THE HASHEMITE KINGDOM OF JORDAN

MINISTRY OF ENERGY AND MINERAL RESOURCES

National Assessment of Jordan's Readiness, Competitiveness, and Economic Feasibility for Attracting Data Centers

Tender NO: 2026/لوازم/ع/14

MINISTRY OF ENERGY AND MINERAL RESOURCES

National Assessment of Jordan's Readiness, Competitiveness, and Economic Feasibility for Attracting Data Centers

1 Introduction

Countries around the world are accelerating their efforts to attract data center investments, recognizing their strategic role in enabling cloud computing, artificial intelligence, high-performance computing, and digital services. These facilities represent large, long-term capital investments that generate high-value economic activity, strengthen national digital capabilities, and support foreign direct investment and export-oriented digital industries.

Jordan possesses notable strengths—particularly in ICT talent, telecommunications infrastructure, and regional positioning. However, attracting data centers requires meeting a set of critical conditions, foremost among them the ability to provide large, stable, and highly reliable 24/7 electricity supply at competitive cost levels. High energy costs relative to competing regional markets, along with the technical requirements associated with redundancy, grid capacity, and long-term power availability, constitute a major challenge that must be addressed to enhance Jordan's competitiveness.

At the same time, data center investment decisions are influenced by a broader ecosystem that includes infrastructure readiness, land and permitting conditions, connectivity, water and cooling feasibility, investor cost structures, regulatory clarity, environmental and social compliance, and the overall economic and fiscal impact.

In this context, the Government of Jordan seeks to appoint a specialized consulting firm to undertake a comprehensive national assessment of Jordan's readiness, competitiveness, and economic feasibility for attracting data centers across different market segments. The study shall integrate market analysis,

infrastructure readiness mapping, power-supply and electricity cost assessment, investor cost modeling, regulatory review, government participation models, and macroeconomic impact analysis. It shall also provide clear policy recommendations, incentive mechanisms, and an actionable roadmap—including the feasibility of establishing a dedicated Data Center Zone—to position Jordan as an attractive and sustainable destination for data center investments, while safeguarding the financial sustainability of the energy sector and maximizing benefits to the national economy.

2 Study Objective

The objective of this study is to provide the Government of Jordan with a comprehensive, data-driven assessment of the national feasibility, readiness, and competitiveness of attracting data centers across different market segments. The study shall evaluate technical, economic, regulatory, infrastructural, and financial dimensions to inform government decisions on electricity pricing, site readiness, investment models, incentive mechanisms, and long-term development strategies.

Specifically, the study aims to:

1. **Assess the regional and domestic data center market**, including hyperscale, colocation, enterprise, HPC/AI, and crypto-mining segments, and identify which segments are most suitable for Jordan based on demand patterns, investor requirements, and competitive positioning.
2. **Conduct an Infrastructure Readiness Assessment**, including water and cooling feasibility, land and zoning conditions, permitting processes, fiber connectivity, physical infrastructure capacity, and the identification and mapping of geographic zones that are realistically "build-ready."
3. **Evaluate electricity supply options and calculate delivered electricity costs** using LRMC, LCOE, grid connection requirements, redundancy needs, and possible combinations of grid-supply, off-grid, hybrid, and PPA models.

4. **Assess the feasibility and economic justification of offering a reduced electricity tariff**, determine affordability thresholds for each market segment, quantify tariff gaps, evaluate their fiscal and sector implications, and identify pricing models that ensure both competitiveness and energy-sector financial sustainability.
5. **Develop a full investor cost structure model**, covering water, connectivity, land and site development, permitting and compliance costs, and other non-electricity costs, enabling meaningful international benchmarking of Jordan's total cost competitiveness.

