

Jordan's Path in 2021: Trends and Scenarios



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Preface

In an increasingly complex region, Jordan, for decades an oasis of stability, has carved for itself a moderating and stabilizing role in a region that is often viewed as immoderate and unstable [1]. Jordan's strategy lays with maintaining a leading and peace-making role that has enabled it to limit instability.

The Middle East is not getting any simpler. In a region with a complicated history, and distinctive ideologies and sects, geopolitical shifts are inevitable, and predicting the future could be an unattainable goal. Nevertheless, accuracy in reading current geopolitical changes and key trends along with their implications will, and should, help Jordan mitigate risks, maintain stability, and preserve its regional role.

The Center for Strategic Studies (CSS) at the University of Jordan, presents potential scenarios to anticipate the future of Jordan and the region, in an attempt to understand the geostrategic and political changes that have occurred or are expected to take place and their impact on Jordan in the years to come.

This study, titled "Jordan's Path in 2021: Trends and Scenarios" aims to reveal the underlying significance and future implications of major emerging internal and regional key trends. It ought to provide correct predictions for shifts in geopolitical power balance, which will help policymakers make informed and knowledgeable decisions.

CSS is delighted to share the results of the January survey carried out in 2021 and wishes to thank the 174 experts who participated in it. The results include the experts' assessment of key trends in Jordan, as well as key trends related to other countries, such as the GCC, Turkey, Israel, Iran, and Egypt. It will be interesting to monitor how the trends play out over the next few months and to assess its precautions on Jordan.

Since its establishment in the '80s of the last century, CSS has been a leading institution in assessing and designing evidence-based policy interventions. It is a center for public policies and strategic research and analysis; which continues to be recognized as MENA's top Center for Excellence since 2016, according to the Global Go to Think Tank Index (last updated in January 2021) as part of the Think Tanks and Civil Societies Program (TTCSP) program of the University of Pennsylvania.

Prof. Dr. Zaid Eyadat

Director

Center for Strategic Studies (CSS)

Executive Summary

This report highlights certain trends predicted by Jordanian political and economic experts and analysts regarding regional and domestic changes in 2021. The trends focus on the Biden administration's stance on the MENA region, regional political dynamics, as well as Jordanian domestic affairs. It is important to note that these predictions were made at the end of 2020 before certain events that have taken place at the beginning of 2021.

As a result of the experts' and analysts' expectations, CSS has drafted three possible scenarios for Jordan, which shift from positive to more negative, focusing on both foreign and domestic affairs. The first scenario, the most positive, discusses a more stable MENA region where Jordan's role is solidified. Domestically, Jordan can adjust to the challenges and consequences that are a result of the COVID-19 pandemic, in addition to Jordan's consolidation of democracy and reform. The second scenario is categorized by rising tension in the MENA region due to the Biden Administration's focus on other regions as well as an increase in the pressure on Jordan domestically, which is facilitated by the rise of COVID-19 cases and economic prolonged recovery. Finally, the third scenario is based on an unstable MENA region, an insurgent ISIS and radicalization, and deteriorating domestic affairs.

CSS has also included a section describing the probability of the elements presented in the three scenarios based on the experts' predictions and certain events that have taken place with regards to regional and domestic affairs.

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1- Geostrategic Shifts in the MENA Region

Over the last two decades, the Middle East has experienced two major geostrategic and political shifts, which resulted in the rise and fall of major regional powers.

The first major geopolitical shift is denoted by the 2003 invasion of the U.S. on Iraq; this has resulted in the fall of Iraq as a regional power, and the rise of Iran's role regionally. Nevertheless, for the next 7 years, the region had experienced a, relatively, steady situation where the Arab states seemed to be going into stability. Economically, Jordan achieved a record high economic growth, above (7%), for five consecutive years—2004 – 2008 [2]. This economic growth, which topped Jordan's threshold, enabled Jordan to employ its yearly youth fresh graduates.

During that period, Jordan's ties with Israel were still and steady. Nonetheless, Jordan was reaping the economic benefits of the Israel–Jordan peace treaty. As of 2010, the Qualifying Industrial Zones (QIZ), one of the few economic cooperation towards normalization with Israel, succeeded in creating 40,000 jobs in Jordan alone through 13 industrial zones across the kingdom.

In parallel, the consecutive U.S. administrations have been strongly present in the region but with very distinct roles and strategies. G. W. Bush completed his 8-year tenure with two wars, one on Iraq and one on Afghanistan, and left the office with no clear strategy on how to manage Iran's increasing leverage in the region. Ironically, Iran has been viewed as a potentially stabilizing force in Iraq where it shares religious ties with the majority Shia Iraqis. Iran has pioneered in using religious ties, which proved to be more important than political ties. It showed interests that were aligned with those of the Western

countries: the desire for a stable government in Baghdad and the war against ISIS [3].

The “Arab Spring,” which began in Tunisia in December 2010, marks the second major geopolitical shift that was denoted by both regimes’ change, and the emergence of a Russian-Iranian-Turkish triangle, limiting a western hegemony in the region [4]. This triangle first emerged in Syria during the Arab Spring in which the three actors gained a key role through foreign intervention. The “Astana Format” was officially launched in January 2017 to formalize Russia’s dialogue with Turkey and Iran to negotiate an end to the Syrian conflict. The summits that are a part of the Astana Format signaled to the world that the key players in Syria are Russia, Turkey, and Iran since they are willing to negotiate and use military force to shape political outcomes.

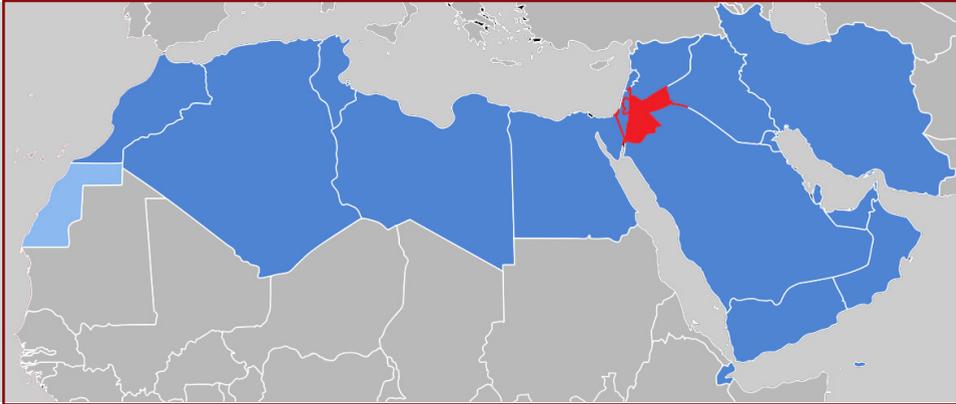
Throughout this period, the Israeli-Palestinian peace talks were stagnant in which Jordan, on many occasions, requested both sides to resume direct peace talks based on the 2002 Arab Peace Initiative—proposed by Saudi Arabia. In 2016, Jordan signed an agreement with Israel that will guarantee the transportation of \$10 billion worth of natural gas over 15 years from Israel into Jordan which is anticipated to save Jordan JOD 700M yearly. Nevertheless, in 2019, Jordan’s relation with Israel was described as “*at an all-time low*” [5].

The key trends which are assessed by this study predict that a **third major geopolitical shift** is expected to occur. This shift could be based on Israel’s new relations with Arab countries, specifically Gulf countries that may result in a new dynamic in the region.

At the beginning of 2020, a novel coronavirus began spreading globally [6]. On March 20, 2020, the Jordanian government declared a state of emergency as part of a series of measures to limit the spread of COVID-19 [7] and the Prime Minister imposed a mandatory cur

few according to the law. 2020 was categorized by ambiguity as a new virus became a pandemic, leading the world into a series of lockdowns that resulted in global panic and an economic slowdown. Even though 2020 was filled with uncertainty, we saw many changes taking place in the region, namely Israel's peace treaties with some Arab countries including the UAE and Bahrain.

2- Three Scenarios for Jordan and the MENA Region



2.1- Setting the Scene

Due to COVID-19, which has hit all countries hard, there have been many uncertainties. In 2020, many changes took place both in the MENA region and in Jordan. On a regional level, Israel signed a peace treaty with both the UAE and Bahrain. Following the Israel-UAE agreement to normalize relations, the Minister of Foreign Affairs, Ayman Al Safadi, emphasized Jordan's stance regarding the Palestinian Question with a two-state solution [8]. He stated that the agreement between Israel and the Arab countries should not be a means to continue the occupation as that will deepen the conflict, jeopardizing the region's security. Before the peace treaties, Netanyahu threatened to annex the West Bank further risking any peace negotiations between the Palestinians and Israelis.

With regards to other states, namely Turkey, while it has become involved in the region via its intervention in the Syrian civil war.

Another important state to highlight in the MENA region is Egypt, once a major regional player. Since the early to mid-2000, Egypt was viewed to be in a downward trajectory as it began placing more of a focus on domestic affairs. However, recently, it has been placing more of an emphasis on its foreign policy with regards to dealing with regional instability in an attempt to resume its leading regional role.

It is also important to highlight the competition in the East Mediterranean over gas and resources, which began in 2009-2011 with the discovery of the Tamar and Leviathan fields off the shore of Israel and the Aphrodite field off the shore of Cyprus. Currently, due to the scramble underway for the gas fields, conflicting claims are taking place between several players that are both in the MENA region and outside of it. At the core of the tensions is the unresolved dispute in Cyprus and the rivalry between Turkey and Greece.

In 2019, the Eastern Mediterranean Gas Forum (EMGF) was established in Cairo. At its inception, it included Egypt, Cyprus, Greece, Israel, Italy, Jordan, and the Palestinian authority. Recently, France has also joined the forum. EMGF aims to promote cooperation on natural gas issues and improve trade relations. However, it has been viewed as a way to isolate Turkey and undermine its role in the East Mediterranean.

On another note, Trump's Middle East policy further divided the Palestinians and Israelis by siding with the Israelis and not pushing for both sides to join the negotiation table. Trump also forged an anti-Iranian stance by subjecting Tehran to a policy of 'maximum pressure' under the weight of increased US sanctions at a time when Iran was also hit

hard by COVID-19. Nevertheless, Trump's presidency has ended, and even though experts have a more positive outlook towards the Biden Administration's policy in the Middle East, it is still too early to tell.

