence that redundancy is cheaper built before a crisis than improvised afterwards, the article argues that Riyadh and Abu Dhabi are widening their options while remaining anchored to dollar pegs and the US-led security architecture, and that China gains credibility, renminbi internationalisation

and standard-setting influence in return. Yet with the e-CNY accounting for some 95 per cent of settlement volume, it concludes that mBridge currently represents optionality rather than geopolitical realignment.

Keywords: mBridge, central bank digital currencies (CBDCs), China–Gulf relations, cross-border payments, de-dollarisation, hedging, functional minilateralism

China and two of the Gulf's most influential economies are moving closer to turning mBridge into functioning cross-border financial infrastructure. Recent reports indicate a commercial rollout run by a Hong Kong-based entity, with fees roughly half those of established networks (Jha, 2026). Backed by the monetary authorities of mainland China, Hong Kong, Thailand, the UAE, Saudi Arabia and, since June 2026, Macao, mBridge has reportedly processed about RMB 470 billion (\$69 billion) in transactions (Jha, 2026; Ma, 2026b). Meanwhile, China's Cross-Border Interbank Payment System hit all-time highs in March 2026, a spike analysts linked partly to demand for RMB oil settlement after the US and Israeli strikes on Iran, though volumes receded by May (Ma, 2026a). Both trends point the same way: demand for payment channels outside exclusively dollar-centred networks. That raises a sharper political question. Why are Saudi Arabia and the

UAE, two of Washington's closest security partners, helping build China-linked settlement infrastructure? Their participation could suggest not a turn from the US but an effort to widen their options in a fragmenting order.

Much of the answer comes down to infrastructure. Conventional transfers pass through several correspondent banks, adding fees, delays and compliance steps that put a lot of pressure on smaller firms. mBridge however connects participating banks on a common platform for direct settlement in central bank digital currencies, cutting settlement from days to minutes. The Bank for International Settlements (BIS, 2024), which coordinated the project from 2021 until its withdrawal in October 2024 (Graham, 2024), identified high costs, low speed and operational complexity as the inefficiencies mBridge was built to address. Using the platform does not require rejecting the dollar or SWIFT. SWIFT mainly provides secure financial messaging, whereas mBridge combines payment instructions with settlement in central bank money (Cipriani et al., 2023). It adds a channel for business transactions, letting states reduce dependence on any single network while keeping existing access.

For Saudi Arabia and the UAE, participation reads as hedging rather than de-dollarisation. Both remain embedded in the US-led security architecture, as Riyadh

was designated a major non-NATO ally and signed a strategic defence agreement with Washington in November 2025, (The White House, 2025; Presidential Determination No. 2026-03, 2026) and both currencies stay pegged to the dollar (Central Bank of the UAE, n.d.; Saudi Central Bank, n.d.). Nevertheless, both also have strong incentives to deepen economic and technological ties with China, now the Gulf's largest trading partner (Xinhua, 2025); additional payment channels support that relationship without loosening ties to Washington. China's interests run parallel: mBridge supports RMB internationalisation, strengthens links to energy and commodity trade and gives Beijing a hand in shaping digital-payment standards. Gulf participation lends the platform credibility a purely Chinese initiative would struggle to carry. The UAE, a founding participant since 2021, made the first real-value digital-dirham payment to China in January 2024 and went live in November 2025 (Central Bank of the UAE, 2024, 2025). Saudi Arabia was announced as a full participant in June 2024, though reporting in mid-2026 indicated it had yet to go live (Ledger Insights, 2026a).

Russia's experience since 2022 could explain why states increasingly treat payment infrastructure as national resilience. As part of broader sanctions following the beginning of the conflict between Russia and Ukraine, the EU disconnected seven Russian banks from

SWIFT in March 2022 (Council of the European Union, 2022). Sharaf et al. (2026) found that after the cut-off Russian export revenues stayed temporarily elevated, largely reflecting surging oil prices rather than structural resilience, while international reserves contracted steeply and persistently. Alternative arrangements kept some transactions moving but did not replicate SWIFT's reach, liquidity access or network trust. Therefore, Russia has since expanded alternative channels, but that took years. China and the Gulf face different exposure, but the lesson holds, where building redundancy before a crisis is cheaper than improvising afterwards.

mBridge also shows why narrow, practical cooperation outpaces ambitious multilateral schemes. BRICS Pay, discussed since a 2018 gathering of the BRICS Business Council, has spent years in testing without reaching an operational phase (Johnston, 2025). This is because mBridge resembles functional minilateralism, a small coalition solving one technical problem, whereas BRICS Pay must coordinate eleven economies with divergent inflation regimes and capital controls. Gulf states needed no common currency or foreign policy to join mBridge, only technical standards and the commercial value of faster settlement.

Yet mBridge falls short of evidence for a post-dollar order. Among GCC states only Saudi Arabia and the UAE participate, and

the e-CNY accounted for roughly 95 per cent of the platform's settlement volume on data through November 2025 (Chhangani, 2026). That concentration is partly mechanical, because most activity has run between mainland China and Hong Kong, and other participants had yet to launch their own wholesale digital currencies (Ledger Insights, 2026a, 2026b). Nonetheless, it leaves open whether broader commercial use will diversify the currency mix or simply expand a renminbi-centred system with Gulf nodes attached. Chinese officials frame the project in deliberately limited terms. Former PBOC governor Zhou Xiaochuan has said mBridge does not exclude use of the dollar and is aimed at filling gaps in the international payment system, and that the dollar's standing depends largely on US policy choices, China Daily reported (Zhou, 2024). This framing fits the evidence, as mBridge currently represents optionality rather than geopolitical realignment. It can be argued that China and the Gulf are building capacity to trade across both dollarised and non-dollar environments, and this development could make the system more resilient for some participants and even more fragmented overall.

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Chinese Contributions

战略对接与产业共振：中沙旅游合作的逻辑与进路

韩沂珊 (Han Yishan)

摘要：在共建“一带一路”倡议与沙特“2030愿景”深度对接的战略框架下，中国与沙特阿拉伯之间的合作不断加强，旅游业作为国民经济战略性支柱产业不仅推动国家经济的发展，同时能够满足人们日益增长的物质与文化需求，中沙旅游合作议题逐渐成为双边关系的新增长极。本文系统梳理了中沙旅游合作的战略基础与发展前景，指出两国在顶层设计耦合、基础设施共建、人文交流合作、数字媒体宣传四重动力驱动下，旅游合作前景呈现“制度对接+硬件建设+区位外溢”的发展趋势。然而，合作深化仍面临地缘政治波动、国别差异约束及传播效能不足等结构性挑战。未来需以政策协同为引领、以文旅融合为抓手、以数字宣传为窗口，推动中沙旅游合作从机遇驱动转向制度化、可持续的高质量发展轨道。

关键词：“一带一路”；旅游合作；沙特阿拉伯；“2030愿景”

引言

中华人民共和国与沙特阿拉伯王国于1990年7月21日正式建交。中沙建交后，尽管两国社会制度、信仰、文化传统等多方面不同，但两国的关系一直维持友好和平发展。2008年6月，中国和沙特阿拉伯建立了战略性友好关系，进一步加强了双方的合作。2016年1月，中沙两国建立了全面战略伙伴关系。2022年12月，首届中国—阿拉伯国

家峰会在沙特举行，双方政府签署“一带一路”倡议与沙特的“2030”愿景深度对接实施方案，两国的合作再次提升到了一个新的水平。2023年8月，沙特加入金砖国家，中沙间合作进一步加深。

旅游业作为国民经济战略性支柱产业，兼具经济拉动效应与文化沟通功能，日益成为国际产能合作与民心相通的重要载体。在不断的发展下，中沙间旅游合作也迅速升温，通过旅游合作促使两国民心相通，两国人民互通有无，进行更多的文化交流。2025年“中沙文化年”的启动，标志着两国人文交流进入机制化、系统化的新阶段。当下，面对百年未有之大变局，中沙两国将持续共同努力从多领域深化合作以构建中阿命运共同体。

中国与沙特阿拉伯深化旅游合作的基础

2025年“中沙文化年”的启动，中沙旅游合作不断升温。两国的旅游合作正从能源伙伴关系的边缘议题跃升为双边关系的新增长极，双方共同关注，从政府政策到基础设施、资源差异到媒体宣传多个方面升级合作，为双方深化旅游合作提供了稳定的基础保障。

（一）双方政府行为、相关政策为深化旅游合作提供制度保证

“一带一路”倡议代表着更多地合作机遇，沙特政府提出“2030愿景”谋求转型发展。双方战略深度对接，不论是在基础设施建设方面，经济，科技创

新合作，能源合作，旅游等方面都在政府层面上为发展提供了一定的保障，由此推动双方的深入合作。

两国都拥有丰富的旅游资源，在“一带一路”与“2030愿景”共同促进下，中沙两国交流日益密切，针对两国人民的旅游交往也实施了相关政策。2022年12月，中国表示同意将沙特列为中国公民组团出境旅游目的地国，扩大双方人员往来和人文交流。9月20日，中国与沙特在北京签署《中国旅游团队赴沙特阿拉伯旅游实施方案的谅解备忘录》，沙特被正式列入中国公民出境团队旅游目的地名单。在北京设有沙特驻华大使馆，在香港设有领事馆，都极大地便利了双方的往来与旅游合作。

在航空政策方面，双方共同努力，增加多条航线，为旅游发展提供便利的交通条件。2024年4月16日，南航北京大兴-利雅得航线成功首航。沙特阿拉伯航空公司于2023年8月成功开通利雅得—北京航线和吉达—北京航线，此外，该航空公司之前还已开通吉达—广州航线。至此，沙航、国航、东航、南航和国泰航空均开通中国至沙特阿拉伯直飞航班。2023年5月20日至22日，沙特阿拉伯举办第三届未来航空论坛，其中提到沙特国家旅游战略计划到2030年吸引游客1.5亿人次，其中计划吸引300万人次来自中国的游客。新增的航线将促使航空旅行载客量增加，从而进一步促进两国之间的旅游、贸易和文化交流。

