Ortadoğu Araştırmaları Merkezi
ORSAM مركز دراسات الشرق الأوسط
Center for Middle Eastern Studies

FILE 11
JANUARY 2026

MIDDLE EAST IN 2025 AND RISK OUTLOOK FOR 2026

FILE 11

JANUARY 2026

MIDDLE EAST IN 2025 AND RISK OUTLOOK FOR 2026

CONTENTS

LEVANT: 2025 REVIEW AND 2026 RISK OUTLOOK

1. SYRIA IN 2025

The process that began with the overthrow of the Baath regime in Syria on Dec. 8, 2024, unfolded throughout 2025 as a multilayered transition focused on rebuilding the political order, restoring state capacity, and establishing both domestic and international legitimacy. While confronting the security and economic crises inherited from the civil war, the new administration, shaped under the leadership of Ahmad al-Sharaa, adopted a realistic and pragmatic foreign policy aimed at reintegrating the country into the international system. The relative gains achieved over the course of 2025 simultaneously exposed persistent vulnerabilities and unresolved arenas of conflict.

The most notable political development in 2025 was the new administration's effort to institutionalize its legitimacy through the principles of inclusivity and a unitary state. The convening of the National Dialogue Conference, the proclamation of a provisional constitution, the formation of a transitional government, and, indirectly, the holding of people's council elections emerged as key steps shaping the legal and institutional framework of the transition. This process was seen as

> In Syria, the most notable political development in 2025 was the new administration's effort to institutionalize its quest for legitimacy through the principles of inclusivity and a unitary state. Public opinion surveys showed that a significant segment of society extended a strong vote of confidence to the new leadership in its initial phase, with particularly optimistic expectations emerging in the areas of security and political stability.

the first institutional expression of a postwar political order in Syria based on societal consent. Public opinion surveys indicated that a significant segment of society extended strong initial support to the new government, with particularly optimistic expectations in the areas of security and political stability. At the same time, it was observed that this legitimacy rested largely on expectations and carried a high risk of erosion if not accompanied by tangible economic improvements.

In 2025, the security sector in Syria remained both the country's most fragile and most decisive domain. The new administration moved to bring armed groups nationwide under central authority, restructure security institutions, and establish an order based on the state's monopoly on the legitimate use of force. Within this framework, operations against remnants of the former regime were carried out alongside amnesty and reconciliation mechanisms, and insurgent attempts, particularly in coastal areas, were largely suppressed. However, the potential for these elements to reorganize with external support continued to pose a long-term security risk.

Last year, the fight against DAESH emerged as a relatively low-intensity but persistent threat. While the group's military capacity remained limited compared with previous years, it sought to regain visibility through attacks targeting sectarian and societal fault lines in the period following the regime's overthrow. In response, the new administration took steps to strengthen its own capabilities, engage with regional cooperation mechanisms led by Türkiye, and participate in the U.S.-led Coalition for the Defeat of DAESH.

One of the most critical domestic political and security issues in 2025 was the relationship between the Damascus government and the SDF/YPG. The March 2025 agreement, in principle, envisioned the integration of the SDF/YPG into the Syrian state structure, but its implementation encountered significant deadlocks. The SDF/YPG's insistence on maintaining its de facto autonomous structure clashed with Damascus' goal of a unitary, centralized state, preventing the process from evolving beyond a transitional arrangement. This tension remained one of the most significant potential sources of internal conflict for Syria's territorial integrity and political unity throughout the year.

External interventions and regional competition were among the factors directly affecting Syria's quest for security and stability in 2025. Israel's military activities and airstrikes in southern Syria were regarded as the main external threat challenging the new government's capacity to exercise sovereignty. These interventions were seen not only as military actions but also as tools of destabilization targeting societal and sectarian balances, particularly among the Druze. In response, the Syrian government sought to balance external pressures through normalization with the Arab world, strategic cooperation with Türkiye, and limited but functional dialogue with the West.

The economy emerged as the weakest link despite relative progress in the political and security spheres. The gradual lifting of sanctions theoretically offered a significant opportunity for economic recovery. However, infrastructure destruction, high unemployment, inflation, and inadequate public services prevented noticeable improvements in everyday life. Public opinion surveys clearly indicated that economic dissatisfaction could, in the medium term, erode the new government's legitimacy, underscoring once again the strong link between political stability and economic recovery.

In conclusion, 2025 was neither a full year of stability nor a return to a new cycle of conflict for Syria. It represented an interim phase in the postwar transition, during which the first tangible tests of the process unfolded and centralization and fragility were deeply intertwined. The new administration made significant strides in political legitimacy and international reintegration but struggled to produce lasting solutions in areas such as security centralization, the SDF/YPG issue, external interventions, and the economic crisis. The overall picture of 2025 demonstrated that stability in Syria had not yet been secured and that the trajectory of the transition largely depended on the simultaneous progress of security reforms and economic recovery.

2. ISRAEL-PALESTINE ISSUE IN 2025

In 2025, Israel faced a multilayered, simultaneous, and high-intensity conflict across a broad regional security landscape that included Gaza, Lebanon, Yemen, and Iran. A cease-fire that took effect on Jan. 19, 2025, collapsed in March following hostage exchanges, and the war in Gaza escalated into a humanitarian disaster, fueled not only by airstrikes targeting civilians but also by restrictions on food access to the Gaza Strip and the activities of Israel-backed militia groups.

June 2025 can be considered a turning point in Middle Eastern history. The "12-Day War" between Israel and Iran caused widespread destruction for both sides, unlike the isolated attacks of 2024. Israel targeted Iran's nuclear facilities and ballistic missile infrastructure, while Iran struck cities such as Tel Aviv, Haifa, and Beersheba, along with critical infrastructure, using numerous ballistic missiles. One of the war's most distinctive features was the U.S. direct strike on Iran's nuclear sites on the night of June 22-23, using B-2 bombers to target the Fordow Fuel Enrichment Plant, as well as the Natanz and Isfahan facilities. The attack was carried out as a one-time, limited operation aimed at Iran's underground nuclear infrastructure. However, reports reflected in open sources toward the end of the year indicate that Iran's ballistic missile program and capabilities were not only recovering but accelerating.

