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IMPROVING QUALIFYING INDUSTRIAL ZONES:

Successes, Failures, & Emerging Opportunities

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Abstract

This report examines the historical context, successes, and challenges of the current Qualifying Industrial Zones (QIZ) framework. QIZs are part of a trilateral trade initiative involving the United States, Israel, Egypt, and the Hashemite Jordan. Developed initially to foster Arab-Israeli normalization and regional economic cooperation under the 1994 Oslo Accords, QIZs have generated measurable benefits such as increased exports and employment, particularly in the textile and garment industries. However, critical shortcomings persist, including exploitative labor conditions, limited technological advancement, and minimal regional political normalization impact. With the evolving geopolitical climate, especially the Israel-Hamas conflict, this memo evaluates the relevance of QIZs in today's Middle East. Drawing on expert interviews, economic data, and comparative analysis with China's SEZ model, the memo proposes modernizing QIZs by integrating high-tech industries, expanding to include Palestinian labor zones, and leveraging Gulf investments. This memo recommends seeking assistance from American and Gulf companies to establish job training, working with regional governments to expand the QIZ structure abroad, and improving labor conditions in existing QIZs and other regional industrial zones.

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Terms List

Abbreviations and Acronyms Used

AKP - Turkish Justice and Development Party
EMDEs - Emerging Markets and Developing Economies
FDI - Foreign Direct Investment
FTA - Free Trade Agreement
GCC - Gulf Cooperation Council
I2U2 - India, Israel, United Arab Emirates, United States
IEFZs - Industrial Estates and Free Zones
IMEC - India Middle East Europe Economic Corridor
ISIS - Islamic State of Iraq and Syria
JUSFTA - Jordan - U.S. Free Trade Agreement
MENA - the Middle East and North Africa
MOU - Memorandum of Understanding
NATO - North Atlantic Treaty Organization
PKK - Kurdistan Workers' Party
QIZs - Qualifying Industrial Zones (Egypt, Jordan)
R&D - Research and Development
SEZs - Special Economic Zones
TVET - Technical and Vocational Education and Training
UAE - United Arab Emirates
U.S. - the United States of America
USG - United States Government

Executive Summary

QIZs were established in the 1990s to promote economic cooperation and normalization between Israel and neighboring Arab states, initially Jordan and later Egypt, by allowing products co-produced with Israeli inputs to enter the U.S. duty-free. These zones contributed significantly to export growth and job creation but have faced criticism over exploitative labor practices, failure to support domestic industries, and limited success in fostering political normalization. QIZs face several challenges: labor exploitation, limited political impact, uneven economic benefits, and geopolitical setbacks. Reports of poor working conditions and reliance on migrant labor have surfaced, especially in Jordan. Experts suggest QIZs have had marginal success in advancing peace between Israel and Arab states. Gains from QIZs have primarily benefited foreign investors and select urban areas, leaving rural and southern regions behind. The ongoing Gaza conflict has diminished regional cooperation and normalization prospects, stalling QIZ modernization. China's SEZ model demonstrates how strategic policy, vocational training, and high-tech investment can evolve industrial zones into innovation hubs. These lessons inform recommendations for revamping QIZs to serve host nations better and support U.S. foreign policy.

Recommendations

- **Modernization**: Transition QIZs to high-tech sectors (ex. semiconductors) with substantial U.S. and Gulf investment, modeled on China's SEZ evolution.

- **Labor Reforms**: enforce labor protections and prioritize hiring local workers through TVET programs.

- **Political Integration**: Reframe QIZs within broader normalization frameworks like IMEC, I2U2, and the Abraham Accords, incorporating Palestinian labor zones to balance equity and political goals.

- **Trade Adaption**: Adjust QIZ terms to accommodate new U.S. tariff policies, including increased American input requirements and preferential tax rates.

- **Gulf Involvement**: Leverage Gulf sovereign funds and multinational firms to reinvest in QIZ infrastructure and workforce development.

QIZs remain a promising yet underutilized tool for fostering economic cooperation and regional peace. With targeted reforms and strategic partnerships, the U.S. can revitalize QIZs to align with 21st century trade, labor, and diplomatic priorities.

Background: QIZs

The QIZ framework seeks to normalize relations between the state of Israel and the Hashemite Kingdom of Jordan, the Arab Republic of Egypt, and the Palestinian Authority while also bringing economic returns to all parties involved through fostering economic development and employment.(1) It does so by promoting industries and companies in these countries to cooperate in making products, which in turn can be exported to the United States duty-free as long as these products include a certain percentage of inputs from both Israel and at least one of the Arab states. (2) Governments or authorities usually locate such industries in industrial parks that they designate as QIZs. When the first agreement, including QIZ provisions, was developed in the early to mid-1990s, Jordan was the only Arab country involved in the scheme. This was because of the efforts of Jordanian businessman Omar Salah, who pioneered the idea first in Jordan and later in the United States. (3) The Israel-Jordanian Peace Agreement, signed in 1994, paved the way for economic cooperation between Jordan and Israel, with supporters arguing that such collaboration would not only bring economic benefits to both countries but also assist in the normalization process. (4)

In 1996, the *West Bank and Gaza Strip Free Trade Benefits Act* amended the preexisting *U.S.-Israel Free Trade Area Implementation Act* to include areas of Jordan designated as qualifying industrial zones, allowing products from these zones to enter the U.S. duty-free. (5) The first area designated as a QIZ was the Al-Hassan Industrial Estate in the Irbid Governorate, which has since become the largest QIZ in Jordan and created over 36 thousand jobs. (6) Egypt would sign the agreement later on December 14th, 2004, partially due to perceived positive results in Jordan and to protect its textile industry, which was facing greater competition with the World Trade Organization’s initiative to phase out textile quotas. (7)

For products to be eligible for duty-free status within QIZs, a product must meet three requirements. First, the product must be produced in and imported from the West Bank/Gaza Strip (administered by the Palestinian Authority) or a QIZ (in Egypt or Jordan). Second, the product's "material and processing costs must total not less than 35% of the appraised value of the product." Of this 35%, "U.S. components may contribute up to approximately 15% (although the U.S. may choose to add no components), and inputs from Israel and Jordan, or Israel and Egypt, must total roughly 20%." The remaining 65% can come from anywhere else in the world. (8)