In Jordan, victory against COVID-19 was unrealistically rushed. However, COVID-19 cases, since July of 2020, have escalated, and harmed an already weakened economy. According to the Department of Statistics, Jordan's GDP declined by 2.2% during the third quarter of 2020 compared to the third quarter of 2019, in which the hotel and restaurant sectors faced the most difficulties decreasing by -9.1%. [9] This is due to Jordan's dependence on the tourism sector which significantly slowed down due to the pandemic. Furthermore, the DoS also stated that Jordan's unemployment rate rose to 24.7% during the fourth quarter of 2020 as compared to 19.3% in the first quarter of the same year. Politically, a new government was put into place, led by Dr. Bisher Al-Khasawneh, following a parliamentary election with Jordan's lowest voter turnout in around a decade.¹⁾ Jordan is facing several emerging security threats, including cybersecurity, climate change, radicalization, health security and growing economic and social inequalities. Nevertheless, His Majesty King Abdullah II has recently discussed the need of implementing political reform including all legal frameworks of political processes in order to begin combating the emerging threats facing Jordan.

1- This is important to point out since Jordan has fallen by four places in the global ranking, making it an authoritarian regime according to The Economist Intelligence Unit's Democracy Index for the year 2020.

2.2- Jordan's Role is Solidified in a More Stable MENA Region (Scenario 1)

In this scenario, Jordan is taking a better geopolitical position regionally and globally. Its role as a modern, moderate and peace promoter in the region continues to be characterized by the Palestinians and Israelis' return to the negotiation table. Internally, things are improving, although slightly, to the levels before the pandemic and in some areas to levels even better than the situation before the pandemic. Signs of domestic development and political reform and democratic consolidation are apparent.

The new U.S. administration, led by Joe Biden, is prioritizing the Middle East in its foreign policy agenda for the year 2021 with a focus on reversing some of the former President's actions in the region and promoting peace and security. First, Biden's administration will sign the nuclear deal with Iran while also working with its allies in the Middle East to curtail Iran's nuclear proliferation and hegemonic ambitions. Furthermore, it will emphasize its diplomatic engagements with regards to the Israeli-Palestinian peace efforts; the new U.S. administration will amend some provisions made by the previous administration in favour of the Palestinian side. Regarding security and stability in the region, the US will push towards a stable Iraq and Syria, as well as move towards better political and commercial policies with both Turkey and China. Finally, Biden's administration will cooperate with the key players in Yemen on ending the conflict and building a civil society.

Regionally, the Gulf reconciliation takes place as well as a Palestinian reconciliation between Fatah and Hamas. The defeat of new ISIS activities in Iraq and Syria as well as the continuation of the stability between Israel and Lebanon—which are all in favour of Jordan's internal and foreign policy.

With regards to Jordan, where the Palestinian cause is central, Jordan returns as a mediator when the Palestinians and Israelis return to the negotiation table. U.S. economic aid to Jordan is placed back on the U.S. agenda and priorities. Domestically, political reform takes place with a focus on election law and political participation. Furthermore, there is a focus on protecting the middle class, in addition to creating a balance between safeguarding public health and protecting the national economy.

In this scenario, Israeli relations with Arab states, including Jordan, are improving with the development of economic ties characterized by the gas deal, importing Israeli goods to Jordan and exporting Jordanian goods to Israel, and most importantly Jordan to become a regional transportation hub. In addition, Egypt is emerging as a major player in the region and is pushing for a more stable Middle East. Middle East politics under this scenario are based on promoting security and peace, leading the status quo to gradually improve.

The region, overall, is moving towards stability with the new U.S. administration's efforts. Jordan's role as a peaceful actor in the region is solidified. Finally, Jordan is strengthening its relations with the GCC significantly, especially after the Gulf reconciliation.

2.3- Increasing Pressure Both Domestically and Regionally (Scenario 2)

Jordan is surviving its geostrategic position regionally and globally. Domestically, democratic consolidation begins taking place. However, not very successful due to the rising pressure as a result of the increase in the number of COVID-19 cases and deaths, lack of political will and the growing trust gap. The four last years characterized by a slow economy, placing a burden on Jordan's economy, health

care sector, education, and social affairs. In this scenario, the security and stability of the Middle East, the regional role of Jordan, and the U.S. economic aid are all deteriorating.

Even though the Middle East is on the Biden Administration's agenda, it is not a priority due to the rise of new challenges, such as the military coup d'état in Myanmar, the advancement of China's 5G technology and the competition with Russia. Thus, there is no urgency with regards to pushing for negotiations between the Palestinians and Israelis. If any negotiations are made, the U.S. will push for amendments to be made in favour of the Israeli side and will place little consideration on the history of the conflict as well as on international law. In addition, Biden begins talks with Iran but due to other pressing global issues, they are unable to reach an agreement. Furthermore, China, Russia, Iran, and Turkey's foreign intervention in the region continues with no interference from the US. On the contrary, the US pushes for tougher political and commercial policies with Turkey and China, which leads to more conflicting sides and less stability in the region, specifically in Syria and Iraq.

Security and peace continue to be a point of uncertainty in the region, with attempts of reconciliation between the Gulf countries as well as between Fatah and Hamas, but with no tangible agreements made. ISIS and new ways of radicalization resume its activities from time to time in Iraq and Syria, and escalation continues between Israel and Lebanon. In addition, either the UAE or Saudi Arabia emerge as a regional player, further causing instability in the region due to their stance against Iran.

With regards to the Palestinian cause, the new U.S. administration does not amend any provisions to the deal in favour of the Palestinian side. Jordan loses its role as the mediator on the negotiations table, while Saudi Arabia takes on the role of the custodianship of the holy sites in Jerusalem in exchange for a peace deal with Israel.

Jordanian-Israeli relations remain the same, with no advancement in economic agreements.

Domestically, the government begins its efforts towards political reform. However, other pressing issues arise, such as the increase in COVID-19 cases and deaths due to the new COVID strain. This places pressure on the healthcare system due to the large portion of the Jordanian population with long-term conditions, leading to many facing complications from the pandemic. Also, the economy partially collapses due to the strain caused by COVID-19, which takes a few years to recover.

2.4- Jordan Loses its Regional Role and Domestic Stability (Scenario 3)

During the past year, many changes have taken place both globally and regionally. Jordan, a small country already surrounded by unstable countries, has been hit hard by the COVID-19 pandemic. With many obstacles coming in Jordan's way, the ugly scenario is characterized by the diminishment of Jordan's regional role, the collapse of its economy, healthcare sector, education, and political stability.

Biden's administration, although very important to regional/Jordan's stability, will not focus on the Middle East files as much as Obama's administration did. Biden, instead, will place more of an emphasis on the regions and issues.

Since the Middle East files lack necessary attention, the Palestinians and Israelis will not go back to the negotiations table; Israel will rather take an offensive approach towards the Palestinians fuelled by its growing relationship with some Gulf countries. Israel will annex the West Bank. Furthermore, relations between Israel and Jordan will deteriorate leading to Israel cutting off Jordan's gas supply from the Mediterranean.

The new US administration is escalating pressure on Iran by imposing tougher economic sanctions, with no signs of Iran taking a more moderate stance in the region. As a result, stability in Syria and Iraq is deteriorating and the new US administration is threatening Iran with war. Turkey's relationship with the new US administration is not at its best shape and its role in the Arab world is expanding which could lead to more tensions between the Gulf states and Turkey.

Furthermore, escalations between Israel and Hezbollah will take place at a time in which Lebanon is unable to defend itself due to the current crisis it is living in as it faces economic strains and political instability, particularly in Tripoli.

The instability facing Jordan's neighbour increases due to an ISIS resurgence in Syria and Iraq, which will result in the rising number of refugees in Jordan. Since Biden's policies are more focused on the Asia-Pacific region, the Middle East will not be a priority. The Global Coalition to Defeat ISIS, formed by the US which Jordan is a member of, will not be contributing to military intervention mainly since, globally, countries have been economically impacted by the pandemic. Since the Global Coalition to Defeat ISIS will not be taking the lead against ISIS, Iran will take on a new role and thus, grow its power not only in Iraq but also in the region.

Not only will Jordan face regional challenges but will also face instability domestically characterized by a collapse in the economy, the healthcare sector, education, and the social safety net system. As the new COVID variant sweeps the globe, Jordan's COVID-19 daily cases grow exponentially which causing schools to return to virtual teaching. Besides, as the number of COVID-19 cases soars, deaths will also increase due to complications as a result of the prevalence of long-term conditions in Jordanians, such as diabetes, high blood pressure, etc. As the numbers increase, Jordan will head towards a new lockdown that will result in protests against the soaring unemployment rates and several deaths. As a result, there will be an increase in economic and social inequalities, which will lead to a rise in crime rates, domestic violence, and radicalization. Furthermore, even though some of those living in Jordan have already taken the covid-19 vaccine, there will be a global shortage which will not lead to equal vaccine access.

3- How Likely Are the Three Scenarios?



Several elements need to be taken into consideration when looking at the possibility of the three scenarios. First, what trends are evident from the experts' predictions?¹⁾ On what basis were the predictions made? Second, what events have taken place since those predictions were made that can give us a glimpse of the region's stability as well as Jordan's domestic affairs?

3.1- The Impact of the New Biden Administration on the MENA Region and Jordan



According to Jordanian political and economic experts, 95% expect that the Biden Administration is more likely to give some degree of importance to the MENA region in 2021, with 59% (4%; highly positively, and 55%; somewhat positively) predicting Biden to influence the security and stability of the Middle East positively. Regarding Yemen,

1- The experts' predictions with more details [specific statistics] can be found in the next section of the report.

Biden is already working on a Yemen policy beginning with an end to American support for offensive operations in the war in Yemen, including relevant arm sales [10].

Nevertheless, there have been recent signs showing that Biden might deprioritize the Middle East in the face of other domestic and global affairs, namely Russia and China [11]. For instance, since Biden's inauguration, he has only contacted one Middle Eastern president, Benjamin Netanyahu. This call, in and of itself, has been delayed and came after calls to non-Middle Eastern allies as well as to China and Russia. According to a former senior national security official and close Biden adviser, the US' top three priorities currently are Asia-Pacific, Europe, and the Western Hemisphere, with a greater focus on China and Russia. If the US does not prioritize the Middle East, the road to a stable region will be more difficult.

