

Humanitarian impact overview (October–December 2024)

ABOUT THIS REPORT

The Syria humanitarian Impact Overview is a quarterly publication that provides decision makers with a short, accessible overview of key trends and emerging challenges with the potential to affect humanitarian needs in Syria. The product combines trends in key conflict and humanitarian data with daily media monitoring, secondary data review, and continuing joint analysis with operational and analytical experts.

Methodology

ACAPS developed the Syria Humanitarian Impact Overview by undertaking the following:

- maintaining a core dataset of 14 quantitative indicators at district level (see ACAPS's Syria core dataset)
- daily monitoring of Syrian media and social media in English and Arabic
- secondary data review of key analysis products published on Syria
- analysing key conflict, displacement, economic, social, and humanitarian indicators to identify trends
- regular joint analysis with operational and analysis experts working on Syria to test and refine assumptions.

Limitations

ACAPS analysis is based predominantly on publicly available reports and datasets, making it susceptible to availability bias. To mitigate, ACAPS crosschecks information with operational experts and actively seeks alternative sources to configure the broadest possible basis for analysis. As the situation in Syria remains highly volatile, some information might be short lived and some sources difficult to triangulate.

Information gaps and needs

The rapid unfolding of events in this reporting quarter led to a number of information gaps and needs. Despite significant coverage of the Hayat Tahrir Al Sham (HTS) offensive against the Government of Syria (GoS), which led to the fall of President Bashar Al Assad, ensuing turmoil, insecurity, and uncertainty have resulted in increased challenges reporting the population's changing humanitarian needs and access to services.

Areas of territorial control that have remained static for several years are now dynamic, and it remains difficult to understand which faction controls which area, what local governance systems are in place, and how this influences humanitarian action. Humanitarian access is challenged by shifting governance and fragmented coordination, making information exchange and analysis challenging.

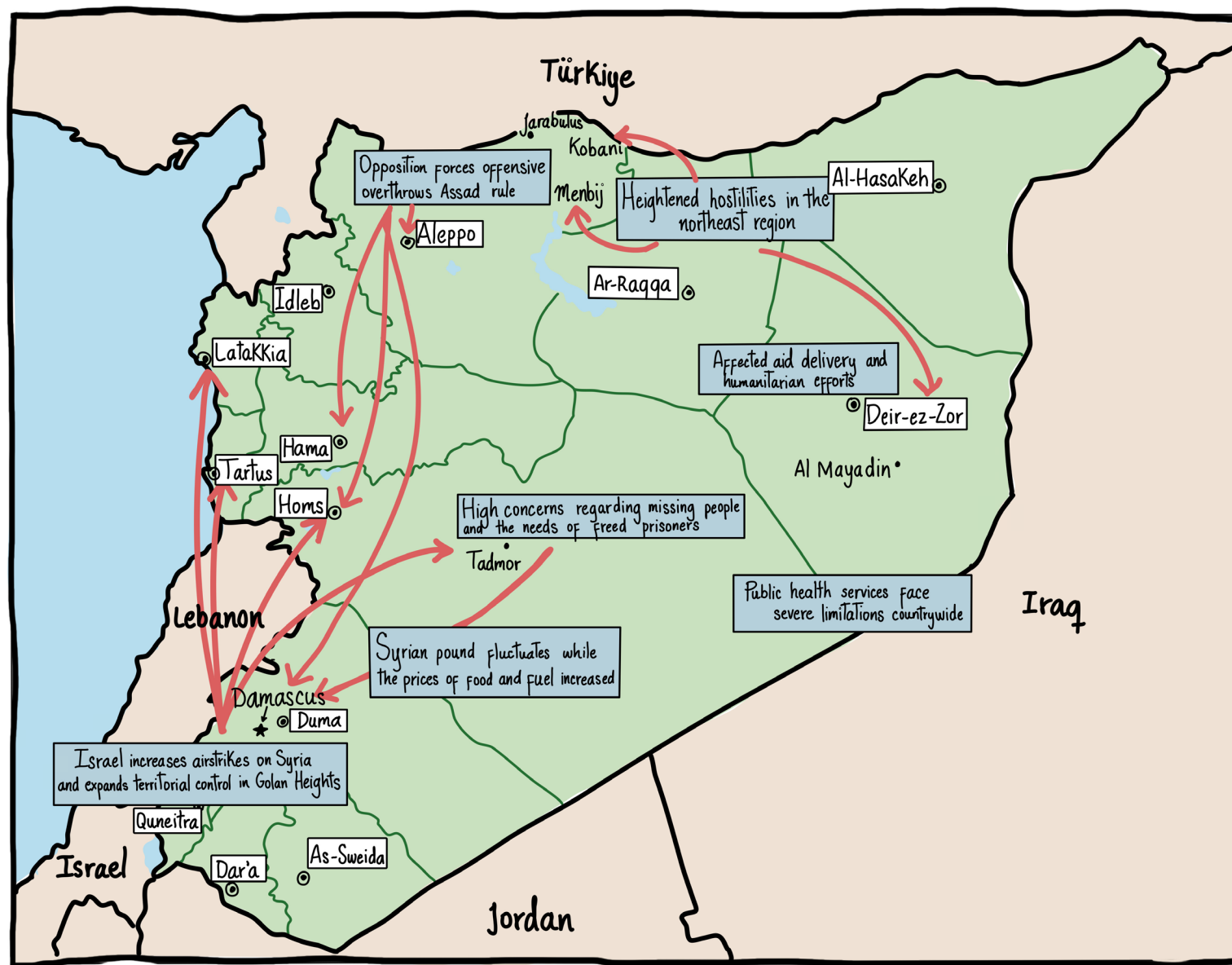
Information gaps regarding administrative and physical obstacles to aid access persist, alongside information on the level of humanitarian aid.

