
SOURCE FILE

THE BARRACK TEMPLATE

ONE ENVOY, ONE DEAL, AND THE PRIVATIZED EXECUTION
OF WASHINGTON'S NEW MIDDLE EAST DOCTRINE



CORE GROUP

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KEY JUDGMENTS

KJ-01 HIGH CONFIDENCE

Special Envoy Thomas Barrack runs a single transactional template across three files, Syria, Iraq, and Lebanon, in which reconstruction, relief, and access are traded for one required deliverable, exclusive state control of arms, on a compressed timeline. The template is the field execution of the December 2025 National Security Strategy: economic statecraft supplies the inducement, nation-state primacy supplies the deliverable. The template, not any single theater, is the unit of US regional policy toward Iran's armed clients.

KJ-02 HIGH CONFIDENCE

Barrack is the field executor and public interpreter of that strategy, converting its doctrine (nation-state primacy, burden-shifting, economic statecraft, and an explicit end to democracy promotion) into the "benevolent monarchy" and anti-federalism lines he advanced at the December 2025 Doha Forum. The "benevolent monarchy" statement is primary-verified. The National Security Strategy text supplies the doctrinal spine beneath it.

KJ-03 HIGH CONFIDENCE

The three files have diverged. Iraq is the template's strongest case, with a prime minister who owns the disarmament goal, a stated 30 September 2026 handover deadline, and factions that have at least declaratively assented, even as the same file carries open friction over federalism. Lebanon is stalled, with Barrack conceding a year after the roadmap that Beirut offers only talk and Washington holds no coercive instrument. Syria is the laboratory where the model was first proved and now the source of cross-pressure on the other two.

KJ-04 MEDIUM CONFIDENCE

Washington runs two incompatible tracks on Hezbollah. Barrack's is a voluntary, Lebanese-state-led disarmament tied to reconstruction. President Trump's, floated at the June 2026 Group of Seven summit, would have Syrian forces confront the group. The proposal is very unlikely to be executed. Its effect is diplomatic rather than kinetic, and it undercuts the state track by signaling to Beirut that the state track can be bypassed.

KJ-05 MEDIUM CONFIDENCE

The inducement side of the template runs through a Gulf-funded, Turkish-executed, US-wrapped consortium network Barrack convened, fusing his diplomatic office with the private-capital lineage he built through Colony Capital and DigitalBridge. He benefits from that network structurally and indirectly, through his convening role and returns such as success fees and carried interest, rather than through a documented direct equity stake in the vehicles. His November 2022 acquittal on unregistered-foreign-agent charges is part of the record on how the exposure reads.

KJ-06 **MEDIUM CONFIDENCE**

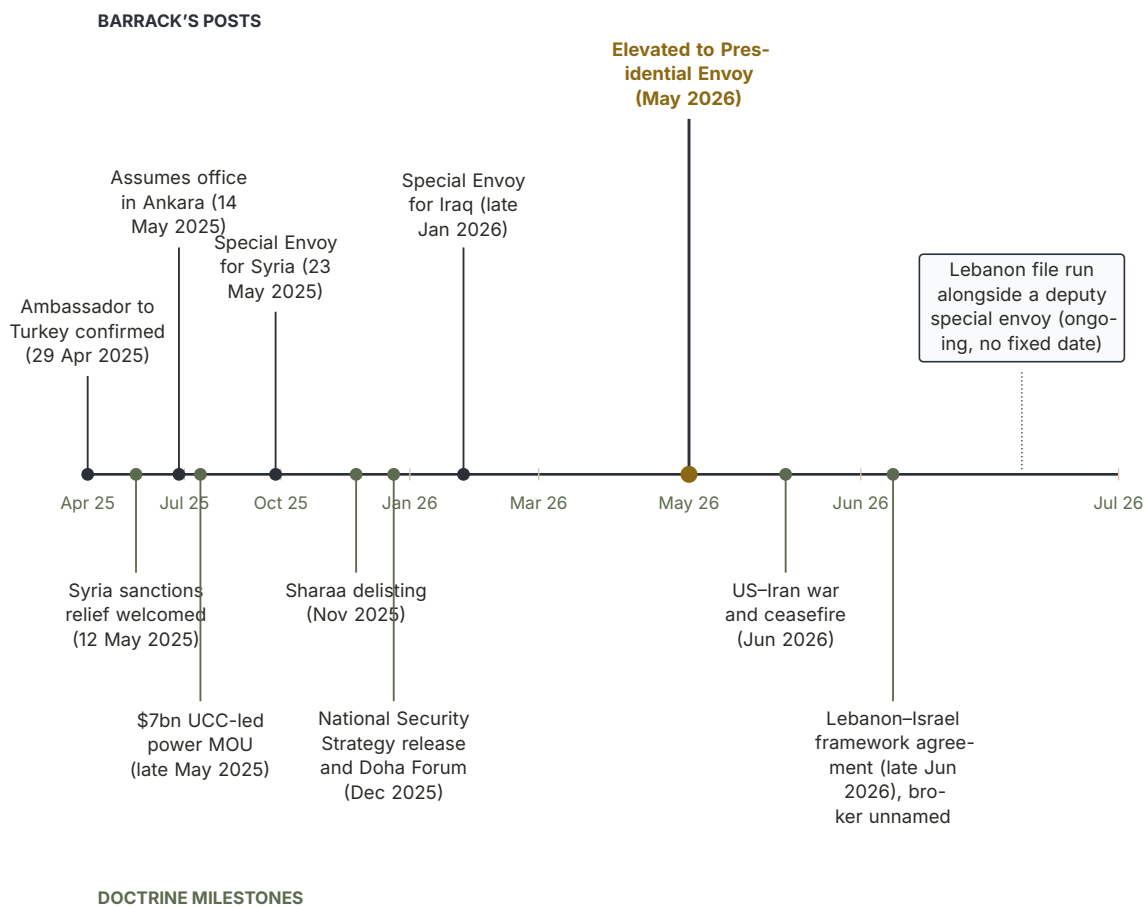
The template's ceiling is set by local ownership, not US design, and its durability rests on conditions outside Barrack's control: the Sharaa government's survival and centralization, the persistence of Caesar Act executive waivers against congressional re-imposition, actual disbursement of Gulf capital, and Israel moderating its operational tempo in Syria. Where a local principal owns the goal, the file advances. Where the state will not coerce the armed actor, or the capital does not move, it stalls regardless of the size of the package.