Regarding the Deal of the Century, experts most likely anticipate Biden's administration to either continue the policies of the Trump administration or take action in favour of the Palestinians. Only 8% of the experts expect to see Biden's administration pushing for amendments in favour of the Israeli side. On the ground, we have seen some effort from the Biden administration regarding the Palestinian-Israeli conflict. First, Richard Mills, the acting US envoy to the UN, told the Security Council that Biden supports a two-state solution to the Israeli-Palestinian conflict and that the Arab-Israeli normalization should not be considered a substitute for Israeli-Palestinian peace [12]. Besides, in January of 2020, contact between the United States and the Palestinian Authority was resumed following a three-year pause [13].

Furthermore, while Antony Blinken, the US Secretary of State, stated that Biden will restore aid to the Palestinians, he also emphasized Biden's decision to continue Trump's policies regarding moving the

American Embassy to Jerusalem and recognizing Jerusalem as the capital of Israel [14]. The new developments that have taken place only reaffirm the trends that the Jordanian experts identified. While the Biden administration has the same position that Jordan does regarding a two-state solution, if it does not push for the return of the Israelis and Palestinians to the negotiations table, Jordan will not be able to solidify its role in the region.

Finally, an important state to keep in mind in the region is Iran, which has gained a more geostrategic role after the U.S. invasion of Iraq in 2003. According to the experts, the Biden administration's handling of the Iranian files is expected to reflect somewhat positively on Jordan (5.7%; extremely positive, 39.8%; somewhat positive, 32.6%; neutral). The Biden administration has agreed to nuclear talks with Iran in hopes of reaching an agreement [15]. While the experts had positive expectations regarding Iran, recently, Shiite militias backed by Iran fired several rockets at positions affiliated with the U.S. presence in Iraq, including a military base on February 20th, 2021 [16]. Biden, on the other hand, ordered retaliatory strikes against the militias whose attacks in Erbil killed one civilian contractor and wounded a U.S. service member [17]. Even though talks between Iran and the U.S. were expected to take place, it is still too early to know for certain the path that the U.S. will take in this regard.

3.2- The Impact of Israeli Policies on Jordan

According to experts, the majority predict Israel to sign new peace treaties with Arab states further normalizing its relations in the region. Regarding Jordan's relationship with Israel, even though the majority of experts (59%) predict the continuation of the status quo, the relationship between the two states may have worsened.

Jordan has been outspoken about Israel's role in East Jerusalem, most recently regarding Israel's lack of respect towards Jordan's role in administering the Muslim holy sites in Jerusalem [18].

In the event of proceeding with the "Deal of the Century," as it is, some experts (38%) predict the gradual collapse of the Jordanian infrastructure and economy due to bearing the consequences of the deal unaided. However, 25% of experts predict the continuation of the status quo, while 23% predict Jordan to receive international assistance to withstand the consequences of the deal which would be reflected positively on Jordan's infrastructure and economy. When taking into consideration the recent peace agreements between Israel and Arab states, it is important to note the role that the U.S. played by creating the Abraham Accords, which was signed by Bahrain, Morocco, Sudan, and the UAE. The Abraham Accords are characterized by certain concessions made to reach a peace deal with Israel. For instance, it was agreed that the UAE will receive F-35 stealth jets from the United States, while Sudan will be removed from the US terrorism and sanctions list [19].¹⁾ Since certain agreements were previously made with Arab states, what will other states, specifically Saudi Arabia gain from a peace treaty with Israel?

1- It is important to note that, according to Bloomberg's defense reporter Anthony Capaccio, the Biden administration has put a pause on the F-35 stealth jets to the UAE.

3.3- Jordan's Domestic Affairs

The Economy



Economically, before COVID-19, Jordan was already facing a slowdown that worsened with the spread of the virus globally. Almost two-thirds of experts (68%) did not think that the governments of Dr. Omar Al-Razzaz and Dr. Bisher Al-Khasawneh were able to provide just economic protection for the various economic sectors and institutions during the COVID-19 pandemic (44%; unjust, and 24%; completely unjust). Furthermore, more than half of the experts (53%) predict that it will take Jordan 3-5 years to recover economically from COVID-19's consequences, while 36% foresee a longer-term recovery (6-10 years). Also, experts predict that the most likely scenarios regarding the economic structure in Jordan are a partial collapse of traditional sectors in 2021 (39%), or the rise of new sectors whilst the traditional sectors continue to survive (30%). Only a total of 10% expect the total collapse of traditional sectors with the rise of entirely new economic sectors.

As evident from the statistics mentioned, experts are leaning towards a more pessimistic view of the economy evident by the slowdown due to the pandemic that will take several years for recovery. Hence, the most likely scenario to take place, with regards to the economy, is the second one, which is categorized by pressure on the economy in the meantime, but also recovery in a few years.

The Social Sphere

Most experts (78%) view the current social protection programs in Jordan to be inefficient and incomprehensive. However, some (38%) predict that no new changes will take place and that the current social protection programs will remain the same. Furthermore, due to the pandemic and the economic slowdown, experts predict poverty, crime levels, the inequality gap, societal violence will increase. This will, in turn, lead to social protests that threaten the stability of Jordan.



In a joint report by UNHCR and the World Bank focused on changes in poverty since the onset of COVID-19, it is estimated that poverty increased around 38 percentage points among Jordanians [20]. Additionally, Jordan has witnessed an increase in crime levels, including domestic violence and horrific crimes that became cases of public opinion. It is important to also note the threat of radicalization, which could increase as the economy shrinks and inequalities increase. Recent events in Jordan and the rise of poverty all indicate that the experts' predictions are likely to occur, which is important to keep into consideration as the repercussions could lead to instability.

Healthcare System



As for the healthcare sector, the majority of interviewed experts (76%) trust the capacity of the Jordanian healthcare system, in addition to the majority (70%) foreseeing improvement in the overall capacity of the Jordanian healthcare system in 2021. Regarding the COVID-19 vaccination in Jordan, almost two-thirds (63%) of experts believe that it will be safe, inclusive, comprehensive, and fair, while 37% of experts believe that it may not be as orderly as aspired.

However, recent developments, experts' opinion and published studies indicate the opposite. Jordan's strict response to the pandemic, relative to other countries, remains inadequate and is forecasted to harm and delay the economic recovery of the country, leading to serious social security repercussions and unrest [27].

On December 7, 2020, the Ministry of Health announced the commencement of the first military field hospital's work in Zarqa governorate, as part of its effort to increase the capacity of the healthcare system to contain the COVID-19 pandemic. This was followed by the establishment of four additional field hospitals across the kingdom (in Irbid, Aqaba, Karak); with a total capacity of 1,060 beds, 192 intensive care units and 30 intermediate care beds, in parallel with the vaccination rollout and gradual easing of lockdown measures.

However, the situation began to rapidly deteriorate as of mid-February, 2021. Jordan's COVID-19 indicators have been on the rise, reaching a record high by mid-March. On average, 10,000 new cases and 100 deaths are being registered per day, with almost 20% positive test rate.

As of March 28, 2021, the total number of cases in Jordan has reached 596,183, of which 495,417 recovered and 6,636 deceased. On another hand, the number of registered people on the COVID-19 vaccination platform was 822,143; of which 251,197 received at least one dose and 68,943 were fully vaccinated (2.49% and 0.68% of the total population; respectively).

According to the Minister for Media affairs, the ICU beds in the central region reached an alarming 82% occupation capacity (also as of March, 28, 2021), and the daily hospital admission rate is exceeding the discharge rate, sometimes by double the amount, intensifying the burden on Jordan's healthcare infrastructure and system as a whole. Tackling the COVID-19 pandemic with minimal human losses has been and remains a priority for Jordan's leadership. Therefore, the Ministry of Health and the National Center for Security and Crisis Management continue to maximize their efforts to contain the virus. A recent media summary (published on March 19, 2021), "indicated that the total number of vaccines contracted by the government amounted to 10,200,000, which is sufficient to vaccinate a total of 5,100,000 people. The total amount will arrive consecutively until the end of the year".

Nevertheless, the country's COVID-19 status quo has become alarming, with relatively no control over the spread of the disease. The current vaccination rate remains relatively low, the numbers of cases are persistently high, there are calls for establishing new field hospitals in many governorates, including Tafileh and Jerash, and the government is to maintain strict partial lockdown measures until mid-May, 2021 (with possibility to extend as necessary).

Education Sector

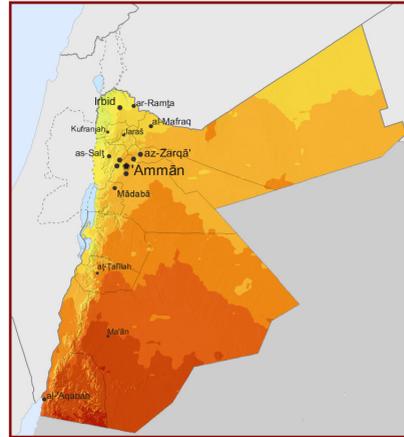


In light of COVID-19, education for the first semester for the year 2020-2021, had to be switched online by all public and private educational facilities. For the second semester, the Ministry of Education stated the first three grades and Tawjihi from remote learning. However, the option of online learning remains open for all grades [19]. The recent statements regarding remote learning have sparked unease in Jordan [21]. However, the experts have low trust in the performance of schools in conveying distance learning. Furthermore, the majority of experts (59% for schools, and 54% for universities) believe that opting to distance learning alone has an overall negative impact on the knowledge gap, i.e. the gap will increase.

Regarding the future of education in Jordan, following the passing of the pandemic, more than half of the experts (64% for schools, and 72% for universities) predict that educational facilities in Jordan will integrate “distance learning” into their curriculum to a certain extent. Due to the current situation with the spread of COVID-19 in Jordan, this is yet to be determined.

Political Domain

Regarding the domestic political sphere, the predictions are not very optimistic. More than two-thirds expressed ‘low to moderate’ trust in the seriousness and capability (67%; 71% respectively) of the current government of Dr. Bisher Al-Khasawneh in fighting corruption. A considerable 21% expressed no trust at all neither in the seriousness nor the capacity of the current government to fight corruption.



According to the Corruption Perception Index for the year 2020, Jordan ranks 60th globally and 5th regionally [22]. Countries such as Denmark and New Zealand, which have received the highest scores on the CPI, have adopted gender equality and social justice, as well as invested more in healthcare. This is important to keep in mind for the future of Jordan.

It is important to note that Jordan's road to democracy is deteriorating; according to the Economist Intelligence Unit, Jordan's ranking has increased from 114 to 118 globally, i.e. becoming more authoritarian [23]. However, this could change as His Majesty King Abdullah II has recently called for political reform, leading to democratic consolidation [24].

