THE SYRIAN ELECTRICITY EQUATION: THE QUEST FOR STABILITY IN A FRAGILE GRID, REGIONAL FINANCING ARCHITECTURE, AND THE PROBLEM OF SOCIETAL LEGITIMACY

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Abstract

Following the collapse of the Bashar al-Assad regime in December 2024, the energy sector inherited by Syria's transitional government faces a tangle of problems that extends far beyond the physical destruction left by fourteen years of war. This study examines Syria's electricity equation through three components — generation capacity, transmission-distribution infrastructure, and input supply — and analyzes the January 2026 Damascus protests triggered by the November 2025 tariff reform, the government's short-term interventions aimed at securing stability, and the multi-layered financing architecture formed by Qatar, the United Nations system, and Saudi Arabia. In addition to this tripartite structure, Türkiye's multidimensional role — spanning natural gas supply, solar investments led by Kalyon Holding, grid integration, regulatory support, and contracting capacity — is examined in depth in a dedicated section. Alongside technical-financial reform proposals, the strategic communication frameworks necessary for rebuilding societal legitimacy are also discussed. The findings show that Syria's electricity crisis is not merely an infrastructure matter but a social-contract problem that tests the political legitimacy of the transitional government.

Keywords: Syria, electricity crisis, energy security, Qatar, World Bank, Saudi Arabia, Türkiye, Kalyon Holding, societal legitimacy, energy diplomacy

I. Introduction

The regime change that took place in Syria in December 2024, following more than fourteen years of civil war, brought with it a fundamental transformation in the energy sector as well. One of the most urgent problems facing the transitional government is the electricity sector. Beyond being a technical public service, electricity sits at the center of a multidimensional equation ranging from the sustainability of daily life and the revival of economic activity to the construction of public trust and the testing of the new administration's legitimacy.

Syria's electricity system, which had an installed capacity of 9.5 gigawatts (GW) before the war, came close to total collapse during the conflict; according to United Nations data, generation capacity fell to roughly 1.6 GW (Argus Media, 2025). Although this picture has shown a partial improvement since the transitional government came to power, the supply gap remains enormous. A Syrian businessman speaking to Semafor stated that against the country's demand of roughly 10,000 megawatts (MW), only about 5,000 MW can currently be delivered to the grid (Semafor, 2026). The fact that many settlements still receive electricity only at certain hours, and that outages remain frequent, illustrates the severity of the situation. The physical constraints on the supply side and the ability-to-pay problem on the demand side thus produce an intertwined crisis picture.

The purpose of this study is threefold: first, to systematically examine Syria's electricity equation through its generation, transmission-distribution, and input-supply components; second, to assess the social dimension of this equation around the November 2025 tariff reform and the January 2026 Damascus protests that followed it; and third, to examine the contribution of the regional-global financing architecture formed by Qatar, the United Nations system, and Saudi Arabia to resolving the crisis. The study, accordingly, looks beyond a purely technical energy-policy analysis to also scrutinize the relationship between energy security and political legitimacy.

II. Syria's Electricity Equation: The Structural Supply-Demand Gap

Syria's electricity equation requires three core components to be assessed together: the collapse in generation capacity, the physical destruction of transmission-distribution infrastructure, and external dependence in the supply of inputs feeding the power plants. These three components are not independent of one another; they form a vicious cycle that feeds and deepens itself.

II.I. The Collapse in Generation Capacity

During the war, major facilities that together made up roughly one-fifth of installed capacity — such as the Aleppo Thermal Power Plant, the Zeyzun Plant in Idlib, and the al-Taim Plant in Deir ez-Zor — were either completely destroyed or taken offline for extended periods. According to data compiled by Al Majalla, Syria's installed capacity has fallen to 5,500 MW, actual generation hovers at only around 2,000 MW, while demand approaches 7,000 MW (Al Majalla, n.d.). Confirming a similar picture, Enab Baladi sources report that total generation stood at around 2,200 MW as of late 2025 (Enab Baladi, 2025a).

A methodological note is warranted here: there are noticeable discrepancies among sources regarding generation and demand figures. For instance, Argus Media (2025) gives pre-war capacity as 9.5 GW while putting today's figure at 1.6 GW, whereas Semafor (2026) cites the capacity deliverable to the grid as 5,000 MW. This divergence stems largely from different sources using the concepts of "installed capacity," "grid-connected capacity," and "actually dispatched generation" interchangeably, and partly from differences in the measurement dates (ranging from mid-2025 to mid-2026). Throughout this study, the most current and narrowly defined figure — actually dispatched generation — has been used wherever possible.