The political framework agreed upon in Sharm El-Sheikh and the cease-fire process in Gaza were shaped around a U.S.-proposed framework publicly presented as the "20-Point Plan." On Oct. 10, Israel approved the plan, withdrew from certain areas, and the ceasefire process began. However, Israel maintained military control over much of Gaza, particularly after the hostage exchanges, and continued attacks in some areas. On the ground, the "Yellow Line" was established as the initial withdrawal line to manage civilian movement and humanitarian aid under the agreement, but Israel was reluctant to move to the second phase and sought to impose the line as Gaza's new border. Moreover, the Rafah border crossing remains closed, contrary to the agreement, and humanitarian aid continues in a limited capacity through the Kerem Shalom crossing under Israeli control. Disputes over the mandates of the Peace Council and the International Stabilization Force, as outlined in the agreement, are ongoing.

Since 2021, the West Bank has perhaps never seen a period of calm, and in 2025 it was perceived as a less visible issue due to the humanitarian crisis in Gaza. However, it is important to emphasize that human rights abuses in the region continued to increase. Throughout the year, military operations—named "Iron Wall" and "Five Stones"—caused widespread suffering among Palestinians across nearly the entire West Bank, while expanding settlements and accompanying settler violence, along with military raids, continued unabated.

In the Syrian arena, Israel adopted what it described as a preemptive, aggressive engagement following Assad regime's collapse. In southern Syria, along the Quneitra, Daraa, and Suwayda corridor, Israel imposed measures to strengthen its influence on the new Damascus administration and carried out numerous attacks targeting Syrian forces under the pretext of protecting the Druze population. Positioning Türkiye as a threat became one of the most striking aspects of Israel's regional policy throughout 2025. In the aftermath of the Syrian uprising, Israel strongly opposed Türkiye's presence in southern Syria and went further by entering an openly political and military alliance with Greece and the Greek Cypriot directed against Türkiye.

Throughout 2025, Israel continued its attacks targeting Hezbollah, particularly along the southern front in Lebanon, using these operations as a form of sustained military pressure. Maintaining its presence in southern Lebanon, Israel, backed by the U.S., continued to pressure the Lebanese government to disarm Hezbollah. Under these conditions, repeated warnings were issued as of Dec. 31, stating that Hezbollah must be disarmed or military action would be undertaken.

Domestically, 2025 was marked by pronounced polarization around accountability for the Oct. 7 security failure, tensions between the judiciary and the executive, and the conscription of Haredi Jews. The Supreme Court emphasized the need for an independent, official investigative commission; however, Prime Minister Netanyahu avoided accountability by delaying the process and attempting to expand its scope. Ongoing legal proceedings against Netanyahu, along with the government's interventionist measures targeting the judiciary, reflected a continued hostile stance toward democratic oversight mechanisms. More broadly, appointments within Israel's military and intelligence apparatus reinforced the perception that the country has increasingly shifted toward a "competitive authoritarian" model in recent years.

3. SYRIA IN 2026: OUTLOOK AND RISK ASSESSMENT

As Syria enters 2026, one of the strongest assets of the new administration is the foundation of domestic and international legitimacy that emerged in the post-revolution period, along with a centralized political will shaped around the leadership profile of al-Sharaa. International support for the drafting of a constitution, a limited but functional capacity derived from local governance experience, and a widespread civil society network formed during the civil war offer significant advantages for state-building. However, as the country moves toward 2026, these strengths also carry the potential to generate risks due to serious underlying weaknesses.

The most pronounced risk lies in the lack of institutional capacity and the weakness of the legal system. During the transition, decision-making has been concentrated largely around the central executive, while political parties, a strong parliament and established judicial mechanisms have yet to take shape. Although this arrangement appears manageable in the short term, it could lead to institutional bottlenecks in 2026 as political demands increase. In particular, the politicization of local rivalries and identity-based fault lines stands out as a dynamic that could erode the legitimacy of the central authority.

The fragility of relations between the SDF/YPG and the central authorities is another core risk for state-building. Failure to complete the integration process would both undermine the vision of a unitary state and lead to the entrenchment of de facto autonomous areas in different regions. If this issue remains unresolved in 2026, it will increase the risk of geographically fragmented state capacity and the inability of the central government to establish equal sovereignty across the country.

The economy stands out as the area with the highest risk-producing potential for Syria in 2026. The process of lifting sanctions, investor interest, the potential contribution of the diaspora and regional integration projects, in theory, provide a strong framework for economic recovery. A young population and the search for a new economic model are also viewed as long-term opportunities. However, the weakness of economic infrastructure, the near dysfunction of the financial system and limited access to natural resources make it difficult for these opportunities to

> As Syria enters 2026, the risks it faces are multidimensional and cannot be reduced to a single domain. Weak institutionalization in state-building, the slow pace of economic recovery, fragmentation within the security sector, and a high degree of external dependence in foreign policy stand out as interlinked risk areas that reinforce one another.

translate into tangible results in the short term. For 2026, the central risk is the rapid erosion of public support if economic expectations are not met. The post-revolution optimism could give way to disappointment if it is not backed by job creation, income growth and improvements in public services.

The return of refugees and broader population movements also constitute a dual-sided risk area. If returns do not proceed in parallel with economic capacity, rising unemployment pressures could deepen social tensions. In 2026, should economic recovery remain slow, this dynamic carries the potential to fuel local rivalries and identity-based tensions, turning them into sources of political instability.

In the security domain, the new administration's most important advantage is the combat experience gained on the ground during the civil war and the operational expertise acquired in the fight against radical groups, particularly DAESH. Security cooperation established with regional and international actors also ranks among the factors supporting technical capacity. However, the fragmented structure of the security sector and the presence of multiple armed groups pose risks for 2026. Failure to reform the security sector and consolidate it under a single hierarchical structure would undermine the state's monopoly on the legitimate use of force. This, in turn, increases the risk that local power struggles could escalate into armed conflict.

