



Syria in 2026: Between Transition and Recovery

*A Secondary Data Review of Humanitarian Conditions and
Operational Implications*

August 2026

Foreword

In the last two years, Syria has changed faster than our collective understanding of it. Since December 2024 sanctions have been substantially eased, frontlines and administrative arrangements redrawn, international engagement resumed. More than 3.5 million people have returned home, while 15.6 million remain in need and the response plan meant to reach them is funded at only a fifth of its requirement.

Much of that change was not set in motion by the humanitarian system. Syrians returned ahead of the services meant to receive them and have rebuilt largely on their own, while government institutions have begun to reorganize, restoring basic services and easing regulatory constraints on humanitarian operations. These are early steps in a system still short of liquidity, infrastructure and staff. They do not diminish the scale of need, but they alter what is operationally possible from quarter to quarter.

There is no shortage of reports on any of this. What has been missing is a reading that holds the separate pieces together, as each assessment answers the question its author was mandated to ask. When read separately, each is accurate and none is sufficient on its own as a basis for programme design. **The Estonian Refugee Council (ERC)** carried out this review in mid-2026 to do the reading that no single source performs. It examines how political transition, institutional recovery, return migration, protection barriers, household income and market conditions act upon one another, and follows those interactions to their operational consequences.

This review is intended to provide a shared evidence base for programme development and to identify priorities for further primary assessment, including through the planned MSNA. The aim of this product is to support the reader in judging where return is likely to hold and where it may reverse; to inform transfer-value decisions against current prices, wages and exchange conditions; to anticipate where documentation, liquidity or connectivity may constrain delivery; to identify which needs cash cannot meet on its own; and to distinguish programmatic directions supported by current evidence versus questions that still require ground validation.

These considerations are also shaping our own next steps in Syria. By publishing this analysis, we hope to contribute to a shared understanding of partners, coordination colleagues, and donors across the wider Syria response. The final section therefore sets out both the operational implications emerging from the review and the priority questions requiring further assessment.

The review prioritizes material published in 2026, drawing on UN planning and operational reporting, WFP food-security and market analysis, World Bank economic assessments, IOM and UNHCR movement monitoring, NGO assessments and inter-agency cash analyses, on older sources where they establish baselines or document cash-delivery systems predating the transition, and on independent research and reporting for how these conditions are lived. No primary data was collected, so coverage is only as even as the assessments behind it.

The research behind this review was carried out by ERC's MEAL department, from the compilation of sources to the analysis presented here. Their contribution is gratefully acknowledged.

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Key Takeaways

- Since December 2024, Syria has witnessed one of the largest and most rapid return movements of this century. More than 3.5 million refugees and IDPs have returned to their places of origin – a scale unimaginable only a few years ago.

While the renewed possibility of return is encouraging, movements have far outpaced many communities' absorption capacity. In many locations, returnees have found essential services missing and are having to live in damaged housing. As such, any future humanitarian programming should incorporate an area-based reintegration approach.

- Available benchmarks show that income covers only a fraction of essential costs. In March, the minimum wage covered 28% of WFP's MEB for a family of five and less than half (43%) of its food component. Independently, SCPR found that university-educated public-sector and private-sector wages covered only 33.9% and 38.5% of the household abject-poverty line in April.

These findings reinforce the need to verify household income and expenditure locally before setting transfer values and to review values regularly as prices and exchange conditions change.

- Women-headed households, children, people with disabilities and families of missing persons face compounded protection concerns. Documentation and death-registration gaps restrict property rights and assistance; people with disabilities experience exclusion from work; economic stress increases GBV and harmful coping; and children are at a high risk for explosive-ordnance casualties, child labor and child marriages.

Specialist legal assistance and robust referral system add-ons should be considered to ensure that assistance coverage goes beyond the minimum survival standards and accounts for specific vulnerabilities of affected groups.

- Cash-delivery conditions improved somewhat in June and July as exchange-rate differences narrowed and the Central Bank expanded currency choice for beneficiaries of covered incoming remittances. However, local humanitarian transactions and procurement must still be conducted in Syrian pounds, and feasibility remains highly location specific.