6. **Analyze the feasibility and bankability of establishing a dedicated Data Center Zone (DC Zone)**, including requirements for a high-capacity substation, unified and streamlined permitting frameworks, and a comparison between a cluster-based development model and a geographically distributed model.
7. **Evaluate government participation models and business structures**, including PPPs, co-investment, anchor-tenant models, and approaches tailored to different investor types and project sizes.
8. **Identify alternative data-center-related business models** that Jordan can pursue independently of hyperscale development.
9. **Develop a macroeconomic and fiscal impact model** to estimate direct, indirect, and induced effects on GDP, employment, foreign currency inflows, fiscal revenues, national value chains, and the financial sustainability of the electricity sector.
10. **Assess technical, regulatory, environmental, and social requirements** for hosting data centers, including data protection, cybersecurity, telecom and fiber regulations, environmental permitting, and international ESG alignment.
11. **Design a comprehensive incentive framework** consistent with investor expectations, fiscal constraints, and long-term strategic objectives.
12. **Develop a phased national roadmap** outlining priority actions, regulatory reforms, institutional responsibilities, quick-win interventions, and long-term measures to position Jordan as a competitive destination for data centers.

13. **Prepare a concise, investor-oriented Data Center Investor Brief** that synthesizes the study's key findings into a clear, actionable communication tool for international promotion. The brief shall be designed to support investment outreach and engagement efforts by government agencies.

3 Scope of Work

3.1 Data Center Market Assessment, and international Benchmarking

Current data center market assessment:

- Existing investments, capacity, number of facilities, and market gaps
- Barriers preventing global and regional service providers from entering Jordan

Domestic, regional and international demand assessment:

- Spending by Jordanian companies on foreign data centers
- Size of the local market that could be captured by domestic providers
- Size of the regional and international markets that could be captured by domestic providers.

Segment potential market (hyperscale, colocation, enterprise, HPC/AI, Crypto-mining)

Electricity pricing models:

- Benchmark markets that successfully attract data centers.

Advanced global best practices:

- Success factors in leading countries.
- Dominant energy contracting models (PPAs, wheeling, RECs/GOs….)
- Tax incentives and state-level support mechanisms

- Assessment of applicability to Jordan

Government incentives in competing markets:

- Tax exemptions
- Special electricity prices
- Economic zones or dedicated land
- Performance-based incentives

Competitive positioning of Jordan:

- Strengths, weaknesses, and opportunities relative to benchmark countries

3.2 Infrastructure Readiness Assessment

The consultant shall conduct a comprehensive assessment of Jordan's overall infrastructure readiness for data center development. This assessment shall examine:

- Water availability and cooling feasibility under different technology options;
- Land suitability, zoning regulations, and permitting conditions relevant to data center construction;
- The capacity and adequacy of physical infrastructure, including access roads, utilities, and proximity to fiber backbones; and
- The identification and mapping of geographic zones that are realistically 'build-ready,' where permitting, infrastructure access, and development conditions can support accelerated deployment. The consultant shall highlight constraints, opportunities, and required interventions to ensure alignment with international data center siting standards and investor expectations.

3.3 Electricity Cost Analysis and Evaluation of Target Tariff Framework

Review of Existing Electricity Sector Data and Cost Information

Government will provide relevant studies and data on generation costs, transmission and distribution costs, tariff structures, and planned investments. Consultant shall review and validate and use them for delivered cost estimation. No standalone power sector assessment required.

Assessment of power supply options:

The consultant shall assess the full range of electricity supply options available for data centers in Jordan (e.g. fully depend on the national grid, partially covering electricity needs through self-generation from renewables or conventional sources, etc.). The Consultant shall determine the feasible and competitive delivered electricity tariff range for each feasible market segment, while accounting for the technical, economic, contractual models, and regulatory requirements associated with each option.

For each option assess delivered cost, reliability, licensing, and sector impact.