The possibility of DAESH and similar radical groups reemerging persists, particularly in rural areas and zones marked by power vacuums. If security reforms slow or stall in 2026, these groups could trigger a new wave of instability by exploiting sectarian and ethnic fault lines. In addition, the external ties of various armed groups risk turning Syria's internal security into an instrument of regional competition.

The new administration's potential for regional and international recognition remains a key advantage in 2026, just as it was in 2025. A regional environment conducive to normalization, the need for cooperation with neighboring countries, and opportunities for partnerships in counterterrorism expand Syria's room for maneuver in foreign policy. Increased engagement with international institutions is critical for economic and humanitarian support. At the same time, Syria's dependence on external actors represents a major risk for 2026. The influence and competition of foreign powers over Syria have the potential to directly shape the country's decision-making processes. Capacity gaps within foreign policy institutions, combined with local power centers attempting to act independently from the center, could create a fragmented picture of Syria's foreign policy.

If regional tensions rise or great power competition intensifies in the Syrian arena in 2026, the new administration's balancing strategy will face serious tests. Such a scenario carries the risk of Syria once again becoming a theater for proxy conflicts. As the country enters 2026, the risks it faces are multidimensional and cannot be reduced to a single area. Weak institutionalization in state-building, slow economic recovery, fragmentation within the security sector, and high external dependence in foreign policy stand out as mutually reinforcing risk factors. The common thread among these risks is the central question of whether the transitional process can evolve into a durable and inclusive state.

4. ISRAEL-PALESTINE IN 2026: OUTLOOK AND RISK ASSESSMENT

The year 2026 is a scheduled election year for Israel. In the election atmosphere, expected to take place by October at the latest, it is highly likely that the current government will increase its populist policies. Therefore, this factor must not be overlooked when assessing expectations for Israel in 2026.

For Israel, the deepening humanitarian crisis in Gaza will remain a key agenda item in 2025, contributing to ongoing reputational damage. While Israel is currently attempting to position the "Yellow Line" as a new boundary, there is also a possibility that, if conditions allow, it could resort to continued military action in Gaza, exploiting ambiguities in the 20-Point Plan. Meanwhile, the ceasefire in Gaza is becoming increasingly fragile. Israel has repeatedly violated its terms and supported anti-Hamas and Islamic Jihad criminal networks. Under these circumstances, Hamas has linked full disarmament and transfer of authority to the establishment of a unified Palestinian national structure. As a result, it resists giving up weapons that do not pose a direct threat to Israel and opposes the process by claiming that the ISF and the Peace Desk are moving toward a "protectorate-style" regime.

Meanwhile, for Israel, both the continuation of Iran's nuclear activities and the replenishment of its ballistic missile arsenal are considered serious threats. In this context, it is conceivable that Israel could take action first in Lebanon, to prevent Hezbollah from regaining strength, and subsequently against Iran. Regardless of questions of legitimacy, in both arenas Israel's stated red lines are being crossed.

Under Finance Minister Bezalel Smotrich, who also oversees settlements through the Defense Ministry, and National Security Minister Itamar Ben-Gvir, both the Israeli military and settler violence in the West Bank are expected to continue increasing. Record growth in new settlements in 2026 raises the likelihood of heightened conflict and crises in the region. In 2025, Israel carried out extensive destruction in northern West Bank cities, and this trend is likely to continue into 2026.

In the Eastern Mediterranean, Israel's efforts in 2026 and beyond are expected to focus on limiting Türkiye's influence in coordination with Greece and the Greek Cypriot. The Syrian arena, as in 2025, is also likely to remain an area of escalating tension. ■

THE GULF IN 2025: CURRENT DYNAMICS AND 2026 RISK OUTLOOK

1. THE GULF IN 2025

For the Gulf countries—namely Saudi Arabia, the United Arab Emirates (UAE), Qatar, Kuwait, Oman, and Bahrain—2025 was primarily a period focused on avoiding the negative impacts of regional crises while participating in regional and international efforts to manage them. The Gulf states had to maintain a balance of power within the Gulf Cooperation Council (GCC) while also making active decisions on issues such as Israel-Iran military tensions, the war in Yemen, the civil war in Sudan, and security in the Red Sea.

The primary issue within the Gulf is the redefinition of leadership and spheres of influence within the GCC and the broader Middle East. The ongoing leadership contest between Saudi Arabia and the UAE is closely monitored by Riyadh, particularly in light of Abu Dhabi's military, political, and economic activities in Yemen, Sudan, Somalia, and the Horn of Africa, which reveal differing priorities between the two countries. While this situation did not produce a direct or open crisis between them in 2025, it has led to more cautious and distanced coordination in Gulf decision-making processes.

The Gulf's greatest foreign policy test in 2025 was managing the military tension between Israel and Iran. Gulf states continue to view Iran as the primary threat to regional security.

In 2025, the Gulf's biggest foreign policy test was managing the military tension between Israel and Iran. The Gulf states continue to view Iran as the primary regional security threat. However, Israel's first-ever military action targeting Qatar, a U.S. ally, marked a significant shift in Gulf security perceptions. Israel is no longer seen as a balancing force against Iran and has instead become an actor that poses risks to the Gulf on its own. Nevertheless, during the conflict, the Gulf states avoided taking a clear military or political position alongside either Israel or Iran. Their main objective was to prevent the tension from spilling into the Gulf militarily. In line with this goal, the Gulf acted to contain the conflict while also minimizing its economic impact.