在签证政策方面，沙特已公布了一系列面向中国市场的重要举措。沙特已

经向中国开放了电子签证和落地签，为搭乘沙特阿拉伯航空的旅客提供96小时过境签证，并提供免费酒店住宿。沙特自2019年9月28日起正式对包括中国在内的49个国家的公民开放旅游签证申请，这是沙特首次向外国游客开放旅游签证。2023年，沙特共接待了10万中国游客，并计划在2030年将这一数字提升至500万。签证方面的便利有利于吸引更多的游客，促进两国之间旅游业的蓬勃发展。

在旅游景点方面，沙特充分利用独特的自然和文化资源，打造高端旅游品牌。沙特拥有6项联合国教科文组织世界遗产。沙漠海洋，古迹现代风光，沙特不仅拥有吸引人的古迹，同时也有现代化科技的产物。红海旅游项目，德拉伊耶古城，北部红海沿岸NEOM未来城等等。沙特阿拉伯当下在旅游领域进行大量投资，“投资多，发展快”已成为沙特目前旅游业发展的特点。当下沙特旅游不仅通过其独具特色的异域风光吸引游客，更是大力投资，让我们见证现代科技的力量。

在娱乐设施方面，沙特推出一系列与沙特传统形象极具反差效果的娱乐项目，旨在将沙特打造为地区娱乐胜地。2021年底，沙特奇迪亚（Qiddiya）娱乐城正式开工建设，项目合同额达10亿美元。在未来几年，首先要建成的是高端度假岛Sindalah和滑雪胜地Trojena，配有豪华度假村和自然保护区，利用沙漠国家的冰雪运动场这一特色给游客带来独特体验；通过发展旅游和体育产业，吸引短期人口入驻。沙特获得2029年亚洲冬季运动会的举办机

会，成为首个举办亚洲冬季运动会的西亚国家。通过大量投资修建新的娱乐设施，增加旅游趣味性，也是大量吸引游客的方式。

在配套设施方面，加强住宿环境、支付手段等领域的国际合作，提升游览体验，银联网络已经进驻沙特五十多万商户，覆盖面超60%。2023年9月22日，沙特旅游局宣布和蚂蚁集团达成全球战略合作，双方通过蚂蚁创新的跨境数字支付和营销解决方案Alipay+，期待让更多亚洲游客，都能实现“一个钱包游遍沙特”。同时，中国的金融机构在沙特设立分支机构。2024年5月2日，全球室内设计教父Yabu Pushelberg设计的第三家EDITION酒店在吉达正式开幕。TheJeddah EDITION的首次亮相，证明了沙特阿拉伯奢华酒店新纪元。

沙特阿拉伯旅游局大中华区总经理陈懋良介绍，沙特将在机场等公共设施建设中逐步推进中文标识和中文提示；同时，银联国际近日与沙特旅游局签署合作备忘录，银联卡在沙特的受理覆盖率将增至70%以上。通过配套设施方面的改革，从支付、住宿、出行等方面都为中国游客提供了极大的便利。

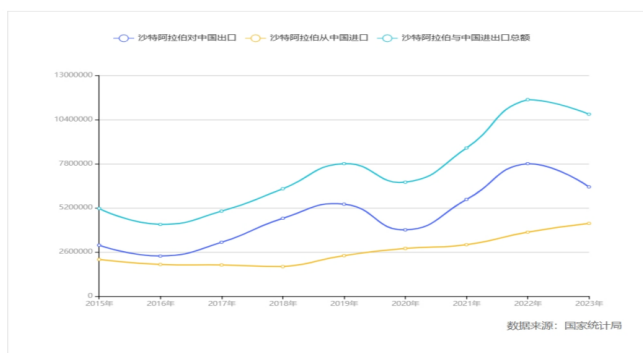
中沙旅游合作的深化并非偶然的市场现象，而是两国国家战略深度耦合的必然结果。从政策维度看，“一带一路”倡议强调政策沟通、设施联通、贸易畅通、资金融通、民心相通，而沙特“2030愿景”则明确将旅游业作为摆脱石油依赖、实现经济多元化的关键路径。沙特阿拉伯在政策上从多个领域促

进旅游业的发展，同时加强与中国的合作。为推动两国间的旅游业发展提供了制度保障。

（二）其他产能合作、既往经验为推动旅游合作提供经验支撑

1990年7月21日，中国和沙特建交。建交以来，两国友好合作关系全面、快速发展，双方交往频繁，合作领域不断拓宽。2001年以来，沙特一直是我国在中东地区第一大贸易伙伴。2008年6月，两国建立战略性友好关系。我国自2013年以来成为沙特第一大贸易伙伴。2016年1月，两国建立全面战略伙伴关系，并决定成立中沙高级别联合委员会。2022年12月8日，中沙签署《中华人民共和国政府和沙特阿拉伯王国政府关于共建“一带一路”倡议与“2030愿景”对接实施方案》，计划共同推进两国基础设施、产能、能源、贸易和投资、财金、人文等领域的建设合作。2023年8月，沙特加入金砖国家，中沙间的合作进一步加深。

沙特拥有丰富的油气资源，沙特长期是中国主要原油供应国之一，两国间能源领域合作成果丰硕，经验丰富。除此之外，在共建“一带一路”框架下，两国有关部门在能源、基建、投资、交通、通信和信息技术等领域签署多份合作协议。在第六届中阿博览会中沙贸易投资推介会上，9个重点合作项目集中签约115亿元，项目涉及清洁能源、新型材料、商业地产、旅游、云计算、云存储、大数据、乳品加工、优质农产品等。



数据来源：国家统计局

根据数据显示，近年来中沙之间的进出口量持续增高，经济合作不断增加，这离不开双方政府的支持。经济的发展同时也推动了中沙间人文领域的合作，在“一带一路”倡议下，中沙两国的友好合作关系取得了显著成果，合作范围逐渐扩大，包括经贸、能源、文化、教育等多个领域。2022年12月8日，中国政府与沙特政府签署了《中华人民共和国政府和沙特阿拉伯王国政府关于共建“一带一路”倡议与“2030愿景”对接实施方案》，共同推进两国基础设施、产能、能源、贸易和投资、财金、人文等领域合作。

于2023年10月18日发布的第三届“一带一路”国际合作高峰论坛务实合作项目清单中涉及中沙之间实现多个领域的合作与发展。卫生健康领域，银行数字合作，文物考古类合作等等，中沙之间的合作已走向更深层次，更广领域的合作。

中沙在多个领域都有丰富的合作成果，尤其在能源合作与基础设施建设方面，不论从政府角度到民间企业合作都积累了充足的合作经验。不断地合作，丰富的合作经验也为中沙之间旅游业的

合作打下良好的基础，提供可参考的经验，助力旅游合作。

(三) 旅游资源丰富、具有差异为加强旅游合作提供基础保障

从文明发生学的视角审视，旅游本质上是人类对“异质文化体验”的本能追寻，其吸引力强度与主客文化间的距离呈正相关。中国与沙特阿拉伯分别代表了东亚农耕文明与阿拉伯游牧文明的典型形态，二者在生产方式、社会组织、空间观念、时间感知等深层文化结构上存在根本性差异，这种系统性异质恰构成旅游吸引力的核心源泉。

中国和阿拉伯世界都有悠久的历史 and 灿烂的文化。到2016年，15个阿拉伯国家拥有61处联合国教科文组织世界自然和文化遗产，截至2023年，沙特阿拉伯有6处联合国教科文组织世界遗产。同样,作为世界十大国际旅游目的地之一，到2023年，中国有57项世界遗产，包括39项文化遗产，14项自然遗产，4项文化与自然双遗产。

双方的旅游合作具有极强的互补性，中国作为传统的农耕文明国家，历史悠久，文化底蕴深厚，依靠黄河，长江在亚洲东部这片土地上诞生了悠久的文明。我国地域辽阔，地理位置优越，拥有多种地貌类型，格局错综复杂，同时，气候类型多样形成了得天独厚的生物地理资源。众多的民族也形成了多样的风情，各具特色，极具吸引力。

地处阿拉伯半岛的沙特阿拉伯，虽在地理区划上属于亚洲，但其气候类型与地形地貌与亚洲其他区域迥然相异，

形成以热带荒漠为主体的自然格局。该地区降水稀少，地表径流匮乏，大面积覆盖着鲁卜哈里沙漠这一全球最大的连续流动沙丘体系。此种严酷的生态承载力限制，迫使历史上该地域的部落社会采取“逐水草而居”的游牧生计方式，资源的高度稀缺性进一步强化了以血缘和地缘为纽带的部落认同机制。同时，麦加与麦地那作为伊斯兰教的两大圣城，承载着全球穆斯林的精神向心性。其城市建筑群以清真寺、宣礼塔及朝觐设施为核心，遵循宗教仪式逻辑与历史传承风格，形成了区别于世俗都市的独特天际线。这种兼具异域视觉张力与神圣空间意涵的建筑形态，与周边的荒漠基质相互映衬，共同构建了对外部世界极具吸引力的文化地理意象。

与此同时，自20世纪中叶以来，沙特凭借其雄厚的油气资源储备，深度嵌入全球能源供给体系，石油经济不仅推动了其国内现代化的跨越式发展，也使“海湾富裕”形象成为国际认知中的典型标签。2022年卡塔尔世界杯作为区域性重大体育盛事，进一步在包括中国在内的东亚社会引发了关于阿拉伯社会文化、生活方式与现代性转型的广泛讨论。而与之相呼应，改革开放以来中国综合国力的显著增强，及其发展模式的独特性，亦成为阿拉伯国家观察与研究的重点对象。汉语教育在阿拉伯地区的持续升温，即体现了双方在“文明互鉴”框架下日益增长的人文交流需求与双向认知愿望。

两国受地域文化等要素的影响不同，产生了两个截然不同的民族，以农耕为主的田园生活与以游牧为主的沙漠

生活，两者以巨大的差异吸引着对方，中沙旅游合作的深层驱动力不仅源于政策推动与市场利益，更扎根于两种古老文明在生活方式、文化逻辑与审美体系上的结构性差异。这种差异构成了一种可持续的、天然的吸引力资源，使中沙旅游合作具备了超越一时政策红利的长期文化动能。