Many people in Syria have been on the move since the beginning of the escalation of hostilities in late November 2024, initially as a result of fears of the armed conflict and then, following the overthrow of Assad, to reach areas previously under GoS control – e.g. Aleppo, Damascus, Hama, and Homs – to which access may have been restricted. While OCHA and INGOs are continuing to update IDP and returnee figures, humanitarian responders have also noted that political sensitivities mean that many people are unlikely to report their displacement status.

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MAP 1. KEY DEVELOPMENTS IN SYRIA BETWEEN OCTOBER–DECEMBER 2024



Source: ACAPS

KEY DEVELOPMENTS OVERVIEW

Opposition forces overthrow Assad rule in Syria

In October 2024, GoS and Russian forces conducted over 400 aerial and shelling strikes in northern Syria, double the number of incidents recorded in September, across more than 100 opposition-held locations. This surge in Russian-backed strikes coincided with escalating hostilities between Hezbollah and Israel in Lebanon, raising concerns that Hezbollah would redeploy its forces from Syria to Lebanon (ACLED 07/11/2024).

On 27 November, HTS, which had controlled Idleb governorate in Northwest Syria since 2017, launched the Deterrence of Aggression operation against GoS forces in Aleppo, in coordination with the Syrian National Army (SNA) (LBC 09/12/2024; AJ 30/11/2024). By 8 December, opposition forces had swiftly advanced to control Aleppo, Hama, Homs, and enter Damascus, taking de facto control of government-controlled areas and leading to the overthrow of Bashar Al Assad's 24-year rule (ICG 17/12/2024).

Israel increases airstrikes on Syria and expands territorial control in Golan Heights

Following the fall of Assad and an aerial campaign already started in October, Israel intensified attacks on Syria, targeting key military sites including anti-aircraft batteries, airfields, weapons production facilities, and missile systems in Damascus, Homs, Lattakia, Palmyra (Tadmor), and Tartous, with the Israel Defence Forces estimating that 70–80% of Syria's strategic military capabilities had been destroyed by 473 airstrikes within a week after the fall of Assad (MEM 18/12/2024).

On 8 December, Israel also seized control of a 400km² demilitarised buffer zone in southern Syria, near the Israeli-occupied Golan Heights, following the collapse of Assad's rule (Newsweek 09/12/2024). Israeli forces entered the buffer zone and surrounded commanding positions after Syrian troops withdrew from Quneitra province. Prime Minister Benjamin Netanyahu justified the move as a defensive measure, citing the need to prevent hostile forces from establishing positions near Israel's borders (AP 19/12/2024). Israeli forces told the residents of five Syrian villages in the demilitarised buffer zone to remain indoors. Israel's occupation of the buffer zone violates the 1974 ceasefire agreement, which established the area after the 1973 Arab-Israeli War. Critics view the move as exploiting Syria's chaos for territorial gain, while Israel insists the seizure is temporary until a new arrangement ensures its security. The Golan Heights, annexed by Israel in 1981, remains an internationally disputed territory (BBC 08/12/2024; ICG 17/12/2024).

Heightened hostilities in northeastern Syria persist in December

Hostilities are continuing in northeastern Syria, namely in Deir-ez-Zor, Kobani, and Menbij, driving the displacement of Kurds, Arabs, and other communities as factions of the Türkiye-backed SNA fight the Kurdish-led Syrian Democratic Forces (SDF), the armed wing of the Autonomous Administration of North and East Syria (AANES). Since the fall of Bashar Al Assad on 8 December, the SNA has intensified strikes against SDF positions (Euronews 26/12/2024). Following the SNA advance in late November, 100,000 people had already been displaced from Aleppo to AANES regions (HRW 11/12/2024). By 16 December, 250 sites, including schools, mosques, and municipal buildings, had been repurposed as collective centres, accommodating over 44,000 IDPs across all northeastern areas. This is alongside reports of discrimination and abuse toward civilians in Menbij on the basis of ethnicity (NES NGO Forum 17/12/2024).