In other words, the products produced by QIZs must contain a certain amount of inputs from Israel and Egypt, Jordan, or the Palestinian Authority. It is worth noting that there are some differences between the Egyptian and Jordanian QIZ agreements. For the Jordanian products, of the 35% quota, 11.7% must come from Jordan, 8% (7% for high-tech goods) must come from Israel, and the remaining 15.3% "any combination of input from a Jordanian QIZ, Israel, the United States, and the West Bank and Gaza Strip." (9) In the Egyptian QIZ agreement, of the 35%, 11.7% must come from Egypt, 10.5% must come from Israel, and the remaining 12.8% may come from "an Egyptian QIZ, Israel, or the United States." (10)

QIZs operate similarly to free trade zones worldwide but have several key differences. Authorities give specific industrial parks QIZ designations and classify these zones outside the country's customs territory. As such, products made within these QIZs are not subject to tariffs and go through streamlined customs procedures until the product enters the country where it will be consumed, similar to free trade zones. (11) However, QIZs differ from free trade zones in three significant ways. Firstly, manufacturers will process a single product through two QIZs in two countries (an Arab state/territory and Israel) before exporting it.

Secondly, exporters will send all QIZ products to the U.S. for consumption. And thirdly, a single qualifying industrial zone is under the authority of both the host country and, notably, the United States. (12) According to the International Trade Administration, nineteen QIZs are in Jordan, and six QIZs are in Egypt. (13)

Successes and Failures of QIZs

Perhaps one of the most important accomplishments of QIZs was the improvements to countries' economies. By loosening the restrictions on goods entering the United States, products coming from these zones in Egypt, Jordan, Israel, and the Palestinian Territories gain preferential access to the largest consumer market in the world. As such, economic growth has notably increased in countries that have adopted QIZs. (14) Notably, they also increased the total number of exports from Jordan, from $5 million worth of goods exported in 1997 to $164 million in 2001. (15) In addition, QIZs have employed many individuals. According to Oren Kessler, QIZs in Egypt had reportedly employed three hundred thousand people and encompassed around 700 different companies. (16) Jordan also had similar results, employing over two hundred thousand people in 2010. (17) Women's participation in the QIZ workforce was also very high, with the number of women workers in QIZs surpassing the number of men working in QIZs in Jordan. (18)

However, there are several key failures within the QIZ framework. Although one of the main objectives is incentivizing normalization between Israel and its neighbors, its effectiveness is negligible at best. While fostering economic cooperation between these countries, multiple sources have stated that the QIZ program has done little to promote long-term stability and peacebuilding with Israel.

A joint Royal Scientific Society and Friedrich-Ebert-Stiftung report stated that although economic growth would tend to reduce the potential for conflict, the QIZ program has done little to promote peace with Israel. (19) In an interview, Wilson Center labor expert Alexander Farley said that the successes of QIZs were not impressive. (20) In addition, although economic growth was a benefit of QIZs, foreign companies in Egypt benefited the most, rather than Egypt's domestic companies. (21) The same can be said of Jordan. (22) In addition, although youth unemployment is a significant issue in Jordan, the QIZs there hired primarily foreign workers rather than Jordanian-born citizens. (23) A final but still very significant issue regards the safety conditions in QIZs. Numerous sources have described QIZs as having sweatshop-like conditions, including low wages, (24) and the abuse of women. (25)

Successes and Challenges in Egypt

In 2004, Egypt became the second country in the Middle East and North Africa region to join the QIZ initiative. (26) This trilateral trade agreement involved the United States, Israel, and certain Middle Eastern countries. The QIZ agreement allowed Egyptian manufacturers duty-free access to the U.S. market, stipulating that their products contained approximately 10.5 percent of Israeli input, intending to promote regional cooperation and stability with economic incentives. (27) Egypt's decision to participate came at a pivotal time, as its government pursued liberalization reforms and sought to expand its non-oil exports. (28) While the QIZ initiative in Egypt has significantly enhanced export performance and the creation of formal employment within the nation, ongoing challenges related to labor conditions, regional inequality, and political sensitivity must be considered.

Economic Impact of QIZs in Egypt

Since signing onto the QIZ initiative, Egypt has experienced a significant expansion in its manufacturing exports, especially in the textiles and garments sectors. (29) By allowing Egyptian products that include Israeli components to enter the U.S. market duty-free, QIZs provided local manufacturers a competitive edge in global trade. As a result, exports from Egypt's QIZs reached over $1 billion in 2019, with more than 90 percent coming from garments alone. The U.S. then became one of Egypt's top trading partners for non-oil exports, while QIZ factories contributed significantly to overall export diversification during a time when Egypt was trying to reduce its dependence on oil and remittances. (30)

The QIZ framework also attracted FDI, particularly from investors looking to take advantage of Egypt's large labor force and preferential trade terms. (31) Multinational apparel brands such as Levi's, GAP, and Calvin Klein began sourcing from Egyptian QIZs, often working through subcontracted factories in designated zones in Cairo, Alexandria, Port Said, and the Suez Canal area. (32) These investments supported industrial growth and helped integrate Egypt more deeply into global supply chains, particularly in fast fashion. However, this growth largely depended on low-skilled labor, including clothing assembly, with limited opportunities for technology transfer, innovation, or vertical integration. As a result, Egypt remained dependent on a narrow segment of the export economy, which exposed it to global market fluctuations and shifting demand from U.S. retailers.

Additionally, the unevenly distributed economic benefits of QIZs impacted the country, with industrial centers flourishing in the north. At the same time, the program largely excluded its gains from regions in Upper Egypt and the rural south. (33)

This geographic imbalance highlighted broader patterns of regional inequality in Egypt's economic development and highlighted a missed opportunity to use QIZs as a tool for more inclusive growth. Despite these challenges, QIZs have been vital to Egypt's trade policy as the government strives for higher export revenue, reduced unemployment, and increased investment.