Financial service provider liquidity, currency availability, fees, agent coverage, documentation requirements, electricity, connectivity and cash-out safety should therefore be verified before selecting a delivery mechanism, with offline and non-cash alternatives retained.

- Explosive-ordnance contamination and the prohibitive cost of land clearance constrain agricultural recovery in many return areas. Livelihood support should therefore extend beyond agriculture to viable non-farm microenterprises, particularly for women-headed and returnee households. Productive-asset grants including support to purchase sewing machines, workshop tools, small-business stock, or equipment for small food retail activities is recommended, provided local assessment confirms demand and viability.

An Uneven Transition

Political transition has moved faster than material recovery. Sanctions relief, renewed international engagement and mass returns coexist with 15.6 million people in need¹ and a response plan funded at roughly a fifth of its US\$2.9 billion requirement.²

The December 2024 political transition has altered Syria's operating environment more rapidly than it repaired the systems on which households depend.³ Frontlines and institutional arrangements that had shaped humanitarian delivery for years have been revised;⁴ international engagement has increased;⁵ and economic sanctions have been substantially eased.^{6,7} Yet the reconfiguration of longstanding frontlines has not produced uniform peace. Syria remains a patchwork of local security conditions, administrative arrangements, community tensions and service capacity.⁸

This distinction is operationally significant as International NGO Safety Organisation (INSO) reports that NGOs have been able to reach areas that were previously difficult to access and that cross-area coordination has become more feasible. At the same time, project-approval procedures have remained unclear, criminality has increased, road conditions and telecommunications remain unreliable in some locations, and As-Sweida has been notably difficult to access since the 2025 violence.⁸ In general, physical access appears to have opened faster than predictable administrative access.

For those returning home, explosive ordnance (EO) contamination continues to pose widespread risks, with 164 EO-related incidents recorded by OCHA during the months of March and April alone.⁹ These incidents resulted in 90 deaths and 226 injuries, presenting continued constraints for safe movement, agricultural livelihoods and services across multiple governorates. In the northeast and south, especially, renewed violence and quickly-changing authority arrangements can rapidly reverse apparent gains.

Return to the Unexpected

More than 3.5 million Syrians have gone home to places that cannot yet hold them. Nine in ten surveyed returnees found essential services missing on arrival, and returnees are the group most often identified living in damaged housing.

The collapse of the Assad government in December 2024, dramatically altered conflict dynamics and opened new possibilities for displaced Syrians to return home.¹⁰ In what has been described as one of the largest return movements this century, over 3.5 million Syrians have returned to their places of origin: more than 1.6 million refugees and 1.9 million internally displaced persons (IDPs), together approximately 14% of the population.^{11,12}

This is not a planned, consistently assisted resettlement process, however, but rather a predominantly self-organized movement of highly vulnerable people into areas that are significantly unprepared to receive them. Although some refugees have travelled through facilitated programmes and organized convoys, the International Rescue Committee (IRC) found that only 18% of its surveyed returnees considered the support available during their journey adequate. Among those reporting inadequate support, cash was the most frequently identified gap, followed by food and transport.¹¹

For those who have returned, they find infrastructure destroyed, basic services insufficient, while the humanitarian response is critically underfunded. According to IRC's research, spanning 425 returnee surveys, 31 key-informant interviews, and 15 focus groups across seven governorates, 91% of returnees reported that essential services were missing in their community upon arrival. A large majority reported that they are living in damaged housing (71%), and the single factor most frequently cited as undermining reintegration was insufficient services for all community members (71%).¹¹

Geographic corridors of movement

Internally displaced households are moving from camps, informal sites, rented accommodation and host communities towards places of origin, but also between locations within the same governorate. IOM's May 2026 baseline illustrates the complex and fluid nature of movements.¹³ Idleb and Aleppo accounted for 41% and 30%, respectively, of IDP return departures recorded that month, while Aleppo and Idleb also received the largest shares of IDP returnees. Aleppo was simultaneously the main governorate of departure and arrival for newly displaced people, with many movements taking place over short distances within the governorate.