In 2025, Yemen remained a central issue for the Gulf region. The Houthis' expansion beyond Yemen's borders and emergence as a regional actor became a defining factor that year. The group continued attacks on commercial vessels in the Red Sea until a ceasefire was reached in Palestine, directly affecting global maritime trade. Leveraging the legitimacy gained from this, the Houthis demonstrated that they had become an actor capable of producing outcomes not only at the local and national level but also regionally and internationally. Gulf countries largely adopted a unified stance against the Houthis, expressing concern over the group's growing military capabilities and the strengthened will to use them. Although Houthi military activity visibly declined after the ceasefire in Palestine, the capabilities they had developed remained a permanent factor in Gulf security calculations. Another critical issue in Yemen was the expansion of UAE-backed political and military structures in southern provinces, extending their control into Hadramout and Al-Mahra and permanently altering the balance on the ground. During this period, political circles in the UAE and populations in southern Yemen increasingly began to openly discuss the idea of an independent "South Yemen" and sought regional and international support. This situation positions the Yemen issue as one that directly impacts Gulf politics.

Sudan is also a key issue on the Gulf agenda. The advance on the ground of the Rapid Support Forces (RSF), led by Mohammed Hamdan Dagalo and associated with UAE backing, has drawn significant criticism both locally and at the regional level. As this case shows, the Gulf's policy toward Africa clearly carries both security and influence dimensions.

On the economic front, the period saw strengthening relations between the Gulf states and Türkiye. Rising trade volumes brought new cooperation onto the agenda in strategic sectors such as energy, infrastructure and technology. In Egypt's case in particular, Gulf investments reached a new scale. Investments by Qatar and the UAE totaling nearly $70 billion in projects along Egypt's northern Mediterranean coast became a critical source of financing for the Egyptian economy and contributed to closer relations between Egypt and Gulf capitals.

2. GULF 2026: RISK OUTLOOK

In the Gulf and in foreign policy arenas where Gulf states wield influence, risks in 2026 are shaped less by the emergence of new files than by the intensification of existing risk trends, making them more pronounced and more difficult to manage. First, within the Gulf, differing priorities between Saudi Arabia and the UAE are likely to become more visible. The approach pursued by the UAE in theaters such as Yemen, Libya and the Horn of Africa does not fully align with Saudi Arabia's security outlook. This divergence could lead to more limited coordination within the Gulf.

The Yemen file will remain one of the most sensitive areas in 2026. While the de facto situation in the south appears to have established a degree of order in the short term, it raises serious questions for Saudi Arabia in the long run in terms of border security and regional influence. As for the Houthis, even if the preservation of the ceasefire in Gaza leads them to scale back their regional ambitions, they may continue to threaten regional stability by maintaining military activities—both in the Red Sea security domain and within Yemen—against the internationally recognized government and the structures in the southern governorates.

The UAE's presence in Sudan is also set to be among the most heavily debated issues in 2026. The protracted nature of the fighting on the ground and the growing prominence of claims that external support is being provided to the actors involved are likely to make the Gulf's Africa policy as a whole more difficult to defend on international agendas.

In the context of Israel-Iran tensions, the Gulf's room for maneuver may also be more constrained in 2026. A new escalation between the two countries, or fresh scenarios related to problematic areas such as Iran's nuclear file or the sanc-

> In addition to geopolitical flashpoints, the Gulf also faces economic and policy-related risk areas. In this context, the prospect that the impact of geopolitical tensions on energy supply security could become permanent represents a major risk for the region.

tions dossier, could have negative repercussions for energy markets, maritime trade and the investment environment that directly affect the Gulf. For Gulf states, the principal risk in this context lies not in becoming a party to the issue, but in having to bear the economic costs of a conflict they cannot control.

Beyond geopolitical flashpoints, the Gulf also faces significant economic policy risk areas. In this context, the entrenchment of the impact of geopolitical tensions on energy supply security stands out as a major risk for the region. More than 20.1 million barrels of oil pass daily through the Red Sea and the Strait of Hormuz, and any disruption along these routes would have a direct effect on prices. The growing tendency for oil prices to be shaped by geopolitical tensions, alongside parameters such as U.S. oil production exceeding 13.4 million barrels per day, is limiting the Gulf states' price-setting power in global energy markets. As a result, 2026 points to a period in which the Gulf will be squeezed into a narrower room for maneuver between expectations of high revenues and the realities of global oversupply and persistent security risks.

Therefore, for Gulf states, 2026 will be less about sudden, unexpected crises and more about a year in which accumulated files are assessed more openly and clearly.

IRAQ IN 2025 AND OUTLOOK FOR 2026

Developments in Iraq throughout 2025 pointed less to solutions for the country's political and administrative problems and more to a period in which these issues were deferred through temporary balances. The long-delayed formation of a government in the Iraqi Kurdish Regional Government (KRG) left sensitive issues between Baghdad and Erbil unresolved. Meanwhile, the collapse of the Baath regime in Syria reshaped Iraq's security perceptions and foreign policy priorities. The issue of non-state armed actors became more visible under the regional pressures following October 7, bringing the position and future of the Popular Mobilisation Forces (PMF - Hashd al Shaabi) into open discussion for the first time. Parliamentary elections held during the same period did little to open a new political horizon, instead reproducing Iraq's fragmented structure and fragile balance politics. Taken together, these developments suggest that 2026 represents not a new beginning for Iraq but a threshold in which the files postponed in 2025 can no longer be ignored. In the coming period, the true test of Iraqi politics will be whether it can take realistic and sustainable steps that maintain a balance between internal and regional pressures, rather than producing quick fixes to these challenges.

1. IRAQ IN 2025

1.1. KRG: Government Formation Process

Despite the KRG parliamentary elections held in 2024, the failure to form a new government throughout 2025 highlighted not only tactical disagreements between parties but also the structural fragility of KRG politics. This process transformed the government deadlock from a temporary political crisis into a governance problem that directly affected relations between Baghdad and Erbil.

Two main dynamics have shaped the deadlock in forming a government in the KRG following the elections. The first is the Iraqi parliamentary elections held in November 2025, and the second is their fundamental impact on the negotiation framework among political actors in the KRG. For parties outside the Kurdistan Democratic Party (KDP) and the Patriotic Union of Kurdistan (PUK), joining the KRG government carried the risk of political costs among opposition voters ahead of the upcoming Iraqi parliamentary elections. As a result, these parties deliberately chose to remain in opposition and define their positions after the elections rather than take on executive responsibility. This narrowed the arithmetic for government formation and effectively confined the process to the KDP-PUK axis.