Egypt's participation in QIZs has been economically beneficial, with complex social and political implications. This program serves U.S. foreign policy goals and functions to normalize economic and political relations between Israel and other countries in the Middle East and boosts Egypt's development, providing economic profits and formal employment for Egyptians in the labor force. Overall, the future of QIZs in Egypt relies heavily on regional politics, U.S. trade policy, and economic diversification.

Successes and Failures in Jordan and Palestine

Jordan's economy has faced financial and economic hardships in the last few years. A World Bank Group report published in the summer of 2024 projects that Jordan's economic growth will slow, and while unemployment has decreased in 2024, the report recorded over one-fifth of the workforce as unemployed. (34) QIZs represent the opportunity to improve the economy and employ Jordanians who do not already have employment. Upon the establishment of QIZs, the justification for their continuation was the positive influence the project had on Jordan's economy, both in its exports and its unemployment figures. (35) The QIZ project has led to the JUSFTA and has contributed to some degree of cooperation with Israel by requiring Israeli input into final products. (36) Some interviewed went as far as to say that the QIZ scheme led to a "limited impact" on the ties between Jordan, Egypt, and Israel, with the sole incentive to bring business to Jordan rather than Israel being its aforementioned cheaper labor. (37)

The fundamental issues in Jordan are the A) lack of resources within the country and B) the imported business. Without the QIZ scheme, businesses that arrived in Jordan since the 1994 agreement likely would not have come. This was not due to the sudden ease of founding a company or benefiting from a preexisting labor market focused on apparel but because new locations and opportunities offered limited tariffs and competitive labor prices, where businesses could relocate in the long or short term. To some extent, the apparel industry in the Jordanian industrial zones seems both artificial and unhelpful to the people struggling to find employment in Jordan.

Economic Ties and Humanitarian Concerns

According to Amidror et al., Israel prioritizes a strong relationship with Jordan, largely due to Jordan's administration of significant Islamic religious sites in Jerusalem. (38) While QIZs were initially viewed as tools for fostering ties, their relevance has diminished, particularly with the growth of the U.S.-Jordan FTAs. The report suggests that cooperation on security, refugees, and immigration now forms the foundation of bilateral relations. (39) Similarly, former Israeli Foreign Ministry official Professor Dan Arbell noted that current regional instability, especially the Israel-Hamas conflict, hinders further normalization between Israel and Arab states. (40) However, he suggested QIZs may still serve as peacebuilding tools, referencing recent regional integration efforts like the Abraham Accords and IMEC, although political progress is needed before economic ties can deepen.

The economic benefits of QIZs in Jordan are disputed, primarily due to labor concerns. Only approximately one percent of QIZ workers are Jordanian, as there are limited local skills in apparel manufacturing within Jordan. Kandeel argues that firms were attracted by cheap labor, not local talent. (41)

While QIZs have contributed to export growth and increased female employment, their impact is constrained by Jordan's lack of natural resources and an established apparel industry. In addition to economic benefit-related disputes, concerns persist over the treatment of migrant workers, primarily from Southeast Asia. Reports, including from Jadaliyya, have documented labor abuses, including poor wages and sexual harassment. (42) Additionally, many companies within QIZs are foreign in origin, and consequently more focused on quota avoidance rather than long-term local engagement. (43) Dr. Howard Schatz suggests shifting toward industries better aligned with Jordan's strengths, such as semiconductors, to capitalize on its educated workforce and export capacity. (44) Though politically symbolic, QIZs may have undermined Jordan's human rights reputation in terms of labor.

Palestinian Labor Issues

The Palestinian Territories maintain a network of IEFZs, similar to the QIZs established under the Oslo Accords. Developed in the 1990s with international support, including funding from France and Japan, these zones aim to concentrate industrial development. (45) However, political and economic restrictions imposed by Israel have severely limited their effectiveness. A UN report highlights that these zones often function more as extensions of the Israeli economy, exploiting Palestinian labor and, in some cases, aligning with illegal settlement structures. (46) Critics argue that they promote dependency and undermine Palestine's economic advantages. (47) Despite these concerns, some see potential for these zones to contribute to more equitable economic models and improved labor rights if the framework is reformed. (48)

[39] See Annex B.

The ongoing war in Gaza may be the most significant obstacle to advancing or reforming QIZs. Interviews with experts in regional politics and economics indicate that normalization efforts between Israel and Arab states are unlikely to progress during the conflict. These experts also question the utility of QIZs as a primary mechanism for normalization, suggesting that while they may play a supportive role, political resolution must come first. In this view, QIZs should be seen as peripheral tools that may support, but not drive, normalization. If improved, they could play a role in easing regional tensions by enhancing the quality of life for Palestinians and addressing broader regional concerns.

International Expansion Opportunities

The Kingdom of Morocco presents an interesting opportunity for the QIZ initiative, as it is both a U.S. major non-NATO regional ally and is seeking a renewed partnership with Israel. Similarly to Egypt and Jordan, its population that has difficult relations with Israel. However, while trade could be a valuable asset in improving relations between the two nations, QIZs can be an ineffective tool because of the free trade agreement that exists between Morocco and the US. (49)

Turkey has a robust relationship with Israel since its creation, however a decline in cooperation has been observed in recent years. Since October 7, 2023, defense and trade cooperation have plummeted to a point where Turkey is openly supporting parties directly hostile to the Israeli government. While the Israeli occupation of Gaza and the West Bank is a primary issue for the Turkish government, the two countries experience friction on a host of recent issues, notably Israeli support for the PKK.

[48] See Annex C.
[49] See Annex E.