Assessment of the true cost of supplying electricity:

- Generation costs (by energy source)
- Transmission and NEPCO interconnection costs
- Costs for using distribution networks
- Required infrastructure investments
- Costs associated with high availability

Impact of new large loads:

- NEPCO operations
- Distribution companies (JEDCO, EDCO, IDECO)
- EMRC regulatory commitments

- Government revenue streams

Long-run and marginal cost calculations:

- LRMC and LCOE for different technologies over 10–20 years

Determination of a sustainable economic tariff

3.4 Full Investor Cost Structure Modeling

The consultant shall develop a comprehensive investor cost structure model to enable meaningful international benchmarking and to assess Jordan's overall competitiveness as a data center destination. So in addition to the electricity costs previously calculated (according to the available electricity supply options outlined above), the model shall identify and quantify all non-electricity cost components that data center investors typically incur, including:

- Water consumption and cooling-related costs under different technology scenarios; Connectivity costs, including fiber access, redundancy requirements, cross-connect fees, and international bandwidth charges;
- Land acquisition or lease costs and site development expenses; and
- Regulatory compliance and permitting costs, covering environmental approvals, construction permits, data protection and cybersecurity compliance, and specialized data center licensing requirements.

The consultant shall present the total cost structure in a transparent, comparable format aligned with global benchmarks and investor decision-making practice.

3.5 Feasibility Analysis of a Data Center Zone

The consultant shall assess the feasibility and bankability of establishing a dedicated Data Center Zone (DC Zone) in Jordan. This assessment shall examine the technical, regulatory, and infrastructural requirements for developing a purpose-built zone capable of hosting data centers at scale. At a minimum, the analysis shall include:

- The feasibility and bankability of developing a dedicated high-capacity substation and associated grid infrastructure to support large and continuous data center loads;

- The design of a unified and streamlined regulatory and permitting framework, including fast-track processes, consolidated approvals, and clear institutional responsibilities.
- In addition, the consultant shall compare a 'cluster strategy'—in which data center development is concentrated within a single, fully serviced zone—with a geographically distributed development model, evaluating the advantages, challenges, cost implications, and strategic trade-offs associated with each approach. The consultant shall provide clear recommendations on the most suitable model for Jordan, supported by international benchmarks and local readiness factors.

3.6 Government Participation and Business Models

- Facilitator-only model
- Infrastructure co-investment model
- PPP / concession model
- Joint venture model
- Anchor tenant model
- Consultant may propose additional models.

3.7 Economic–Financial Modeling, Feasibility and Bankability Assessment of Net Economic Impact

Direct impacts:

- CAPEX
- OPEX
- Direct employment
- Direct fiscal revenues

Indirect & induced impacts:

- Telecommunications, construction, technology services, cybersecurity

- Local value chain development
- Increased demand for fiber and internet services
- Enhanced digital competitiveness

Foreign currency impact:

- FDI inflows
- Cross-border service exports
- Reduced reliance on foreign data center services

Fiscal impact:

- Total tax revenues
- Comparison with the cost of tariff reductions or incentive packages

Sensitivity analysis:

- Energy price variations
- Tariff levels
- Cost of capital
- Discount rates

3.8 Technical and Regulatory Requirements for Hosting Data Centers

Technical infrastructure readiness:

- High-reliability fiber connectivity
- Stable electricity supply and required levels of availability
- Suitable locations (economic zones, industrial areas, near load centers)
- Gap analysis and identification of required reforms

Regulatory environment assessment:

- Data protection and data residency policies
- Licensing requirements
- Cybersecurity regulations
- Gap analysis and identification of required reforms

Environmental and Social Requirements:

- The consultant shall assess environmental and social considerations associated with the development and operation of data centers in Jordan. This shall include evaluating potential environmental impacts (e.g., land use, water and cooling requirements, energy source implications, emissions profiles, waste and equipment disposal), as well as social impacts related to labor, community engagement, health and safety, and alignment with relevant national legislation and international ESG standards. The consultant shall identify any required mitigation measures, institutional responsibilities, and compliance requirements to ensure that data center development adheres to environmental and social best practices.