I. THE MAN AND THE METHOD

FIGURE 1

One envoy, four mandates

Four US mandates accreted onto one man in thirteen months, and the doctrine milestones tracked the appointments, one envoy carrying one method into four capitals. Axis ordered chronologically, with spacing widened across the dense Nov 2025–Jun 2026 cluster for legibility, not strictly linear.



Filled circles mark realized events. The gold marker is the elevation to Presidential Envoy, the visual density peak of the concentrated mandate.

Source: Core Group assessment

Thomas Barrack reached diplomacy from private equity. He founded Colony Capital, one of the largest real-estate private-equity firms in the world at its roughly \$25 billion peak, carried it through the NorthStar merger, and steered its restructuring into DigitalBridge (NYSE: DBRG), a pivot from distressed real estate to digital infrastructure. He stepped down as chief executive in 2020 and 2021, sold part of his position, and remained a shareholder and an

influential figure at the firm. In 2021 the government charged him with acting as an unregistered agent of the United Arab Emirates. A jury acquitted him on all counts in November 2022. The lineage is the method. Barrack manages relationships and structures deals, and he has spent decades placing Gulf capital into Western vehicles.

The diplomatic turn concentrated an unusual mandate on one man. Barrack holds three US posts at once. He is Ambassador to Turkey, Special Presidential Envoy for Syria, and, since early 2026, Special Presidential Envoy for Iraq, and he runs the Lebanon file alongside a deputy special envoy. The accretion is the signal. Four northern-tier files that a normal administration would split among an assistant secretary, two envoys, and an ambassador instead sit with a single interlocutor who reports to the president directly. The concentration converts personal access into policy: what Barrack proposes in Beirut, Damascus, Baghdad, and Ankara carries the weight of a direct line to the Oval Office, and the four capitals read it that way.

The method is fixed and it is the same in each capital. Barrack leads with an economic lifeline and names the price as the disarmament of the armed movement Iran cultivated, on a clock measured in months. Commerce over chaos, the deal over political engineering. He does not build institutions or broker power-sharing. He offers reconstruction, investment, sanctions relief, and the standing that comes with a White House meeting, against a single deliverable. That deliverable, exclusive state control of arms, is not incidental to the doctrine he serves. It is the operational face of the doctrine's first principle, that the nation-state is the only unit that counts, and that a state which does not monopolize force is not yet a state.

II. THE DOCTRINE

At the December 2025 Doha Forum, Barrack said he saw democracy nowhere in the region, that Israel could claim to be a democracy, and that what had worked best in the Middle East was "benevolent monarchy." The line traveled as a gaffe. It was doctrine read aloud. The National Security Strategy the White House released the same month, a 29-page document, states that the nation-state "is, and will remain, the fundamental political unit" of the world, and that the US government is responsible only for securing the God-given natural rights of its own citizens. It commits Washington to seek good relations with other states without imposing democratic or social change that departs from their traditions and history. Barrack's benevolent monarchy is that sentence applied to the Gulf: the Saudi, Qatari, and Emirati model is not a problem to be reformed but the regional template to be generalized.