By 18 December, clashes between SDF and SNA fighters in northern Syria had jeopardised fragile ceasefire agreements and hindered US efforts to contain rising armed conflict amid the waning civil war. Fighting has erupted in key locations, notably Kobani, which holds deep emotional significance for SDF forces. The SDF, long-time US allies in combating the Islamic State (IS) armed group, had liberated cities – including Kobani and Menbij – from IS control, detaining 9,000 IS fighters with support from 900 US troops. Türkiye, however, sees the SDF as affiliates of the Kurdistan Workers' Party, which the Türkiye Government has labelled a 'terrorist organisation'. Both Kobani and Menbij have been points of contention between the SDF and SNA. By 18 December, US-brokered ceasefires between the SDF and SNA had calmed hostilities, with the SDF agreeing to withdraw from Menbij and move east of the Euphrates River (Al-Monitor 16/12/2024; NYT 18/12/2024).

IS also continues to pose a significant threat to stability in northeastern Syria. On 6 November, SDF-led operations – such as Operation Enduring Security – targeted IS hideouts near the Syrian-Iraqi border and in Al Hawl camp, resulting in arrests, weapon seizures, and the dismantling of tunnels. These efforts yielded limited and short-term success, highlighting the persistent challenge of countering IS. The group conducted multiple targeted attacks in northeastern Syria in late 2024, including ambushes, bombings, and assaults on SDF fuel tankers and posts, causing casualties and disrupting vital supply lines. Although continuing operations showcase a persistent SDF and International Coalition effort to contain IS, underlying issues such as unstable governance, economic fragility, and unregulated desert areas continue to fuel the group's resilience (CA-SYR 12/2024; CA-SYR 03/12/2024).

Syrian pound declines during opposition offensive and rebounds after Assad's fall

The Syrian pound, which had been stable between May–November 2024 at around SYP 14,750/USD 1, recorded a sharp decline during recent hostilities. By 6 December, the exchange rate had risen to SYP 19,000/USD 1 in Damascus, while in areas of intensified military activity, such as Idleb and Aleppo, it reached SYP 22,000/USD 1 and SYP 25,000/USD 1 respectively (SP-Today accessed 17/12/2024). Economic uncertainty has deepened across northern Syria, where dual-currency use has been the norm for several years. In opposition-controlled areas, people largely transact in Turkish lira, while those in Aleppo and Idleb predominantly use Syrian pounds. This shift has disrupted markets and caused widespread confusion over the pricing of commercial goods, raising concerns about unchecked inflation and marking a deeper fragmentation of Syria's economic system (KII 02/12/2024). The fall of Bashar Al Assad on 8 December had an immediate effect on Syria's economic landscape. The Syrian pound rebounded, reaching SYP 15,800/USD 1 in Damascus and Aleppo and SYP 16,500/USD 1 in Idleb by 17 December (SP-Today accessed 17/12/2024).

Increased food and fuel prices in December

Hostilities and economic uncertainty have led to significant variations and fluctuations in bread prices across different areas. In Idleb and Aleppo, for instance, bread prices surged by 900% between 27 November and 9 December, reflecting the deepening economic crisis (OCHA 10/12/2024). As a result, families are increasingly adopting coping strategies with potentially harmful effects, such as consuming less food or switching to cheaper alternatives. In late December in Northwest Syria, subsidised bread prices remained stable, but vendors were reducing bundle weights and loaf counts – potentially another form of coping with the economic pressures (REACH 19/12/2024). Critical shortages of food, fuel, and essential supplies persist as a result of disrupted trade routes and unpredictable border crossing possibilities, as some crossings remain operational and others are in transition or affected by continuing instability (UN News 17/12/2024; UNHCR 27/12/2024). In key areas, such as Al-Hasakeh and Ar-Raqqa, currency volatility means that most households struggle to afford basic food items and disruptions to supply chains further aggravate food insecurity (NES NGO Forum 17/12/2024).

The Joint Market Monitoring Initiative reported that cooking fuel prices also rose by 40% in northeastern Syria and 70% of vendors in Northwest Syria reported severe shortages of fuel for transportation, underscoring December's significant market constraints (REACH 12/12/2024 and 19/12/2024). Fuel demand in Syria decreased by 60% between 2011–2022, reflecting years of conflict and displacement. The potential return of refugees from neighbouring countries, however, could drive increased consumption, putting pressure on the transitional government to stabilise fuel supplies and rehabilitate critical energy infrastructure (Argus Media 13/12/2024).