II.II. The Physical Condition of Transmission-Distribution Infrastructure

In addition to problems on the generation side, it is reported that roughly 40% of transmission lines have been damaged, cable theft has become widespread, and most transformer substations remain unmaintained (The New Arab, 2025a). According to Syria's Ministry of Energy estimates, the cost required merely to repair generation and transmission infrastructure reaches $5.5 billion; this figure does not include the full reconstruction of destroyed infrastructure (The New Arab, 2025a). This fragility in the transmission-distribution system turns every additional megawatt secured on the generation side into a separate engineering and financing problem before it can reach the end consumer.

– Regional inequality: Damascus Governorate has a relatively sound grid infrastructure compared to Rif Dimashq (rural Damascus), since the latter was subjected to intense bombardment by the former regime (Enab Baladi, 2026c).

– The meter problem: the destruction or complete absence of meters in millions of households during the war has effectively rendered billing meaningless. Many households have had to run their own cables from the transformer substation to their homes (Arab News, 2026).

– The smart-meter project: the government plans the phased installation of 6.5 million smart (Wi-Fi-connected) meters. However, passing the $60-70 cost per meter on to consumers is a separate source of backlash in an already fragile social climate (Enab Baladi, 2025a).

III. The Energy Input Problem: Natural Gas Supply and External Dependence

Perhaps the most neglected component of Syria's electricity equation is the fuel input that feeds the power plants. Regardless of the technical capacity of existing plants, no increase in generation is possible without a sufficient supply of natural gas or fuel oil. Syria needs 30 million cubic meters of natural gas daily, while domestic production stands at only around 6 million cubic meters (Enab Baladi, 2025a). The resulting gap is being closed through imports from neighboring and allied countries.

– Azerbaijan: via SOCAR, through the Türkiye-Syria Natural Gas Pipeline, an annual flow of 1.2 billion cubic meters of gas has been secured since August 2025; this quantity corresponds to a generation capacity of 1,200-1,300 MW at the plants in Aleppo and Homs (Modern Diplomacy, 2026).

– The Jordan-Qatar line: Qatar transfers the LNG it produces via the regasification platform at Jordan's Aqaba Port to Syria through the disused section of the Arab Gas Pipeline — intended in particular for distribution to the Deir Ali power plant and Damascus Governorate (Washington Institute, 2026; Modern Diplomacy, 2026).

– The Egypt connection: under memoranda of understanding signed between Cairo and Damascus in January 2026, plans call for Egyptian gas to also be transferred to Syria via Jordan (Modern Diplomacy, 2026).

Fuel-oil supply, meanwhile, is generally handled through private companies via Iraq's SOMO. In these trade processes as well, the inability to make payment at the time of delivery discourages enterprises seeking to enter this field.

The stability of all these import lines and routes, moreover, is highly sensitive to regional geopolitical fluctuations. In a statement issued in March 2026, Syria's Ministry of Energy noted that the reduction in gas flows via Jordan, and the occasional complete cutoffs, stemmed from "regional emergency developments," which had forced grid management into a rationing program based on local resources (Syrian Observatory for Human Rights, 2026a). This picture shows how dependent Syria's energy security remains — at least in the medium term — on developments beyond its own borders.

IV. Price Shock, Societal Backlash, and the Government's Quest for Stability

IV.I. The November 2025 Tariff Reform and the January 2026 Damascus Protests

Citing an annual loss of roughly one billion dollars in the electricity sector as justification, the transitional government carried out a sweeping tariff reform through Decision No. 687 of 30 October 2025 (Enab Baladi, 2026c). With the cost of producing one kilowatt-hour of electricity at roughly $0.14, while it was being sold to consumers under the previous pricing system for less than $0.001, the sector's financial sustainability had become effectively impossible (Enab Baladi, 2025a). Under the new system, a rate of roughly 600 Syrian pounds per kilowatt-hour (about $0.05) was set for the first tier of 300 kWh, rising to 1,400 Syrian pounds (about $0.12) for consumption above that threshold (Al Jumhuriya, 2026).