Cross-border movement is similarly multifactorial. UNHCR's first-quarter monitoring found that, since December 2024, the largest proportion of recorded refugee returns originated in Türkiye, followed closely by Lebanon, then Jordan, Iraq and Egypt.¹⁴ Movements from Türkiye have passed primarily through the established north-western and northern crossings, including Bab al-Hawa/Cilvegozu, Keseb/Yayladagi, Al-Salama/Oncupinar, Jarablus/Karkamis, Tal Abyad/Akcakale and Al-Rai/Cobanbey. From Lebanon, movement has been concentrated through the Masnaa-Jdeidet Yabous and Al Qaa-Joussieh crossings, with smaller flows through other reopened crossing points. Jordanian movements generally enter through Nassib, followed by onward travel towards Dar'a, Damascus, Rural Damascus, Homs, Hama and Aleppo.

Return journey conditions

Conditions during movement vary significantly. Some refugees are able to travel through UNHCR- or IOM-supported programmes which provide counselling, transport, limited cash assistance, border facilitation and onward referrals. Most, however, organise the journey independently. Transport was among the most consistently reported practical gaps¹¹: public transport outside major cities is limited, and families often need to hire private vehicles or trucks. In order to meet the costs of travel, many are having to incur debt, sell productive assets, or rely on help from relatives.

Returnees with disabilities, older people, women travelling with children and households carrying possessions face additional expense and protection risks. There are also documented concerns that families who are unable to afford formal transport or border-related costs may use irregular crossings, increasing exposure to exploitation and unsafe routes.

Intent & Durability of Returns

Since December 2024, there has been a growing emphasis on return to Syria. Neighboring host countries especially, have shifted their focus toward facilitating or encouraging the return of Syrian refugees, though approaches differ markedly across the region¹¹:

- + Lebanon has introduced administrative facilitation including counseling, voluntariness assessments, documentation support and modest return grants, aiming for 400,000 returns within the first half of 2026.
- + Türkiye maintains that returns should remain self-organized and voluntary, with no promoted large-scale return program.
- + Jordan has seen UNHCR-registered returns rise sharply.
- + Recent EU policy developments and political discourse also suggest a growing emphasis on return to Syria, with principles of voluntariness, safety, and dignity formally reaffirmed.

The common thread is a growing alignment of refugee policy with the expectation that conditions in Syria are changing. Yet this shift is unfolding alongside deepening economic hardship and more restrictive residency, employment and protection environments, which together have narrowed the options available to many refugees, indicating that many return decisions may be made under constrained circumstances rather than as the result of a fully informed and genuinely voluntary choice.

Conflict in Lebanon

The scale and nature of crossings from Lebanon in March 2026 illustrate this dynamic at its most acute. Over 400,000 people are reported to have crossed from Lebanon into Syria through official border crossings since then, driven primarily by renewed conflict in Lebanon rather than improved conditions in Syria. Among those crossing, only 27% indicated an intention to remain in Syria permanently.

Intention surveys capture the gap between aspiration and readiness: around 80% of refugees hope to return one day, but only 14% intend to do so within the next year.

Intentions to return also differ between generations. Adolescents and young adults who have built their lives in displacement, through education, friendships, and professional identities, may also be less inclined to return immediately, yet may have limited influence over the decision.

In practice, therefore, many returns considered technically voluntary may be driven by volatility and the absence of any other durable option.

"She was born in Lebanon and her friends live there. She feels more comfortable over there." – Returnee from Lebanon speaking of her 11-year-old daughter¹¹

"I was crying for fear of the unknown and of losing the life that I built there, and my opinion was completely different from my father's." – 19-year-old who grew up in Jordan¹¹

Housing Damage & Contamination

For millions of Syrians returning to their areas of origin, one of their most fundamental needs – a safe and dignified place to live – is unattainable. Continuing in the theme of constrained choices, the October-December 2025 Nationwide Housing Damage Assessment found that many returns are taking place in contexts of significant housing damage, seemingly driven less by the availability of safe and adequate housing and more

by constrained choices, limited alternatives, and enduring connections to land and property.¹⁵ According to the assessment, 89% of assessed communities reported housing damage, with nearly half indicating that more than half of their housing stock was affected. 17% of the damaged stock was completely destroyed. Damaged housing is nonetheless widely inhabited, particularly by returnees. Nearly all communities reporting housing damage indicated continued habitation across all severity categories, including in structurally compromised units. Vacant alternatives to unsafe housing are few and far between: 43% of communities reported no safe vacant housing available at all.