Public health services face severe limitations

The healthcare system in Syria has suffered extensive damage, with over one-third of hospitals partially or fully non-operational. The healthcare staff-to-population ratio remains below international standards, resulting in limited access to essential medical services. Severe challenges are critically affecting maternal and neonatal care, forcing many women to give birth in unsafe conditions. Mental health services remain scarce despite widespread psychological distress, leaving significant needs unmet. Fuel shortages, coupled with the destruction of or damage to numerous ambulances, have further weakened emergency response and medical transport services. Women, adolescents, and marginalised groups – including people with disabilities, older people, and unaccompanied minors – face increased risks as a result of limited access to comprehensive healthcare, deepening their vulnerabilities during the conflict.

Overcrowded displacement camps lack adequate healthcare infrastructure, and the onset of winter has further increased health risks. Many displaced individuals attempting to return to their homes have encountered damaged infrastructure and disrupted basic services, such as water, electricity, and healthcare, compelling them to return to camps and further straining available health resources (MFS 12/12/2024; UN News 03/12/2024; IPPF 11/12/2024; Health Cluster 27/12/2024).

Intensified conflict in the northwest has led to the displacement of approximately 80,000 people to areas in the northeast, including Al-Hasakeh, Ar-Raqqa, and Tabqa. These areas have already been experiencing significant healthcare limitations because of their reliance on declining international assistance. The escalation of hostilities, particularly in and around Menbij, has heightened concerns about additional displacement and further deterioration of the health situation in affected regions (MFS 12/12/2024).

The conflict in Syria, compounded by the 2023 earthquake and economic instability, has also resulted in a significant mental health crisis, particularly in the northwest. Despite the high need for mental health services, a shortage of specialised care facilities and trained professionals means access remains limited. According to the WHO, Northwest Syria, home to 4.5 million people, has only four mental health centres and two psychiatrists. Social stigma around mental health and funding gaps further hinder access to care (SciDev.Net 04/11/2024).

By September 2024, half of the maternity hospitals in Northwest Syria had suspended operations, affecting approximately 1.3 million women of reproductive age (UNFPA 23/10/2024).

High concerns regarding missing people and the needs of freed prisoners

Following the change in Syria's political landscape, families continue searching for missing or forcibly disappeared relatives. Many gather at hospitals, prisons, and morgues in Damascus, reviewing photos of unidentified bodies and examining old prison records. Organisations such as the Syrian Emergency Task Force are searching for missing individuals, including foreign nationals. In one instance, activists inspected an abandoned intelligence facility in Damascus, uncovering records and evidence of prior detentions and revealing the detail of GoS detainee records, which potentially provide crucial information on the fate of the missing and a basis for holding the GoS accountable (NPR 17/12/2024).

The uncovering of mass graves has highlighted significant humanitarian concerns linked to enforced disappearances and potential mass atrocities and large-scale human rights violations (OHCHR 20/12/2024). Advocacy organisations estimate that hundreds of thousands of individuals who went missing during Assad's rule may be buried at these sites, with major discoveries reported near Damascus and in other regions, such as the city of Al Qutayfah. Several suspected mass graves have been identified, including in Al Qutayfah and areas along the Damascus International Airport Road (CNN 17/12/2024; OHCHR 20/12/2024).

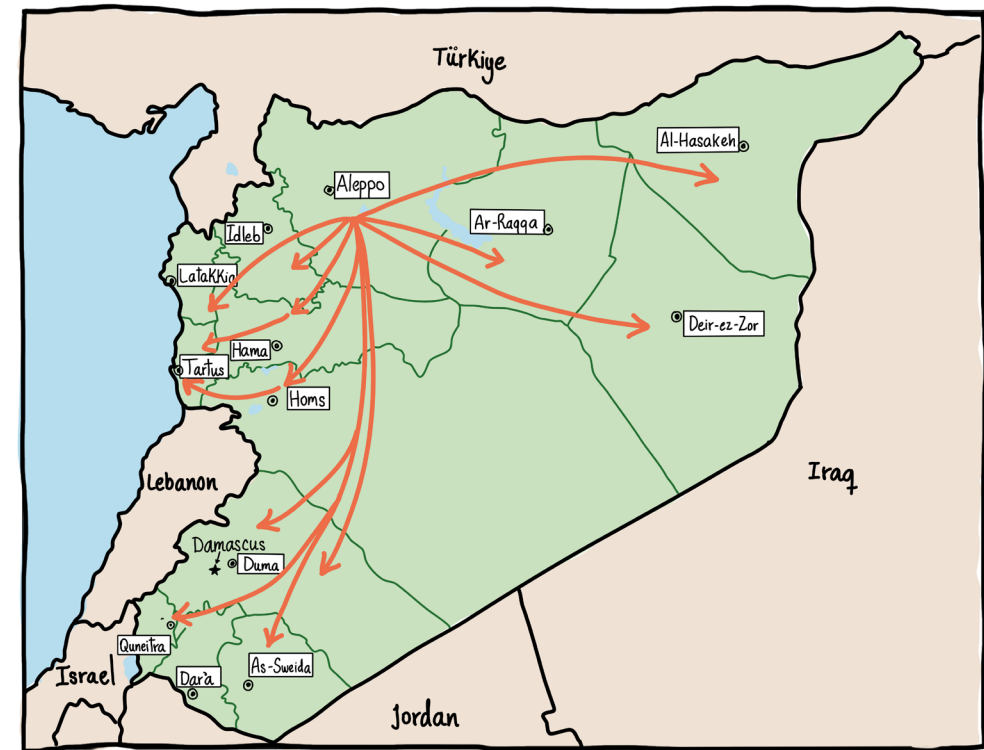
Affected aid delivery and humanitarian efforts