When looking at the potential priorities of Dr. Al-Khasawneh's government, the experts believe that the main priorities should be: providing job opportunities/fighting unemployment and eradicating poverty (24.5%); preserving the internal safety and security (18.1%); resuming the political reform process and expanding participation in decision-making and public life (13.9%); fighting COVID-19 spread (12.9%), and eliminating corruption and nepotism (12.7%).

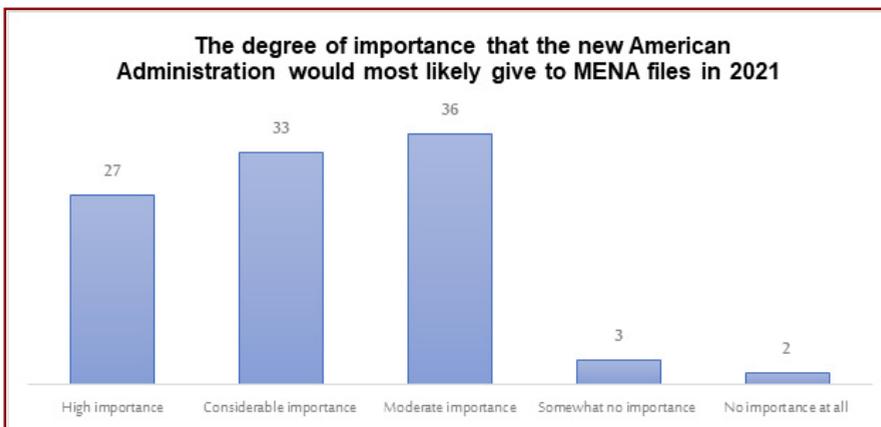
4- The Experts' Predictions in Graphs



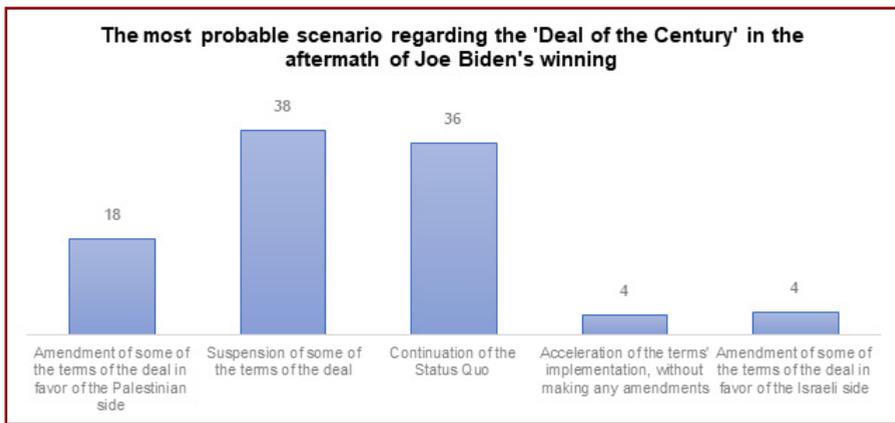
4.1 Regional Changes and Their Impact on Jordan

The Impact of the New American Administration on the MENA Region

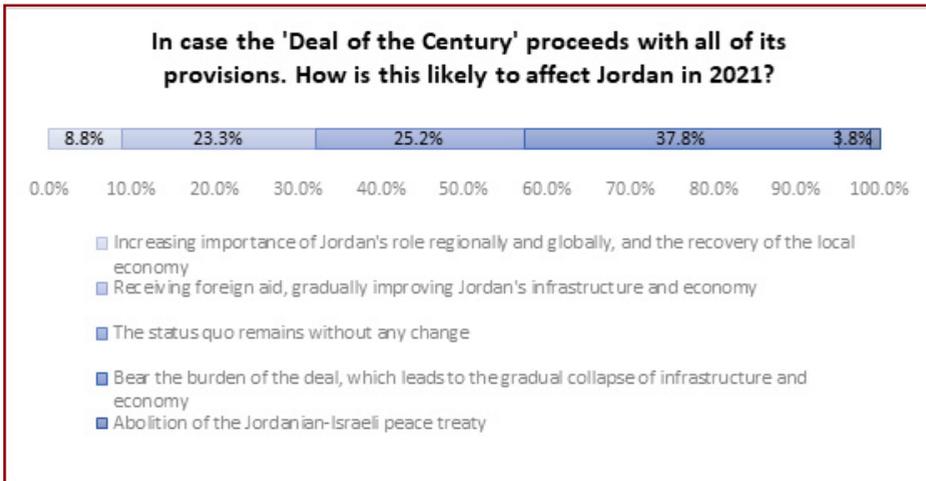
According to Jordanian political and economic experts and analysts, a large proportion (96%) foresee that the new American administration headed by Joe Biden is most likely to give some degree of importance to MENA cases in 2021. Only 2% expect no importance to be given at all. Nevertheless, it is important to note that 41% of the experts predict that the MENA file may not be the highest priority for the Biden administration.



Regarding the deal of the century, experts most likely anticipate Joe Biden's administration to continue in the steps of the former presidency (36%) or take action in the favor of the Palestinian side (56%); either by reviewing some of the terms to serve the Palestinians (18%), or suspending some of the terms of the deal (38%). Only 8% expect to see a change in favor of the Israeli side. Hence showing that the majority of experts have an optimistic view regarding Biden's role in the 'Deal of the Century.'



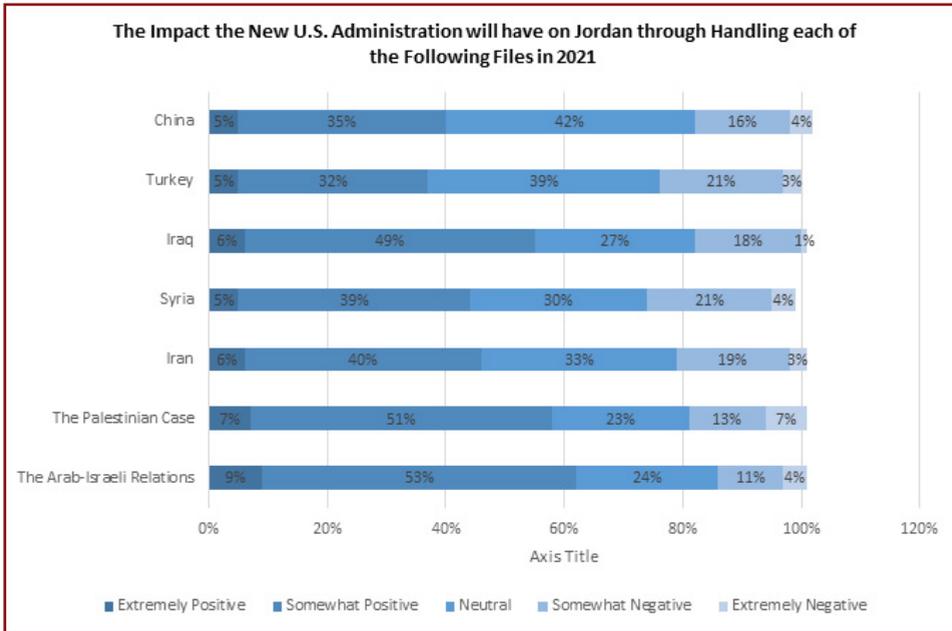
It is also important to highlight the experts' predictions on the impact of the Deal of the Century if no provisions were made. Almost one-third of the experts (32.1%) of the experts have a positive outlook where (8.8%) believe that this will increase the importance of Jordan's role regionally and globally and will recover the economy. Furthermore, (23.3%) believe that the deal of the century with no amendments will help Jordan receive foreign aid, gradually improving Jordan's infrastructure and economy. Nevertheless, 37.8% of experts believe that the burdens of the deal will lead to the gradual collapse of infrastructure and economy in Jordan. Besides, 4.9% predict that the of the Century will either lead to the abolition of the Jordanian-Israeli peace treaty (3.8%) or will lead to the point of threatening war.



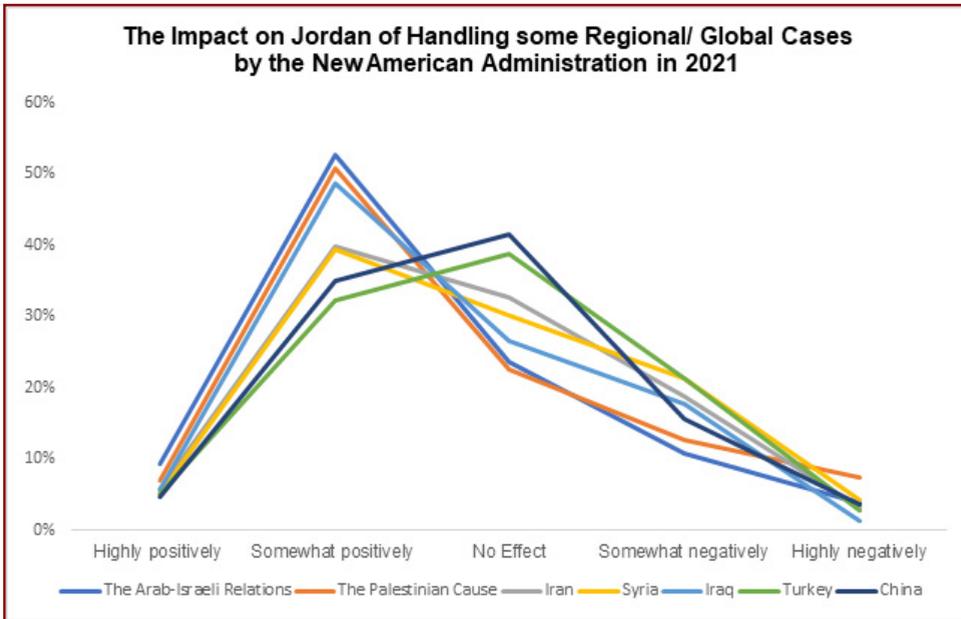
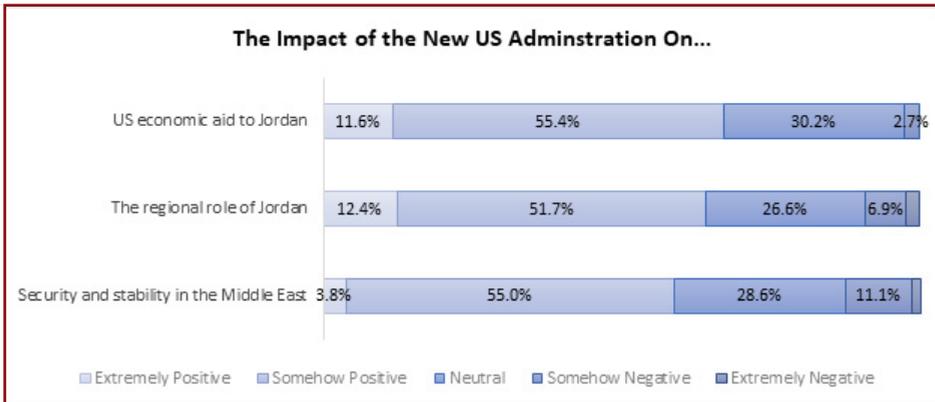
The Impact of the New American Administration on Jordan

Jordanian experts predict the most likely scenario for the regional role of Jordan in light of the new American administration to be impacted positively (64%). Almost one quarter (27%) see no effect in this regard, and a mere 9% expect a worse outcome. A comparable, but more positively skewed, the scenario is foreseen for the influence of the new American administration on the U.S. aid flow to Jordan.