（四）数字媒体宣传为促进旅游合作提供宣传效益

《花儿与少年·丝路季》前往沙特阿拉伯领略其秀丽风景和迥异人文，实地参观了解共建“一带一路”的合作项目，走进沿途中国建造，学习中国方案，领悟中国智慧。美兰德数据显示，截至2月4日，节目热播期间全网热搜上榜10889次，188次登上多平台热搜TOP1，热搜累计上榜时长达64858小时，其中微博平台热搜上榜8423次，累计在榜35561.5小时。中国驻沙特大使馆评价《花儿与少年·丝路季》用有烟火气的民生视角、大众视角和微观视角，将“一带一路”的庞大主题，拆解成一个个让观众们易感知、易理解、易共鸣的生活细节，以此讲述可信、可爱、可敬的中国形象，也让合作共赢的力量直抵人心。

该节目通过邀请嘉宾旅游，让观众们了解了“一带一路”倡议在沙特的合作项目，看见了相关建设成果。通过该节目的推广以及明星效应的带动不仅让更多人了解到了中沙在“一带一路”倡议建设下的相关成果，同时也让更多中国游客选择沙特作为其旅行目的地。

2024年10月，“沙特电影之夜”在上海成功举办，这场跨文化、跨语言的沟通不仅能带来中沙之间电影邻域的密切合作，同时宣传推广两国文化，促进中沙之间的交流，人民交往，通过加大宣传来提升吸引力，从而推动两国间旅游合作。2025“中沙文化年”以文明互鉴、民心相通、双向奔赴为关键词。全年60余场活动让中沙两大文明更加深度交流互鉴、两国人民更加相知相亲，为两国全面战略伙伴关系行稳致远奠定了更有温度、更有力量的人文根基。

顶层战略深度对接、其他产能合作提供丰富经验加之资源差异带来的自然吸引力以及数字媒体的宣传推广，中沙间的旅游合作形成了稳定的基础支持，为不断深化合作，推动两国互通有无，民心相通提供了保障。

中国与沙特阿拉伯深化旅游合作的前景

中沙旅游合作正站在从“机遇驱动”向“战略驱动”跃升，其发展前景具备多重坚实支撑。从双方政府支持到旅游业对非油经济的显著乘数效应——包括就业创造、产业链延伸与外汇收入增长——使双方均具有推动客源双向流动的内生经济激励；再者，随着两国间直飞航线的加密与沙特朝觐签证体系的优化，中沙之间的空间距离被大幅压缩，旅游流动的物理门槛显著降低；而沙特地处亚非欧三洲交汇地带的独特区位，更使其具备吸引中国游客顺访乃至延伸至中东与非洲市场的枢纽功能。

（一）沙特阿拉伯积极促进国家转型推动旅游业发展

沙特阿拉伯提出“2030愿景”推动加强旅游业发展，与“一带一路”倡议不断对接中沙之间合作加强，人民交流日益密切，更全面地了解彼此成为当下的热点话题，中国人民出境旅游想法愈发强烈，沙特阿拉伯旅游业发展呈现肯砸钱，动作快两大特征，沙特阿拉伯旅游产业对中国市场渴望强烈。沙特在国家转型战略“2030愿景”中，明确提出要将本国打造成为全球主要旅游目的地，到2030年接待1亿人次游客。2023年6月，沙特旅游部部长艾哈迈德

（Ahmed Al Khateeb）在中阿合作论坛第十届企业家大会上表示，未来十年沙特将投资超8000亿美元以发展旅游业，希望2030年旅游业对沙特GDP的贡献从目前的4.45%提高到10%。随着中沙间合作不断加强，中国强大的市场及资源，自然使其成为沙特阿拉伯旅游业发展的发力目标。

沙特作为传统的能源国家提出“2030愿景”进行转型发展，沙特阿拉伯采用先进的制造技术并加强其全球市场地位，沙特阿拉伯工业部长对国家准备采用现代制造技术的信心植根于沙特2030年愿景的战略框架。利雅得机场与亚行Safegate合作实现航空基础设施现代化，标志着该地区致力于利用先进技术提高效率和运营绩效。杜尔酒店和旅游目的地解决方案(TDS)之间的合作凸显了沙特阿拉伯将自己定位为全球旅行社首选目的地的努力。此外波音与阿联酋领先的可再生能源公司马斯达尔

(Masdar)结盟，推动全球可持续航空燃料产业的发展，使中东成为可持续航空倡议的重要参与者。“2030愿景”是一个指导框架，强调了该国致力于减少对石油的依赖，并采用先进的制造技术。总之在经济多元化、技术进步和战略伙伴关系的推动下，沙特阿拉伯和整个中东地区正在经历一场重大转型。

沙特阿拉伯旅游局在中国多地举办路演，宣传沙特丰富多彩的旅游体验。在最新路演活动上，沙特旅游局还宣布了一项重要举措——将降低签证费。为了进一步减轻旅客的行程开销并提高入境沙特的便捷性，自2023年4月1日起，旅游签证保险费已从180沙特里亚尔降至95沙特里亚尔。加之支付宝，银联这样的支付手段，这样的惠民利民措施将有效提升中国人民的旅行意愿以及体验。

（二）深化旅游合作带来多方面效益产生效益

旅游业是一个综合型产业，涉及吃、住、行、游、购、娱，六个方面，其中涉及的餐饮业、住宿业、交通业、娱乐业等都会因旅游业的发展而产生效益。同时，旅游业是国民经济战略性支柱产业，推动旅游业发展不仅能为经济发展做出贡献，增加就业岗位促进社会发展，同时加强了资源整合，促进了文明之间的沟通。2023年期间，沙特国内外游客人数大幅增加，沙特海外游客消费额创下新纪录。根据沙特中央银行(SAMA)发布的数据显示，2023年前三季度旅游收入超过1000亿里亚尔。这远远超过了2023年前第三季度预估的378

亿里亚尔，与2022年同期相比增长了72%。2023年，沙特游客数量达到1亿，比原定计划提前了七年。作为TIEP计划的一项举措，旗舰项目酒店投资促进计划(HIE)旨在利用这一势头，计划在关键目的地向酒店业注入高达420亿沙特里亚尔的投资，预计到2030年将单独创造12万个新工作岗位。

旅游业的发展不仅可以推动经济的快速增长，同时通过旅游业的发展也可以促进沙特本土文化的传播，促进不同文明之间的交流，使得两国间人民民心相同。通过国内旅行综艺《花儿与少年·丝路季》的推广以及沙特旅游文化周的举办让中国人民对于沙特有了一定的了解，通过切身的体验更能感受到不同文化之间相互吸引的魅力。

（三）旅游区位条件优势扩展旅游合作发展潜力

对旅游业发展来说，资源、资金、交通、市场、政府、社会经济是主要旅游区位因素。在前文中已具体阐释资源、市场、政府等区位因素，除了优势的上述条件外其地理位置，交通条件同样具有优越性。

地理位置：中东地区处于亚欧非三大洲的交界处，处于枢纽位置，拥有丰富的油气资源，是全球政治体系中的重要组成部分。沙特阿拉伯东濒波斯湾，西临红海，同约旦、伊拉克、科威特、阿联酋、阿曼、也门等国接壤，并经法赫德国王大桥与巴林相接。自古以来，无论是陆上还是海上都占据重要的地理位置，连接东西方。

交通条件：南航北京大兴-利雅得航线成功首航，中国内地至沙特阿拉伯首条定期直飞客运航线正式开通。沙特阿拉伯航空推出了吉达-北京和利雅得-北京两条直飞航线。多条直飞航线，以及不断出台的优惠措施。利游客的出行，降低旅行成本，从而提升该地区的旅游吸引力。沙特国内运输业以及建筑行业的投资不断扩大，其基础设施不断完善，在多个城市都有国际机场。

沙特地处亚非欧三大洲交汇地带，东邻海湾、西接红海、北通地中海，这一独特的地理枢纽地位赋予其超越双边范畴的区域辐射功能——中国游客经由沙特，可便捷延伸至埃及、土耳其、阿联酋等周边目的地，形成“沙特+中东/北非”的连线旅游产品格局。加之两国直飞航线持续加密，北京、上海、广州等门户城市与利雅得、吉达间已实现常态化直航，旅途耗时大幅缩短；沙特针对中国游客推行的电子签证与落地签政策亦不断优化，使入境程序日趋便捷。交通动脉的打通与制度通路的理顺，使中沙旅游流动具备了物理与制度的双重可达性，沙特正从单一目的地向中国与中东、非洲之间的旅游集散中枢迈进。重要的地理位置以及不断发展的交通基础设施建设对于旅游业的发展都有重要作用，可以扩大其发展优势。

中国与沙特阿拉伯深化旅游合作的挑战

中沙旅游合作的深化之路并非坦途，在战略对接与市场扩张的光鲜表象之下，也存在多重制约因素。从宏观环境看，中东地区地缘政治格局的周期性震荡始终是旅游业发展的重大威胁之

一，地区局势的任何波动都可能对跨境旅游流动产生直接且剧烈的冲击。从制度层面审视，两国在法律法规体系、商业惯例、质量标准等方面存在显著差异，中国企业在沙本地化运营时常面临合规成本高企、文化适应周期漫长等隐性门槛。从产业配套角度而言，大型文旅基建项目的快速推进与旅游接待软件服务的滞后形成了鲜明反差——中文导览覆盖不足、餐饮习惯适配欠缺、移动支付互联不畅等问题。中沙间深化旅游合作仍前路漫漫。

中东地区政局动荡，冲击旅游业发展

中东地区长期以来的地缘政治紧张与军事冲突，对该区域旅游业构成了系统性且剧烈的冲击。作为全球旅游业增长最为强劲的地区之一，中东在2025年曾实现5.3%的增长率，远超全球4.1%的平均水平。然而，自2026年2月底美以伊军事行动爆发以来，区域安全局势急剧恶化，旅游业几乎在一夜之间陷入“断崖式”衰退。

此次冲击首先表现为国际游客信心的崩塌与旅行需求的骤降。各国政府与国际组织陆续发布的旅行警告，叠加空域受限导致的航班大规模取消与延误，使大量潜在游客推迟或取消了赴中东计划。世界旅游及旅行理事会（WTTC）估计，冲突已给中东旅游业造成每天近6亿美元的经济损失。牛津经济研究院旗下的《旅游经济学》预测更为具体：即使在乐观情境下，2026年中东国际游客到访量将同比下降约11%，损失约2300万游客及340亿美元旅游消费；若冲突持续，游客流失规模或扩大至3800