Designed on paper as a tiered system that would protect low-income households, this reform met with a far greater backlash than expected once implemented. On 29 January 2026, a sit-in was held in front of the Ministry of Energy in Damascus; participants voiced that the tariff decision was incompatible with household budgets (Enab Baladi, 2026a). This formed part of a wave of protests that had been recurring in different cities since November 2025. Banners reading "My electricity bill is higher than my salary" were carried in the industrial district of Salamiyah and Hasia (The National, 2025), while at the Damascus demonstrations the slogan "Electricity is a right, not a luxury" came to the fore (Daher, 2026). In a country where roughly 90% of the population lives below the poverty line and average monthly income does not exceed $75 (Enab Baladi, 2025b), electricity expenses consuming 30 to 70% of the household budget (Al-Modon, 2026) indicates that this backlash points to more than mere price dissatisfaction — it marks a threshold at which the social contract itself is being tested.

IV.II. The Meter-Removal Threat, Legal Challenge, and Erosion of Legitimacy

Faced with growing backlash, the government's first reflex was toward hardening rather than easing. A directive leaked from the electricity office in Masyaf, in Hama Governorate, called for the permanent removal of meters following three consecutive unpaid bills. The rising complaints in this vein subsequently turned into widespread discontent across the country (Al-Modon, 2026; Syrian Observatory for Human Rights, 2026b). These developments led independent lawyers such as Hadi Bazghlan to file a lawsuit against the Ministry of Energy at their own expense. However, the 10th Civil Court of the Damascus Judicial Complex dismissed the case on procedural grounds — citing

lack of jurisdiction — on 4 June 2026 (Enab Baladi, 2026c). With the judicial route also blocked, the ground was prepared for social anger to shift from institutional channels toward street politics and payment resistance (Enab Baladi, 2026a).

IV.III. Temporary Relief Measures: The Uninterrupted-Power Experiment and Tiered Subsidies

The government's effort to re-establish stability has not consisted solely of coercive measures. Symbolic and concrete relief steps have also been rolled out simultaneously. The most notable of these was supplying Damascus with 48 hours of uninterrupted electricity in November 2025 — the first such instance since the fourteen-year war and political upheaval (The New Arab, 2025b). The Ministry of Energy presented this experiment as a result of repairs to plants such as Deir Ali and the securing of the necessary gas-fuel supply. Public perception, however, was quite different. As one Damascus resident put it: "Even if the power stays on longer, I feel our bill will only get bigger" (The New Arab, 2025b). Another resident staged a symbolic protest by shutting off his home's main circuit breaker to avoid a high bill (The New Arab, 2025b).

One point deserves emphasis: the simultaneous occurrence of improved service quality and rising prices has paradoxically weakened the government's "improvement" narrative in the eyes of the public. The initiative to subsidize the first tier of the tiered-subsidy system (up to 300 kWh) at a rate of 60%, protecting low-income households (The National, 2025), has not been found sufficient by broad segments of society. As economist Abdel Karim has noted, the new tariff structure is perceived as "a fundamentally biased liquidity-extraction instrument aimed at the poor and middle class" (Al-Modon, 2026).

Accordingly:

– Short-term relief: a short-term relief process was envisaged, and in this vein steps such as uninterrupted-power experiments, temporary discount campaigns, and smart-meter installment plans have been taken.

– Medium-term target: according to Ministry of Energy sources, a plan has been announced to raise daily supply to 14 hours by mid-2026 (Enab Baladi, 2025a).

– Yet within all these targets and processes, the structural risk matrix remains elevated, because achieving these targets depends heavily on the stability of external financing and gas supply. "Stability" thus becomes both a government objective and an external variable at the same time.

V. Regional and Global Financing Architecture

Resolving Syria's electricity crisis is not possible through domestic resources alone. The strategy pursued by the transitional government has taken shape around building a multi-actor financing and technical-support architecture. The three core pillars of this architecture are Qatar, the United Nations system (particularly the World Bank), and Saudi Arabia. Türkiye, in turn, joins this structure as a complementary partner.

V.I. Qatar's Multidimensional Role: LNG, Capital, and Political Capital

Qatar's position in Syria's energy reconstruction is not a matter of financial contribution alone; it carries both capital and political-capital dimensions together. The fact that Emir Sheikh Tamim bin Hamad Al Thani was the first head of state to visit Damascus after the transition (Semafor, 2026) is the most concrete indicator of this political capital.