An economic arrangement that encourages the two countries to communicate on political and social issues could have a ripple effect in the region. (50)

Gulf states including Bahrain, Saudi Arabia, the UAE, and Qatar show potential for the QIZ initiative through the GCC and their politically-minded foreign direct investment. Fully and partially state-owned investment funds from the region are seeking to diversify gulf economies and support Gaza and the West Bank in the aftermath of the war, and there is no doubt that leveraging this interest could prove to be valuable for the QIZ initiative. Previous examples of this working include joint-stock companies and projects that paired Gulf investors with unemployed high skill workers, such as the Qatar-owned company Masdar's investment into renewable energy in Jordan. (51)

Further Opportunities for Regional Interconnectivity and QIZs

Middle Eastern economies face several difficulties in reaching their full GDP, employment, and output potential. In October 2024, World Bank Group reported in their annual MENA Economic Update Report that MENA economies had expanded a quarter of the rate of other EMDEs, the current Gaza conflict adding to a history of conflicts impeding economic growth. (52) Across the Middle East, traditionally prosperous sectors including tourism have suffered from the escalating conflict in the Gaza Strip as far afield as Egypt and Jordan, along with the World Bank report citing a 62 percent decrease in Suez Canal revenue in Q1 and Q2 of 2024. Rising shipping costs from the conflict have contributed to uncertainty in the oil market, in which much of MENA participates. (53)

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[50] See Annex F.
[51] See Annex G.

Despite this, the World Bank cited international trade as a path towards economic improvement, as well as a potential source of innovation in the business and technology sector. (54)

International Trade Engagement

Engaging ongoing interregional trade projects may be a viable route to finding a productive solution to the question of improving QIZs. During interviews with experts on the subject, some projects improving the outcome of Arab-Israeli engagement, namely the IMEC, I2U2, and Project Prosperity, came up frequently. These projects aim to increase economic cooperation between countries in the Middle East, namely between Arab nations and Israel. IMEC is an initiative announced by the Biden Administration in 2023 aimed at connecting India to Europe through a series of railway, maritime, and overland transportation projects. (55) It aims to improve infrastructure and connect countries within the Middle East, particularly Saudi Arabia, Jordan, and Israel. (56) IMEC could be a continuing opportunity to improve trade relations and regional infrastructure. QIZs could benefit from taking advantage of their new centrality in the trade between India and Europe, two significant economic hubs.

Another project focused on increasing economic and trade interdependence is I2U2, composed of India, Israel, the U.S., and the UAE. (57) I2U2 integrates both the private and public sectors, with a particular focus on food security, renewable energy, and attracting private companies to countries in the Middle East and India. (58) I2U2 is a framework that may boost overall business ventures in the region and could potentially lead to further investment in industrial zones across the Middle East.

Increased attention and new connections between government leaders and industry professionals may also contribute to the willingness of companies to work with USG or other stakeholders to train employees and improve the industry in QIZs in both Jordan and Egypt. This new structure could be a boon for solving some of the problems today in interconnectivity.

Finally, one project initiated in the last few years is the Project Prosperity joint initiative between the UAE, Jordan, and Israel. (59) The MOU launching the initiative aims to boost the amount of solar power generated by Jordan for export to Israel and desalinate water in Israel for export to Jordan. (60) The project was announced in November 2022 at COP 27 and intends to increase the renewable energy and water sources in the region while promoting stable political and economic relationships across the three countries. (61) This project gives Jordan the cover of working with both the UAE and Israel, not just Israel, to both appease its people, who are by and large against working with Israel and maintain this vital trade. (62) This could be a potential solution to some of the consistent opposition to working with Israel in recent years – working with a mediating Arab country, such as the UAE, Saudi Arabia, Qatar, or Bahrain, could reduce opposition to the project and boost Israel's ties with that Gulf country as well. Despite the hopes of these projects to improve the economic and political conditions of the regions, these projects have been affected by the onset of the 2023 Israel-Hamas War in the Gaza Strip, as well as the continuing opposition in Arab countries towards working with Israel. Recent political developments, such as the Abraham Accords, brought Middle Eastern countries closer to one another through boosted economic cooperation; however, Arbell, in our interview, said that the political situation in Gaza cannot be disentangled from the economy, and the time is simply not right to pursue economic solutions to a political problem. (63)

While Jordan and Israel have a close working relationship within the bounds of these agreements, the Gaza War presents a challenge to the King of Jordan Abdallah II in pursuing continuing relations with Israel. (64) In the abstract, promoters could advertise QIZs as areas where industry and a workforce are already established, creating an attractive investment opportunity for tech companies that wish to position themselves, for example, in the middle of the new IMEC corridor and the increased flow of goods from India and Europe. Overall, while opportunities and pre-existing projects are bountiful, tying QIZs into some agreements between Arab states and Israel and benefiting from the increased investment these projects could bring may be challenging. Politically, it may be unattractive for leaders in Jordan or Egypt, or indeed the Gulf, to engage with Israel, given the plight of the Palestinians today.

Case Study: The Evolution of Chinese SEZs

SEZs are widely regarded as a successful model for expanding industrial zones' utility politically and economically. Established in the late 1970s under Deng Xiaoping's reforms, SEZs aimed to attract foreign capital, technology, and managerial expertise, as China's economy transitioned from centrally planned to more market-oriented. (65) The first SEZs— in Shenzhen, Zhuhai, Shantou, and Xiamen— offered tax incentives, relaxed regulations, and access to global markets, especially from Hong Kong and Taiwan. (66, 67)

Initially focused on labor-intensive manufacturing, these zones became hubs for exporting consumer goods such as electronics, textiles, and toys. (68) Over time, driven by FDI, government support, and a growing domestic market, SEZs evolved into centers of high-tech innovation. (69) Major multinational corporations established R&D facilities, while Chinese firms like Huawei and ZTE emerged as global players. (70)

The Chinese government invested heavily in education and vocational training to support this shift, aligning with broader industrial strategies such as the Made in China 2025 initiative, which targeted advanced sectors like robotics, aerospace, and biotechnology. This transformation was enabled by coordinated policies fostering innovation, technology transfer, and human capital development. (71)

China's SEZ framework, characterized by strategic planning, strong investment in infrastructure and education, and gradual technological upgrading, offers valuable lessons for QIZs in the Middle East. With favorable conditions and targeted investment, QIZs could replicate aspects of China's success, especially in transitioning toward knowledge-based industries.