Regional Variations:

- + Severe damage was disproportionately reported in southern and north-western governorates, reflecting differing conflict and shock dynamics across the country.
- + While rents stay below US\$50 per month across most of the country, Some Damascus locations exceed US\$300 – localized dynamics like these are worth considering in any transfer-value calculation.

Explosive Remnants of War (ERW)

Contamination from ERW was identified as one of the most severe and life-threatening protection risks affecting people, particularly in areas of return in northwestern Syria. According to UNICEF, 300,000 explosive ordnances contaminate the country.¹⁶

Agricultural and grazing areas were identified as the most heavily affected areas, making up approximately 90% of contaminated sites,¹¹ and resulting in 81% of all Explosive Ordnance (EO) incidents,¹⁷ preventing households from safely accessing agricultural land, restricting livelihood opportunities, and increasing reliance on unsafe or unstable income sources.

Clearing these remnants poses further challenges. Private clearance teams charge between \$100 and \$500 per residential property, and significantly more for agricultural land, costs that most returning families cannot afford.¹⁶

As Syrians marked Eid al-Adha, EO-related incidents across multiple governorates resulted in deaths and injuries, including incidents in which children were killed or injured while playing with explosive items or travelling through contaminated areas.¹⁷

- + Between 1 March and 1 July 2026, 268 EO-related incidents were recorded across the country, resulting in 452 casualties, including 130 people killed and 322 injured.
- + Men and children were disproportionately affected, accounting for 56% and 37% of casualties, respectively.
- + The highest shares of EO incidents were reported Aleppo, Deir ez-Zor and Idlib.

Protection & Social Repair

Undocumented at home

NRC's Legal Needs Assessment¹⁸ (covering 1,200 households across nine governorates), found that 62% of households have at least one member lacking key civil documentation. Among those who have returned since December 2024, the figure is as high as 80%.

Across Syria, more than 4.1 million people require support on housing, land and property issues, according to the Housing, Land and Property (HLP) Technical Working Group.¹⁹ In Aleppo alone, an estimated 51,500 properties require HLP-related intervention.²⁰

In parts of South Damascus, returnees have found their properties subject to fraudulent transfers that took place during their absence. Research documents how the Assad-led government issued 35 laws during the conflict enabling the confiscation and expropriation of property, primarily affecting displaced persons and political opponents.²¹

In some cases, these properties were subsequently sold through formalized contracts processed during years of conflict and administrative disruption, leaving returnees with limited or no legal avenues to reclaim their homes. As a result, families have arrived to find strangers occupying their homes, with documentation to support legal ownership.¹¹

Documentation barriers form a key obstacle, not only in reclaiming property, but to accessing services in general. The WLO Platform focus groups¹¹ noted how, for many returnees, title deeds for their property, national records and identity papers have been lost after years of displacement and conflict. Without identity documents, families cannot register for assistance, enroll children in school, access health services, or legally reclaim their homes.

This issue acutely impacts women-headed households, particularly in conflict-affected neighborhoods where widowhood or missing persons cases are widespread. Women cannot establish legal identity in their own names through most available channels, leaving them unable to assert inheritance and property rights or access the services they are entitled to.¹¹ This finding was corroborated by NRC, as they found that among respondents who reported a missing husband or partner, 87% stated they are unable to benefit from the missing person's property or legal rights.¹⁸ The absence of official death registration emerged as a central bottleneck, effectively freezing inheritance and property claims.

Gender & Mental Health

Restoration of third places²², and mental health and psychosocial services is an important opportunity for repairing and rebuilding the social fabric of communities in Syria.