In this context, Qatar is carrying out the following strategic support initiatives toward Syria:

– LNG support: Qatar has committed to transferring the LNG it produces at Jordan's Aqaba Port regasification facility to Syria via the Arab Gas Pipeline (Washington Institute, 2026).

– The $7 billion consortium led by UCC Holding: an agreement was signed among Qatari UCC Holding, the Turkish companies Kalyon and Cengiz, and the U.S.-based Power International Holding (PIH). The agreement covers four combined-cycle natural gas plants (totaling 4,000 MW) and a 1,000 MW solar power plant, targeting a combined installed capacity of 5,000 MW (Washington Institute, 2026; Dayan Center, 2026).

– Floating power vessels: Qatar and Türkiye have offered to cover the fuel and operating costs of floating power plants, each capable of generating roughly 400 MW, to be stationed at the ports of Baniyas and Tartus (Washington Institute, 2026).

– The Qatar Fund for Development has directly contributed to financing the Türkiye-Syria natural gas pipeline project; this has been confirmed by officials of Türkiye's Ministry of Energy and Natural Resources (Memurlar.net, 2026).

– Power International Holding's cross-sectoral expansion: PIH, controlled by the Al-Khayyat family, has also signed on to strategic projects such as Damascus Airport's new terminal alongside its energy investments, combining energy diplomacy with a broader strategy of economic influence (Semafor, 2026).

It would be difficult to claim that this close relationship enjoys uncontested acceptance among the Syrian public. Symbols such as the Al-Khayyat family's past ties to the former regime and the signing of agreements at the presidential palace have also fueled suspicions that "a new elite is being built atop the ruins" (Semafor, 2026). In assessing Qatar's role in this context, both its structural contribution and its dimension of public perception need to be considered together.

It is also worth noting, on the other hand, that Turkish companies appear as stakeholders and contributors in many of Qatar's initiatives as well.

V.II. The United Nations System and World Bank Financing

The United Nations system's contribution to rebuilding Syria's energy infrastructure is embodied chiefly through the World Bank and the International Development Association (IDA).

A critical threshold was reached when Saudi Arabia and Qatar cleared Syria's arrears to the IDA in May 2025. This step enabled Syria to regain access to World Bank financing after a fourteen-year gap (World Bank, 2026). The roles of Qatar and Saudi Arabia are intertwined here as well; the two countries have positioned themselves not merely as direct investors but also as door-openers for the multilateral financing system.

Following this process:

– The "Syria Electricity Emergency Project": the World Bank approved a $146 million grant through the IDA; this funding has been allocated to the rehabilitation of damaged transmission lines and transformer substations (Modern Diplomacy, 2026).

– The 400 kV lines linking Jordan and Türkiye: under this same grant, the rehabilitation of two 400 kV transmission lines connecting Syria to Jordan and Türkiye is envisaged; this represents the World Bank's first direct financing for Syria in more than four decades (Argus Media, 2025).

– Complementary grants: the World Bank approved an additional $225 million in financing in April 2026 for the restoration of water and health services, and a separate $20 million grant in March 2026 to strengthen public financial management (World Bank, 2026). Although not directed at the electricity sector directly, these grants make an indirect contribution by strengthening financial-institutional capacity.

According to the World Bank's own estimates, Syria's post-war reconstruction cost stands at around $216 billion (World Bank, 2026). Given the scale of this figure, it is clear that the existing grants for the electricity sector — however symbolically significant — cover only a small fraction of total need. The principal function of multilateral financing, for this reason, should be read not as providing direct funding but as constructing a signal of confidence and a risk-mitigating framework for private-sector investors.

V.III. Saudi Arabia's Repositioning

Saudi Arabia's presence in Syria's energy sector has gained accelerating momentum since the summer of 2025. At an investment forum held in Riyadh in July 2025, Saudi Arabia signed a

bilateral memorandum of understanding covering oil supply, electricity, renewable energy, and energy efficiency, including a $150 million commitment to Syrian energy projects (Washington Institute, 2026). In this context:

– ACWA Power: Saudi Arabia's state-backed energy giant ACWA Power has signed a partnership agreement for developing up to 2.5 GW of solar, wind, and storage capacity (Norton Rose Fulbright, 2026).