The disputes over power-sharing between the KDP and the PUK have gone beyond the issue of office distribution. For both parties, the real question concerns how uncertainties in Baghdad politics, beyond the balance of power within the KRG, will affect the region. A government formed without full consensus would have exposed the KRG to greater vulnerability in key areas such as budget negotiations, the distribution of oil revenues, and the payment of public salaries. For this reason, the parties opted to maintain the current status quo rather than form a government based on a partial agreement.

1.2. Relations with Syria's New Government

Another issue Iraq inherited from 2024 was the challenge of defining its position following the collapse of the Baath regime in Syria. The change in Syria's leadership represented more than a power shift in a neighboring country; for Baghdad, it marked a turning point with direct consequences for Iraq's internal security architecture, the balance among Shiite political actors, and the positioning of non-state armed groups. The development undermined the pro-Baath stance of Iran-aligned militias engaged in Syria under the banner of the "resistance axis." At the same time, it exposed the limited capacity of Iraqi Shiite actors to produce a unified position on the Syrian file.

In Baghdad, official policy circles sought to turn this rupture into an opportunity in a pragmatic manner focused on risk reduction. The government's emphasis on "non-interference in Syria's internal affairs" was reinforced by two concrete steps following December 8. First, 1,905 Syrian Baath soldiers who had sought refuge in Iraq were returned to Syria on December 19, 2024. Second, on December 26, 2024, the head of the Iraqi Intelligence Service, Hamid al-Shatri, met in Damascus with al-Sharaa, the leader of the new Syrian administration. This approach reflected Baghdad's intention to institutionalize its Syria policy separately from the ideological priorities of militias, centering instead on border security, stability, and concerns over the resurgence of the terrorist group DAESH.

During this period, Shiite militia-linked groups issued fragmented statements blaming different actors for the collapse of the Baath regime in Syria. However, no militia directly intervened on the ground in Syria, and their responses remained largely rhetorical. As a result, actors within the Shiite Coordination Framework experienced internal divergence along the lines of differing political and militia-based positions. Outside of these structures, the Sadrist Movement maintained its "non-intervention" stance both before and after December 8.

Although political and security actors in Baghdad experienced significant internal divergence in defining a position on Syria, channels of contact were established with the new Syrian administration, and the process was managed in a controlled manner. Despite rhetorical differences among Shiite actors, Baghdad succeeded in producing a minimal consensus around shared priorities such as border security, maintaining stability, and limiting risks to Iraqi territory. In this way, Baghdad approached the Syrian file less as an ideological engagement and more as a manageable security and foreign policy issue. However, this pragmatic approach highlighted differences in priorities between Baghdad and Erbil. While Baghdad's focus in the Syrian file centered on sovereignty, border security, and restricting the operational space of non-state armed actors, Erbil's assessments were largely shaped by the position of Kurdish actors in Syria and their indirect political and security influence over the KRG. In particular, uncertainty over the future of Kurdish structures in northern Syria shifted Erbil's perspective on the Syrian theater onto a plane distinct from Baghdad's.

1.3. Non-State Armed Actors

For non-state armed actors in Iraq, 2025 was one of the periods in which the legacy of the regional security environment created after October 7, 2023, was felt most acutely. With the Gaza war, pressure on Iran-aligned armed groups across the Middle East intensified, narrowing the operational space of militias in Iraq as well. For these actors, 2025 was shaped less as a year of expansion or pursuit of new positions and more as a period focused on preserving existing gains.

This pressure environment brought discussions about the future of Hashd al Shaabi to the center of Iraqi politics. Debates openly questioned Hashd al Shaabi's legal status, institutional position, and role within the state structure. Throughout 2025, the failure to pass legal

> Developments in Iraq throughout 2025 pointed to a period in which the country postponed its political and governance problems through temporary balances rather than resolving them. In the KRG, the failure to form a government for months left sensitive files between Baghdad and Erbil in limbo. In Syria, the collapse of the Baath regime reshaped Iraq's security perceptions and foreign policy priorities.

measures that would have strengthened Hashd al Shaabi's status in the Iraqi Parliament highlighted the absence of political consensus on this issue. Amid external pressures, the law's non-passage signaled that, rather than resolving the problem, it was deliberately deferred to 2026 and the incoming government.

For Baghdad, the priority during this period was to avoid sudden or radical steps despite mounting pressure. Consequently, Baghdad did not adopt a line aimed at dismantling Hashd al Shaabi. Instead, it favored a strategy focused on increasing oversight, tying the group more firmly to institutional frameworks, and isolating it from external files. Concerns over a potential resurgence of DAESH were cited as a key justification for this cautious approach. As a result, Hashd al Shaabi and the groups within it faced a dilemma between the "resistance axis" narrative and the need for greater integration into the Iraqi state.

Outside of the militia groups, steps taken throughout 2025 in line with Türkiye's "terror-free" objectives set in motion a process that directly affected Baghdad's state capacity and debates over sovereignty in Iraq. The armed presence of the PKK in Iraq has long been a central issue in Türkiye-Iraq relations, and with the progression of this process, Baghdad began to frame that presence more clearly as a matter of "sovereignty and internal security." In particular, weak state authority in areas such as Qandil, Sinjar, and Makhmur made it necessary to reconsider Iraq's security architecture within the framework of a "terror-free Middle East."

However, the implications of this process for Iraq are not limited to the weakening of the PKK's armed capacity. The possibility of the PKK's withdrawal or disarmament raises the question of who would fill the security vacuum that could emerge on the ground. At this point, militia groups emerge as the main actors likely to shape the course of the process. The key test for Baghdad and Erbil will be whether they can build a lasting security and governance capacity in these areas that strengthens central authority in the post-PKK period. Otherwise, the opportunity window created by Türkiye's "terror-free" objective in Iraq will remain limited, and non-state armed actors will continue to exist in different forms. In this sense, the process can be seen both as an opportunity to reinforce stability in Iraq and, if mismanaged, as a testing ground that could generate new vulnerabilities.