The 2024 Humanitarian Response Plan faces one of the greatest funding shortfalls in recent years, receiving less than one-third of required funding, while the winter response plan – critical for 1.4 million people – has secured only 10% of its USD 112 million target. These gaps threaten the provision of shelter, food, healthcare, and water sanitation, particularly as winter aggravates such vulnerabilities (OCHA 18/10/2024). The UN, European Commission, UK, and International Federation of Red Cross and Red Crescent Societies have mobilised emergency funds and resources, but coordination and enhanced international support remain urgent. Protection services, particularly for women and children, face severe challenges, with mobile units and online platforms attempting to fill gaps caused by disrupted access (Reuters 20/12/2024; MPI 19/12/2024; Govt UK 16/12/2024; UNHCR 17/12/2024; IFRC 13/12/2024).

KEY ISSUES TO MONITOR

Mass displacement and population movements

Map 2. IDP movements by governorate as at 20 December



Source: ACAPS using information from OCHA (23/12/2024)

Between 27 November and 8 December, during the opposition offensive, over 1.1 million Syrians were newly displaced across the country, many for the second time (OCHA 12/12/2024).

By 16 December, approximately 225,000 IDPs had returned, mainly to Hama and Aleppo, while 880,000 remained displaced. Some displaced families who initially returned to their areas of origin have moved back to camps, as the absence of essential services and widespread infrastructure damage in their hometowns made it untenable to remain. Some families indicated that they are delaying their return until explosive remnants of

war are cleared from their areas, with Northwest Syria being particularly affected. In this region, frequent landmine explosions and unexploded ordnance have resulted in numerous casualties, including children, highlighting the significant risks for returning families (OCHA 16/12/2024; UNHCR 27/12/2024). Camps and reception centres across Syria remain overcrowded, forcing displaced families to endure harsh winter conditions and inadequate shelter (UNHCR 11/12/2024).

In northeastern Syria, 44,000 people are still living in 250 emergency shelters, while 186 schools have had to be repurposed as temporary housing, disrupting education for 185,000 students (OCHA 16/12/2024). In places such as Tabaqa and Ar-Raqqa, makeshift accommodations have reached full capacity, leaving many to live in unsafe and deteriorating conditions (HRW 11/12/2024).

By 13 December, only limited numbers of Syrian refugees were returning from Türkiye and Jordan. From Lebanon, fewer than 10,000 individuals have crossed back since 8 December. Many of these seem to be short-term returns, with people mainly going back to inspect their property or visit family members while awaiting more clarity on security and stability (OCHA 16/12/2024; UNHCR 11/12/2024). The dire conditions in Syria, including damaged homes, lack of basic services, and security concerns, may have prompted many returnees to consider re-migration (UNHCR accessed 17/11/2024; KII 16/12/2024; KII 26/12/2024).

By late December, UNHCR monitoring reported that 58,350 Syrians, nearly half of whom are children, had returned to Syria since 8 December through official border crossings. Most returns were directed to Aleppo, Ar-Raqqa, Dar'a, and Homs. Persistent threats, such as unexploded ordnance and clashes between armed factions, continued to raise safety concerns. In Jordan, updates to border-crossing regulations facilitated entry for Syrian investors and their families, while in Iraq, movement through the Peshkhabour border remained steady, with both temporary and permanent returns reported (UNHCR 27/12/2024).

Türkiye hosts the largest population of Syrian refugees globally, with over three million individuals. The UNHCR has reported steady voluntary returns through monitored crossings since the fall of the Assad regime, with many returnees travelling alone to assess conditions before deciding whether to bring their families. Improved security and political changes have motivated some returns, but social, economic, and security concerns continue to influence decisions (World Vision 09/12/2024; UNHCR 19/12/2024).