The strategy breaks with seven decades of American practice on four axes, and Barrack executes all four. It ends nation-building and democracy promotion, the Wilsonian inheritance that ran from the Cold War through the neoconservative era. Barrack's critique that nearly every decision the West imposed on the region "was a mistake," with Iraq and Libya as the exhibits, is the doctrine's language, not his own improvisation. It shifts the burden from Washington to capable regional partners, replacing the resident security guarantor with a distant

balancer, on the premise that US energy independence has ended the country’s dependence on Gulf oil. Barrack’s insistence that stability in Syria comes from regional partners and private capital rather than a permanent American troop presence is burden-shifting in operational form. It makes the economy an instrument of security, treating the private sector as the engine of American power and investment, sanctions, and technology as its levers. This is why a private-equity financier, not a career diplomat, holds the northern-tier files. And it demotes Israel from a shared-values ally to a shared-interests one, valued for strength and sovereignty rather than for democratic character.

FIGURE 2

The doctrinal break

The 2025 turn is a clean break from the prior line across every axis, values to interests, federalism to central authority, donor aid to investment, and Barrack’s Doha statements read each axis out loud.

Axis	The Prior Line (2022)	The 2025 Barrack / Trump Line
Global frame	Democracies-vs-autocracies contest	National sovereignty and the rejection of globalism
Middle East objective	De-escalation and gradual integration	Burden-shifting and investment
Preferred governance model	Democratic institutions and rights	"Benevolent monarchy," the competent strongman
Syria file	Isolate the government, back the SDF, Caesar sanctions	Rehabilitate the government, delist, invest
Stance on federalism	Support decentralization, including Iraq and northeast Syria	Call decentralization an "illusion," back central authority
Gulf relationship	Conditioned on human-rights files	Full strategic partnership, financiers of stability
Israel relationship	Shared democratic values, two-state horizon	Shared security interests and power, the Sparta model

Source: synthesizes the December 2025 National Security Strategy and the Doha Forum record. The "benevolent monarchy" cell is primary-verified.

The doctrine’s replacement for donor-conference reconstruction is investment-led stabilization, which Barrack has described as a leap from a payphone to Starlink. Rather than pledge humanitarian aid, Washington lifts or waives sanctions on specific projects that its allies finance and build, drawing the target economy into the Gulf-Turkish commercial orbit and starving the Iranian networks of the conditions in which they thrive. The mechanism is the inducement half of the template. It is also where the money and the private networks that carry it come in, and where the conflict-of-interest exposure sits.

The doctrine’s second operational principle is central authority. Barrack told the Doha Forum that decentralization, federalism, and confederation “are all illusions” and that decentralization “has never worked in this region,” citing the Balkans, Iraq, Lebanon, and Libya as the failures. The line is nation-state primacy applied to state form: a strong center that can secure borders and monopolize arms is preferable to a bargain among sects, regions, or ethnicities. That principle is what makes the anti-Kurdish turn, the friction with federal Iraq, and the pressure on Syria’s minorities coherent rather than incidental, and it is the hinge on which Turkey, the fourth mandate, becomes the doctrine’s principal beneficiary.

III. THE TEMPLATE

FIGURE 3
One template, three files

The deal is identical across the three files, only local uptake differs, and that difference, not any variation in US design, is the whole story.

Attribute	Syria	Iraq	Lebanon
Local principal	Sharaa transitional government	PM Ali al-Zaidi	Aoun-Salam government
US inducement	Sanctions relief, delisting, reconstruction capital	Reconstruction, investment, White House access, air-defense cover for northern fields	\$200M military aid, reconstruction, sanctions posture
Required deliverable	Sever the Iranian arms corridor, bring arms under the new state	Disarm and disband armed groups outside state control	Exclusive state control of arms nationwide
Declared timeline	No fixed public deadline	Stated 30 September 2026 handover	120-day roadmap from mid-2025
Status (2 July 2026)	Laboratory proved, corridor severed, now cross-pressured by the Syria-fights-Hezbollah proposal	Advancing. Factions assent declaratively, physical transfer not yet verified	Stalled. Only talks, no coercive instrument. Framework-agreement broker unnamed

Status cells carry two tradecraft honesty notes, not source flags. The Iraq assent is stated, physical transfer not yet verified. The Lebanon framework-agreement broker is not publicly named. Source: Core Group assessment.

The template has one structure and it does not vary. The inducement is economic and the deliverable is coercive, in that order. Barrack packages a lifeline, then names the price as exclusive state control of arms, on a clock measured in months rather than years. Lebanon received a written proposal in mid-2025 built on three headings, all weapons under state authority, financial and border reform, and the Lebanon-Syria relationship, with a 120-day schedule and \$200 million in US military aid tied to progress on internal control. Iraq carries

a stated end-September 2026 handover deadline. Syria's framework conditions relief and legitimacy for the new government on its severing the Iranian supply architecture that once crossed Syrian territory. The recurring phrase, exclusive state control of arms, is not three coincidences. It is one policy applied serially down a single geographic corridor, and it is the operational deliverable of the doctrine's nation-state primacy.