1.4. Iraq's Nov. 11 Parliamentary Elections

The lead-up to Iraq's Nov. 11, 2025, elections, the sixth parliamentary vote since 2003, presented a technically broad-based and competitive picture. Politically, however, the elections unfolded amid deep fragmentation and a fragile environment. With 21.4 million eligible voters, 7,743 candidates, and 147 political formations participating, these elections represented a critical threshold, as the 329-seat parliament would shape Iraq's political direction for the next four years.

The pre-election landscape was marked less by the emergence of strong, unified blocs and more by deepening divisions both between and within Shiite, Sunni, and Kurdish politics. Even among actors gathered under the Shiite Coordination Framework, the inability to develop a shared political vision—and the decision of different groups, notably Sudani's Reconstruction and Development Coaliton, to run on separate lists—stood out as a clear sign of this fragmentation. This disunity within the Shiite bloc also weakened the motivation for consolidation in Sunni politics, resulting in a highly fragmented scene with multiple lists, including Taqadum, Siyada, Azm, and Hasim, competing for prominence. In Kurdish politics, the KDP-PUK rivalry carried over into the pre-election period, compounded by the failure to form a KRG government, limiting the Kurds' negotiating power in Baghdad.

The election results produced an arithmetic in which no single political formation gained decisive dominance, while a large number of medium-sized actors secured representation in parliament. The Reconstruction and Development Coalition, which came in first with 46 seats, did not have enough leverage to emerge as the dominant actor shaping executive power. The fragmented landscape—composed of actors such as the State of Law Coalition (29), Taqadum Party (27), Sadiqun Movement (27), KDP (26), and National State Forces Coalition (18)—made coalition negotiations inevitable. This picture indicated that the structural factors behind the prolonged government formation process seen after the 2021 elections largely persisted.

Examined through the lens of identity groups, the election results show no radical change in Shiite, Sunni, or Kurdish representation. The southern governorates, where the Shiite population is concentrated, maintained their numerical advantage in parliament, as in previous elections. However, this advantage was not consolidated under a single Shiite bloc. The multiplicity within Shiite politics resulted in different lists winning similarly sized numbers of seats, institutionalizing competition within the "Shiite house." In Sunni governorates, increased voter turnout contributed to the relatively strong performance of lists such as Taqadum and Azm. On the Kurdish front, the combined weight of the KDP and PUK, round 41 seats, indicates that the Kurds preserved their bargaining power in Baghdad, though political fragmentation within the KRG continues to limit that influence.

In this context, the elections can be seen less as a platform for political actors to advance reform, governance, or policy proposals and more as a mechanism in which post-election government formation negotiations take precedence, serving not as a direct vehicle for a change in power, but as a means to recalibrate the balance of power in Iraq.

2. IRAQ 2026: KEY EXPECTATIONS

As 2026 begins, the primary expectation for the KRG is that the long-delayed government

The central expectation for 2026 is that the government formed after the elections will have limited capacity to generate stability. A fragmented parliamentary arithmetic makes prolonged negotiations and fragile coalitions inevitable. The continuation of a national unity government model may provide short-term stability; however, it will continue to constrain reform capacity.

formation process will be revived in line with the new parliamentary arithmetic in Baghdad. However, the process is not expected to be completed quickly or smoothly. Disputes over power-sharing between the KDP and PUK, as well as coordination with Baghdad, are likely to remain the main determinants of KRG politics in 2026. In particular, the increasing linkage of files such as the budget, oil revenues, and public salaries to Baghdad's political balances could impose a challenging timeline for government formation in the KRG. Consequently, the government expected to be formed in 2026 is more likely to be built on a fragile and limited consensus rather than a strong political agreement.

In 2026, the main expectation for Iraq's Syria policy is that Baghdad will continue the pragmatic, security-focused approach it adopted in 2025. The new Syrian administration's capacity to maintain stability will remain closely monitored by Iraq, particularly in terms of border security and the DAESH threat. At the same time, differences in priorities between Baghdad and Erbil are likely to become more visible. While Baghdad continues to approach the Syrian file through the lens of sovereignty and central oversight, Erbil's assessments will remain shaped by the future of Kurdish actors in Syria. This dynamic could turn the Syrian issue into a new test of coordination in Baghdad-Erbil relations in 2026.

For non-state armed actors, 2026 may be less about reduced uncertainty and more about the need to make clearer strategic choices. Discussions postponed in 2025 regarding Hashd al Shaabi's legal status and institutional position are expected to resurface with the formation of the new government. However, the process is more likely to focus on increasing oversight and deepening institutional integration rather than dismantlement. Continued regional pressure and the potential escalation of U.S.-Iran competition may compel Baghdad to proceed cautiously on this file. Nevertheless, the prevailing approach in 2026 is expected to remain one of managing non-state armed actors in a controlled manner, rather than pushing them entirely outside the system.

In 2026, the impact of Türkiye's "terror-free" objective in Iraq is expected to become more tangible. The PKK's withdrawal or the weakening of its armed capacity will bring a new security and governance test, particularly in northern Iraq. The main risk in this process is that any resulting security vacuum could be filled by other armed groups. Whether Baghdad and Erbil can establish a joint mechanism to strengthen central authority in these areas will determine if the process works in Iraq's favor or generates new vulnerabilities. Thus, 2026 may be the year when it becomes clear whether the "terror-free" initiative represents an opportunity window or an unmanaged risk for Iraq.

The main expectation for 2026 is that the government formed after the elections will have limited capacity to produce stability. The fragmented parliamentary arithmetic makes prolonged negotiations and fragile coalitions inevitable. Maintaining a national unity government model could provide short-term stability but would continue to constrain reform capacity. Conversely, an attempt at a narrower majority government carries significant risks given Iraq's political culture and identity-based balances. In this context, what will be decisive for Iraq in 2026 is not who forms the government, but the executive's ability to manage a balance between internal and external pressures.