- + During focus groups with the WLO Platform, the importance of providing mental health and psychosocial support for ex-detainees released following the fall of the Assad-led government was a particularly strong finding.¹¹ Male ex-detainees who face struggles in adjusting to family and community life will require a high degree of personalized support.
- + Such support is expected to have positive knock-on effects on spouses too, who have reported continued presence of gender-based violence (GBV) within their households driven by economic stress, overcrowded living conditions, and entrenched dependency dynamics.²³
- + Distress linked to prolonged hardship, poverty, and deteriorating living conditions is also frequently cited as a key driver of negative coping strategies including child marriage and child labor.²³
- + Overcrowded and inadequate housing, including shared accommodation among multiple families, tents, and unfinished buildings, further exacerbate GBV risks by reducing privacy and increasing stress within households.²³

"We have lost safe spaces for psychological gathering or unloading, and phones have become our only world to escape reality." – Young woman in rural Homs ¹¹

- + Refugee returnee women are reported to face particularly heightened exposure to GBV in certain areas, linked to negative perceptions and social stigma, including views of them as more “liberal,” which can increase risks of harassment and violence.²³
- + Psychosocial needs are widespread, with 47% of respondents reporting stress-related symptoms and 31% unable to access support services, primarily due to service unavailability, lack of information, and affordability barriers.²³

Livelihoods & Economic Reintegration

According to a 2025 estimate, one in four Syrians is unemployed, and nine out of ten live in poverty.²⁴ At current growth rates, Syria’s economy will not regain its pre-conflict GDP level before 2080. Against this backdrop, the expectation that returning families will achieve economic stability through individual effort and limited assistance alone may be unrealistic.¹¹

Agriculture, the primary livelihood for rural populations in Aleppo, Hama, Homs, and Daraa, is operating under conditions that make recovery extremely difficult: recurring droughts, damaged irrigation infrastructure, sharply higher input costs, market structures that disadvantage smallholder farmers, and agricultural land contaminated by explosive remnants of war.¹¹ Qualitative research with farmers in seven locations across Rural Damascus, Dar’a and Homs found that agricultural inputs were generally available but frequently unaffordable. Farmers reported purchasing inputs on credit in exchange for commitments to sell their harvest below prevailing market prices, while transport costs sometimes exceeded the expected value of taking produce to market.²⁵ Reported responses included selling household assets, accumulating debt, leaving land uncultivated or moving into casual labor.

Youth and returnee economic activity appears largely informal, as commerce and services are mostly advertised through Facebook and WhatsApp marketplaces, with very few businesses formally registered with the relevant government entities.¹¹

The weight of economic pressure falls hardest on specific groups. Women-headed households face the combination of sole financial responsibility and restricted access to formal labor markets. They face a labor market that is not only informal, but also is physically concentrated in areas they cannot safely reach and governed by social norms that restrict independent participation in some communities.¹¹ Moreover, the economic assets many women relied on before displacement, including sewing machines, workshop equipment, and small business stock, were lost during years away and cannot be replaced without capital.

“If I had the help to buy the fabric and repair my machine, I would have supported myself and my family without needing anyone.” – Sewing worker returned to Homs from Lebanon¹¹

Young men without capital, property, or established networks are categorized by some assistance frameworks as “capable” and therefore excluded from support, even when they are unable to start economically. IRC’s Resilience, Peace and Conflict Assessment (RPCA)²⁶ identified this exclusion as a source of accumulating frustration.

Income & Affordability

Following the January 2026 transition to new bank notes,²⁷ the Central Bank of Syria (CBoS) reported over a third of cash in circulation already replaced by late February.²⁸ While the rollout of new bills may have signaled a positive direction in departing from the Assad-era imagery, the change in actual value of the Syrian pound (SYP) is purely nominal, providing no material change in household purchasing power. In fact, SYP has been experiencing sharp depreciation in recent months, losing around 15% of its value, driving the price of the Survival Minimum Expenditure Basket (SMEB) up.²⁹ In May 2026 alone, the national median SMEB cost increased by 10% in SYP (reaching 2,171,139 SYP) compared with February 2026, despite a decline in USD prices. In contrast, the more moderate 5% depreciation of the Turkish Lira (TRY) contributed to relatively stable or slightly declining SMEB costs in northwestern Syria.

Regardless of the basket costs, affordability has remained limited. REACH's May Humanitarian Situation Monitoring (HSM)³⁰ found that, while sufficient quantities of food were reported as available in most communities (83%), soaring prices have meant that people's ability to access these goods is largely lagging behind. Key informants (KIs) in two thirds of communities (67%) reported significant increases in food prices, with food insecurity being the most frequently reported priority need directly as a result of the high cost of food (77%). Overall, KIs in 90% of communities reported that people struggled to earn enough to meet their basic needs; low wages (91%) and limited work opportunities (90%) were the main reported constraints, while household incomes generally remained unchanged as living costs increased.