万人次，损失高达560亿美元。国际航空运输协会（IATA）2026年5月数据显示，中东地区远期预订量骤降约50%。

航空枢纽与酒店业的惨淡经营直观反映了衰退的深度。受到美伊以冲突的影响，中东多国领空关闭，机场受到不同程度的损害，沙特机场虽然未受到直接打击，但是对于航班等同样产生了一定影响。酒店行业也受到了沉重的打击，但是，其更深层的影响在于，这场动荡正在动摇海湾国家耗资数百亿美元打造的经济多元化战略根基。旅游业与房地产业率先承压，外籍劳工流失与投资者信心滑坡使区域发展前景面临根本性调整。有分析指出，若霍尔木兹海峡封锁持续，跨国旅行或将因运力缩减与成本飙升而成为“奢侈品”。尽管业界认为旅游业韧性较强，危机后有望逐步复苏，但当前局势的持续时长仍是决定损失规模与复苏节奏的关键变量。同样也影响游客对于沙特安全与稳定的信任程度。

（二）双方文化差异较大，民众了解程度低且有局限

虽中沙同处亚洲，但其气候不同导致双方地理环境的巨大差异，因此双方文明同样有着显著的差异。近现代以来，由于沙特阿拉伯同台湾建立外交关系，保持密切往来导致中沙建交道路蜿蜒曲折。1990年建交以来，两国关系稳步发展，但由于不同的政体，信仰原因，两国间研究较少，至于民众之间的了解也限于部分信仰伊斯兰教的少数民族对于圣地的有限认识，大多数人们之间的了解是十分有限的。巨大的差异与

较少的了解这种不对等的关系导致双方深化合作的困难。

其次，双方饮食文化的显著差异，构成跨境长途旅游体验中不可忽视的关键变量。中国饮食文化以菜系繁多、口味层叠为特征，东西南北各地因地理气候、物产资源与历史传承的不同，形成了咸、甜、香、辣各具侧重的味觉谱系，整体呈现出极高的内部多样性与地域可辨性。相比之下，沙特阿拉伯的饮食风格则深刻植根于其热带荒漠环境与历史商贸网络。一方面，高温干旱的气候条件使甘蔗种植得以发展，糖分成为当地廉价且高效的能量补给来源，由此塑造了阿拉伯社会普遍嗜甜的味觉偏好，甜食点心与日常茶饮中大量添加糖分构成其饮食常态；另一方面，阿拉伯半岛自古以来便是东西方香料贸易的重要枢纽，豆蔻、肉桂、藏红花、丁香等香料被广泛运用于肉食与主食的烹制中，赋予食物以浓郁而复杂的风味层次，其中相当一部分香料组合在中国传统烹饪中较为罕见，对初访者的感官适应能力构成一定挑战。

从旅游体验的视角来看，此类饮食差异具有双重效应：其独特的风味结构与进餐仪式，作为异域文化最直接的身体感知载体，能够成为吸引游客寻求深度文化沉浸的特色资源；然而，差异的显著性亦可能引发部分游客的口味排斥或生理不适，在缺乏有效过渡与引导的情况下，演化为影响旅行满意度乃至阻碍文化交流的实际障碍。因此，在跨文化旅游产品设计与行前教育中，饮食文化的差异不应被简单视为趣味性点缀，

而应作为关乎体验质量的核心要素加以系统评估与策略性应对。

（三）沙特阿拉伯政府政策近几年逐步开放，程度有限

2016年沙特开启“2030愿景”之前，沙特的大街小巷随处可见宗教警察；沙特的女性被重重束缚所限制，她们的活动范围仅限于家庭，出门必须得到男性家庭成员的陪同。虽然2018年3月，萨勒曼王储公开表示，法律上没有规定伊斯兰教女性必须穿戴罩袍与面罩，但社会风俗远远迟滞于行政律令的改变，目前在利雅得的大街小巷，大多数本地女性还是会穿长到脚踝的黑色罩袍，人们的思想变化与政策改革往往有一定的时间差异性，在传统沙特社会中根深蒂固的思想并不能轻易得到改变，而民俗风情正是通过普通百姓反应出来的，因此，真正对于人们思想的变革还需要一定的时间。

娱乐产业的发展时间较晚也会影响游客在沙特的旅行体验。2018年，沙特才拥有第一家商业电影院；从1952年起，沙特禁止公开销售和消费酒精饮料，直到2024年年初，首都利雅得的外交区域才拥有了第一家酒类商店，只为外籍非穆斯林外交官提供服务。

沙特国王，王储决心改革。如今，沙特女性不仅可以驾车自由出行，还能在体育场观看比赛、参与社交活动，甚至在政府和企业中担任要职。2024年5月17日，沙特阿拉伯举办了第一场以泳装模特为主的时装秀。现在，沙特已经举办了多届娱乐主题活动，如“利雅得季”和“吉达季”，这些活动不仅丰富

了人们的文化生活，也向世界展示了沙特开放包容的新形象。然而，尽管沙特政府不断的努力，但不免会有反对的声音，部分男性对女性社会地位的提升也颇有微词，觉得这是对传统性别角色的挑战。

改革的生效需要一定的时间加持，不断的文化教育，思想变革才能真正的打开人们心里的“枷锁”，虽然沙特如今大力改革，但要真正改变国际游客的观念还需要一定的努力。

同时，由于恐怖分子等问题，加之近期巴以冲突所带来的战火纷飞，也让国际游客对“中东”这个大的文化地理区位的安全性产生怀疑。安全问题是发展中的首要问题，尽管沙特本土法律健全，但受其所处地理位置，周边国家的状况影响，当下民众对于穆斯林的看法仍是有一定偏差的。改变这种看法需要全世界共同的努力。

（四）旅游景点标识，配套设施仍不够完善

在国内的大部分景点设有中文，英文。根据地域不同设有朝鲜语，日语的标识。但是鲜少有阿拉伯语标识，并且目前在国内，仅有少部分人掌握阿拉伯语，大部分在广州，浙江一带的商人掌握阿拉伯语的简单沟通以及商业贸易，国内对专业的阿拉伯语旅游培训也存在缺失的现象，当前阿拉伯语在国内针对旅游景点的翻译仍存在一定的争议，目前还不能准确地进行翻译，这些都会给沙特来华游客造成困难。

在沙特则是阿拉伯语和英语居多，部分地方有中文标识，但仍是少数。至于中文，据《沙特公报》等多家媒体报道，沙特政府已将中文作为第二官方外语纳入教学课程，阿拉伯国家掀起中文热，孔子学院的影响力也在不断上升，沙特正式将中文教育纳入国民教育体系。虽然在沙特阿拉伯中文教育开展如火如荼，但是仍然缺乏旅游相关的专门培训，并且两国文化差异大，所说的语言属于不同的语系，学习起来较为困难，对于中国人旅游仍然有一定的障碍。

深化中国与沙特阿拉伯旅游合作的对策建议

面对上述挑战，中沙旅游合作仍需精细化推进，以系统性思维破解结构性难题。从政策、产业、人才、传播等多维度的协同发力。以系统性对策回应结构性挑战，中沙旅游合作方能行稳致远。

（一）推动两国间国别区域研究，加深认识深化旅游合作

旅游交流有利于不同文明之间的相互理解，促进不同文明的交融，但要推动旅游业发展需要对双方文化进行了解，以此更好地认识两国文明，更好地进行全面地推广，加大吸引力。因此有必要加强对沙特阿拉伯的国别研究，丰富两国间的细节认知和全面认识，科学研判合作发展的形势和条件，有针对性地开展人文交流和公共外交，尤其是促进两国间民众的认识，同时营造良好的旅游环境，加强语言与多学科的交融，

为相关领域培养更多的人才。推动中沙两国的互相认识，互相信任。人才对于旅游业的发展至关重要，人才是旅游发展中的高级因素，因此要将国别区域与旅游以及相关语言相结合，加大力度培养相关人才。

在政策层面，应充分发挥中沙高级别联合委员会的统筹功能，将旅游合作纳入双边战略对话的常设议题，推动签证互惠、航权开放、旅游标准互认等制度性瓶颈的突破。在产业层面，需引导企业从“工程承包”的单点模式向“投资—建设—运营”的全链条模式转型，深度参与沙特旅游生态的系统性构建。在人才培养层面，依托中阿文化和旅游合作研究中心等学术平台，培育兼具语言能力、法律素养与跨文化沟通能力的复合型人才，为企业出海提供智力支撑。

（二）利用数字媒体，加强宣传为深化旅游合作打造信息平台

在对外宣传方面，利用社交媒体外界展示国家形象与最新面貌。沙特堪称一个社交媒体重度使用国，DataReportal的数据显示，2024 年 1 月，沙特拥有 3510 万社交媒体用户，相当于总人口的 94.3%。CGTN央视阿拉伯频道在央视频，脸书和X等全平台专题报道鲸鸿动能智慧营销平台惊艳亮相第31届阿拉伯旅游展，与阿联酋航空，卡塔尔旅游局，沙特埃尔奥拉旅游局等签订合作备忘录，持续赋能区域文旅相关企业，助力文旅一带一路，点亮文旅丝绸之路。同时，中国的书籍，影视作品等翻译成阿拉伯语，在阿拉伯国

家进行传播，例如：2017年中沙合拍的动画片《孔小西和哈基姆》有效利用了社交媒体这一平台，增加中国对沙特人民的吸引力。亦或通过电影之夜等诸多形式，加深两国间人民的认识，促进民心相通。

2024年10月20日，沙特旅游节在天坛公园成功举办，让市民身临其境感受阿拉伯文化。这一活动通过数字媒体的宣传也加深了其影响力，可以通过多次举办诸如此类的活动，并通过社交媒体进行宣传，来增加沙特旅游的吸引力。

利用数字媒体加强对于沙特的宣传，拓宽其受众面，让更多的人了解到沙特。借助“中沙文化年”等品牌活动，推动文旅产品的本土化生产与精准化投放，使旅游真正成为文明互鉴的实践场域而非文化折扣的牺牲品。