NORTH AND EAST AFRICA: 2025 OVERVIEW AND 2026 RISK OUTLOOK

From 2025 into 2026, North and East Africa are witnessing a regional order reshaped not by sudden crises but by vulnerabilities that deepen over time and intersect with one another. Along the belt from Sudan to Somalia and Ethiopia to Libya, security, governance, and economic-political challenges are no longer isolated issues; they are part of an interconnected crisis ecosystem that reinforces one another and narrows regional stability, with Egypt increasingly at the center. In this context, 2025 marked a year in which conflicts settled into a "manageable uncertainty" regime, while 2026 will test whether this uncertainty solidifies into a persistent condition or can be controlled through calibrated balancing.

1. 2025 OVERVIEW

In 2025, Sudan remained the region's most severe fault line. The externally backed conflict between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) persisted around Khartoum and along the Darfur-Kordofan axis, expanding fragmented armed control rather than state capacity. The siege of Al-Fasher, waves of displacement, and mass violence against civilians highlighted that the conflict had evolved beyond a struggle

From 2025 into 2026, North and East Africa have been witnessing a regional order reshaped not by sudden crisis eruptions, but by vulnerabilities that deepen over time and become increasingly interconnected. Along the arc stretching from Sudan to Somalia and from Ethiopia to Libya, security, governance and political economy challenges are no longer emerging as separate files. Instead, they are unfolding within a crisis ecosystem in which these dynamics reinforce one another, narrowing the space for regional stability and making it necessary to place Egypt at the center of analysis.

between two military centers into a war of attrition targeting humanitarian corridors and local survival strategies. International monitoring reports and media coverage throughout 2025 reinforced Sudan's status as the site of the "world's largest humanitarian crisis," with millions displaced, widespread rights violations, and blocked aid access. In this context, Türkiye stood out for its diplomatic engagement with the SAF in Port Sudan and for supporting humanitarian efforts through coordination by AFAD and the Turkish Red Crescent.

The main dynamic in Libya in 2025 can be described as a "transitional regime that appears political but fails to produce decisions." Throughout the year, discussions focused on an election timeline and the goal of a unified executive, but in practice, the country was managed through negotiations among Tripoli-centered government structures, institutions along the Tobruk-Benghazi axis, and local armed networks. Although the United Nations Support Mission in Libya (UNSMIL) reframed a roadmap in 2025 emphasizing electoral frameworks, a unified government, and inclusive dialogue, the on-the-ground security economy—including militarized public order, rent-sharing, and local veto actors—continually politicized "technical solution" initiatives. Limited processes, such as municipal elections, were insufficient to break the national deadlock. In this context, UN efforts and Qatar's support drew attention, while Türkiye particularly engaged with all Libyan actors, including the Haftar administration, to develop dialogue channels.

In 2025, Ethiopia experienced a year defined less by "post-conflict normalization" and more by simultaneous pressures from multiple internal fronts: the Fano dynamics in Amhara, armed competition in Oromia, and the transitional governance crisis in Tigray. Institutional weaknesses in the Pretoria arrangement fueled political power struggles in Tigray, while rising securitization in Amhara and Oromia hardened center–periphery relations. As a byproduct, a zone of strategic uncertainty emerged, keeping tensions with Eritrea alive at a "cross-border deterrence" level. This situation underscores a security paradox in which Ethiopia's internal vulnerabilities constrain its regional relationships. For Türkiye, the Ethiopian context has been primarily economic-political, with Ankara successfully managing Ethiopia's ambitions for Red Sea access in the framework of the Ankara Process, taking into account the fragile balance in its relations with Somalia.

In 2025, the critical axis in Somalia was the recalibration of the security architecture amid the ongoing Al-Shabaab threat. The transition from the African Union Transition Mission in Somalia (ATMIS) to the African Union Support and Stabilization Mission in Somalia (AUSSOM), including its funding and capacity dimensions, intensified the dilemma between "holding ground" and "withdrawing." When the transition architecture was poorly designed, federal-state tensions and local security gaps clearly created conditions that could enhance Al-Shabaab's rural pressure and asymmetric attack capabilities. Conversely, when properly structured, it became evident that territorial control could be maintained even with limited resources. In this sense, 2025 can be characterized as a "fragile transition year," oscillating between these two extremes. From Türkiye's perspective, the focus was on development-oriented policies to strengthen Somalia's state institutions, achieving progress in security, hydrocarbons, and fisheries, supported by the February 2024 framework agreement.

Meanwhile, as 2025 drew to a close, Israel's recognition of a separatist entity such as Somaliland directly challenged Somalia's sovereignty and territorial integrity—and, by potentially encouraging unilateral redrawing of borders in the international system, undermined Somalia's national unity. This recognition erodes Mogadishu's claim to "sole legitimate representation" across the country, creating new power dynamics based on external recognition rather than internal political consensus or federal arrangements, and further fragmenting the security architecture. In this context, Somalia's strong reaction and the African Union's emphasis on territorial integrity are particularly significant. For Mogadishu, the visible alignment of entities like SSC-Khaatumo and Awdal with the federal center serves as a strategic lever, weakening Somaliland's claim to a "singular and homogeneous political will" and narrowing the legitimacy base for international recognition efforts. At the same time, this approach allows the central government to gradually reestablish sovereignty and security structures in the north, while limiting external actors' capacity to project influence through separatist channels. At the broader African level, the case sets a dangerous precedent. If the African Union's historically entrenched principle of "respect for existing borders" weakens, it could trigger a cascade of separatist pressures along ethnic and regional fault lines in multiple countries. This, in turn, would heighten the risk of internal conflict in fragile states stretching from the Sahel to the Great Lakes region, while providing external actors with opportunities to exert influence through "recognition diplomacy." Against this backdrop, Türkiye's continued support for Somalia's unity in 2026 is not only a matter of bilateral relations, it also represents a rational, interest-driven approach to safeguarding regional order in the Horn of Africa and maintaining stability in the Red Sea security equation.