This finding is supported by DRC's labor market assessment (LMA).³¹ Based on fieldwork in Aleppo, Homs, Dar'a, Damascus and Rural Damascus, DRC found that wages across agriculture, construction and textiles were low, irregular and frequently delayed. Daily workers in construction earn between 7-12 USD per day, while factory and agricultural workers average below 100 USD per month. World Food Program (WFP)'s March monitoring³² points in the same direction: the national daily wage for unskilled labor increased by 8% month-on-month, but the MEB for a family of five increased by 9%, leaving wage growth still slightly behind the rising cost of basic needs.

Salaries among typically higher-income professions were similarly lagging behind. According to the Syrian Center for Policy Research (SCPR), the household abject poverty line (minimum required for food and other essential goods) was calculated at SYP 3.34 million per month, while average wages for university-educated public-sector employees covered only 33.9% of this threshold, and private-sector wages covered 38.5%.³³ Although SCPR's poverty line and the humanitarian MEB are built on different methodologies, they converge on the same conclusion: prevailing incomes remain substantially below the cost of meeting basic household needs.

Markets & Essential Services

The Syrian Ministry of Energy and industry actors have shown attempts of moving towards repair and service stabilization. As of November 2025, for example, Syria's electricity production has risen to about 2400 megawatts, with a noticeably improved electricity supply across various provinces.³⁴

Since 2011, Syrians throughout the country have become accustomed to receiving electricity from the state for only a few hours a day. In November 2025, however, as part of an unprecedented experiment the Ministry of Energy supplied the capital Damascus

with 48 continuous hours of electricity. And while these improvements are encouraging, the overall market remains largely unstable.

Prices of energy goods and services are skyrocketing as the national median cost of refilling a 24 kg liquefied petroleum gas (LPG) cylinder rose by 15.8% from February to May reaching 144,726 SYP.²⁹ Water trucking costs similarly recorded substantial increases in SYP, rising by 19% nationally, with a staggering jump in Northeastern Syria (+40%).²⁹ While currency depreciation is one of the factors pushing prices upwards, state tariffs have also played a part in raising electricity costs.³⁵

For many, higher electricity costs are cutting into the funds reserved for other essential expenses, particularly food. Around 50% of participants in an independent study stated that they reduced the number of meals and lowered both the quantity and quality of food to afford electricity bills.³⁶

"My bill used to vary between 15,000 and 20,000 pounds [less than \$2]. Now, it has surpassed 800,000 pounds [\$72].

Where are we supposed to get this money from? People are emerging from a crisis, exhausted...they can't even put food on the table." – Retired agricultural engineer living with a \$70 monthly pension³⁵

According to the World Bank, conditions in the overall Middle East region are further exacerbating Syria's energy vulnerabilities, as disruptions to natural gas supplies from Jordan and Egypt have reduced electricity generation.³⁷ It predicts, even if imports resume, higher gas prices are expected to impose significant additional financial losses on the energy sector.³⁷

Additionally, limited market functionality and operational barriers are further preventing access to basic goods and services. Of the 101 subdistricts included in the May JMML, only one was classified as having a fully functional market, with majority classified as working under reduced or stressed functionality. Among

interviewed vendors, 57% reported difficulties keeping their businesses open or adequately stocked.

Cash Feasibility & Delivery conditions

Humanitarian operations have been facing severe financial constraints since May, following a Central Bank of Syria directive requiring humanitarian transactions to be conducted in Syrian pounds.³⁸ According to ACAPS' early July update, these requirements to conduct humanitarian transactions in SYP, combined with withdrawal and transfer restrictions and exchange-rate volatility, had reduced the value of cash assistance by up to 25% and had delayed aid by several weeks.³⁹

Separately, on 7 June, the Central Bank amended Decision 235, allowing beneficiaries of incoming transfers through international companies, including MoneyGram, Western Union and Shift, to receive payment in either Syrian Pounds or foreign currency, according to their preference and the paying provider's available capacity.⁴⁰ This represents a meaningful improvement in remittance and potential cash-delivery conditions. However,

the amendment applies specifically to these incoming remittance channels and does not state that all humanitarian transactions may now be settled locally in foreign currency.