According to the Lebanese Government, Lebanon is home to an estimated 1.5 million Syrian refugees, 815,00 of whom are registered with the UNHCR. Many live in informal tented settlements. Displacement remains fluid, with 10,000 returns recorded through official border crossing points by 17 December 2024, but restrictive border policies, limited resources, and harsh winter conditions are prolonging displacement (World Vision 09/12/2024; UNHCR 19/12/2024; UNHCR accessed 29/12/2024).

Jordan hosts 649,100 Syrian refugees, around 120,000 of whom live in organised camps, including Za'atari and Azraq. Refugees in Jordan expressed mixed opinions around returning to Syria, citing concerns over security, infrastructure, and economic opportunities. The UNHCR continues to monitor border activities and engage with refugees, using surveys to understand perceptions and needs (World Vision 09/12/2024; UNHCR 19/12/2024).

Refugees in Iraq face tightly controlled movements, making longer-term migration plans a challenge. The Peshkhabour border crossing remains open for temporary family visits, while the Al Qaim border crossing closed on 8 December, restricting movements except for exceptional cases (UNHCR 19/12/2024).

Some European governments have paused asylum decisions for Syrians, citing the need for more clarity on the evolving situation in Syria. This shift has raised concerns about the potential erosion of international protection for refugees. The UNHCR has strongly urged nations to uphold their obligations under international law and avoid actions that could lead to premature returns or leave refugees in prolonged uncertainty (UNHCR 11/12/2024).

Despite pauses in asylum decisions, conditions in Syria remain deeply challenging, with continued instability and lack of infrastructure. While some governments, such as Austria, have introduced financial incentives for voluntary repatriation, the international community and UNHCR emphasise that large-scale returns should only occur under safe, dignified, and sustainable conditions. Such conditions require substantial donor contributions to stabilise Syria and rebuild its infrastructure. Without these measures, the risk of renewed displacement and further conflict remains high, threatening long-term solutions for refugees (UNHCR 11/12/2024; Reuters 20/12/2024).

Host countries may face challenges encouraging Syrians to return. Many Syrians in Europe have lived there long enough to obtain long-term residency or naturalisation, granting them the right to remain without refugee status. By December 2023, nearly 180,000 Syrians held long-term residency in EU countries, while more than 300,000 had acquired EU citizenship since 2013. In contrast, by December 2024, over 780,000 Syrians in the EU remained under refugee or subsidiary protection, a less secure position. For individuals whose refugee claims were based on fears of persecution by the Assad regime, EU law allows governments to potentially decline renewal or consider revoking this status (MPI 19/12/2024).

Looking forward...

The dynamic nature of population movements within Syria, alongside unpredictable humanitarian population figures, makes planning the humanitarian response very challenging.

The head of the UN migration agency has cautioned that large-scale refugee returns to Syria could overwhelm the country and potentially lead to renewed conflict. The IOM Director General highlighted that the fragile state of Syrian communities makes them unprepared to absorb displaced individuals, urged governments to delay repatriation plans, and called on donors to support the stabilisation and rebuilding of the country (IOM 20/12/2024; Reuters 20/12/2024).

Governance issues and fear of repression contribute to the uncertainty and lack of security that prevent many from returning to their places of origin (Wilson Center 18/12/2024). Displaced populations in Syria face overcrowded shelters, limited resources, and the continued threat of violence, while host countries in the region struggle to meet the needs of refugee populations, exposing Syrians to insecure legal statuses and potential forced returns (HRW 11/12/2024; Reuters 24/12/2024; AP 20/12/2024).

Within Syria, increased conflict in the northeast – with hostilities in Menbij and Ain Al Arab and a potential military operation in Kobani – threatens further displacement. The lack of long-term shelter solutions combined with the freezing winter conditions poses high risks for displaced people. Overcrowding and inadequate facilities heighten protection risks and worsen living conditions. Without urgent support, including expanded shelter options, heating supplies, and basic services, displaced populations will face worsening hardships. Insecurity and access constraints further complicate the response, making it difficult for humanitarian responders to address these urgent needs. Continued instability could push more families into displacement, compounding the already critical humanitarian crisis in the northeast (NES NGO Forum 19/12/2024).

New governance and humanitarian access

On 11 December, HTS and its allies appointed Mohammed Al Bashir as the head of Syria's new transitional government, tasked with governing until March 2025. Bashir chaired a meeting in Damascus between former GoS and HTS Salvation Government ministers to oversee the transfer of authority. The Salvation Government, established by HTS, had previously governed HTS-controlled areas in Idlib and Aleppo, managing public services, security, and infrastructure for four million residents (BBC 11/12/2024).