– The Saudi Electricity Company and the Saudi Electricity Projects Development Company have become involved in grid rehabilitation and investment feasibility studies (Norton Rose Fulbright, 2026).

– A technical exploration delegation from Saudi Aramco has conducted site visits to assess the rehabilitation potential of oil fields in northeastern Syria (Washington Institute, 2026).

– Information-sharing diplomacy continues; however, the ambiguity of jurisdictional boundaries among the ministries, the Syria Investment Authority, and other institutions is causing difficulties in communication for investors (Washington Institute, 2026).

Saudi Arabia's strategy proceeds along a more cautious and institutional line compared with Qatar's earlier and more overtly political positioning. Priority is being given to large-scale renewable energy projects and to opening multilateral financing channels — as in the example of the IDA arrears clearance. The role of Türkiye — the fourth and, in practice, irreplaceable actor completing this tripartite financing architecture — spans a range wide enough, from natural gas supply to renewable energy investment and from grid integration to regulatory support, to merit its own separate examination, and is accordingly addressed as a dedicated section below, in Section VI.

VI. Türkiye's Role and Contribution: From Energy Diplomacy to Grid Integration

As decisive as — perhaps even more decisive than — the tripartite financing architecture formed by Qatar, Saudi Arabia, and the United Nations system in Syria's electricity equation is Türkiye's multi-layered role, arising from geographic contiguity. Whereas the contribution of the other actors is largely confined to the transfer of capital and political capital, Türkiye's contribution carries security and intelligence support, political engagement, physical infrastructural contiguity, institutional-regulatory experience, and direct contracting capacity all at once. This section examines Türkiye's contributions along five axes: natural gas supply, renewable energy investment, grid integration, regulatory support, and contracting capacity.

VI.I. Natural Gas Supply and the Transit-Route Role

Türkiye's most concrete and earliest contribution to Syria's energy equation has come in the area of natural gas supply. The activation of the Türkiye-Syria Natural Gas Pipeline has made it possible not only for Türkiye's own gas resources but also for Azerbaijani gas to be transferred to Syria via a transit route. It has been reported that the flow through this line, which began at 3.4 million cubic meters per day, could be raised to 6 million cubic meters with full line capacity, a quantity that could meet the electricity needs of roughly 5 million Syrian households (Memurlar.net, 2026). As Türkiye's Minister of Energy and Natural Resources Alparslan Bayraktar has also emphasized, this cooperation model has evolved into a multilateral structure that also includes Azerbaijan and Qatar (Memurlar.net, 2026). Regional energy diplomacy is thus evolving from a bilateral into a network-based architecture.

At this point Türkiye's role goes beyond that of a mere "pipeline owner"; Türkiye also functions as a transit and coordination hub enabling both Azerbaijani gas and, potentially in the future, Egyptian gas to reach Syria. The clearance of landmines along the border line by the Ministry of National Defence and the rapid linking-up of the pipeline (Ekonomim, 2025) point to this role carrying a security dimension as well as a commercial one.

VI.II. Kalyon's Solar Investments and the Transfer of Renewable Energy Experience

Türkiye's contribution to rebuilding Syria's energy sector is not confined to gas supply; it is also made concrete in the dimension of direct generation investment. A $7 billion strategic cooperation agreement was signed at the Presidential Palace in Damascus in May 2025. Under this agreement, a consortium including Kalyon Holding and Cengiz Holding committed to building combined-cycle natural gas plants with a total installed capacity of 4,000 MW in the Traifawi, Zayzoun, Deir ez-Zor, and Mehardeh areas of Syria, along with a 1,000 MW solar power plant (SPP) in the Wedian Alrabee area (Anadolu Ajansı, 2025). The gas plants are expected to come online within three years, and the solar plant within roughly two years. Upon completion of these projects, a combined installed capacity of 5,000 MW is expected to generate approximately 35 billion kWh of electricity annually (Anadolu Ajansı, 2025; Sabah, 2025).