Conclusion

It is clear from this exploration of QIZs that there are some fundamental flaws in the design of the QIZ framework, though there is great opportunity as well. Several courses of action can be taken to improve outcomes in U.S. foreign policy objectives and improve the peace process at a pivotal point in Middle Eastern history. This may mean looking to private sector Gulf companies or governments to invest in QIZs or considering which countries may be fertile ground for a new agreement with Israel. Above all, solutions that will best work for QIZs' host country while propelling forward political normalization, interpersonal contact, and the expansion of Middle Eastern economies into new sectors were considered. Based on evaluations of the potential courses for action, the following section summarizes the recommendations given in this memo. The first collection of policies assumes the absence of tariffs, while the last collection of policies recommends specific policies reacting to the new landscape in American trade policy.

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[67] See Annex D.

Recommendations

Modernizing QIZs

- USG should work with Jordan and Egypt to bring high-tech industries, such as semiconductor manufacturing or other technological manufacturing, to QIZs. These industries require low—and high-skilled labor.
- USG should leverage FDI to modernize QIZ industries, drawing on China's technology transfer strategy while encouraging high-tech global companies to invest in Jordan and Egypt with incentives like tax breaks and SEZ status.
- USG and other government actors should partner with countries like the UAE, Saudi Arabia, or Qatar to build high-tech zones, focus on technology transfer, and provide workforce training while improving the investment climate in Jordan and Egypt by offering low labor costs, market access, and regulatory stability.
- Governments and companies should jointly invest in TVET programs that cater to the emerging needs of local industries, improving labor quality and overall productivity.
- USG should work with the governments of Jordan and Egypt to create incentives that attract foreign companies, specifically within QIZs, by offering preferential access to markets such as the U.S. and Europe in exchange for investments. This should ensure Palestinian West Bank and Gaza workers are included in QIZ opportunities to support economic development in the Palestinian Territories.

- USG should work with the governments of Jordan and Egypt to leverage labor rights to help ensure that a significant portion of the workforce consists of indigenous workers rather than relying too heavily on imported labor.
- The governments of Jordan and Egypt should prioritize the inclusion of indigenous workers in these zones while ensuring fair working conditions, pay, and opportunities for skill development.
- USG and other regional actors should revise future Abraham Accords discussions to involve an economic component. This may mean integrating an economic component into the Abraham Accords by using QIZs to strengthen economic ties between Israel and its Arab neighbors, including Jordan and Egypt.

Improvement of Regional Ties with Jordan, Palestine, and Israel

- USG and the State Department should work towards schemes for Israeli companies to invest in QIZs in Jordan and Egypt, focusing on technological advancement and sustainable development.
- Future agreements should build Palestinian IEFZs into the Qualifying Industrial Zone framework, drawing on the Oslo Accords' inclusion of the Palestinian Territories in the foundational texts of QIZs. This may result in closer American ties to the Palestinian Territories and opportunities for political peacebuilding in Israel and the Palestinian Territories.
- USG should create policies that incentivize companies in QIZs to hire more Jordanian workers in managerial and skilled roles to reduce dependency on foreign labor. Develop programs that enhance the skills of Jordanian workers, focusing on sectors that are growing within the QIZs, and ensure that employers prioritize these workers.

- USG should engage with companies, countries, and other shareholders who can help Palestinians rebuild their homes and businesses. QIZs may lead to investment and economic revitalization in the West Bank and Gaza Strip.
- USG should fund IEFZs federally and work with private American companies on investment in the Palestinian Territories, focusing on Palestinian economic growth while protecting Palestinian rights and dignity.
- USG and partner governments should introduce frameworks within the QIZ agreements, including mechanisms for Palestinian workers to legitimately enter the labor force in Palestine, Jordan, and Israel, causing better treatment through competition amongst employers.

Expansion of QIZs

- USG and partner governments should discuss using QIZ expansion to foster cooperation and reduce geopolitical tensions between regional partners, including Israel. They should also promote dialogue on expanding regional trade, focusing on mutual economic benefits beyond political differences. Countries in the Gulf, Syria, and Lebanon may contribute to restoring stability and cooperation following political resolutions.
- USG should promote the expansion of QIZs as a tool to increase cooperation between neighboring countries, reduce geopolitical tensions, and enhance economic collaboration.
- USG should work with stakeholders to eliminate trade barriers between Arab countries and Israel to boost economic integration. It should also work towards a free trade zone with countries like Saudi Arabia, Jordan, and Israel, streamlining trade and harmonizing labor standards.

Regional trade barriers significantly hinder economic integration and growth within the Middle East.

Emerging Opportunities From April 2025 Tariffs

- USG should work with Gulf countries to revitalize the Abraham Accords' economic objectives, building Gulf companies' participation in QIZs and expanding to higher-skilled labor like tech or textile manufacturing.
- USG should work with QIZ stakeholders to increase interregional trade in addition to trade with the United States, boosting peacebuilding efforts.
- USG should work with Gulf companies on training programs to become competitive in the face of apparel tariffs and export strategically significant goods such as computer components.
- USG and stakeholders should renegotiate QIZ terms to require a certain percentage of American and Israeli materials in product manufacturing within QIZ zones. This may make QIZs more beneficial to U.S. markets and regional peace building.
- USG should allow QIZ goods to claim preferential status on imports and tax them lower than the 10 percent worldwide tariff.

Annex A: Sociopolitical Complications in Egypt

While QIZs provide export-based economic benefits for Egypt, the primary goal of this initiative was to normalize the relationship between Egypt and Israel economically, as well as politically and diplomatically. While the 1979 Egypt-Israel Peace Treaty provided a foundation for diplomatic relations, economic programs such as QIZs have pushed the two nations further toward normalization. (72)

However, the QIZ initiative has faced opposition from various parts of Egyptian society. Professional unions have been at the forefront of resisting normalization efforts with Israel. (73) Since the mid-1980s, these unions have consistently opposed normalization-aimed initiatives, showing such engagements' broader political and social implications. This resistance is rooted in historical conflicts, as well as the widespread perception that normalization efforts may undermine the Palestinian cause. (74) Consequently, significant portions of Egyptian organized labor maintain skepticism or opposition to the government's pursuit of economic collaborations. (75)

In addition to normalization-related concerns, labor conditions within Egypt's QIZ factories have been disputed, particularly regarding the treatment of women and migrant workers. (76) Female workers reportedly encountered challenges such as limited legal protections, exposure to exploitative practices, and inadequate working conditions. Additionally, some reports indicate that these workers face long hours, insufficient rest periods, and low wages, with minimal options for assistance, due to gaps in labor laws and enforcement mechanisms. (77) Also, while Egypt's QIZs employ a significant amount of local labor, neighboring countries have relied heavily on migrant labor. (78) This illustrates the possible vulnerability of QIZs while also emphasizing the successful creation of formal employment that benefits Egyptian labor.