3.9 Incentive Framework Development

- Special electricity pricing linked to investment size or economic impact
- Performance-based tax incentives
- Government guarantee mechanisms (as needed)
- Local content and employment policies
- All options supported by rigorous quantitative economic analysis

3.10 Business Models for Jordan without Hosting Hyperscale Data Centers

The consultant shall evaluate a set of alternative data-center-related business models that Jordan can pursue regardless of whether large hyperscale facilities are ultimately developed in the country. This assessment shall identify and analyze high-potential opportunities that leverage Jordan's strengths in ICT talent, cybersecurity capabilities, connectivity, and regional positioning. The

consultant shall quantify the economic, fiscal, and employment benefits of these alternative models, assess associated risks, and determine their feasibility and bankability as standalone opportunities that can generate value independently of hosting hyperscale data centers. The alternative models include:

- Remote operations (NOC, SOC, CloudOps)
- Regional cybersecurity services
- Software and cloud-services development
- Backup/DR data centers
- Edge & micro data centers
- Fiber landing stations and transit hubs
- Training and certification centers
- HPC/AI computing clusters
- Export of renewable energy attributes (RECs/VPPA)
- Hybrid partnerships with regional hyperscale centers

Including financial estimates, job creation potential, value-chain impacts, and risks.

3.11 Roadmap for Attracting Data Centers

- Required government actions
- Legislative and regulatory updates
- International investor outreach strategy
- Phased implementation plan (short-, medium-, and long-term)

3.12 Workshops, Reporting, Investor Brief and Presentations

- Draft reports

- Investor Brief document: an investor brief that can be used for international promotion. It should highlight Jordan's competitive advantages, incentive framework, and institutional readiness.
- Consultation workshops
- Final comprehensive report
- Executive presentation for decision-makers

4 Timeline and Deliverables

#	Phase	Weeks from Award (W0)	Main Deliverable
	Inception Phase	Weeks 1-2	• Inception Report • First Workshop
	Market Assessment, Benchmarking, and Infrastructure Readiness Assessment	Weeks 3-6	• International Benchmarking Report • Infrastructure Readiness Assessment
	Investment Cost Analysis including Electricity Costing Assessment	Weeks 7-10	• Electricity Cost Analysis and Evaluation of Target Tariff Framework Report • Full Investor Cost Structure
	Feasibility and Bankability of Data Center Zone and Government Participation and Business Models Assessment	Weeks 11-13	• Feasibility and Bankability Analysis of Data Center Zone Report • Government Participation and Business Models Report

	Economic & Fiscal Impact Model Report	Weeks 14-15	• Economic & Fiscal Impact Model Report • Model in Excel • Model documentation • Feasibility and Bankability Assessment • Second Consultation Workshop
	Requirements, Incentives and Alternative Business Models Development Phase	Weeks 16-18	• Technical & Regulatory Requirements Report. • Incentives Framework Report • Alternative Business Models Report
	Roadmap Development Phase	Weeks 19-20	• Implementation Roadmap
	Preparation of Investors Brief Phase	Weeks 21-22	• Investor Brief document
	Finalization	Week 23-24	• Final Comprehensive Report • Executive Presentation • Final Workshop

5 Data Ownership

All data, models, and outputs shall become property of the Government of Jordan.

6 Team Requirements

Role	Core Requirements
Project Director	Minimum 15 years of experience in energy or data center projects and management of multidisciplinary teams.
Financial Expert	Minimum 10 years of experience in LCOE/LRMC modeling, market analysis, NPV/IRR modeling and PPAs.
Macroeconomic Modeling Expert	Minimum 10 years of experience in CGE or Input–Output modeling.
Data Center Expert (2)	Minimum 8 years of experience in design/operation with deep knowledge of Uptime Institute Tier I--IV, redundancy, Up-time and infrastructure required to achieve Tier III/IV.
Telecom & Fiber Expert	Minimum 8 years of experience in network design and international fiber routing.
ICT Policy & Cybersecurity Expert	Minimum 7 years of experience with ISO 27001, GDPR and cybersecurity frameworks.
Regulatory Expert	Minimum 8 years of experience in energy sector regulation, and environmental & social compliance.

7 Consultant Firm Qualifications

- Minimum 10 years in energy policy, tariff reform, data centers, or national-level economic studies.
- Three relevant projects in the last 10 years (data centers, energy policy, CGE/IO, PPAs, digital infrastructure).