Kalyon Holding's position in this project is not that of a coincidental investor participation. The company's renewable-energy track record in Türkiye lends the Syrian project a reference-level technical credibility. Indeed, Kalyon Enerji is the company behind Türkiye's and Europe's largest solar power plant, the Karapınar SPP (1,350 MWp installed capacity, roughly 3 billion kWh of

annual generation, with photovoltaic panels manufactured at an 80% local-content ratio) (Kalyon Enerji, n.d.). At the signing ceremony, Kalyon Holding Chairman Cemal Kalyoncu stated that the company had invested more than $2 billion in renewable energy to date and planned to add a further $1 billion over the following three years (Anadolu Ajansı, 2025). In this light, the 1,000 MW solar investment in Syria can be read as a regional extension of the engineering and supply-chain experience Kalyon has accumulated at Karapınar.

VI.III. Grid Integration and Interconnection

The reaching of Syrian consumers by investments on the generation side is possible only through robust grid integration; here, although Türkiye's contribution is overshadowed by large-scale power-plant projects, it is technically no less critical than them. A concrete example is the 100 MW solar power plant project realized between Syria's General Establishment of Electricity Transmission and Distribution and the Türkiye-backed Syria-Türkiye Energy Company (STE), located at Kafr Behm in Hama Governorate. This facility is planned to be connected to the 230 kV high-voltage grid, with construction expected to take approximately 12 months (Referans Türk, 2025). As a company supplying electricity primarily to the regions of northern Syria supported by Türkiye, STE constitutes a concrete example of the physical and commercial integration between the Turkish and Syrian grids (Referans Türk, 2025).

The scalability of such projects depends on expanding the synchronization and interconnection capacity between the two countries' grids. Türkiye Elektrik İletim A.Ş. (TEİAŞ, the Turkish state transmission-system operator) regularly publishes the net transfer capacities of the interconnection lines with Syria, and states that cross-border import-export applications will be evaluated within a framework of mutual agreement with the counterpart country's transmission system operator (TEİAŞ, n.d.). This is a sign that Türkiye now treats grid integration with Syria not merely as an emergency solution but as an institutionalized trade relationship.

VI.IV. Regulatory Support and Institutional Capacity Transfer

One of the contributions Türkiye can offer Syria is the transfer of its own electricity-market regulations and regulatory-institution experience. In Türkiye, cross-border electricity trade is conducted within the framework of the Electricity Market Import and Export Regulation, and is managed through institutionalized mechanisms such as interconnection capacity, physical transmission rights allocation, and the secondary physical transmission rights market (Mevzuat.gov.tr, n.d.). As Syria works to rebuild its own regulatory institutions — an independent

energy-market regulatory board, transparent tariff-setting mechanisms, a cross-border trade licensing system — it is assessed that Türkiye's EPDK (Energy Market Regulatory Authority) and TEİAŞ model could offer a reference framework, both as a regulatory template and at the level of personnel training. In this context:

– Transfer of a regulatory template: presenting Türkiye's Electricity Market Law and its secondary regulations as a starting point for Syria's process of rewriting its own market legislation.

– Personnel training and institutional capacity: TEİAŞ and EPDK experts providing technical training and institutional advisory support to staff of Syria's Ministry of Energy and the newly established Syrian Electricity Company.

– Sharing tariff methodology: transferring the experience Türkiye has gained from its own past subsidy-cost balancing reforms to the process of managing the tariff shock Syria is currently experiencing. Such contributions would allow the sizable cohort of Syrian administrators trained in Türkiye to implement a new framework in rapid synchrony with their Turkish counterparts.

VI.V. Contracting Capacity and the Physical Rebuilding of the Grid

Perhaps Türkiye's most concrete and visible area of contribution is contracting capacity. The participation of companies such as Kalyon Holding and Cengiz Holding in the project not merely as financiers but as the parties directly undertaking construction offers an important solution to Syria's grid-rebuilding process — if not on the financing side, then at least on the implementation side. The fact that the Turkish contracting sector has, within its own country, completed mega-scale energy projects spread over areas as large as Karapınar's 20 million square meters on schedule (Kalyon Enerji, n.d.) offers a concrete indication of capacity that the 4,000 MW gas-plant and 1,000 MW solar investments in Syria can likewise be completed within their projected three- and two-year timelines.