As for the handling of Joe Biden's administration of some of the regional and global cases in 2021, such as the Arab-Israeli relations, the Palestinian cause, Iran, Syria, Iraq, Turkey, and China; experts foresee 'somewhat positive' comparable outcomes in most circumstances, except for China and Turkey in which case it is most likely expected to not affect' on Jordan's stance.



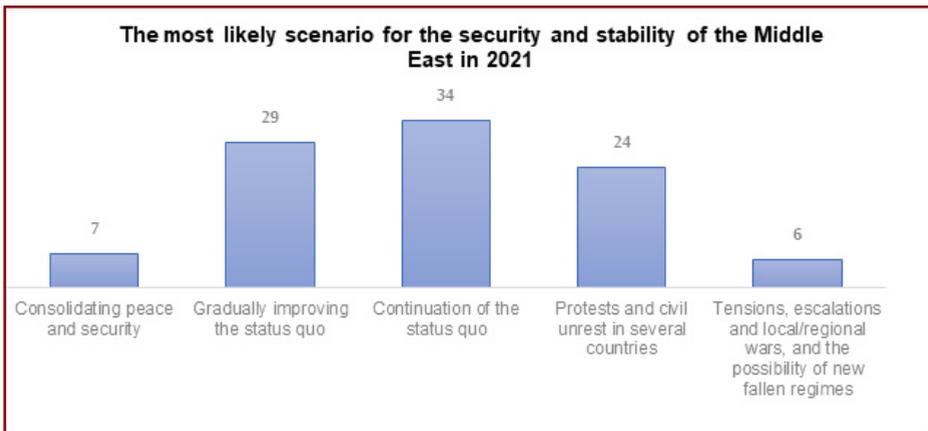
Lastly, the experts predicted the impact of the new U.S. administration on Jordan's economic aid, Jordan's regional role, and the Middle East's security and stability. Although the majority of the experts were somehow positive about the impact of the new U.S. administration on these three key trends: (55.4%), (51.7%), and (55.0%), consecutively, variant responses show that only (3.8%) are extremely positive about the role of the U.S. on security and stability in the Middle East, compared to (12.4%) and (11.6%) in the other two areas.



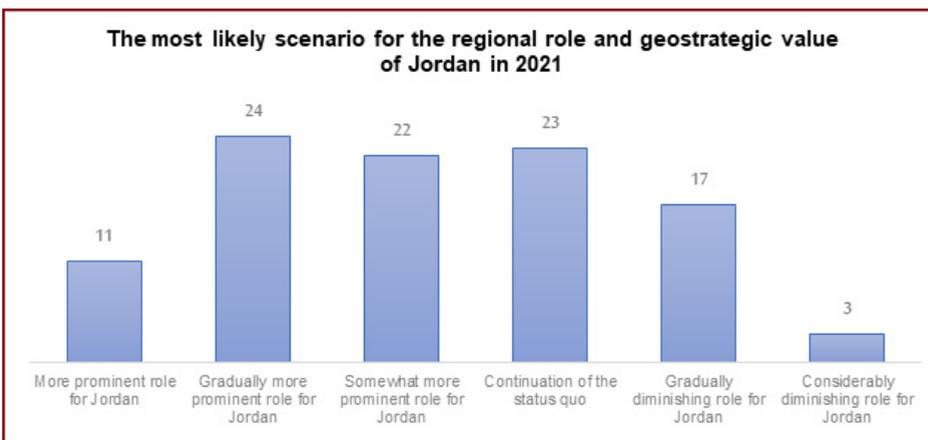
	Highly Positive-ly	Somewhat Positively	No effect	Somewhat Negatively	Highly Negatively
The impact of electing Joe Biden on each of the following in 2021:					
<i>The regional role of Jordan</i>	12%	52%	27%	7%	2%
<i>U.S. economic aid to Jordan</i>	12%	55%	30%	3%	0%
The impact on Jordan of handling each of the following cases by the new American Administration in 2021:					
<i>The Arab-Israeli Relations</i>	9%	53%	24%	11%	4%
<i>The Palestinian Cause</i>	7%	51%	23%	13%	7%
<i>Iran</i>	6%	40%	33%	19%	3%
<i>Syria</i>	5%	39%	30%	21%	4%
<i>Iraq</i>	6%	49%	27%	18%	1%
<i>Turkey</i>	5%	32%	39%	21%	3%
<i>China</i>	5%	35%	42%	16%	4%

The Impact of Middle Eastern Affairs on Jordan

The majority of the experts (64%) believe that security and stability in the Middle East are either remaining the same, or are deteriorating to the worse, but not improving. The remaining (36 %) are optimistic and believe that the security and stability in the Middle East in 2021 will gradually improve. Overall, this key trend is aligned with a more pessimistic view of stability in the region.



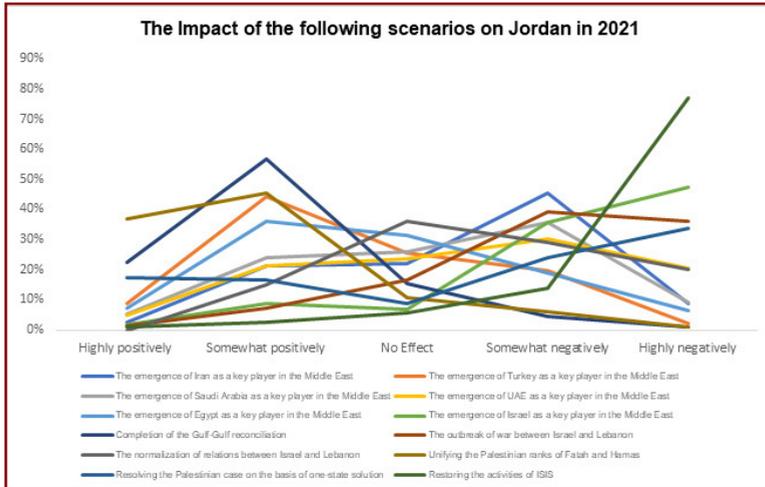
While experts have a more pessimistic view of the stability in the region, many believe that the most likely scenario for the regional geostrategic value of Jordan is to undertake a relatively more prominent role to some extent in 2021. However, one-fifth (20%) of the experts expect that Jordan’s role is more likely to diminish.



Another important aspect to consider is Middle East politics, how they are expected to change, and the foreseen impact on Jordan. Regarding the rise of new powers in the region, the experts believe that the greatest impact on Jordan would be if Egypt rises as a key player in the Middle East. They also view Turkey's rise favorably on Jordan and its role in the region. However, if Saudi Arabia or the UAE rise as a major player, experts have a more pessimistic view on the impact on Jordan. Lastly, the experts believe that the rise of Israel or Iran as a major player in the Middle East would be the worst scenario for Jordan.

The experts' assessment of the other key trends shows that the best scenario for Jordan is aligned to its moderate foreign policy which is driven by peace and security. For example, the Palestinian reconciliation between Fatah and Hamas, the completion of the Gulf-Gulf reconciliation, and the normalization between Israel and Lebanon have been all assessed in favor of Jordan.

On the other side of the spectrum, the emerging of events that destabilize peace and security in the Middle East, such as a war between Israel and Lebanon and the restoring of ISIS activities are believed to harm Jordan.



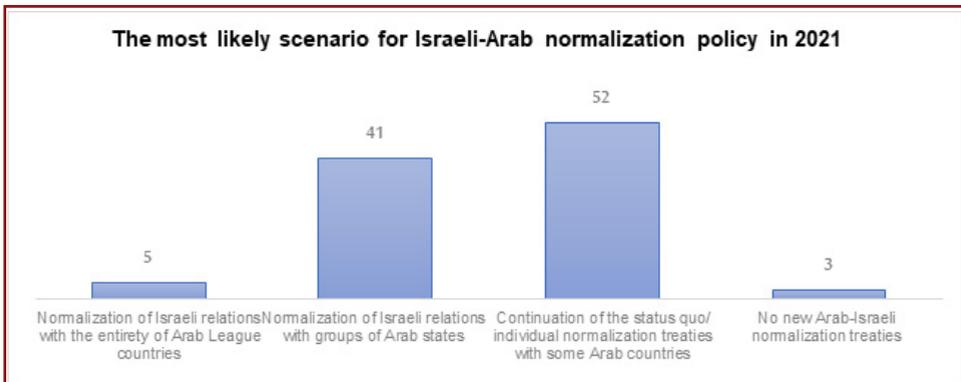
Conversely, the scenarios with the most negative outcome on Jordan in 2021 are predicted to be: the restoration of ISIS activities (91%), the emergence of Israel as a key player in the Middle East (83%), the outbreak of war between Israel and Lebanon (75%) and the resolution of the Palestinian issue based on a one-state solution (58%).

The impact of each of the following scenarios on Jordan in 2021:					
	Highly Posi- tively	Some- what Posi- tively	No effect	Some- what Nega- tively	Highly Nega- tively
The emergence of Iran as a key player in the Middle East	3%	21%	22%	46%	9%
The emergence of Turkey as a key player in the Middle East	9%	44%	26%	20%	2%
The emergence of Saudi Arabia as a key player in the Middle East	5%	24%	26%	36%	9%
The emergence of the UAE as a key player in the Middle East	5%	21%	23%	30%	20%
The emergence of Egypt as a key player in the Middle East	7%	36%	31%	19%	7%
The emergence of Israel as a key player in the Middle East	2%	9%	7%	36%	47%
Completion of the Gulf-Gulf reconciliation	23%	57%	16%	4%	1%
The outbreak of war between Israel and Lebanon	1%	7%	17%	39%	36%
The normalization of relations between Israel and Lebanon	0%	15%	36%	29%	20%
Unifying the Palestinian ranks of Fatah and Hamas	37%	46%	11%	6%	1%
Resolving the Palestinian cause based on the one-state solution	17%	17%	9%	24%	34%
Restoring the activities of ISIS	1%	3%	6%	14%	77%

The Impact of Israeli Policies on Jordan

The perception of the experts surveyed in this study depended largely on the immoderation in the Israeli foreign policy towards Jordan. His Majesty King Abdullah II has stated in 2019 that Jordan might suspend the 26-year-old treaty if Israel takes unilateral steps to claim sovereignty over parts of the West Bank [12].