（三）依托“一带一路”推出特色文旅项目，打造旅游品牌

定制以“一带一路”为主题的旅游品牌，参观中沙共建“一带一路”的项目，学习中国经验。《花儿与少年-丝路季》正是以此作为一大买点，在后期同样可以利用之一效应，定制特色的旅游路线，以参观“一带一路”项目为主线，浏览学习的同时加入沙特阿拉伯的特色文化项目，欣赏独属的沙漠风光，感受其现代化发展。

卡塔尔世界杯的举办让对于这个国家有了进一步的了解，同时也对于中东地区国家有了一定的改观。可见利用体育赛事，文化活动等带来的效应可以有效发展旅游行业。沙特签约C罗，可利

用这一明星效应，加强推广与宣传，打造特色旅游项目。

何为特色？即在发展同时面对外来文化的态度应当是取其精华，去其糟粕，在不断发展的同时仍能够坚守初心，保持特色。在近期沙特旅游部部长艾哈迈德在采访时表示：酒精很重要，但我们决定不提供它。沙特作为传统的伊斯兰教国家，是个政教合一的地方，被穆斯林誉为伊斯兰教发源圣地，千百年来，伊斯兰教早已深深烙印在这片土地上。不允许饮酒是伊斯兰教的规定，沙特虽然现在在大力发展旅游业，但是并没有人云亦云，而能够保持自我。事实上，大部分前往沙特的旅游者以朝觐为目的，这样的做法不仅是遵守教法，同样能形成一个特色点，以此宣传，推动旅游业发展。

结语

中沙两个大国自建交以来就不断深化合作，随着中国“一带一路”政策与沙特“2030愿景”的深度对接以来，双方合作迅速发展，旅游业作为其中一个重要因素，旅游业的发展不仅影响其经济增长，同时也带来持续的可发展性，互利共赢是国家间合作的核心，只有双方都能获得实实在在的利益，合作才会长远发展。当前中沙旅游合作前景呈现“制度对接+硬件建设+区位外溢”的发展趋势。未来中沙合作还会迎来许多挑战，但只要秉持互利共赢的理念，终会不断加强在各个领域的合作，迎来更加辉煌的明天，共同构筑人类命运共同体。

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抵近观察：以色列视角下的中国—海湾国家关系

宋载誉 (Song Zaiyu)

摘要：本文立足特拉维夫大学的“抵近观察”，从以色列视角重审中国—海湾国家关系。文章回溯“中东”概念的殖民话语起源及中国知识分子的重构，梳理中国—伊斯兰与中国—犹太人两条内核迥异的知识脉络，指出当代中海关系已成为以能源为生命线的高度制度化战略伙伴关系；继以2026年美以对伊朗的军事打击与霍尔木兹海峡封锁为切口，分析海湾安全范式的崩塌及其对中国能源与高科技供应链的冲击，剖析中国“非对称存在”的逻辑，即回避实质性安全承诺而持续深耕经济、外交、科技与金融立足点，揭示美国战略收缩如何推动海湾防务多元化；并考察“大以色列”叙事与《亚伯拉罕协议》下务实防务合作的张力及海湾话语的分化。文章认为，中国须尊重海湾国家对生存安全威胁的优先排序，避免冷战式阵营划分，中国青年学者亦应超越西方中心主义框架，构建独立的学术叙事。

关键词：中国—海湾国家关系；以色列视角；抵近观察；霍尔木兹海峡；非对称存在；《亚伯拉罕协议》

然而，在研究的准备与推进过程中，首要的学术瓶颈在于如何界定“中东”这一高度流动且充斥着意识形态张力的区域。在19世纪至20世纪上半叶的西方殖民扩张话语中，“近东”“中东”与“远东”是基于大英帝国地缘防务利益而强加于亚洲的地理标签。然而，当这些概念在20世纪初传入中国

后，中国知识分子并没有消极接受，而是将其置于自身反帝、反殖民及民族自决的叙事框架中进行重构。

在这条知识生成的复线脉络中，“中国-伊斯兰（及阿拉伯）”关系与“中国-犹太人”关系展现出截然不同的精神内核：

1. 中国-伊斯兰脉络：在抗日战争及中华人民共和国成立初期，中国与海湾阿拉伯国家及更广泛伊斯兰世界的联系，往往伴随着共同的第三世界民族解放诉求。彼时的中国知识分子引介阿拉伯觉醒与伊斯兰复兴运动，以寻求弱小民族联合抗战的思想资源。

中国—犹太人脉络：20世纪30年代，大批避难的犹太人流亡至中国的哈尔滨和上海。这一独特的历史片段，让犹太流亡群体、白俄侨民、中国左翼知识分子与国际主义运动在中国大地上深度交融。中国知识人通过对犹太复国主义运动的观察，折射出自身对于国家建构、文化重组以及现代化转型的焦虑与向往。

在这一历史底色之上，当代的“中国-海湾国家关系”已演变为高度制度化和多维度的综合战略伙伴关系。中华-海湾研究所（SGI）的常态化追踪表明，海湾阿拉伯国家合作委员会（GCC）成员国目前是中国最关键的能源生命线，承担了中国近三分之一的原油进口。在过去十年中，这一关系迅速跨越了单一的石油贸易范畴，深度拓展至长达数十年的液化天然气（LNG）合同、本币互

换协议、双边主权财富基金联合投资、定期高层互访以及日益频繁的人文交流等诸多领域。这种深度的利益互锁，使得任何发生在该区域的地缘震荡，都会立刻转化为对中国供应链安全与宏观经济稳定的严峻考验。

战局重塑：2026年伊朗战争下的海湾地缘战略剧变

对该区域进行抵近观察的现实意义，在2026年年初爆发的局部地缘冲突中得到了极其残酷且直观的验证。根据特拉维夫大学摩西·达扬中心研究主任布兰登·弗里德曼博士在工作坊中的系统阐述，2026年2月28日，美国与以色列联手对伊朗发动了高强度的军事打击。这场军事行动旨在通过对伊朗最高领袖阿里·哈梅内伊的“斩首式打击”，迅速粉碎伊斯兰共和国的领导层，迫使其在核计划上做出根本性让步。在冲突初期，美以联军在几周内摧毁了伊朗80%的防空能力，打击了多达13000个目标。

然而，美以试图通过精确制导、空中力量和人工智能武器速战速决的设想宣告失败。伊朗依托强大的伊斯兰革命卫队体系、富有韧性的情报和宗教网络以及庞大的庇护集团，展开了极其顽强的抵抗，并迅速将其邻国——海湾合作委员会（GCC）国家违背自身意愿地拖入这场生存战争之中。

自2026年4月13日起，伊朗对海湾国家的民用和经济基础设施发起了大规模的导弹与无人机袭扰，并成功封锁了全球经济的动脉——霍尔木兹海峡，导致美国随后反向封锁伊朗港口，局势演变为一场极其惨烈的经济消耗战。这场

冲突彻底摧毁了海湾国家长期奉行的“在对伊朗实施安全威慑的同时与其进行外交缓和”的国家安全范式。

这场地缘浩劫不仅使海湾国家的安全成本暴增，也对全球及中国的能源和高科技供应链造成了破坏性冲击。霍尔木兹海峡承载着全球四分之一的原油和贸易流向，其运送的主要目的地正是中国、印度、日本和韩国等东亚主要经济体。同时，该通道也是全球三分之一化肥贸易和三分之一氦气贸易的必经之路，后者作为半导体和人工智能基础设施生产的关键原料，其断供直接威胁到东亚乃至全球的数字经济安全。

非对称足迹：大国博弈与中国的“非安全承诺”深耕

从特拉维夫的学术与政策视角出发，中国在海湾及中东局势中的表现呈现出一种高度精密的“非对称存在”。塞拉教授在2025年7月发表于以色列国家安全研究所（INSS）的专题报告《致力于自身：中国与以伊战争》

（Committed to Itself: China and the Israel-Iran War）中指出，尽管外界普遍存在一种直观认知，即随着美国在中东军事存在的重新确立，中国因未直接参与战局而有所退却，但多维度的实证分析表明，事实远比这复杂。

在经历2025年以伊战争以来的地缘洗礼时，中国在维持其一贯的行为模式——即坚决避免做出任何实质性地缘安全承诺的同时，持续深耕并巩固其在海湾及整个中东的经济、外交、科技和金融立足点。中国持续成为一个在军事上保持边缘化的角色，但却在极为谨慎地

利用地缘危机来累积其长期的地区影响力。

这种“非安全承诺”的深耕，给以色列及海湾国家带来了一个极其核心且棘手的后战局悬念：中国未来将在何种程度上、以何种形式参与伊朗的战后重建——特别是关于其军事防务能力和国防工业的重组。在伊朗的代理人网络

（如黎巴嫩真主党、胡塞武装、叙利亚和伊拉克的什叶派民兵）对美以基地及海湾合作委员会基础设施实施无差别打击后，这一问题已超越理论探讨，成为高度迫切的地缘防务课题。为此，以色列正在国际多边舞台上与遭受伊朗攻击的海湾伙伴紧密协调，试图共同施加外交影响，促使北京在对伊军工技术出口和敏感能力重建上保持克制。

与此同时，大国博弈的另一极——美国的姿态变化，正在迫使海湾国家重新评估其长期安全资产。在唐纳德·特朗普的第二个总统任期内，华盛顿对国际冲突与多边安全事务的应对，呈现出极为彻底的“美国优先”孤立主义特征。按照章永乐的说法，这在很大程度上是“门罗主义”乃至“唐罗主义”的延续。与战后数十年视自身为全球自由贸易与海洋运输“守护者”的全球主义美国不同，当下的特朗普政府更倾向于从国内政治损益和选票计算的角度来审视霍尔木兹海峡的关闭。对于氦气断供对东亚半导体产业链的摧毁性打击，或者海湾化肥断供对南美洲及南亚农业的灾难性影响，华盛顿表现出了明显的政治冷漠。