Egypt's participation in QIZs has been economically beneficial, with complex social and political implications. This program serves U.S. foreign policy goals and functions to normalize economic and political relations between Israel and other countries in the Middle East and boosts Egypt's development, providing economic profits and formal employment for Egyptians in the labor force. Overall, the future of QIZs in Egypt relies heavily on regional politics, U.S. trade policy, and economic diversification.

Annex B: Economic Ties and Humanitarian Concerns

On Jordan and Israel, Amidror et al. wrote that Israel's interests lie in maintaining a positive relationship with Jordan, primarily because of the existence of the Jordanian-administered Islamic Waqf at some of the most important religious sites in Jerusalem. The report written by Amidror et al. concludes that because of the development of free trade agreements between the U.S. and Jordan, the continuation of QIZs may not directly contribute to the building of relations but rather the foundation of support through collaboration on security, refugee, and immigration issues. (79)

Similarly, in an interview with Professor Dan Arbell, a former Israeli Foreign Ministry official, current political developments in the region may not be conducive to developing stronger ties between Israel and other Arab states given the Israel-Hamas war; however, he said that QIZs could be an important peacebuilding tool down the road, as they were in 1994. (80) He pointed to the regional interconnectivity boosted in recent years by initiatives like the Abraham Accords and IMEC due to the push for reconciliation between Arab States in the Gulf, Levant, North Africa, Israel, and the U.S. However, the ongoing war has complicated this, and political issues need to be advanced before economic ties can be solidified. (81)

Proponents may have overstated the positive impact of the QIZs on the economy. Notably, only one percent of workers were Jordanians due to a lack of indigenous skills in apparel manufacturing. In an article on the issue, Kandeel concludes that it stands to reason companies were drawn to Jordan for its cheap labor rather than its human capital in apparel. (82) Other studies have found some positive impacts from QIZs in Jordan, mainly in boosting its exports and its industrial, manufacturing, and exporting sectors, and supporting growth in the number of women employed in Jordan overall. (83) However, Jordan continually suffers from a lack of natural resources and regional conflict and does not have a preexisting apparel industry as Egypt did. (84) The inorganic nature of the businesses flourishing in QIZs may not benefit migrant workers in the long run, either. The news website Jadaliyya reported in 2011 that migrant laborers, primarily from Southeast Asia, alleged that companies supplying American brands engaged in abusive working conditions, provided poor wages, and sexually abused the women working in the factories. (85) The arrival of Southeast Asian migrant laborers and companies employing them are part of the aforementioned broader trends in the growth of sectors not previously seen in Jordan, particularly the apparel sector. One report found that the companies investing in QIZ development were primarily doing so to avoid quotas in their home countries. (86)

This means that despite the good intentions of the Oslo Accords process, some foreseen benefits may not be realized. At the same time, Jordan has higher exports, but the companies contributing to that in the QIZs are not indigenous companies but companies importing their business, skill sets, and labor rather than engaging with preexisting labor markets or comparative advantages in Jordan.

In one interview with Dr. Howard Schatz, he said that possible solutions could involve pursuing development in sectors with balanced high and low-skilled labor in an export-heavy field, for example, semiconductors, which could take advantage of Jordan's educated population and Queen Alia Airport for export. (87) While some might see it as a success in terms of a political lens, the impact of QIZs on Jordanian society could be interpreted not as a success but as a stain on Jordan's reputation for respecting human rights.

Annex C: Palestinian Labor Issues

The Palestinian Territories have a similar scheme to the Oslo Accords QIZs composed of scattered IEFZs. The existing framework for these concentrated economic zones is similar to Jordanian QIZs in that their Israeli-Palestinian versions were established in the 1990s to develop industry in concentrated and efficient areas within the Palestinian Territories, among other goals. (88) Countries like France and Japan have funded some of the zones to train workers or invest in infrastructure within them. (89) While the investment and widespread nature of these zones may be envied to some degree, a United Nations report states that political and economic restrictions imposed by the Israeli government have impeded the Palestinian economy's development. (90) Some have criticized these economic zones as part of the Israeli economy rather than the Palestinian economy, exploiting Palestinian labor and are part of the illegal Israeli settlement structures in some cases. (91) At the same time, critics describe QIZs as promoting an extractivist and dependency-oriented relationship that will "empty large tracts of land of their productive capacity" while deemphasizing or ignoring Palestine's "natural economic comparative advantages." (92)

While human rights advocates see their current incarnations as problematic, the already-present industrial zones could figure into broader solutions for integrating Palestinians into more equitable profit-sharing missions and improve labor rights across Jordan and Palestine upon improvement to QIZs.

However, the War in Gaza may be the most significant barrier to QIZs. Experts interviewed, including former ambassador Daniel Kurtzer, and Professors Joseph Sasson, Dan Arbell, and Gregory Aftandillian (see previously cited interviews), have expressed that Arab countries will be unlikely to work on normalizing relations with Israel for at least the duration of the conflict, perhaps even longer. As such, any attempts to edit or expand the QIZ framework will likely remain frozen for the foreseeable future. In these interviews the efficacy of using QIZs and economic cooperation to encourage normalization between Arab states and Israel was scrutinized. Aftandillian, Sasson, and Arbell explained that although economic efforts might work "on the periphery," they will not be the impetus for normalization. The War in Gaza has further intensified the hostility between Israel and its neighbors, highlighting that despite decades of economic cooperation via QIZs, the root of the conflict remains political; normalization will not occur until Israel and the Arab state(s) reach a lasting political agreement. Given this, it may be better to view QIZs not as the sole impetus for normalization but as an additional, "peripheral" way to incentivize normalization with Israel. Furthermore, QIZs could help achieve a political agreement by improving the lives of Palestinians in the West Bank and Gaza, thereby alleviating concerns from the Arab states about the status of Palestinians living in those areas.