The template is possible now because of what happened in June 2026. The short US-Iran war and the agreement that closed it left Iran retrenching across the region and its land bridge to Hezbollah severed at the Syrian segment. Barrack is working the corridor at the moment its patron is weakest, converting a military outcome into a set of political deals before Tehran can rebuild the networks. The severed Syrian segment is what makes the Lebanese and Iraqi files thinkable at all: with the resupply route cut, the armed clients along the corridor are isolated from their source, and the state-consolidation offer has something to consolidate against.

The method is fast and transactional by design, and its speed is both its advantage and its liability. The advantage is that it moves while the adversary is off balance and while Gulf financiers have an appetite that Barrack likens to a market frozen since the 1990s and now waiting to reopen. The liability is that a compressed clock forces the declaratory deliverables due before the actual transfers can be verified, and puts the whole frame at the mercy of whether the capital behind the inducement actually moves. The three files make the point in different ways, and they are where the single template meets four different local realities.

IV. THE THREE FILES

The template acts on three files that carry an armed network to dismantle, Syria, Iraq, and Lebanon, and it is worked from a fourth mandate that carries none. Turkey is not a disarmament file. It is the patron whose core aim the doctrine delivers, and it is addressed first because it conditions the other three. Barrack sits as ambassador in Ankara and envoy for Syria at once, and the anti-decentralization line is the instrument that hands Ankara its central objective: no Kurdish entity on its southern border. His message to the commander of the Syrian Democratic Forces, Mazlum Abdi, that Syria will be "one state, one army, one people," is the operational edge of that line. It closes the Kurdish autonomy experiment in the north-east, aligns Washington's Syria policy with Ankara's, and prices the Kurdish file as the cost of restoring the strategic partnership with a NATO ally. Barrack has said he expects the remaining US-Turkey differences resolved within four to six months.

A. Syria: The Laboratory and the Cross-Pressure

Syria is where the doctrine was first proved. Washington led the November 2025 UN Security Council effort to delist the new Syrian president, Ahmed al-Sharaa, and Barrack described his achievements in the year since Assad's fall as "epic" and "heroic," a rehabilitation of a figure once designated a terrorist into a competent strongman the strategy can back. Prime

Minister Salam welcomed the US move to relieve Syria sanctions on 12 May 2025, an early marker of how the regional principals read the turn. The consortium model followed: the United States supplies the political cover through sanctions waivers, the Gulf supplies the financing, and Turkey and Syria supply the execution, a division that runs as American capital, Gulf political cover, and Syrian labor. The Iranian corridor that once crossed Syrian territory is severed, which is the precondition for the other two files.

The cross-pressure is the president's, and it is the sharp new development on this file. At the June 2026 Group of Seven summit, in a meeting with Qatar's emir, Trump floated the idea that Syria, rather than Israel, should take care of Hezbollah, and praised al-Sharaa. He has repeated the suggestion since. It cuts directly across Barrack's own diplomacy. Barrack had denied in March that Washington was lobbying Syria to invade Lebanon, and the voluntary, Lebanese-state-led track he runs in Beirut is premised on the Lebanese state, not a foreign army, disarming Hezbollah. The president's proposal tells Beirut the opposite, that the state track is optional and a Syrian intervention is on the table, which weakens the very pressure Barrack's Lebanon package depends on.

Capability and intent both cut against the proposal being executed. The Syrian army rebuilt from the insurgency that toppled Assad lacks the force structure to invade Lebanon and defeat Hezbollah in the field, a capability fact. Damascus has disavowed any such intent, with al-Sharaa denying rumors of Syrian intervention and calling the president's remarks misconstrued, an intent fact. The regional response has been uniform rejection, from Lebanon, from Israel, which regards the Islamist-led Damascus government with suspicion, and from Syria itself. The proposal's effect is therefore diplomatic. On 2 July the Syrian foreign minister, Shaibani, made his first visit to Beirut since the proposal surfaced, met President Aoun and Speaker Berri, and said Damascus was open to meeting Hezbollah if interests required it, a signal calibrated to lower the temperature the proposal had raised rather than to advance any confrontation. Whether the president meant the proposal as policy or as pressure is genuinely uncertain. The observable effect, a Syrian disavowal and a de-escalating visit, is not.