As for the Jordanian-Israeli relations, a majority of experts (59%) predict the continuation of the status quo; neither improvement nor deterioration. Currently, relations between Jordan and Israel are stagnant and sometimes even cold.

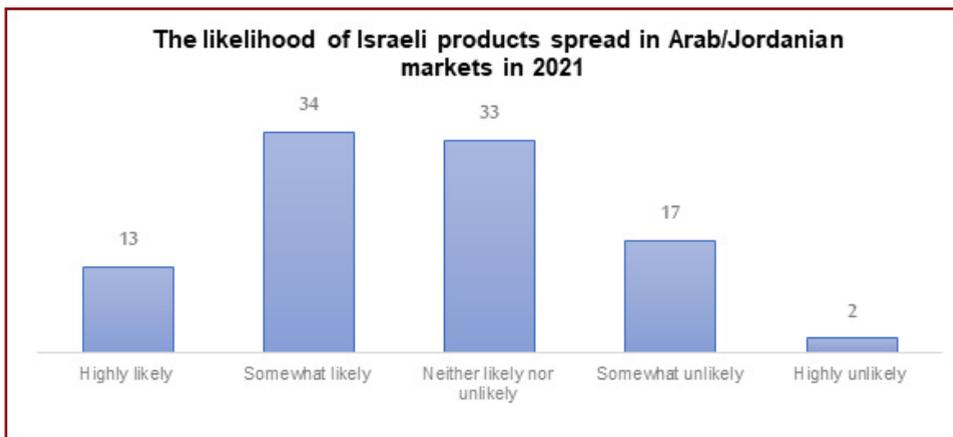


However, even though a majority of experts do not foresee changes in the relations between Jordan and Israeli, many believe that Israel will continue signing peace treaties with Arab countries and forming new ties.

In light of the regional transformations including the emerging peace treaties and the Israeli annexation of the Jordan Valley in 2021, the most probable scenario for Jordan is seen to be steering the international community to prevent an annexation if it were to take place (41%). Whereas 23% foresee the continuation of status quo/ complying with the reality of the matter, 22% predict the rise of tensions between Israel and Jordan accordingly, 12% expect the suspension of Israeli-Jordanian relations, and only 2% think the two countries' mutual peace treaty could be abolished for this reason.

It is important to note that the majority of experts (55%) predict the complete preservation of the Hashemite Royal Family's custodianship over Jerusalem's Islamic holy sites to be the most probable scenario in 2021. One-third (33%) foresee the likelihood of a partial involvement of another (one or more) Arab party intending to the religious sites. A lesser 7% predict the full transfer of custodianship to another Arab party, and a mere 5% predict the assumption of Israel's full custody over the religious sites.

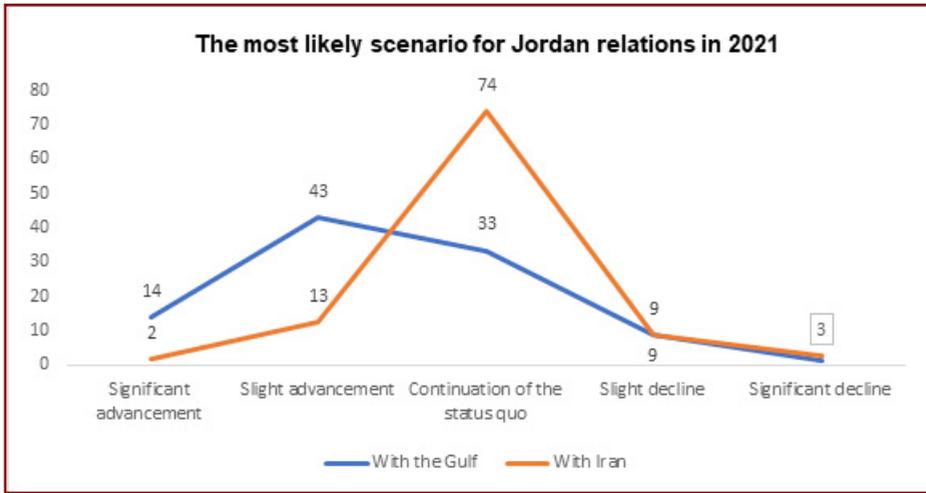
When inquired about the probability of witnessing a rapid spread of Israeli products in the Arab and Jordanian markets in 2021, 48% of experts expressed the likelihood of such an occurrence (13% highly likely, and 34% somewhat likely). On the other hand, only 19% believe it to be unlikely.



Jordan's Foreign Relations

Jordan has carved for itself a moderating and stable role in a region that is often viewed as immoderate and unstable. Jordan's geo-strategic value in the region, driven by its foreign policy, can help it through the change of dynamics of power in the region. While around 20% of experts foresee that Jordan will have a diminishing role in the region, a majority of experts have a positive view of Jordan's role in 2021.

According to experts, the Jordanian-Gulf relations are most likely predicted to undergo an improvement (57%), whereas the Jordanian-Iranian relations are most likely to continue as they are (74%).



4.2 Jordan's Internal Changes

Scenarios for the Jordanian Economy

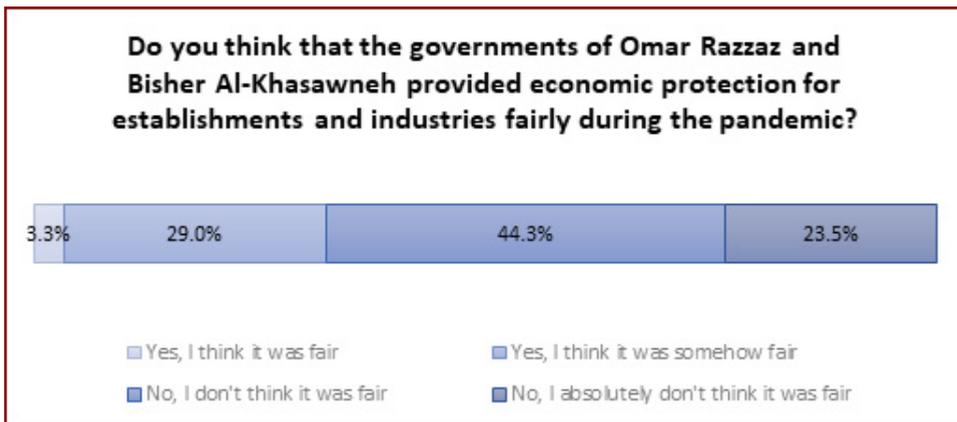
Upon the global spread of the COVID-19 pandemic, in March 2020, the resource-poor kingdom was confronted with very tough decisions and unclear scenarios. Before the pandemic, Jordan was overloaded with accumulating economic struggles since 2017 that resulted in less than 3% annual economic growth rate, paired with high unemployment rates that were already 19.3% before the pandemic [12] and rising sharply to an unprecedented level, in addition to 1.3M Syrian refugees—where less than 0.25M of them live in camps and the remaining live in host communities [13]. Inevitably, the lockdown has had severe economic repercussions on Jordan's economy.

Under this file, it was not surprising that COVID-19 was the pivotal point of the experts' survey questions. The experts were asked about the fairness of government response, recovery expectations, recovery scenarios, economic structure, and food and pharmaceuticals security.

The overall responses of the experts in all five assessed key trends leaned toward a more pessimistic scenario.

The unusual nature of COVID-19 shutdowns and re-openings of various industries and sectors led the vast majority (67.8%) of the survey respondent to believe that both the previous and the current governments have not provided “fair economic security for businesses.” It is worth noting here that both governments have regularly classified sectors to the degree that they were hit by the pandemic—based on the pandemic situation and the shutdown measurements on each sector.

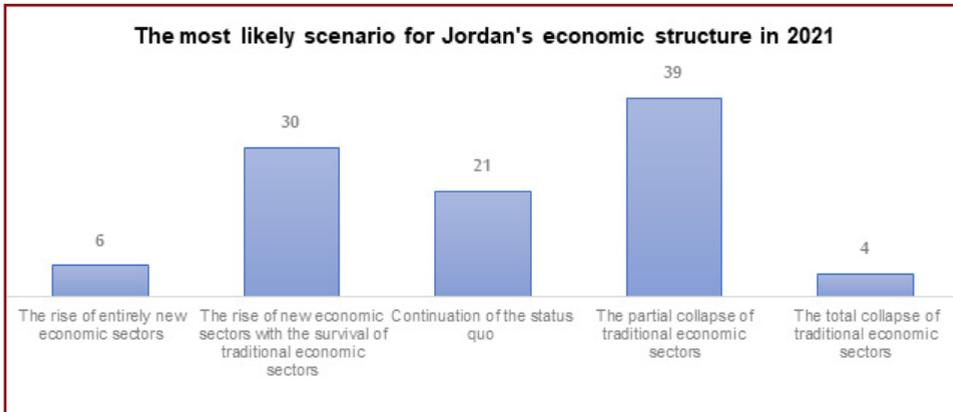
Almost two-thirds of experts (68%) did not think that the governments of Dr. Omar Al-Razzaz and Dr. Bisher Al-Khasawneh were able to provide just economic protection for the various economic sectors and institutions during the COVID-19 pandemic (44%; unjust, and 24%; completely unjust). Only 3% thought that the economic protection provided was just, and 29% said it was ‘somewhat’ just.



Furthermore, starting from the year 2021, more than half (53%) of experts foresee the economic recovery from COVID-19 consequences in Jordan to require 3-5 years (take a medium-term recovery form). A further 36% foresee a longer-term recovery (6-10 years). Whereas only 12% are optimistic about a short-term (1-2 years) recovery.

As for the macroeconomics and food/drug security-related economy in Jordan, the most likely scenario for 2021 as told by experts is the 'gradual improvement'. The macroeconomic status might undertake a 'gradual decline' instead, but has an 11% less chance of doing so (compared to 'gradual improvement').