In the "classic" conflict dossiers of North Africa, 2025 can be characterized as a period of low-intensity but high-strategic-cost continuity. In Western Sahara, the persistence of low-intensity tension has created a backdrop that fuels Morocco-Algeria competition through military spending and diplomatic alignments. Even in the absence of a full-blown crisis, this amounts to a durable "strategic insecurity regime." In Tunisia, rather than security threats, economic and social pressures combined with political closure have heightened fragility, particularly along

As North and East Africa enter 2026, the defining dynamic is not the outbreak of new crises, but the growing complexity, multilayered nature and higher management costs of existing ones. In Sudan, the risk of fragmentation becoming institutionalized; in Ethiopia, the spiral between internal security and regional competition; in Somalia, the sustainability of the security architecture; and in Libya, the political process remaining hostage to militia balances are locking the region into a regime of high uncertainty and low predictability.

the axes of protest and migration management. While Algeria shows some signs of macro-level resilience, elite competition, especially among the Kabyle Amazighs, and the narrowing of political space point to a structural uncertainty that reduces the system's overall predictability.

At the regional level, crises originating from the Eastern Mediterranean, Red Sea, and Bab el-Mandeb showed signs of "partial normalization" in 2025; however, this normalization remained cautious and fragile. As global shipping operators tested a return to the Suez route, the persistence of security risks continued to drive variability in logistics costs as well as insurance and route choices. In the Eastern Mediterranean, alongside the initiatives of international energy companies, overlapping crisis lines, related to Libya, Gaza, Sudan, and Nile water sharing, positioned Egypt at the center of regional dynamics. This Egypt-centered dynamic is expected to deepen further in 2026.

2. 2026 RISK ANALYSIS AND EMERGING CRISIS/FLASHPOINTS

In 2026, the highest risk lies in the expansion of ongoing conflicts into new geographies and social fault lines without approaching a political resolution threshold. In Sudan, the siege and famine risks along the Al-Fasher/Darfur/Kordofan axis, combined with the RSF's parallel governance initiatives and the SAF's strategy that strains the military balance, could escalate the conflict into sharper ethnic and community-based divisions, lasting fragmentation, and cross-border security challenges. In this scenario, the militarization of humanitarian aid and population movements into neighboring countries would become the primary risk multiplier for 2026.

For Ethiopia in 2026, the risk has two layers: first, the inability to simultaneously manage multiple internal rebellion/conflict dynamics; second, the possibility that this could make tensions with Eritrea prone to "accidental escalation." The first layer is difficult to manage purely based on interests, while the second is comparatively easier to handle in the context of Berbera (Somaliland). However, the failed institutionalization of the Tigray transition, combined with security consolidation pressures in Amhara and Oromia, could push Addis Ababa to send tougher signals in foreign policy. If Eritrea interprets these signals through its security lens and responds with mobilization, a deterrence spiral could generate conflict even if neither side intends war. Regarding Nile water sharing, Egypt's strategy to encircle Ethiopia via Eritrea, Djibouti, and Somalia could, from Türkiye's perspective, be managed pragmatically and offer strategic advantages in bilateral and regional relations.

In Somalia, the defining factor for 2026 will be the sustainability of AUSSOM and whether Somali security institutions can shoulder the "post-transition" burden. If funding gaps, training and equipment deficiencies, and federal political crises all deepen simultaneously, it is likely that Al-Shabaab could regain territory and increase the tempo of asymmetric attacks in urban areas. Conversely, if the transition is well managed, 2026 could become a year of gradual recovery focused on state-building and local reconciliation. The likelihood of one-person-one-vote elections in Somalia in 2026 is very low.

In Libya, the main risk for 2026 lies in the election agenda turning back into a "zero-sum" negotiation and thereby triggering the security sector. Even as the UN roadmap is being discussed, if the key actors focus on securing their own veto areas, the fragile ceasefire arrangements around Tripoli could quickly collapse. Moreover, disputes over energy revenue sharing and the legitimacy of institutions, combined with external actors' influence competition, could transform political deadlock from a state of "controlled freeze" to "uncontrolled fragmentation." In this context, it is strategically important for Türkiye to concentrate its power and engagement in Libya in 2026.

In North Africa, the emerging risks in 2026 are more likely to stem not from classical frontline wars but from crises arising from a combination of socio-economic fragility, political closure, and migration/identity politics. In this context, Türkiye, due to limited capacity regarding the Western Sahara or Sahel crises, continues with controlled monitoring, while in Tunisia it maintains its economic-political and socio-cultural policies.

In conclusion, as 2026 begins, the defining dynamic in North and East Africa is not the outbreak of new crises but the increasing complexity, layering, and management costs of existing crises. In Sudan, there is a risk of the institutionalization of fragmentation; in Ethiopia, an internal security-regional competition spiral persists; in Somalia, the sustainability of the security architecture is at stake; and in Libya, the political process remains hostage to militia balances. Together, these factors trap the region in a regime of high uncertainty and low predictability. This situation underscores the growing importance of early warning mechanisms, humanitarian access capacity, and economic-political balancing tools over classical military solutions.

For Türkiye, 2026 may be a year of pragmatic crisis management, selective engagement, and impact through win-win economic-political initiatives, rather than normative mediation claims. Ankara's approach, which prioritizes state capacity in Sudan and Somalia, plays a balancing role in the Ethiopia–Somalia equation, and maintains a multi-channel diplomacy informed by the local reality in Libya, will continue to serve as key levers for limiting crises and securing strategic areas in an environment where regional instability cannot be fully prevented.

NOTES

NOTES

NOTES

NOTES

NOTES

Center for Middle Eastern Studies

Adress : Mustafa Kemal Mah. 2128 Sk. No: 3 Çankaya, ANKARA
Phone : +90 850 888 15 20
Email : info@orsam.org.tr
Photo : Anadolu Agency (AA)