B. Iraq: The Model and the Friction

Barrack carried the identical template into Baghdad and found what Lebanon lacks, a head of government who owns the goal. Prime Minister Ali al-Zaidi, who emerged from a prolonged contest with his predecessors, made bringing all weapons under state control a central priority from his first days in office. The 15 and 16 June 2026 meetings produced a joint commitment by both governments to disarm and disband armed groups operating outside state authority, to consolidate all weapons under the state, and to complete the effort with urgency. Trump invited Zaidi to the White House in mid-July, the access half of the inducement made concrete. Baghdad has set the end of September 2026 for factions to hand over their arms, and several Iran-aligned militias have said they accept state control of their weapons. This is where the template looks like it works.

The distinction between declaratory and actual assent is the whole risk. A statement of acceptance is not a transfer of heavy weapons into state custody, and the Popular Mobilization structure through which many of these factions operate is woven into the Iraqi state's own security and patronage architecture. The Iraqi state's writ over these formations is partial, a capability fact. Zaidi's stated intent to consolidate them is real, an intent fact, but intent does not by itself produce the handover the September deadline names. The backdrop sharpens the stakes: Iranian Revolutionary Guard elements set up covert cells in Iraq in the spring to launch drone attacks on Gulf states, bypassing the established militia command, and consolidating arms under the Iraqi state is, in this framing, the instrument for closing that launch space. The economic engine runs at full power here: Barrack is working to bind Baghdad and the Kurdistan region into a single economic and security framework, with air-defense cover for northern oil and gas fields as the security inducement and foreign investment as the economic one, and Zaidi will carry the release of some \$30 billion in frozen guarantees to his mid-July Washington meeting.

The same file that models the template also carries its sharpest doctrinal friction. Barrack's anti-federalism line, which serves the Syria and Turkey files, collides in Iraq with a constitutional order built on exactly the federalism the doctrine calls an illusion. At the Doha Forum he said Iraq's elected prime minister held "zero power" because he could not form a governing coalition without outside interference, and called the Iraqi scene, with Baghdad, Erbil, the Popular Mobilization, and Iranian-aligned militias, impossibly complicated. The Iraqi foreign minister, Fuad Hussein, confronted him at the forum, expressed the government's astonishment, and stated that Iraq's political structure was not open to external speculation and that federalism and democracy were enshrined in the constitution and reflected the will of the Iraqi people. Barrack softened afterward, saying he had meant the American experience in Iraq rather than a criticism of Iraqis, but the message had landed: Washington no longer defends the federal system it engineered in Baghdad after 2003. The friction is the cost of running one doctrine across files whose local orders point in opposite directions, and it is why the Iraq file is the model case and a live diplomatic irritant at the same time.

C. Lebanon: The Stalled File

Lebanon answered the mid-2025 proposal with a seven-page counter-document handed to Barrack at the presidential palace, and the file has not moved past that exchange of paper since. Barrack's own verdict is that everything Lebanon does is talk without action. He has described Lebanon as a failed state unlikely to be able to disarm Hezbollah by force, called the matter internal to Lebanon, and stated plainly that Washington brings no consequence, no threat, and no whip, operating on a voluntary basis. That is a candid admission of the template's central weakness in this theater, though it is a stated posture rather than proof that no instrument exists. The United States can offer the inducement but has chosen to withhold coercion, and the Lebanese state that would have to execute the disarmament will not turn its army against Hezbollah. Hezbollah rejected the roadmap as a demand for surrender.

Barrack's Doha framing put the choice to Beirut in the doctrine's own terms. He called the Lebanese Army well-intentioned but ill-equipped and asked, of any move to arm it further, who its soldiers would be sent to fight, answering that Washington did not want a Lebanese force built to fight Israel and would not build one to fight its own people. He tied the disarmament directly to prosperity, casting the Lebanese choice as arms and poverty on one side or disarmament and Gulf investment on the other. Prime Minister Salam received Barrack twice, on 18 June and 6 July 2025, and the exchange established the frame that still governs the file: an economic package offered against a disarmament deliverable, the south-of-Litani zone as the first increment, nationwide arms monopoly as the endpoint.