Also, experts predict that the most likely scenarios for the economic structure of Jordan in 2021 are the partial collapse of traditional sectors in 2021 (39%), or the rise of new sectors whilst the traditional sectors continue to survive (30%). Only 10% expect the total collapse of traditional sectors with the rise of entirely new economic sectors.



Scenarios for the Jordanian Social Sphere

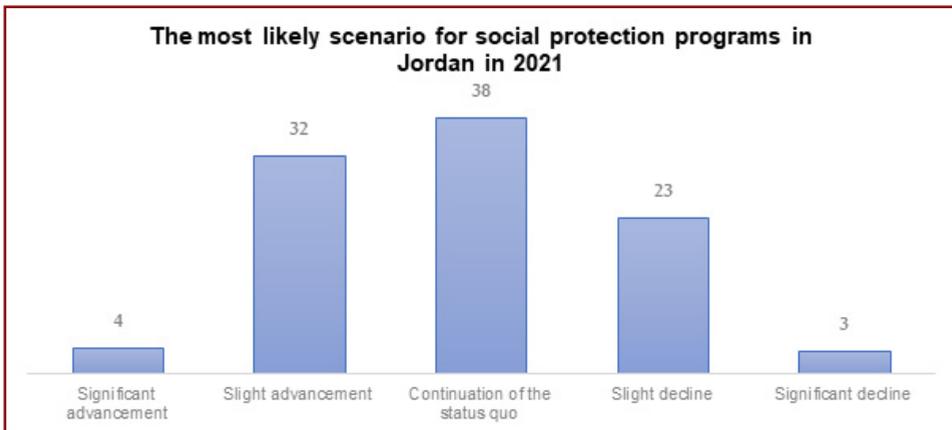


COVID-19 threatened the societal security of many nations causing various damages. Although social unrest due to an increase in poverty and unemployment rates during the COVID-19 pandemic has been a concern for many

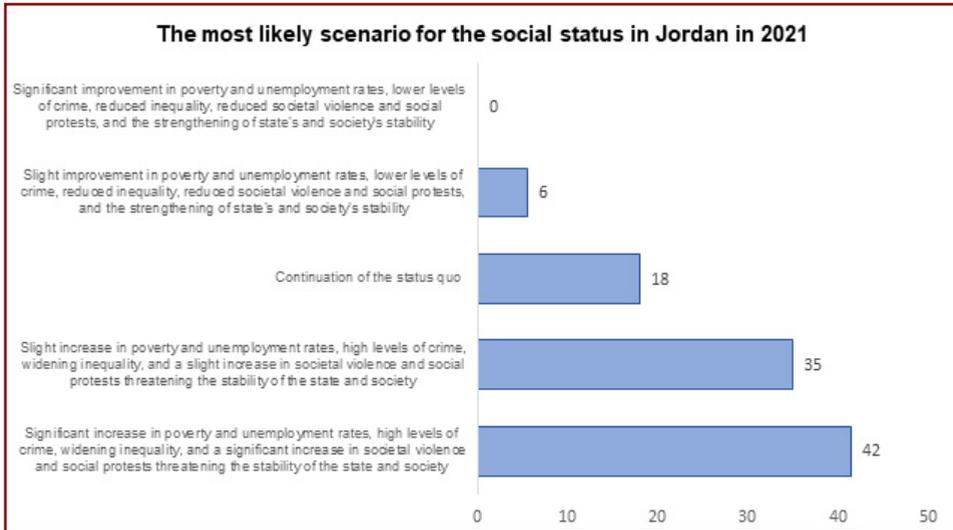
Middle Eastern countries, Jordan's social welfare programs and social solidarity have been heavily tested as a result of the pandemic.

Currently, the common (78%) view of social protection programs for community safeguarding in Jordan is that they are ineffective and incomprehensive. In contrast, only 4% think that these programs are highly effective and comprehensive, and an additional 18% think of them as moderately effective and comprehensive.

The same experts foresee the continuation of the social protection programs' status quo to be the most likely scenario in 2021 (38%). However, 10% more experts predict the improvement of these programs to some extent.



In the year 2021, the most likely scenario in Jordan is expected to be the increase in poverty and unemployment rates, levels of crime, inequality gap, societal violence, and social protests, threatening the stability of the state and society (77%).



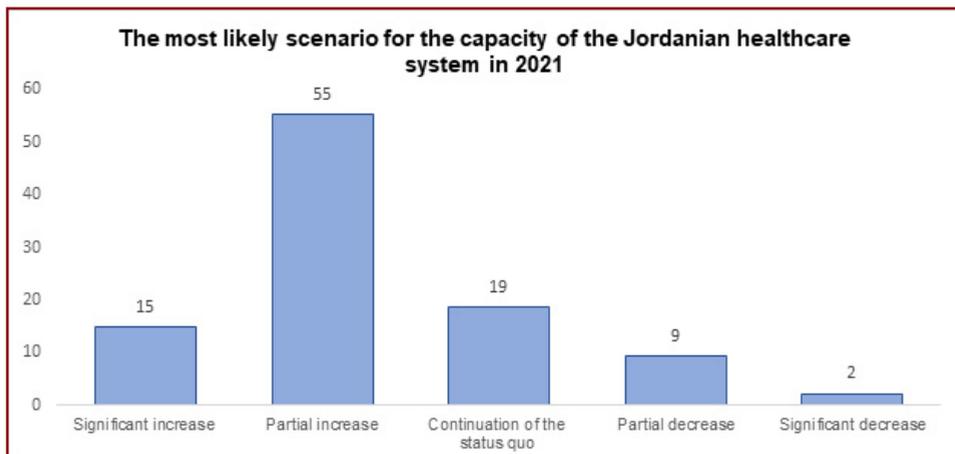
Furthermore, social media played a big role in spreading rumors in Jordan in the past period. In 2021, this phenomenon is expected to increase ‘to a degree that threatens internal and societal security but can be controlled by 43% of experts. Meanwhile, 13% think it will get out of hand. Almost one-third (34%) believe the situation will remain as is, and only 10% hope it will fade away (9%; partially, 1%; completely).

Scenarios for the Jordanian Healthcare System

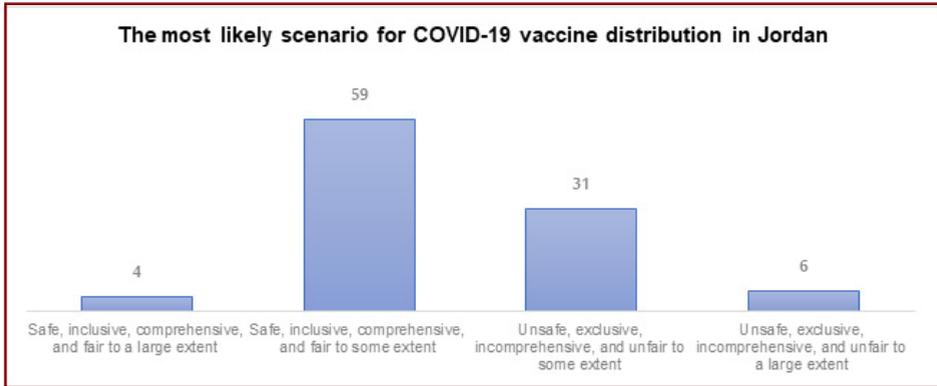
Jordan's health policy amid COVID-19 was, since day 1, to prioritize public health over the economy. It accomplished an early and severe lockdown that resulted in only 1,131 COVID-19 cases and 11 deaths during the first 4 months of the pandemic—making Jordan one of the

safest countries globally. Herd immunity was not an option for Jordan. A hardline that was perceived as strict by neighboring countries. During the first months of the pandemic, Jordan had achieved a safe but economically paralyzed society. COVID-19 cases were very low, the hospital's capacity had space, and tracking of new cases was very effective. This has given high trust in the Jordanian health sector. Overall, the expectations of the experts as well as the key trends are assessed positively.

The majority (76%) of experts trust the capacity of the Jordanian healthcare system. In contrast, 20% have low trust, and 4% have no trust at all in the capacity of the healthcare system in Jordan. In terms of the capacity of hospitals/ field hospitals, beds, medical devices, and trained health personnel, the overwhelming majority (70%) foresee an improvement in the overall capacity of the Jordanian healthcare system in 2021.

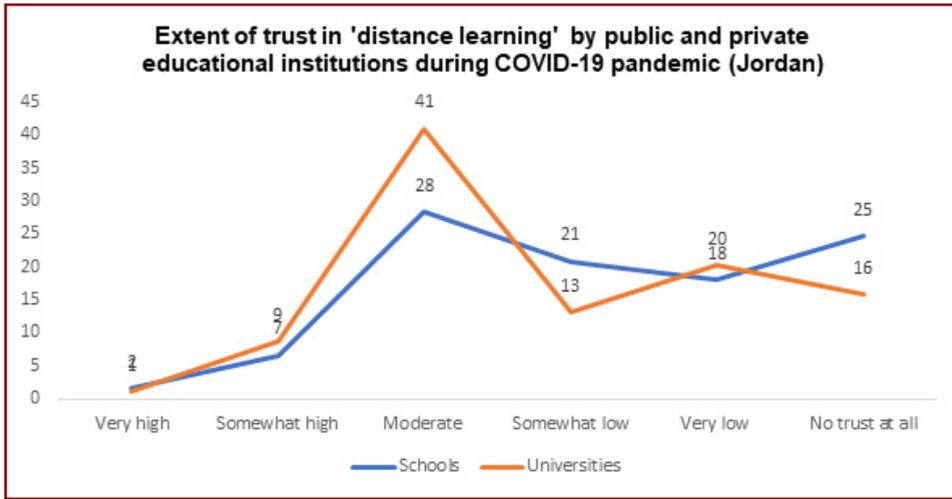


As for COVID-19, regarding the vaccination in Jordan, almost two-thirds (63%) of experts believe that it will be safe, inclusive, comprehensive, and fair. On the contrary, a considerable 37% believe that it may not be as orderly as aspired.