- Experience in similar regulated electricity markets, with separation among generation, transmission and distribution.
- Consultant may be single firm or consortium with complementary expertise.
- Declaration of no conflict of interest.

8 Evaluation Criteria

- Technical proposals will be opened first. Financial proposals will be opened only for tenderers who are qualified technically.
- The Technical Proposal will carry a weight of 70% of the total score and will be assessed based on the following criteria:
  - Understanding and Methodology (20%)
  - Firm Experience (30%)
  - Key Experts (40%)
  - Work Plan (10%)
- Consultant firms shall be requested to deliver a presentation outlining their proposed methodology and approach to the assignment. The presentation will form part of the technical evaluation and will be specifically assessed under the "Understanding and Methodology" criterion (20%). The purpose of the presentation is to allow the evaluation committee to assess the firm's depth of understanding, clarity of approach, feasibility of the proposed methodology, and overall alignment with the study objectives.
- The proposal shall get a mark of (70/100) in the technical evaluation step in order to be considered technically qualified. If the proposal did not technically qualify (if did not get 70/100 or higher), the offer will not go through the financial evaluation phase and financial proposal will be returned unopened.

- Financial proposals will be evaluated from 30 marks, the lowest price will achieve a full mark i.e. 30 and the rest of the offers will be given marks depending on the ratio between the lowest price and the offered price.
- The final mark (out of 100) will be the sum of the technical evaluation mark (out of 70) and the financial evaluation mark (out of 30).
- Prices are to be expressed in Jordan Dinars.

9 Instruction for the Bidders:

- All Bidders interested in bidding for this Tender shall comply with the Jordanian laws and regulations related to the bidding process.
  - The Bidder shall provide a bid bond(Adherence to the attached form, otherwise the submitted offer will be excluded) equal to (6000 JD) from a local Jordanian bank acceptable to MEMR and shall be valid during the proposal validity, Contains tender number & name of tender . After Contract signature, MEMR shall return the bid bonds to the unsuccessful Bidders. The conditions for losing and liquidating the Bid Bond are subject to the provisions of the Jordanian Regulations and Tendering Directives.
- Bidder shall submit three (3) **separate** envelopes; one for the technical proposal and one for the financial proposal. The third document is the Bid Bond shall be submitted by the same time of the technical and financial proposals.
- The Bidders are expected to submit a Technical Proposal and one Financial Proposal as specified in the Tender.

- For accounting and evaluation purposes, Bidders are requested to submit itemized prices inclusive of all costs, fees, taxes and other expenses according to the Jordanian laws and regulations.

- Proposals are binding to the Bidders for period of (120) days from the date of submission.
- If the proposal is successful, successful Bidder will be expected to sign a contract with the Ministry of Energy and Mineral Resources "MEMR", using the enclosed standard form.
- All Bidder are requested to submit accredited, confirmed and documented information and references for all similar services and staff resumes that will be involved in the Services.
- All Bidders shall bear all costs associated with the preparation and submission of their proposals and contract signing.
- Late fees shall be imposed in accordance with Government Procurement System No. 8 of 2022 and shall be calculated at the rate of (100) J.D for each day of delay and not exceeding (15%) of the referral value.
    - The technical offer and financial offer must be signed and stamped (Each Page) , otherwise the submitted offer is excluded.
    - Time for delivery & handing over (4 months)

the bank _____

Bid entry guarantee bond

Ministry of Energy and Mineral Resources

Date:___/__/_ 2023

Due date:____/__/_ 2023

Warranty number: (_____)

After Greetings,,

A bank guarantees _____branch _____

Tender _____

How much is (_____) dinars only

In order to _____

This is to ensure the entry of Bid No. (_____)

Your (_____)

The bank undertakes to extend the validity of the guarantee to cover the validity period of the offer and to pay the value of the guarantee or any part of it upon your first written request for extension or payment, during its validity period, noting that any claim submitted to the bank must be made on/or before its due date and the guarantee is complementary. After the expiry of its term.

The Ministry of Energy and Mineral Resources does not accept any condition that hinders extension and payment and rejects any guarantee that includes such.