美国战略信用的部分透支，直接推动了海湾国家防务关系多元化的历史性转变。当前，无论是沙特阿拉伯还是阿拉伯联合酋长国，不仅在积极推进本土军事工业的自主研发，也在大幅增加从欧洲及亚洲（包括中国）供应商处采购武器系统的比重，以此作为应对华盛顿地缘战略收缩的安全兜底举措。

叙事冲突：从“大以色列”焦虑到防务务实主义合作

在硬实力博弈的帷幕之下，地缘政治的另一隐形战场在于舆论叙事的塑造。在海湾及阿拉伯世界中，一种关于“大以色列”（Greater Israel）或扩张主义以色列的恐惧叙事在2026年冲突中被反复激活。海湾地区的部分批评性舆论认为，以色列在黎巴嫩南部建立缓冲区、在叙利亚南部对德鲁兹人施压，以及在多哈对哈马斯高层实施定点清除等强硬行动，表明其正试图凭借其无可匹敌的军事“长臂”，在整个中东建立排他性的地区主导权。这种对以色列“不受惩罚、为所欲为”的叙事认知，甚至直接促使沙特阿拉伯与巴基斯坦签署了正式的安全协议，以此对以色列形成地缘威慑。

然而，特拉维夫学术界对这一叙事给出了截然不同的防务解释。弗里德曼博士强调，以色列在2023年“十月七日事件”后内化了极其深重的集体创伤与脆弱感。以色列的军事战略在本质上已经放弃了被动防守，转而认定必须先发制人地粉碎任何试图通过“统一战线”政策包围并威胁以色列生存的敌对网络。以色列无意将边界扩张至邻国领

土，但在客观上，它有责任向其海湾和平伙伴证明，其军事行动追求的是区域整体安全和反恐稳定，而非建立区域霸权。

事实上，根据以方特拉维夫大学学者的观点，《亚伯拉罕协议》的实践过程正在以极其务实的方式消解上述叙事对抗。在2026年阿联酋遭到伊朗海量弹道导弹和攻击无人机轰炸的危急时刻，以色列顶住自身防务压力，实时向阿联酋提供了“铁穹”（Iron Dome）防空系统以及最新研发的、专门用于拦截神风无人机的激光防空科技，并派遣国防人员协助进行战术操作与培训。这一公开发表的防务互助事实，让阿联酋等海湾国家领导层深刻体会到与以色列实现和平正常化所带来的核心地缘溢价——在面临地区毁灭性威胁的时刻，是以色列而非其他历史盟友挺身而出，提供了无可替代的安全保护伞。

同时，海湾内部的精英话语体系也在发生深刻的分化。诸如阿卜杜勒·拉赫曼·拉希德（Abdulrahman al-Rashed）等海湾知识分子在社交媒体上公开批评部分阿拉伯传统舆论将一切地缘悲剧归咎于以色列的陈旧逻辑。拉希德尖锐地指出，向海湾国家首都和石油设施发射毁灭性导弹的是伊朗，而不是以色列。沙特学者穆沙拉夫（Al-Musharraf）亦撰文指出，在当下的地缘语境中，成为一名现代海湾阿拉伯人，其身份认同的核心尺度在于认清伊朗作为最直接、最现实安全威胁的事实。

这种叙事层面的分化和防务领域的务实合作，为中国在中东的平衡外交提供了更为复杂但充满弹性的博弈空间。它表明，中国在深化与海湾国家能源、金融和基础设施合作的同时，必须高度重视并尊重海湾国家对于生存安全威胁的优先排序，避免用单一的、非黑即白的冷战式阵营划分来指导多边外交政策。

结语：超越西方中心主义的中国青年学者学术担当

当研究视线从2026年战火纷飞的波斯湾，回溯至20世纪上半叶中国旧教科书、游记与传记所载的“中东知识”时，历史与现实在此刻完成了闭环。民国时期的中国知识分子，在国家面临危亡、世界秩序剧烈动荡的背景下，通过有限的文字媒介去探寻犹太民族和阿拉伯民族的生存路径，字里行间流露出的是“弱小民族”之间同病相怜的温情与对自主命运的追求。

今天，置身于特拉维夫大学这一地缘博弈和学术研究的最前沿，新一代中国学者拥有了远超前辈的“抵近观察”条件，“RExPA”项目本年度有8名来自中国不同高校的同学参与，其中7人有着人文社科背景。在奥里·塞拉教授所代表的严谨学术传统指引下，青年学者不仅需练就从古典文献与语言流变中抽丝剥茧的内功，理解犹太文明的历史纵深，更需要具备在全球地缘风暴中保持客观、理性与批判性思考的定力。

面对充满不确定性的未来，中国青年学者当超越西方简单的地理学分类与大国对立框架：

一、坚持历史纵深与现实关切的双向赋能：将“中国-伊斯兰关系”与“中国-犹太关系”的历史积淀，转化为理解现代“中国-海湾”和“中以”合作的智慧源泉，在尊重多元文明主体性的基础之上，构建独立于西方话语之外的学术叙事。

二、积极发出扎根于扎实学术训练的中国声音：正如特拉维夫大学中东学界对中国研究者所寄予的厚望，全球中东研究需要中国学者的深度参与。中国学者不需要拥有中东血统，亦能通过扎实的田野调查、严谨的数据对比和深入的跨文化对话，创造出能够与国际一流学术圈平等互动、并为地缘和平提供实质性智识支持的“新中东知识”。

从特拉维夫大学到海湾各国的学术殿堂，中国青年学者的抵近观察，不仅是学术视阈的一次拓宽，更是为剧变时代下中国与海湾国家、中国与以色列携手前行、重塑包容性区域安全机制所迈出的坚实一步。这也促使当下的学术审视必须突破单一历史文本考据的局限，进而在当下更为具体、务实的“中国-海湾国家关系”（Sino-Gulf Relationship）与“中以关系”（Sino-Israel Relationship）双重图景中，探寻中国在中东地缘变局中的角色与定位。

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经济转型与战略自主：海湾国家对华开展人工智能合作的动因、路径与挑战

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摘要：当前，人工智能已成为全球科技竞争和产业变革的重要驱动力，也为中国与海湾国家深化数字经济合作提供新的契机。海湾国家推进经济多元化转型和“主权人工智能”战略，与中国在人工智能技术、数字基础设施和产业应用等方面形成互补，双方合作潜力不断释放。中海人工智能合作虽已取得积极进展，但仍面临多重挑战，主要包括海湾国家产业基础相对薄弱、制度保障尚不完善、地区安全局势动荡以及外部技术限制等。未来，双方应进一步加强发展战略对接，深化技术创新、人才培养和数字治理等领域的协作，完善长效合作机制，推动中海人工智能合作向更高水平、更深层次发展。

关键词：经济转型；战略自主；主权人工智能；人工智能合作；技术主权

以生成式人工智能、大模型和智能算力为代表的新一代人工智能技术不断取得突破，人工智能正逐渐成为影响国家综合实力和国际竞争格局的重要战略资源。在此背景下，海湾国家纷纷将人工智能置于国家经济战略的中心，纳入国家发展长期规划之中。对于长期依赖油气出口的海湾国家而言，人工智能不仅是推动知识经济转型、提升治理能力的重要技术支撑，也是增强国际竞争力与战略自主能力的重要抓手。与此同时，中美围绕半导体、大模型和数字基础设施的博弈不断加剧，技术竞争呈现

出安全化、政治化与地缘化特征，海湾地区正逐渐成为全球数字地缘政治竞争的重要场域。近年来，海湾国家在人工智能领域“向东看”的趋势引发了国际社会的广泛关注。海湾国家与中国在数字丝绸之路框架下的人工智能合作，已由早期的设备采购演变为涵盖云原生底座、主权大模型联合研发、智慧城市及传统产业赋能的多维度生态融合。

现有研究多聚焦于中国与海湾国家数字经济合作的现状、合作案例或政策前景，对海湾国家为何在人工智能领域不断加强对华合作的内在逻辑缺乏系统性阐释。事实上，海湾国家推进与中国在人工智能领域的合作，并非简单的技术引进或产业合作，而是经济转型需求与战略自主诉求共同作用的结果。一方面，人工智能成为海湾国家摆脱资源依赖、推动经济多元化的核心技术支撑。另一方面，在全球科技竞争日益加剧的背景下，海湾国家希望通过拓展对华科技合作，实现技术伙伴多元化，提升数字主权和技术主权水平。基于此，本文以经济转型与战略自主为切入点，重点探讨海湾国家对华人工智能合作的战略考量、实践路径及现实挑战，以期为理解中国与海湾国家关系提供新的分析视角。

一、海湾国家发展人工智能的实际需求

近年来，沙特阿拉伯、阿联酋和卡塔尔等国相继出台人工智能发展战略，并力争将自身打造为全球人工智能发展

中心，依托低成本能源和区位优势，吸引超大规模数据中心运营商在该地区建设数据中心网络。这一现象并非源于对新兴技术的简单追逐，而是海湾国家在国内经济结构调整与国际战略环境变化共同作用下作出的主动选择，具有经济转型与战略自主双重导向。

第一，对海湾国家而言，发展人工智能是推动其由资源依赖型经济向知识创新型经济转型的核心动力。长期以来，以沙特、阿联酋为代表的海湾君主国，国民经济与国家财政高度依赖石油和天然气出口。然而，受国际油价周期性波动及全球碳中和进程加快等因素影响，以资源出口为主的经济模式面临严峻的可持续性挑战。在此背景下，海湾国家迫切需要将石油时代的“资本红利”转化为数字时代的技术与产业优势，而人工智能正是其实现跨越式发展的重要引擎。海湾地区拥有丰富的油气资源、较强的电力供应能力以及相对低廉的电力成本，是高耗能数据中心的理想选址，而数据中心正是人工智能和云计算发展的基石。通过“AI + 能源”的深度融合，海湾国家可实现向金融科技、智能制造、智慧物流、生物医药等非油气产业的全面辐射，催生出具有内生韧性的数字化经济增长极。

第二，发展人工智能是海湾国家跨越“内源性人口结构瓶颈”，吸引国际资本和高端人才的重要途径。人工智能产业作为资本密集型和技术密集型产业，其发展有助于优化资本配置，推动劳动力结构转型升级。据统计，人工智能和自动化技术可能会在2025年至2030年间影响全球约22%的现有工作岗