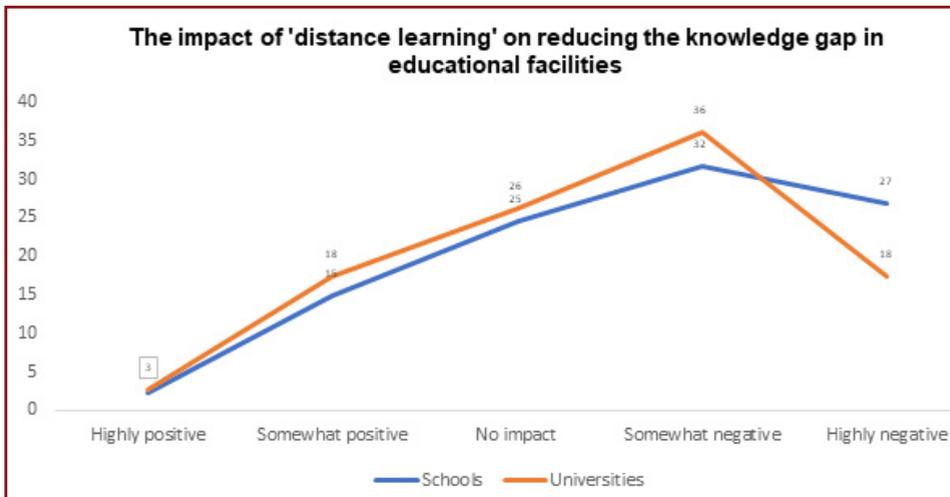


Scenarios for the Jordanian Education Sector

In light of COVID-19, education had to be switched online by all public and private educational facilities. Trust in schools and universities was recorded to be ‘moderate’. However, experts interviewed had less trust in the performance of schools in conveying information through distance learning.

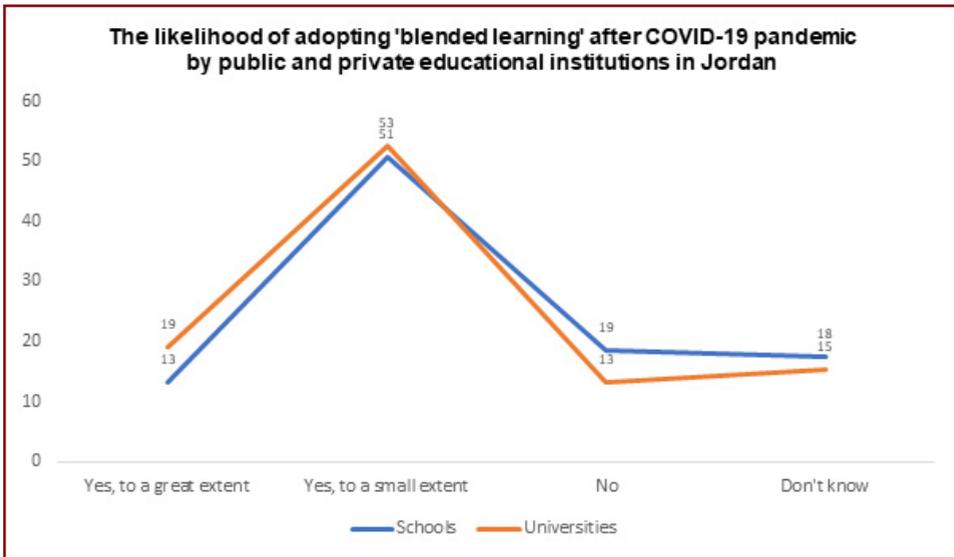


Furthermore, the majority of experts (59%; for schools, and 54% for universities) believe that opting for distance learning alone has an overall negative impact on the knowledge gap, which will increase the current knowledge gap.



Regarding the most probable scenario for continuing education in the second semester of the scholastic year 2020/2021 in schools, experts were not able to arrive at a specific conclusion. The opinions varied almost equally between those who predicted the return of all/most students to traditional learning versus continuing employing distance learning.

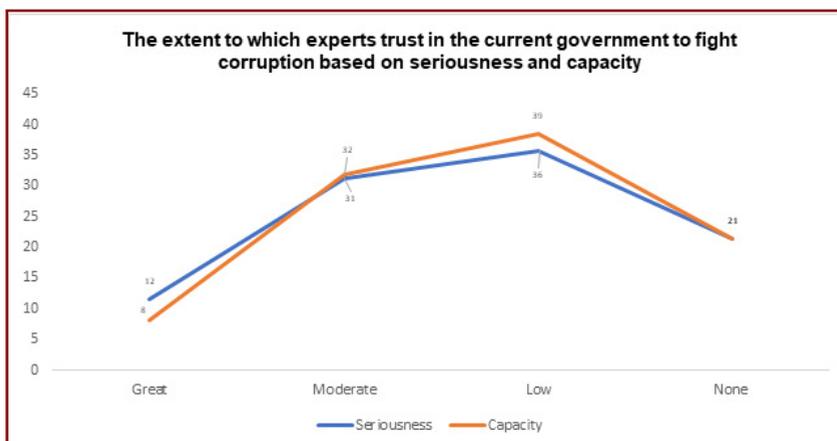
It is important to note that after the passing of the pandemic, more than half of the experts (64%; for schools, 72% for universities) predict that educational facilities in Jordan will integrate 'distance learning' into their curriculum to a certain extent.



Scenarios for the Jordanian Political Domain

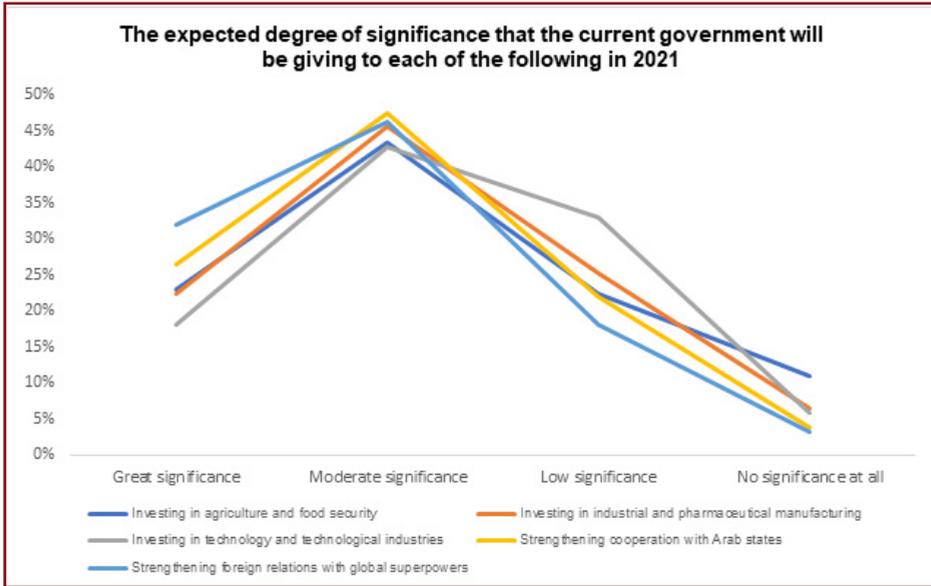
Regarding the general fight against corruption in Jordan in 2021, it is most likely expected to remain as is (48%). However, a significant number of experts (37%) foresee a positive transformation regarding fighting corruption on all fronts. Only 15% believe the opposite to be true. More than two-thirds expressed 'low to moderate' trust in the seriousness and capability (67%; 71% respectively) of the current government of Dr. Bisher Al-Khasawneh in fighting corruption. A considerable 21% expressed no trust at all neither in the seriousness nor the capacity of the current government to fight corruption.

The majority of experts (61-78%) project that Dr. Bisher Al-Khasawneh's government is going to be according to 'moderate to great' significance in 2021 with regards to investing in agriculture/ food security, pharmaceutical, and industrial manufacturing, technology/ technological industries, as well as enhancing relations with Arab states and worldwide superpowers. A mere 3-11% think that no significance will be given to any of the aforementioned in 2021.

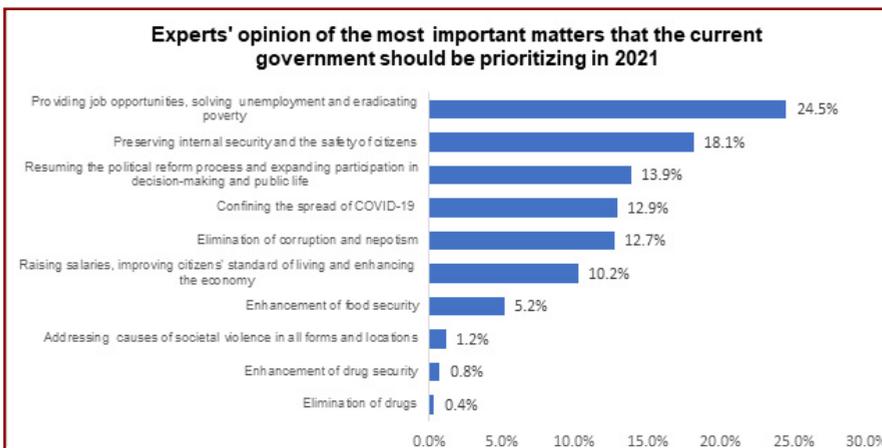


The expected degree of significance that the current government will give to each of the following matters in 2021:

	Great significance	Moderate significance	Low significance	No significance at all
Investing in agriculture and food security	23%	43%	23%	11%
Investing in industrial and pharmaceutical manufacturing	23%	46%	25%	7%
Investing in technology and technological industries	18%	43%	33%	6%
Strengthening cooperation with Arab states	27%	48%	22%	4%
Strengthening foreign relations with global superpowers	32%	46%	18%	3%



Finally, in the opinion of experts, the five main priorities that the current government should be occupied within 2021 are as follows: providing job opportunities/ fighting unemployment and eradicating poverty (24.5%); preserving internal safety and security (18.1%); resuming the political reform process and expanding participation in decision-making and public life (13.9%); fighting COVID-19 spread (12.9%), and eliminating corruption and nepotism (12.7%).



Research Methodology

The study “**Jordan's Path in 2021: Trends and Scenarios**” was compiled as a scenario-building exercise to forecast projections for the coming year on both a domestic and regional level. 2020, by any account, has been a tumultuous one, with increased regional, international, and existential crises. To help understand these shifts and their impact, we sought to exclusively engage in crowdsourcing national political scientists and strategic analysts to gauge how they envisage 2021 to look like.

From the period of the 27th of December to the 3rd of January, we interviewed 174 respondents through an online crowdsourcing tool. This investigating exercise was conducted in Arabic.

Respondents were asked to fill in a 30-minute-long survey, with each question reflecting five potential projections of a scenario or event. This took the shape of several types of questions: (a) basic variation-type; (b) matrix-type; and (c) scenario-type questions.

This report maps and visualizes the experts' responses.

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