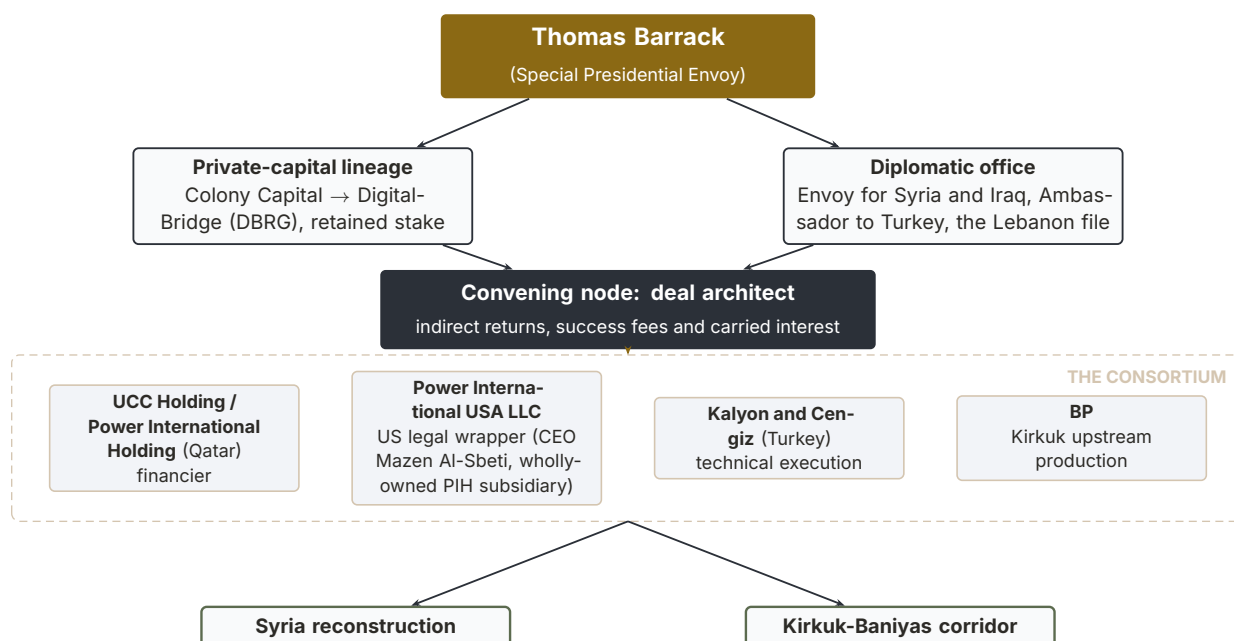
The capability and the intent are separable and both point to stall. The Lebanese Army has the manpower to police the south but not the force ratio or the political mandate to disarm Hezbollah against its will, and it has in practice withdrawn from southern positions as Israeli troops advanced rather than confront either party, a capability and posture fact. The intent fact sits with the political leadership, which has priced an internal confrontation over Hezbollah's arms as more dangerous to the state than the loss of the US package, and has therefore chosen the paper track. Absent a coercive instrument that Washington has declined to supply, or a strategic decision by Hezbollah that it has declined to make, the file has no internal driver. One gap stays open on this file: no public account names the lead US broker of the June 2026 Lebanon-Israel framework agreement. A separate US official, Cooper, appears in the Lebanese Army deployment context, and the broker role is not attributed to Barrack.

V. THE INTERESTS AND THE CORRIDOR

FIGURE 4

Privatized diplomacy: the interest architecture

The envoy's office and his private-capital lineage meet at the convener's role, one man assembling a Gulf-funded, Turkish-executed, US-wrapped consortium and benefiting indirectly from its success, without a documented stake in the vehicles.



The convening edge is drawn solid because the underlying study establishes the mechanism. The study finds no documented direct equity stake for Barrack in the named vehicles, and his November 2022 acquittal on unregistered-foreign-agent charges is carried as record fact. This exhibit rests on a single analytical study. Source: Core Group assessment.

The inducement half of the template is not an abstraction. It runs through a specific network of money, and Barrack sits at the center of it as the convener. His private-capital lineage, Colony Capital and then DigitalBridge, gave him decades of experience placing Gulf family capital into Western legal vehicles, and it is that experience, not an oil portfolio, that he brings to Syria's reconstruction. The flagship deals are already signed. A consortium led by the Qatari group UCC Holding, part of Power International Holding, signed a strategic memorandum in late May 2025 for roughly \$7 billion in power-generation projects in Syria, and a related consortium took a \$4 billion build-operate-transfer deal to redevelop Damascus International Airport. The Turkish construction firms Kalyon and Cengiz, both close to the government in Ankara, hold the technical execution. The division of labor is the doctrine made concrete: Gulf capital, Turkish machinery, American political cover.

The American face of the consortium is thinner than it looks. Power International USA LLC appears as the US partner, which suggests at first glance that a major American energy company has entered the Syrian market. The Kirkuk-Baniyas study finds otherwise. Power International USA is domiciled in the United States but is a wholly owned subsidiary of the Qatari parent, Power International Holding, run by a chief executive, Mazen Al-Sbeti, and its function is to provide an American legal wrapper for Qatari investment. The wrapper does three things: it gives the administration a case to make to Congress that sanctions exceptions support American companies, it affords the assets stronger legal protection, and it opens access to US development financing through vehicles such as the Development Finance Corporation and the Export-Import Bank. The direct American engagement through major oil firms is absent. The substitute is Qatari capital in an American hat.