Annex D: Case Study: The Evolution of Chinese SEZs

China has a long history with economic zones, and some may regard its approach as a success and a blueprint for other special economic zones worldwide.

Chinese President Deng Xiaoping initiated economic reforms in the late 1970s, closely tying the origins of SEZs in China to these reforms. China's previous economic system was based on central planning, stifled growth and industrialization. (93) However, realizing the need for external capital and advanced technology, Deng Xiaoping advocated for reforms that would open China to the outside world. (94) China conceived SEZs to experiment with market-oriented reforms in selected regions. In 1980, China established the first four SEZs in Shenzhen, Zhuhai, Shantou, and Xiamen coastal cities. (95) These cities were chosen for their strategic locations near Hong Kong and Taiwan, making them ideal candidates for opening up to international markets. The aim was to attract foreign investment, especially from Hong Kong, Taiwan, and later Western countries, to jumpstart China's industrial sector. (96) The Chinese government implemented various incentives within these zones, including tax holidays, duty-free imports of raw materials and machinery, relaxed labor laws, and fewer bureaucratic restrictions. (97) This liberalization allowed foreign companies to establish operations in China while bringing in capital, technology, and managerial expertise. In exchange, the government hoped to modernize its economy, increase exports, and create employment opportunities for the growing population.

Initially, the focus was primarily on labor-intensive manufacturing and assembly industries. Shenzhen became a hotspot for electronics assembly due to its proximity to Hong Kong, which had a long history of manufacturing consumer electronics.98 Foreign companies from Hong Kong and Taiwan set up factories in these zones to take advantage of China's low labor costs and favorable business environment. These early SEZs' production focused on consumer goods such as textiles, shoes, toys, and electronics. (99) China's SEZs became a hub for the assembly of electronic products, including radios, televisions, and, in the following years, computers, mobile phones, and other high-tech devices. (100)

Manufacturers produced these goods for export, with the SEZs driving Chinese economic growth through exports. With its abundance of cheap labor, SEZs could focus their early industries on labor-intensive industries and, in doing so, attract foreign capital, facilitating China's further integration into the global market.

With time, China's SEZs evolved from manufacturing centers of essential goods to technology and innovation hubs. Several factors drove this evolution, including the growth of the domestic market, human capital development, the shift from low-cost manufacturing to higher value-added productions, and China's increasing integration into the global economy. As China's economy grew, the SEZs' production diversified and advanced. A crucial driver of this shift to technology and innovation within the SEZs was the flow of FDI into the zones. Foreign companies, first from Hong Kong, Taiwan, and later from the West, were attracted to China's SEZs for their favorable business environments, low labor costs, and tax incentives. (101) Foreign companies were pumping capital, technology, management practices, and knowledge to traverse the global marketplace. (102)

The influx of FDI transformed SEZS. The SEZs became a magnet for high-tech companies, including multinational companies such as Samsung, Dell, and Intel, which established R&D and manufacturing facilities within these zones. Over time, Chinese companies like Huawei and ZTE emerged as leaders in telecommunications and networking equipment, learning from foreign companies, further cementing Shenzhen's status as a global technology hub. (103) The Chinese government invested heavily in education and technical training, ensuring that the SEZ workforce could meet the demands of more sophisticated industries. China developed specialized vocational schools and universities in key industrial zones to provide workers with the skills required for higher-end manufacturing. (104) Graduates of these schools, particularly in engineering and technology fields, went into the growing high-tech sector within the SEZs.

Additionally, the Chinese government introduced policies to encourage innovation and R&D. In the early 1990s, China's leadership began to recognize that the country's long-term growth would depend on cheap manufacturing and developing more advanced technologies. (105) A key component of China's strategy for SEZs was to encourage technological upgrading. This policy aimed to shift from the mere assembly of low-cost goods to the production of more sophisticated and higher-value products, thus allowing China to capture more significant portions of global value chains. (106) In 2015, the Chinese government launched the "Made in China 2025" initiative, emphasizing technological innovation as a core pillar of the country's industrial strategy. (107) The initiative aimed to move China from an economy focused on low-cost manufacturing to one centered on advanced manufacturing. This initiative set specific targets for developing industries such as robotics, aerospace, IT, clean energy, and biotechnology. (108)

The SEZs, especially in cities like Shenzhen, were central to achieving these goals by providing an environment conducive to innovation and high-tech industries. China's transition of its SEZs from essential goods production to centers of technology and innovation resulted from deliberate government policies, foreign investment, technology transfers, and a focus on developing human capital. (109) Over several decades, the Chinese government carefully nurtured an environment in the SEZs that attracted foreign capital and expertise, encouraged domestic technological development, and fostered collaboration between state-owned enterprises and private firms. (110) Today, China's SEZs, especially in cities like Shenzhen, are global leaders in technology and innovation, contributing significantly to the nation's rise as an economic superpower.

The successes of the Chinese SEZs could be a blueprint for the approach of both American and Gulf investors in existing QIZs. The success of the Chinese SEZs was partly due to the investment and transformation of the sectors into technological hubs. The Middle East has many preexisting conditions that allow its economies to thrive in such industries, and Chinese examples may prove instructive to this end.

Annex E: The Case for Morocco

Morocco is unique in the Middle East and North Africa due to its longstanding positive relationship with the United States and recent collaboration with Israel. Morocco is designated a major non-NATO ally of the United States, serving as a key collaborator with the U.S. in the War on Terrorism in past decades. Throughout his reign, King Mohammed VI of Morocco has demonstrated an interest in economic and military collaboration with the U.S. The Kingdom has a healthy trade agreement with the U.S. and has sat at countless summits with the U.S. Routine collaboration between the countries includes a yearly U.S. military exercise in Morocco, held with the Kingdom and other West African nations. (111) Additionally, Morocco is a major purchaser of American-made weapons and military vehicles. The U.S. was a top provider of first-aid equipment and vaccines during the COVID-19 epidemic in 2021. (112)

Despite this long history of relations, the U.S. and its interests face some opposition from the Moroccan public. For example, during the U.S. military campaign against ISIS, Morocco was a top contributor to Islamic fighters in the Levant, even as the Kingdom demonstrated its support for the American campaign. (113) This phenomenon is evident in the dynamic between Israel, Morocco, and the U.S. In late 2020, the three parties signed a tripartite agreement that normalized relations between Israel and Morocco, which Morocco has questioned after withdrawing its diplomatic support.