While HTS-controlled Idlib demonstrates a degree of governance experience, scaling this model to the national level will require cooperation with international and external

experts as well as domestic political stakeholders and civil society (AJ 15/12/2024). The absence of such collaboration could isolate the transitional government domestically and internationally. There is significant uncertainty about whether HTS will consolidate power or work collaboratively with other groups, including other opposition groups, domestic political stakeholders, civil society, and international and external experts. One of the main concerns lies with HTS's history as an Islamist group, raising questions about its commitment to inclusivity and democratic principles.

On 10 December, Bashir announced plans for a constitutional framework and highlighted efforts to restore public institutions and services (Global Times 11/12/2024). HTS has also released statements advocating for a pragmatic approach, with emphasis on a peaceful transition, outreach to religious minorities, and tentative negotiations with regional powers (ISPI 10/12/2024).

The uncertainty around Syria's new governance system under Mohammed Al Bashir is likely to have a profound impact on humanitarian access and operations. While operational responders assume that humanitarian access and scope of activities might increase under this new governance, uncertainties remain around how coordination between authorities and aid organisations across the country and under different areas of control will be managed.

Northeastern Syria in particular, under AANES, has an independent humanitarian coordination mechanism, which could complicate integration efforts should the transitional government seek to centralise authority. The potential marginalisation of Kurdish regions may also aggravate tensions, risking disruptions to aid delivery and creating barriers to accessing populations in need of humanitarian assistance.

Funding constraints will also pose a critical challenge, as HTS's designation as a 'terrorist organisation' by numerous countries, and the UN Security Council, complicates international financial assistance (UN 12/12/2024). Donor nations may hesitate to provide funds for fear of inadvertently empowering HTS, while sanctions on the group could restrict partnerships with key humanitarian organisations. This issue is especially dire given the urgent funding needs across sectors such as health, food security, and water sanitation. The dual-currency system further complicates aid delivery, as areas in the northwest under Turkish influence also use the Turkish lira, while the rest of the country uses the Syrian pound. Areas in Northwest Syria, such as Aleppo and Idlib, previously under GoS control, now need to adjust to the use of multiple currencies, including the Turkish lira, US dollar, and Syrian pound. This currency issue could increase coordination challenges among regions. Without a clear mechanism to standardise economic transactions across Syria's fragmented territories, aid distribution risks becoming inequitable and inefficient.

Looking forward...

In this uncertain environment, the expansion of humanitarian operations will depend on whether HTS can transition from a militant organisation to a legitimate governance stakeholder capable of prioritising the needs of Syrians.

The risk of new conflicts – either because of resistance from excluded groups or tensions with international players, such as Iran, Israel, Russia, and Türkiye – remains high, underscoring the fragility of Syria's post-Assad governance structure. Establishing effective governance will require not only balancing diverse domestic forces, managing regional dynamics, and addressing humanitarian concerns, but also the establishment of a comprehensive truth and reconciliation process to restore societal trust and rebuild fractured communal foundations.

The broader geopolitical context adds another layer of complexity. The international community's approach to recognising and supporting a new Syrian government will significantly affect the country's ability to govern and change the balance of power in the region. Türkiye is focused on limiting Kurdish influence and control while also looking to benefit economically in northern Syria. Israel's military actions across Syria and strategic interests in the Golan Heights are also a source of concern, as such risk a flare-up of hostilities and deteriorating community safety.

Iran, Russia, and the US are likely to reassess their involvement in Syria and engagement with the new leadership. A fragmented or unstable governance structure could lead to further displacement and hinder humanitarian aid.

International recognition of the transitional government hinges on HTS's ability to engage in inclusive governance and implement UN Resolution 2254, which mandates a transitional period culminating in elections (UN 17/12/2024; US Department of State 10/12/2024). Any perceived exclusion or failure to collaborate with civil society and political stakeholders will likely discourage foreign support. Relief from sanctions and greater access to aid could incentivise HTS to collaborate. In this uncertain environment, the expansion of humanitarian operations will depend on whether HTS can transition from a militant organisation to a legitimate governance stakeholder capable of prioritising the needs of Syrians (AJ 15/12/2024).

Halted crude oil imports from Iran and a potential large-scale fuel crisis

The collapse of the Assad regime has raised concerns about a potential fuel crisis in Syria, as the country faces significant disruptions to its already fragile energy infrastructure. The situation is further complicated by Syria's long-standing reliance on Iranian crude, which accounted for 90% of imports under Assad, with the remaining 10% coming from domestic oilfields. This halt underscores the dire fuel shortages facing Syria's interim government, which must urgently find alternative suppliers to meet demand (FT 19/12/2024).

For years, Syria relied on Iranian oil shipments to sustain its two main refineries at Banyas and Homs, which were under GoS control. In 2024, approximately 50,000 barrels of Iranian crude were delivered daily (S&P Global 10/12/2024). Following the HTS advance and fall of Assad, Iranian crude supplies were disrupted. Notably, the Iranian oil tanker Lotus, carrying over one million barrels, reversed course near the Suez Canal on 7 December (Marine Insight 10/12/2024).