By 9 July, the Cash Working Group (CWG) also reported that the difference between official and parallel exchange rates had narrowed to approximately 6%, and government measures had contributed to improved market stabilization.⁴¹ The CWG further clarified that local procurement must continue to be paid in SYP, while international procurement may be paid abroad in USD; exemptions for local foreign-currency transactions were not currently supported.⁴¹

It is worth noting that, while legal feasibility for some remittance-based delivery channels seems to have improved compared to late May, these improvements do not preclude actual, on-the-ground feasibility constraints, including liquidity, solvency, and digital connectivity constraints. In June, the World Bank found that Syria's payment ecosystem remained largely cash-based and lacked modern interoperable infrastructure, while reliable information on bank liquidity and solvency remained limited.⁴² In July, the general regulatory framework for electronic-wallet licensing was still approaching issuance, while reliable telecommunications and internet, interoperability between banks, payment companies and telecommunications providers, sufficient acceptance points, user protection and cybersecurity were identified as prerequisites for wider implementation.⁴³ The HSM published in June also found that only 18% of assessed communities reportedly received more than 18 hours of electricity per day or continuous supply. Digital or account-based transfers should therefore be supported by an offline or manual fallback.³⁰

Additionally, documentation remains a potential exclusion point. As mentioned earlier, 62% of households in a deliberately vulnerable, quota-based sample across nine governorates had at least one member missing one or more key civil documents.¹⁸ Other protection risks include informal fees, unsafe travel, theft, coercion or household appropriation, proxy misuse and exposure of personal or transaction data.

Finally, cash-plus remains necessary where the underlying constraint is not solely lack of income. WFP's 2026 review describes combining targeted cash with nutrition support, agricultural recovery, community engagement and protection referrals.⁴⁴ Where households face documentation barriers, protection or nutrition risks, damaged services or limited livelihood opportunities, transfers should be linked with legal assistance, referrals, livelihood support or market recovery. Where supply, financial-service-provider liquidity or safe access is inadequate, vouchers, in-kind assistance or direct service provision may remain necessary.

Operational Implications

The available evidence supports broad operational directions but is not sufficient to determine priority locations, transfer values or delivery modalities without primary validation. Within this limitation, the following recommendations emerge:

- + Prioritizing area-based assistance in high-return communities where housing damage, service gaps, explosive-ordnance contamination and limited livelihood opportunities overlap. Targeting should be based on vulnerability rather than return status alone and should include vulnerable returnees, internally displaced people and host-community households, with particular attention to women-headed households, people with disabilities and families of missing persons.

- + Combining household assistance with support for restoring essential services, obtaining civil documentation, resolving housing, land and property issues, and mitigating explosive-ordnance risks.
- + Restoring safe community spaces for social interaction alongside mental-health and psychosocial support and protection referrals, helping to rebuild community networks and social cohesion.
- + Supporting diversified livelihoods, including viable non-agricultural microenterprises where explosive-ordnance contamination or prohibitively expensive land clearance constrains agricultural recovery.
- + Treating cash as one component of the response, with transfer values adjusted against current local prices and wages.
- + Selecting cash-delivery channels only after verifying local liquidity, currency availability, fees, documentation requirements, connectivity, agent coverage and cash-out safety. Offline, voucher, in-kind or direct-service alternatives should be retained where conditions for cash-forward digital solutions are inadequate.

Priorities for further assessment include:

- + Identifying which high-return locations have the greatest gaps between population changes and available housing, essential services and livelihood capacity.
- + Establishing where returns appear durable, where secondary displacement or renewed departure is occurring, and how motivations and outcomes vary by sex, age, household composition and displacement history.
- + Measuring household income, expenditure, debt, coping strategies and existing assistance coverage to support defensible transfer-value calculations.
- + Assessing market supply, price volatility, access constraints and livelihood opportunities at locality level.
- + Verifying financial service provider liquidity, accessibility and reliability, including barriers affecting women-headed households, people with disabilities and people without documentation.
- + Examining the prevalence and interaction of documentation, housing, land and property, protection, mental-health and explosive-ordnance risks.

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