While this agreement came in tandem with U.S. recognition of the Kingdom's controversial sovereignty over the Western Sahara, it signaled Morocco's interest in a burgeoning relationship with Israel. (114) Even as the war between Israel and Hamas in Gaza has escalated, the Kingdom continues to demonstrate its support for Israel in its efforts. (115) On the other hand, many Moroccan citizens have made it clear that they oppose any collaboration with Israel, especially since October 7, 2023. In this regard, the political dynamic of Morocco is a perfect target for the expansion of the QIZ framework, mirroring Egypt and Jordan's relationship with Israel. Morocco and Israel have closed their political gaps nationally; however, they could improve relations on an interpersonal scale. Economic collaboration is a primary tool for international cooperation in this setting.

Unfortunately, the QIZ schema is challenging to apply to Morocco as a robust free trade agreement exists between Morocco and the U.S. The U.S.-Morocco FTA, which entered into force in 2006, drastically raised trade between the two countries. While the FTA has undoubtedly positively affected the Moroccan economy and encouraged bilateral relations, it essentially eliminates any American leverage toward establishing a QIZ. Like many other model nations suitable for the QIZ program, an existing trade agreement supersedes QIZs. If Morocco is to serve as a regional partner in repairing relationships in the Levant, it will likely be in a political manner and not an economic manner.

Annex F: Exploring Opportunities in Turkey

Turkey has a long history of collaboration with Israel, having formally recognized the new nation in 1949. In the decades since, the two countries signed a mutual defense agreement and a free trade agreement, both of which indicated a positive outlook on future relations. (116) However, with the Second Intifada and the rise of the AKP, relations soured and have only declined since October 7th, 2023.

Despite political misgivings, the two countries are economically intertwined, with many Israeli companies relying on Turkish exports to fuel their production. Israel imports billions of dollars worth of iron, plastic, and steel each year, among other things. (117)

A secondary source of friction between the two countries has been the Israeli government's firm support for Kurds, both in Syria and Turkey. (118) The Netanyahu government's reluctance to condemn the PKK in Turkey, which primarily stems from the facts that Kurds make up a considerable population in Israel and share a history of persecution in the region, has created a growing rift between the two states. (119) While the Kurdish issue presents a barrier to political resolution between the two states, economic cooperation may prove to be an entryway to open dialogue on similar topics. Erdogan's open support for Hamas in its war against Israel has also proved to be a burr in the Netanyahu government's side. (120) By introducing Turkey into the QIZ scheme and providing economic incentives, it could be brought to the negotiating table with Israel to introduce a more lasting, equitable peace.

In terms of application, the primary destinations in Turkey for QIZs would be in line with Turkey's own "free zones" or Open Industrial Zones, which provide tax incentives for imports into Turkey. One of the most active manufacturing hubs in Turkey, Izmir, is a free zone, meaning it would be an excellent location for a QIZ. Istanbul, a hub of culture and trade in Turkey, also contains multiple free zones, so it is recommended for a QIZ as well. Furthermore, there is an existing TIFA between the US and Turkey, which sets a platform for the reduction of trade barriers between the two states. The Trump administration revived and openly endorsed the US-Turkey TIFA in 2017, which shows a willingness to cooperate with a program like QIZs in Turkey. (121)

Annex G: Gulf Investment Opportunities

Arab states such as Saudi Arabia, the UAE, Bahrain, and Qatar present a possibility for economic development and entanglement in the region through their investment projects. The GCC, of which all previously mentioned states are members, has allowed countries in the region to work together economically and politically, generally through combined investment. Most member states are rich in fossil fuels but are actively seeking to diversify their economies with the surplus of the liquid cash they have on hand. GCC global investments totaled more than 800 billion USD between 2020 and the third quarter of 2023, showcasing a desire to diversify holdings outside their states. (122) Furthermore, several GCC member states were key elements of the 2020 Abraham Accords, which signaled a turning point in the relationship between Israel and the Arab Middle East. While the normalization agreements that comprised the Abraham Accords lacked concrete effects, they laid the groundwork for further regional connection.

Alternatively, while there is undoubtedly a demonstrated interest among GCC states in economic cooperation with Israel, the war in Gaza since October 7, 2023, has soured many of the potential partnerships that the Abraham Accords set up. Politically, Israel maintains essentially unchanged relationships with GCC states, but most Arab citizens have shattered their general cultural perceptions of Israel because of the Gaza war. Even leaders who are seeking to work with Israel are reluctant to be perceived as "selling out" to Israel by their citizens, preventing extensive cooperation. (123) Fortunately, economic entanglement coupled with regional political resolutions presents an opportunity to resolve this image issue.

There are many previous examples of Gulf investment in cooperation with Israel. One variety is joint business ventures with multiple success stories.

Masdar, a renewable energy firm owned by the Abu Dhabi public investment fund Mubadala, has successfully worked with Israel, Jordan, and other regional allies in a model that presents an opportunity for mirroring QIZs. Israel, an economy seeking to invest in renewable energy, agreed to purchase solar-powered electricity from Jordan in exchange for selling desalinated ocean water to Jordan, which lacks access to large amounts of desalinated water. The whole agreement was only made possible by Masdar's offers to create the solar field as a joint venture in Jordan and role as a mediator between Israel and Jordan. (124) Masdar's high-skill jobs and technical input were also pivotal in making the deal work. Unfortunately, in 2023, following the onset of the war in Gaza, the deal fell through.

Nevertheless, the idea remains, and the possibility of further Gulf investment in this model is promising. Gulf money and expertise in investment and renewable energy could be a boon in finding a sustainable solution on a large scale in the Levant. Jordan has an abundance of high-skill, college-educated workers without employment, meaning that renewable energy investments, such as the Masdar solar deal, are more than viable.

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