This optimistic picture nonetheless needs to be balanced. Early in the transition process, a Turkish energy expert emphasized that Syria's transmission-line infrastructure alone would require an investment of $25 to $30 billion to rebuild, and that power-plant or floating-vessel solutions would not be sufficient to close this transmission gap (VOA Türkçe, 2025). Around the same period, Syria's then Minister of Electricity spoke of a $40 billion need for the full repair of infrastructure damaged during the civil war (VOA Türkçe, 2025). These figures date from the earliest phase of the transition (January 2025), when the absence of both a parliament and a durable constitutional framework in

Syria was assessed as a serious source of uncertainty for investment security (VOA Türkçe, 2025). While the establishment of the Ministry of Energy in March 2025 and the signing of the $7 billion agreement in May 2025 suggest that some of these early-stage uncertainties have since been overcome, the greater part of the financing gap at the scale of transmission infrastructure has evidently not yet closed — meaning that the contribution of Turkish contracting capacity on the generation side needs to be complemented by an investment of comparable scale on the transmission-distribution side.

VI.VI. Limitations and Risks

In addition to the contributions noted above, some limitations stand in the way of Türkiye playing a more effective role in rebuilding Syria's electricity system. For example:

– The financing-implementation gap: although Turkish companies' commitments on the generation side (5,000 MW) are substantial, closing the $25-30 billion gap on the transmission-distribution side requires a separate, larger-scale financing architecture (VOA Türkçe, 2025).

– Political risk and guarantee mechanisms: the long-term commitments of Turkish contracting firms will be sustainable only when backed by political-risk insurance and export credit agency guarantees.

– The balance between regional competition and complementarity: Türkiye's acting jointly with Qatar and Saudi Arabia on the same projects — as in the UCC Holding consortium — foregrounds complementarity rather than competition; sustaining this balance, however, depends on continued coordination among the actors.

– Customs tariffs applied by Syria toward Türkiye, which may be considerably higher than those applied to Qatar and Saudi Arabia, inflate costs in implementation and materials-procurement processes and reduce the competitiveness of Turkish enterprises.

– Actors working to limit Türkiye's influence in the region are also reported to seek to undermine Turkish initiatives or stall them at a certain point.

Even so, Türkiye's role in Syria's electricity equation is too multi-layered to be reduced to a single heading: it is a transit power in natural gas supply, a contractor and partner in generation investment as embodied in the Kalyon Holding example, a technical reference point in grid integration, and a model country in regulatory construction. This versatility positions Türkiye as an actor that is difficult to substitute in Syria's energy reconstruction; the sustainability of this position, however, continues to depend on closing the financing gap on the transmission-distribution side and on the political-legal framework achieving stability.

VII. Narrative Frameworks to Persuade the Public: Strategic Communication in Legitimacy Building

The central paradox observed in Syria's electricity crisis is this: while service quality — as evidenced by uninterrupted-power experiments, rising daily supply hours, and new power-plant investments — has objectively improved, societal dissatisfaction has climbed over the same period. The communicative-narrative dimension of crisis management matters as much as its technical-financial dimension. In this light, it is recommended that the government and its international partners systematically deploy the following narrative frameworks to persuade the public.

– The transparency narrative — public communication campaigns should be built that concretely and clearly visualize the gap between the cost of production (\$0.14/kWh) and the old subsidized price (\$0.001/kWh). The citizen's perception of an "opaque bill going who-knows-where" is the true source of anger.

– The fairness framework — the perception that the tiered tariff system falls equally on rich and poor alike needs to be broken. The regionally and income-differentiated tariff examples proposed by economist Abdurrahman Muhammad — 800 SP in affluent neighborhoods, 600 SP in middle-income areas, 100 SP in rural and poor areas — should be communicated to the public in concrete terms (Enab Baladi, 2025b).

– The shared-responsibility narrative — emphasis should be placed on the fact that the electricity crisis is not a failure of the government but a legacy of fourteen years of war, and that overcoming this legacy requires time, patience, and winning the confidence of the outside world. This narrative, however, must not rest solely on references to the past; it needs to be backed by concrete progress timelines.

– The visible-milestones narrative — symbolic achievements such as the 48-hour uninterrupted-power experiment should be announced not simultaneously with price increases but by first celebrating the service improvement and only later, after a reasonable interval, justifying the price adjustment. Delivering both messages at once overshadows the achievement and reinforces the perception of "being offered an excuse rather than a benefit."

– The dialogue-and-accountability narrative — as the reverse of silencing strategies such as the ban on public statements imposed on Ministry of Energy officials (Al-Modon, 2026), it is important to hold regular press briefings, consultative mechanisms involving consumer representatives, and to share independent audit reports.