位。同期，人工智能预计将在全球创造超过1.7亿个新的工作岗位，并取代约9200万个现有岗位。对于海湾国家而言，目前该地区仅有1.7%的劳动力被认为具备先进数字能力，现有劳动力结构无法满足第四次工业革命的发展需要。因此，大力发展AI产业，不仅能够以算力替代部分低端劳动力，将国家从低效的密集型人工依赖中解放出来，还可以通过抢占全球智算中心与主权大模型的发展高地，向全球资本与高素质技术人才释放强烈的信号，吸引他们向中东汇聚，进而推动海湾地区国家向技术驱动型社会转型。

第三，国防安全需求是海湾国家大力发展人工智能的战略动因。一直以来，海湾国家主要依赖美国主导的地区安全体系，以“能源换安全”的模式维护国家安全。随着美西方在中东的战略收缩，加之地区冲突与全球对海湾石油依赖下降，海湾国家面临严峻的安全赤字。因此，增强自主防务能力、提升战略自主水平逐渐成为海湾国家安全战略调整的重要方向。随着人工智能在战争中应用范围不断扩大，中东已成为新兴军事技术的试验场。海湾国家高度重视人工智能自主化发展，强调本土国防建设，各国也开始将算法能力、智能系统与数据优势纳入国防战略布局。此外，海湾国家还计划将算力中心和数据基础设施培育成新的战略资产。通过与甲骨文、微软等科技企业合作，海湾国家试图以数字基础设施为杠杆，建立一种新型的非对称战略捆绑，将全球的“数字命运”与自身的“国防安全”相连，迫使西方大国为其提供安全保障。

第四，海湾国家对人工智能的需求从单纯的“技术买办”向“技术主权”转变。当前人工智能逐渐成为影响国家竞争力和战略自主的重要生产要素，数字技术能力也日益成为国家主权的重要延伸。对于长期依赖外部技术供给的海湾国家而言，仅仅作为人工智能技术和产品的使用者，难以真正掌握未来数字经济发展的主动权。因此，海湾国家的人工智能战略已由单纯引进先进技术，逐步转向构建自主、可控的人工智能生态体系。一方面，大规模投资建设本土数据中心和智能计算中心，不断提升算力基础设施能力；另一方面，加强数据本地化治理，强化对关键数据资源的自主掌控，积极研发符合阿拉伯语言、文化和社会需求的大语言模型，推动人工智能技术本土化发展。海湾国家希望通过这些举措，增强技术自主性，降低对单一技术体系和外部供应链的依赖，提升国家在全球科技竞争中的选择权和议价能力。在此基础上，技术自主逐步成为海湾国家实施战略自主和多边对冲的关键支撑，使其能够在大国博弈下，保持更大的战略灵活性。

二、中海开展人工智能合作的内驱动因

人工智能的发展是一项高度依赖技术、资本、人才、算力和数据等要素协同作用的系统工程，仅凭海湾国家自身资源难以在短时间内建立完整的人工智能产业体系。因此，在加快本土人工智能建设的同时，积极拓展国际科技合作网络，成为海湾国家推进人工智能战略的主要路径。近些年，美国、欧盟、中国等主要技术力量不断加强和海湾国家在人工智能领域的合作，但在多元合作

格局中，中国正逐渐成为海湾国家最重要的合作伙伴之一。这一趋势不仅源于双边经贸关系的持续深化，还建立在双方发展需求高度契合、技术优势互补以及战略利益相互呼应的基础之上。

中国成为海湾国家人工智能合作的重要伙伴，首先源于其拥有相对完整的人工智能产业体系和较强的技术供给能力。经过多年发展，中国已形成覆盖基础研究、算法研发、智能算力、云计算平台、数据中心、行业应用和智能终端等环节的人工智能产业链，并在智慧城市、数字政府、智慧能源、智能制造和智慧医疗等领域积累了丰富的应用经验，为人工智能技术的大规模落地提供了成熟的解决方案。海湾国家对人工智能的战略需求带有强烈的实用主义色彩，其关注重点在于构建完整的人工智能体系，迅速赋能本土产业转型，支撑智慧城市建设落地。中国在“数字丝绸之路”框架下展现出的“基础设施+大模型+应用场景”的全产业链集成优势，恰好符合海湾国家的核心诉求。以华为云、阿里云、腾讯云为代表的中资科技企业，近年来在沙特、阿联酋等国密集承建并运营了大量高标准的本地化数据中心。这些中资云基础设施不仅性价比高，交付快，更通过推动“数据本地化”为海湾国家构建数字主权筑牢基础。在垂直场景赋能层面，中国在5G通信网络、智能安防以及智慧城市精细化治理领域，拥有全球最丰富的样本池与落地经验。特别是，中国企业针对海湾国家的传统产业，设计出“AI + 能源”（如智能油气勘探与精炼降本）的定制化解决方案，高度契合海湾国家渴

望借助人工智能技术加速经济转型的需求。

其次，中国在科技合作中倡导“自主性”，与海湾国家追求“技术主权”与“数字主权”的根本政治目标相一致。海湾国家希望通过发展人工智能技术增强战略自主能力，降低关键技术受制于人的风险，扩大对外科技合作的选择空间。正因如此，合作伙伴的技术能力固然重要，其合作理念和政治属性同样成为海湾国家的重要考量。相对于美国将技术合作视为地缘政治筹码，中国始终坚持相互尊重、平等互利的原则，强调尊重各国主权、反对将科技问题政治化、武器化。这种相对“低政治化”的合作模式，既符合海湾国家奉行战略自主、平衡多元的外交取向，也降低了其在引进外部先进技术时所面临的政治风险。与此同时，数据控制权和数字基础设施自主性也是海湾国家关注的重点。近年来，海湾各国相继出台数据保护和数据本地化政策，要求关键数据优先在本国境内存储和处理，以增强对国家数据资源和数字基础设施的自主掌控。而中国企业在开展数字合作过程中，普遍采用本地数据中心建设、云服务本地部署和联合运营等合作模式，强调本地能力建设，充分尊重东道主国数字主权。

最后，中国与海湾国家的人工智能合作注重“能力共建”，强调通过联合创新、知识共享和人才培养，协助合作伙伴建立自主、可持续的人工智能发展体系。海湾国家引进外部先进技术是希望借此完善本土科研体系，增强自主研发能力，实现从技术应用者向创新参与

者转变。国际合作伙伴能否为本土能力建设提供持续支持，成为海湾国家选择合作对象的重要考量条件。在此背景下，相较美国为维系自身技术垄断，加大对先进芯片、高性能计算设备和人工智能核心技术的出口管制，中国更加强调共同发展，通过技术交流、联合研发、人才培养和产业协同，帮助合作伙伴积累创新资源和发展能力，而非仅停留于产品输出与技术贸易层面。这种着眼于能力培育和长期发展的合作模式，使中海人工智能合作超越单纯的商业交易，成为双方共同推进人工智能能力提升的重要基础。

三、中海开展人工智能合作的实践路径

在共建“一带一路”、中国—海合会合作机制和中阿合作论坛等框架引领下，中海人工智能合作已逐渐突破传统技术贸易模式，由单一项目合作向战略协同、产业协同和创新协同深化，形成了政府引导、企业参与、科研支撑、资本赋能、多主体协同推进的合作格局。这种合作模式不仅促进了人工智能技术在能源、数字基础设施、智慧城市等领域的广泛应用，也推动双方合作由技术输出向能力共建不断拓展。

第一，中海人工智能合作的不断深化得益于双方政府层面的战略对接与合作机制的建立。人工智能涉及数字基础设施、数据治理和产业发展等多个领域，具有投资周期长、政策协调要求高、跨部门协作复杂等特点，单纯依赖市场力量难以推动合作不断深入。因此，政府间战略互信和制度安排成为双方开展人工智能合作的重要前提。从中

国的“数字丝绸之路”倡议与沙特“2030愿景”、阿联酋“We the UAE 2031”等国家发展战略的深度对接，到中国—海合会战略对话、中阿合作论坛以及中国—阿拉伯国家峰会等多边合作平台的持续推进，人工智能、数字经济、数据安全等议题已成为双方合作的新重点。2024年，在中阿合作论坛第十届部长级会议上，包括海湾国家在内的阿盟成员国表示欢迎中国提出的《全球人工智能治理倡议》，赞同其基本理念原则，双方愿加强政策协调，建立对话机制，深化务实合作，形成优势互补。2025年，东盟—中国—海合会峰会还将数字经济、绿色低碳等新兴议题写入联合成果文件。这一系列纲领性文件的提出，标志着中海间人工智能合作已上升至国家战略高度。持续深化顶层战略对接不仅为中海人工智能合作搭建了制度平台，更进一步推动双方合作向国家战略引领、多元主体参与、长期机制保障的发展格局迈进。

第二，主权财富基金与双向资本孵化机制为中海人工智能合作提供经济动力。海湾国家拥有全球规模最大的主权财富基金，沙特公共投资基金

(PIF)、阿布扎比投资局(ADIA)、穆巴达拉投资公司(Mubadala)等长期致力于布局全球前沿科技产业，近年来更将人工智能作为重点投资方向，不断加大对中国科技创新企业和人工智能产业的关注力度。尽管海湾地区局势持续紧张、全球股市普遍承压，中东主权财富基金投资中国人工智能企业仍实现了逆势增值。如阿布扎比投资局以约6500万美元领投中国AI公司MiniMax，自2026年1月在中国香港上

市以来，该笔投资市值已增长逾6倍。与此同时，中国科技企业也借助海湾资本支持，加快拓展中东市场。例如，中国人工智能初创企业智谱AI借助沙特阿美旗下Prosperity7基金的投资，推动中国大模型技术在沙特实现本地研发、本地部署和产业化应用；阿里云依托阿联酋、沙特等国对人工智能产业的投资，逐步形成了集云计算服务、AI开发平台、数据安全和产业数字化于一体的本地化运营模式。资本纽带与技术合作的深度结合，不仅为人工智能项目提供长期稳定的资金支持，也促进了技术成果在海湾地区的本地化应用，为中海人工智能合作持续深化提供物质支撑。