Barrack's exposure to this network is real, structural, and indirect, and the study that traces it draws the boundary carefully. There is no direct evidence that Barrack holds personal equity in UCC Holding or Power International USA, which are private Qatari-family companies with no obligation to disclose minority holders. The relationship the study describes is organic integration rather than ownership: Barrack is the facilitator and deal architect who convened the Turkish and Qatari parties, drawing on the Gulf relationships he has managed for decades, from the Plaza Hotel to a Qatari stake in Miramax. He attended the signing in Damascus and praised the consortium publicly. The most probable form of his benefit is not a titled share in the pipeline but the returns a convener takes for engineering a politically complex deal, success fees or carried interest, alongside the possibility that his private investment vehicles participate in funds exposed to these projects. He does not own the pipe. He owns the political engineering that makes the pipe possible, and he and his circle are its indirect financial beneficiaries. His 2022 acquittal on charges of acting as an unregistered UAE agent is part of how the exposure reads, a prior instance of the same pattern, using a public role to open doors for private Gulf-linked networks, tested in court and not sustained.

The corridor those interests run on is the Kirkuk-Baniyas pipeline, and it is the flagship of stability through investment. Built in 1952 to carry Kirkuk crude to the Syrian Mediterranean coast, roughly 800 kilometers at an original design capacity near 300,000 barrels a day, the line was closed by Damascus in 1982 in support of Iran's war against Iraq and has been out of service since the 2003 invasion, with pump stations on both sides bombed, looted, or left to decay. Iraq's interest in reviving it is a national-security calculation, not a commercial one: more than 85 percent of its exports run through the southern Basra outlets and are hostage to the Strait of Hormuz, while the northern Kirkuk-Ceyhan line has been halted since 2023 by an arbitration dispute with Ankara. Baniyas is the third option, a direct Mediterranean route that frees Baghdad from both chokepoints, and Baghdad frames the revival as export-route diversification. The Iraqi oil ministry confirmed on 1 July 2026 that a consultant study to assess the revival is live. For Damascus, the line is a double lifeline, crude for the Baniyas refinery and transit revenue in hard currency.

The plan is not a repair but a rebuild. The consultant study describes a twin-pipeline design, a crude line with export capacity up to 1.5 million barrels a day, well above the original, carrying both Basra and Kirkuk crude, and a companion gas line tied into the Arab Gas grid to feed the Syrian power plants the consortium is building. BP’s agreement with Iraq to redevelop the giant Kirkuk fields supplies the upstream production the line needs to be viable, which completes a chain of Western and allied control across the whole value stream: British production, Qatari and Turkish transport and construction, and American political cover. The study puts the rehabilitation at \$8 billion to \$10 billion against a 1.5-million-barrel capacity, cheaper than the \$18 billion Basra-Aqaba alternative and dearer than a \$5 billion new Kirkuk-Ceyhan line, but the only one of the three that escapes both Hormuz and Ankara. Those figures are the study’s estimates, not confirmed costs.

FIGURE 5

Three ways out for Iraqi crude

Baniyas is the only route that frees Baghdad from both Hormuz and Ankara, which is its strategic point and its price, the highest security risk of the three.

Route	Estimated cost	Daily capacity	Security profile	Strategic advantage
Kirkuk-Baniyas (rehabilitation)	\$8–10 bn	1.5 mbpd	Medium risk	Independence from both Turkey and the Gulf
Basra-Aqaba (Jordan)	\$18 bn	1 mbpd	Relatively safe	Long and costly
New Kirkuk-Ceyhan	\$5 bn	1.6 mbpd	Safe to the north	Hostage to Turkish politics

Source: the consultant study’s estimates for the cost and capacity columns, not confirmed costs. The Iraqi oil ministry confirmed the revival study live on 1 July 2026.

The corridor is where the doctrine’s geopolitical payoff is clearest and its fragility sharpest. Reviving it displaces Iran’s land-corridor ambitions and the unexecuted Iranian energy memoranda that preceded it, ties the Syrian economy’s fate to Iraqi crude and hands Baghdad and Ankara a durable hold over Damascus, and advances Turkey’s aim of becoming the region’s energy hub. Two risks sit under the whole design. The security risk is the 800-kilometer route through the Anbar desert and the Syrian badia, where Islamic State sleeper cells remain active and a pipeline of that length demands a protection force the new Syrian state cannot yet field, raising the prospect of privately financed contractors. The legal risk sits in Washington: the Caesar Act remains law, the entire structure rests on executive waivers, and a shift in the administration or sustained congressional pressure could re-impose sanctions and strand billions in committed capital. The template’s inducement is only as durable as the waivers that let the money move.

VI. WASHINGTON, ISRAEL, AND THE STRATEGIC ASSESSMENT

FIGURE 6

Winners and losers of the Barrack line

The doctrine picks winners by the same principle throughout, central authority and Gulf capital win, decentralized and minority claims lose, and even a treaty ally sits uneasy.