What these narrative frameworks share is that they need to be operated with a brand-management logic capable of converting technical success into societal trust. The objective improvement of a public service can translate into societal legitimacy only when supported by a properly framed

communication strategy; otherwise, even genuine improvement — as seen in the 48-hour experience in Damascus — risks giving rise to a fresh wave of distrust.

VIII. Policy Recommendations: A Multi-Layered Reform Framework

In light of the analysis above, the policy recommendations that would bring Syria's electricity equation to a sustainable balance should be considered across three layers: technical-infrastructural, financial-institutional, and societal-communicative.

VIII.I. Technical-Infrastructural Recommendations

– Unbundling of generation, transmission, and distribution: it is important to institutionally separate the sector's three functional areas. Applying PPP models in generation, public-multilateral financing in transmission, and performance-based private operation in distribution would be a more reasonable approach.

– Loss and theft management: targeted investment programs should be implemented to reduce transmission and distribution losses. In this vein, it is naturally necessary, for the sake of feasibility, that the cost of smart meters be borne by international grant sources rather than passed on to consumers.

– Diversification of regional interconnections: strengthening existing lines with Türkiye, Jordan, and potentially Iraq would be appropriate for enabling more comfortable grid and power management.

– It is essential that Syria's existing natural gas resource potential be rapidly developed and brought into production, and that the gas produced be converted into electricity through the construction of new power plants.

– Renewable energy momentum: it is important that the solar and wind projects led by ACWA Power and UCC Holding be prioritized in a manner that reduces dependence on imported gas.

VIII.II. Financial-Institutional Recommendations

– A targeted subsidy mechanism: rather than a universal low tariff, cash or bill support should be provided directly to poor households, based on household income data.

– Expanding export credit agency financing: closer integration of Turkish, Qatari, and Saudi ECAs into project financing; risk-sharing instruments should be designed jointly with multilateral development banks.

– Clarity of institutional authority: it is necessary to clarify the boundaries of authority among the Ministry of Energy, the Syria Investment Authority, and related institutions, and to establish a coordination mechanism operating on a one-stop-shop logic for investors.

– Supporting the tiered tariff reform with an independent social-impact assessment, so that decisions are perceived not as sudden shocks but as part of a predictable roadmap.

VIII.III. Societal-Communicative Recommendations

– Lifting the ban on public statements imposed on Ministry of Energy spokespeople; making regular, data-driven public briefings the standard practice.

– Establishing an independent administrative appeals mechanism capable of reviewing tariff decisions on their merits, not merely on procedural grounds.

– It is necessary that projects financed by Qatar, Saudi Arabia, Türkiye, and the World Bank be communicated to the public in terms of concrete benefits that ordinary people can understand.

The success of this three-layered framework depends on technical improvement and societal perception-management being pursued simultaneously and consistently. Otherwise, every new power plant and every new transmission line backed by external financing risks turning once again into disappointment on ground marked by societal distrust.

IX. Conclusion

Syria's electricity equation is not simply an engineering or financing matter. It is a multi-layered crisis domain in which the transitional government's political legitimacy is being tested, in which the interests of domestic and external actors intersect, and in which technical, financial, and societal dimensions are deeply intertwined. Qatar's LNG support and capital strength, the role of the United Nations system — particularly the World Bank — in opening multilateral financing channels, and Saudi Arabia's positioning as both a direct investor and a builder of institutional confidence together form three core pillars of Syria's energy reconstruction. Türkiye, for its part, is the fourth and, in practice, irreplaceable actor completing this tripartite structure: a transit power in natural gas supply, a contractor and partner in generation investment as embodied in the Kalyon Holding example, a technical reference point in grid integration, and a model country in regulatory construction.

The January 2026 Damascus protests and the meter-threat/lawsuit process that followed show that technical improvement backed by external financing is not sufficient on its own. The public needs to be persuaded that crisis management is fair, transparent, and predictable; this in turn requires the simultaneous deployment of targeted subsidy mechanisms and strategic communication frameworks. Syria's case demonstrates once again that, in post-war reconstruction processes, energy security is not simply an infrastructure problem but a matter of building a social contract and

legitimacy. Future research could extend this framework using quantitative data measuring the household-level impact of tariff reforms.

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