Banyas, Syria's largest oil refinery, has halted operations because of the lack of Iranian crude, which previously – when the facility processed between 90,000–100,000 barrels/day – accounted for most of its input. After halting crude imports from Iran, the refinery is focused on maintenance to ensure a resumption of operations once new crude supplies are secured (FT 19/12/2024). Syria's domestic oil production, once nearly 400,000 barrels/day before the civil war, collapsed to around 20,000 barrels/day in government-controlled areas (S&P Global 10/12/2024). Some sources indicate, however, that production in Kurdish-controlled regions averages 80,000 barrels/day (Oil Price 13/12/2024). While oil from Kurdish areas has supplemented domestic needs in the past, access to these supplies could face challenges as a result of shifting political alliances and the potential for conflict between Kurdish forces and the transitional government, although the commander of the SDF, Mazloum Abdi, stated that the SDF is ready to integrate into a new Syrian army under HTS rule, once a "suitable formula" is negotiated (The Cradle 27/12/2024).

The two main refineries, Banyas and Homs, have a combined nameplate capacity of 227,100 barrels/day, but are currently operating well below this level because of war damage and reduced crude supplies. Analysts estimate the plants are processing only about 70,000 barrels/day, covering less than half of Syria's current need (S&P Global 10/12/2024). Longstanding problems at the Banyas refinery include damage from a 2023 earthquake and dilapidated equipment, which require urgent repair to sustain long-term operations, contributing to the low-processing capacity. Sanctions on Syria have prevented the purchase of essential spare parts and equipment, further hampering functionality. The interim government has expressed hope that sanctions will be lifted to enable both the import of non-Iranian crude and the procurement of refinery components, a move that could restore some stability to the nation's energy sector (FT 19/12/2024).

Since 2011, conflict and displacement have led to a decrease in fuel demand, but a possible return of refugees – primarily from neighbouring countries, but also potentially from other regions – could reverse this trend, placing added pressure on fuel supplies. Fuel scarcity, in general, means that Syria as a whole is experiencing acute electricity shortages, with severe effects on daily life, including disruptions to healthcare services, reliance on solar energy for basic needs, and reduced productivity in industries and agriculture. Power plants struggle to operate as a result of both infrastructure damage and the severe fuel shortage, leaving most regions with only two–four hours of electricity per day. This has prompted a shift toward

renewable energy solutions, as families and communities increasingly adopt solar systems to meet daily needs. The situation may have worsened significantly, however, after recent escalations, requiring updated assessments to capture the current state of energy access (Health Cluster 14/10/2024; Carnegie 24/10/2024).

Looking forward...

The transitional government will need to rapidly secure alternative fuel sources and rehabilitate critical energy infrastructure to meet rising demand, especially during the winter when consumption increases sharply (Argus Media 13/12/2024). The restoration of electricity across Syria will depend heavily on the lifting of sanctions, which currently impede the import of fuel and spare parts necessary to repair damaged power infrastructure.

A prolonged fuel and electricity crisis would severely affect current humanitarian conditions, aggravating an already dire humanitarian situation. Hospitals, which rely on fuel-powered generators, could struggle to provide life-saving services. Water pumping stations, dependent on electricity and fuel, risk shutting down, increasing the likelihood of public health crises such as waterborne diseases. Public transport disruptions would isolate communities, limiting access to jobs, schools, and humanitarian aid, while power shortages would cripple economic recovery efforts (UNDP 03/2022).

A potential fuel crisis in Northwest Syria threatens to intensify the already dire winterisation needs of the 1.4 million people targeted for assistance this season. Heating fuel, essential to providing warmth and preventing hypothermia, is critical to the survival of over 800,000 IDPs living in inadequate shelters. Without reliable fuel access, heating stoves will become ineffective, exposing families to life-threatening cold and increasing risks of respiratory infections, particularly among children and older people (Shelter Cluster 17/09/2024).

Fuel shortages could also disrupt the distribution of critical winter supplies, such as thermal blankets and clothing kits, while complicating logistics in areas affected by flooding and snowfall, such as camp areas in Idleb. Rising fuel costs or limited availability could push families toward coping strategies with potentially harmful effects, such as burning unsafe materials, further jeopardising health and safety (Shelter Cluster 17/09/2024).

Representatives of the new leadership are engaging with refinery officials to understand the technical requirements of restoring operations, including addressing corrosion risks from prolonged inactivity at Banyas (Energy Intelligence 23/12/2024). Without sufficient crude imports and a reliable electricity supply, however, these efforts may fall short of meeting the immediate needs of Syria's population.