第三，数字基础设施建设成为中海人工智能合作的主要内容。海湾国家将本土数据中心、智能计算中心和云计算平台建设视为提升数字竞争力的重要抓手。在政府合作机制和市场需求的共同推动下，中国科技企业通过与当地电信运营商及数字技术企业开展合作，积极参与相关基础设施建设。例如，华为云、阿里云等企业相继在中东布局云服务节点和数据中心，为政府、能源、金融、制造等领域提供云计算和人工智能基础服务，并持续推进云平台本地部署、数据本地存储和算力中心建设。随着合作不断深化，中海双方逐步形成了以本地部署、联合运营和持续运维为基础的合作机制，共同构建覆盖算力供给、数据处理和人工智能开发的数字底座，推动双方合作由设备建设向数字基础设施体系共建升级。

第四，“AI+垂直行业”应用是中海人工智能合作由技术供给走向产业孵

化的关键路径。以能源行业为例，中国企业在智能油田、工业互联网和无人巡检等方面积累的经验，能够与沙特阿美、阿布扎比国家石油公司等能源企业的数字化转型需求形成对接，推动传统能源产业向智能化、低碳化和精细化管理转型。如华为与沙特阿美长期开展数字化合作，双方围绕5G、云计算、人工智能和工业互联网等技术推进油气行业数字化转型。除能源行业外，中海双方还在电信网络、智慧城市建设等方面取得了丰硕成果。在阿联酋，华为与本地运营商e&合作建设绿色节能网络，该项目将融合华为的节能技术创新和智能软件功能，帮助阿联酋实现网络脱碳。在沙特NEOM项目建设过程中，华为协助构建5G网络、骨干传输网络、数据中心、云和AI平台等数字基础设施，为智慧交通、智能能源管理和城市感知系统等提供技术支持。由此可见，中海人工智能合作的产业落地是结合海湾国家具体发展需求进行的适配与再创新。通过“AI+能源”、“AI+城市”、“AI+通信”等垂直场景应用，人工智能技术得以嵌入海湾国家经济转型的多个关键领域。

第五，中海人工智能合作还注重人才培养、科研合作以及创新生态培育。人工智能的竞争归根结底是创新能力和人才资源的竞争，仅依靠技术引进难以形成持续的自主创新能力。因此，能力共建成为中海人工智能合作不断深化的新方向。近年来，中国高校、科研机构 and 科技企业不断加强与海湾国家在人工智能领域的教育合作和联合创新。华为依托“Huawei ICT Academy（华为ICT学院）”项目，与沙特、阿联酋等

国多所高校合作开展人工智能、云计算、大数据等课程培训，并建立职业认证体系，为当地培养数字技术人才；商汤科技在阿布扎比设立区域研发中心，积极吸纳本地科研人员参与算法研发和行业应用创新；清华大学、中国科学院等高校和科研机构也不断加强与沙特阿卜杜拉国王科技大学（KAUST）、阿联酋穆罕默德·本·扎耶德人工智能大学

（MBZUAI）等高校的科研合作，通过联合实验室、学术交流、科研项目和创新平台建设，推动人工智能关键技术研发和科研成果转化。这种合作不仅促进了知识、人才和技术的双向流动，也不断提升海湾国家吸收、应用和再创新人工智能技术的能力。

四、中海开展人工智能合作面临的结构性挑战

当前，在经济转型和战略自主目标的驱动下，中海人工智能合作已取得瞩目成果。然而，人工智能作为当前全球科技竞争最为激烈的战略领域，其发展不仅受到技术创新和市场需求的影响，也深受国际环境与地区形势的制约。未来，中国与海湾国家在人工智能方面的合作仍面临诸多挑战。

第一，美国“技术选边站”的强权施压限制了中海人工智能合作的发展空间。尽管中国与海湾国家在人工智能领域具有较强的互补性，但双方合作仍受到中美科技竞争持续升级的影响。近年来，美国将中东视作阻止中国技术扩散的前沿阵地，试图利用其在半导体、高级芯片和算法等领域的领先优势，主导海湾阿拉伯国家的对外科技合作方向，

逼迫其选边站队。阿联酋AI巨头G42集团的转型就是一个典型案例。G42早期深度依赖中国技术体系，但在美国政府的施压下，最终被迫承诺在其系统中拆除并停止使用中国华为公司提供的硬件，以此换取微软15亿美元的注资以及OpenAI的合作。类似地，沙特HUMAIN也表示，若美国施压，其可能调整对华投资安排，以获得美国技术和投资支持。此外，美国还通过长臂管辖限制中国企业对外合作。美国商务部甚至警告称，在世界任何地方使用华为人工智能芯片的企业，都可能因违反美国出口管制而面临刑事处罚。美国通过控制芯片出口和云计算基础设施，将技术合作视为联盟化工具，压缩海湾国家开展多元科技合作的战略空间。这不仅增加了中国企业进入海湾人工智能市场的制度成本和合规风险，也使海湾国家在追求战略自主和获取美国先进技术之间面临更复杂的平衡难题。长期来看，若中美科技竞争继续升级，中海人工智能合作将在数据治理、供应链安全和企业合规等方面承受更大外部压力。

第二，中东地区持续的地缘政治冲突为中海人工智能合作带来挑战。巴以冲突外溢、伊朗与以色列之间冲突升级，进一步加剧中东地区安全形势的不确定性。频繁发生的地区冲突不仅增加了海湾国家的安全风险，也使其经济发展和科技合作面临更多不稳定因素。在安全压力上升背景下，各国政府往往将更多财政资源投入国防建设、边境安全和关键基础设施防护，相应压缩人工智能研发和国际科技合作等领域的资源配置，影响人工智能合作项目的推进。能源、电信、数据中心等关键基础设施在

冲突环境下也更容易成为网络攻击或军事打击的潜在目标。与此同时，地区紧张局势也容易削弱国际资本对中东科技产业发展的信心，影响海湾国家建设区域人工智能中心和吸引全球创新资源的能力。对于中国而言，这意味着未来与海湾国家开展人工智能合作不仅需要应对商业和技术层面的挑战，还需要充分考虑地区安全风险，加强项目风险评估、安全保障机制和应急管理体系建设，以提升合作的稳定性和可持续性。

第三，海湾国家人工智能产业基础稍显薄弱，限制了对华人工智能合作的深入发展。一方面，海湾国家在人工智能领域的发展更多依赖政府主导投资和国际技术合作，本土企业在高端算法研发、基础模型训练、芯片设计等环节的自主创新能力有限。以阿联酋为例，虽然成立了G42、MGX等人工智能企业，并建设了多个大型数据中心，但其核心算力平台、云计算架构以及人工智能模型训练仍较大程度依赖国际科技企业。沙特近年来积极打造利雅得人工智能创新中心，并投资建设大型数据中心，但人工智能产业主要集中于智慧城市、智慧能源等应用层面，基础软件、核心算法和底层技术研发能力相对不足。这不利于构建长期、可持续的人工智能合作生态。另一方面，人才资源不足也制约了海湾国家人工智能产业的发展。由于海湾国家本国高端科技人才储备有限，科研机构 and 高校培养体系起步较晚，人工智能领域的人才供给难以满足快速发展的产业需求。目前，阿联酋、沙特等国虽然通过设立穆罕默德·本·扎耶德人工智能大学（MBZUAI）、建设国家人工智能研究中心等方式，加快集聚国际

科研人员和工程师，但受本土人才培养周期较长、高层次研发人员流动性大等因素影响，其人工智能产业仍高度依赖海外专家、跨国企业及国际科研团队，制约了自主创新能力的提升。相应地，中国企业在海湾国家开展人工智能合作时，也普遍面临本地技术人才不足、项目运维依赖中方团队等现实问题。这不仅增加了企业的运营成本，也影响人工智能项目后续维护、技术迭代和成果推广，不利于合作项目实现本土化和可持续发展。

第四，海湾国家在人工智能国际合作方面的制度保障存在不足。首先，海湾国家围绕数据安全、个人隐私保护、人工智能伦理以及算法监管等领域的法律法规正处于完善阶段，尚未形成协调统一的人工智能治理框架，不同部门之间的监管职责存在交叉和协调不足等问题。其次，海湾国家虽然普遍重视人工智能发展，并通过设立专门机构、发布战略规划等方式推动产业布局，但在政策执行层面采取了一种“软监管”模式，跨部门统筹协调、监管落实和配套机制建设相对滞后，这在一定程度上影响了政策实施效率以及合作项目的落地速度。此外，部分国家在知识产权司法保障、商业秘密保护以及技术成果转化等方面存在薄弱环节，增加了企业在开展联合研发和技术输出过程中，对技术外溢、知识产权纠纷等风险的担忧。同时，海湾国家尚未建立统一的数据保护和审查制度。中国企业在开展人工智能合作时，往往需要分别满足不同国家的合规要求，增加了项目实施和运营

管理成本，不利于双方合作进一步深化。

结语

中国与海湾国家开展人工智能合作具有坚实的战略基础和广阔的发展前景。双方在资源禀赋、发展需求与技术能力方面具有较强互补性。一方面，海湾国家正加快推进经济转型、“主权人工智能”战略和数字基础设施建设，由此形成了对人工智能技术、产品及解决方案的广泛需求，为中国企业进入当地市场提供了空间；另一方面，中国在人工智能技术研发、产业化应用和数字经济建设方面积累了丰富的丰富经验，能够为海湾国家发展本土人工智能产业、推进经济多元化和数字化转型提供技术支持与实践借鉴。近年来，在高层战略引领和“一带一路”倡议框架下，中海人工智能合作不断向智慧城市、智慧能源、智能制造、数字政府等领域拓展，合作层次持续深化。然而，双方合作仍面临诸多现实挑战，既受到美国技术遏制、地区安全局势动荡等外部因素影响，也受到海湾国家人工智能产业基础、制度建设和治理能力等内部因素制约。未来，中国与海湾国家应坚持互利共赢原则，在加强政策沟通与战略对接的基础上，持续深化技术创新合作，完善数字治理协调机制，不断提升合作制度化、规范化和可持续发展水平，携手构建面向未来的人工智能合作伙伴关系，为完善全球数字经济治理贡献中海合作智慧。

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