Standing	Actor	What the doctrine gives or costs	Public reaction
Winners	Turkey	The anti-Kurdish line delivers its core aim, no Kurdish entity on its border	Backs the line
	New Syrian government	A US certificate of good conduct and reconstruction capital	Embraces the rehabilitation
	Gulf financiers (Qatar, Saudi Arabia)	Elevated to founding partners of the new order	Fund and convene
Uneasy	Israel	Discomfort at the speed of Sharaa's rehabilitation, pressure to moderate its Syria tempo	Wary, with Joe Wilson pushing back
	Federal Iraq	Its constitutional order called an illusion	Fuad Hussein rebuts publicly
Losers	SDF and Syrian Kurds	Autonomy closed, one state one army	Ilham Ahmed and MSD officials reject the line
	Syrian minorities (Druze, Alawite)	Fears under a centralized, Sharia-based order	Anxiety and appeals for protection

Source: the documents lay out the winners-and-losers map, with the independent base corroborating the Israel-uneasy (Joe Wilson) and Kurdish (SDF, Ilham Ahmed) cells.

Trump's reliance on Barrack is the load-bearing fact of the whole structure. The concentration of four northern-tier files on one envoy who reports to the president directly is what gives the template its speed and its authority, and it is also its single point of failure. The friction is already visible on the American side. Representative Joe Wilson has publicly pushed back on Israeli operations that cut against the Barrack line, and Israel, though a treaty partner, is uneasy at the speed with which Washington has rehabilitated an Islamist-led government in Damascus and at the pressure to moderate its own operational tempo in Syria to protect the new government's stability. Israel's posture toward Barrack's method is wary. It is the stance of an ally watching Washington reorder the region around interests it shares only in part.

Barrack is the instrument, and the doctrine is the policy. His private-equity style and his direct line to the president make the shift legible and fast, but the December 2025 turn to transactional realism is written into the National Security Strategy and would outlast his removal. Reading the template as one man's improvisation understates how much of it is now codified policy. Confidence is HIGH because the doctrine is documented in the strategy text and executed identically across four files, not because any single actor is indispensable.

Assessment 2 MEDIUM CONFIDENCE

The concentration of the northern-tier files in one envoy buys coherence at the cost of resilience. Four capitals coordinated through a single interlocutor move faster and speak with one voice, but the approach is only as durable as Trump's confidence in Barrack and Barrack's own bandwidth across four files, and a loss of either would leave no institutional structure underneath. Confidence is MEDIUM because the dependency is observable in the mandate's design but its failure mode has not yet been tested.

Assessment 3 MEDIUM CONFIDENCE

The template's ceiling is local ownership, not US design, and the investment-led model substitutes capital flows for political settlement. Where a local principal owns the goal the file advances. Where the state will not coerce, it stalls. In every case the Kurdish, Druze, and Iraqi-federal grievances the doctrine overrides are left unresolved beneath the surface rather than settled. The model can buy stability, but it buys it on credit against claims it has chosen not to address. Confidence is MEDIUM because the pattern holds across the current files but the durability of a stability bought without settlement is untested on this horizon.

The campaign has a most-likely path and two off-ramps from it. The scenarios below run a six-to-twelve-month horizon and are ranked most to least likely. Each names the development that would falsify it.

Scenario 1. Divergent consolidation MOST LIKELY PATH

The template holds as a frame and the doctrine's investment engine begins to turn unevenly. Iraq advances toward at least a declaratory handover around the September deadline, the Caesar waivers hold and a first Gulf tranche moves on a named Syria project, Sharaa centralizes, and Lebanon holds in stall through the year while the Syria

proposal stays rhetorical. The mechanism is local ownership: the file moves where a local principal owns the goal and stalls where the state will not coerce, and neither condition changes on this horizon. This path is the most likely because every current input points to it, Zaidi's ownership in Baghdad, the Lebanese leadership's settled preference for the paper track, the appetite of Gulf financiers, and the uniform regional rejection that keeps the Syria proposal contained. The path falsifies if Washington attaches a coercive instrument to the Lebanon file, if the Iraqi deadline produces a verified heavy-weapons transfer rather than a declaration, or if the waivers fall and the capital freezes.

Scenario 2. Stall and stranded capital

LOWER LIKELIHOOD

Congressional pressure on the Caesar waivers, slow disbursement, and an Israeli operational tempo that Washington cannot moderate freeze the investment model in place, while the cross-pressure from the Syria proposal or a hard US conditionality finally attached to the Lebanon package forces Beirut off the fence, into either a partial south-of-Litani step it can present as progress or a confrontation it has so far avoided. The mechanism is inducement withdrawn and pressure restored: the money that makes the template credible does not move, and the threat the voluntary track lacked arrives from an unintended direction. This path is of lower likelihood than the first because the administration has just exited one regional war and has explicitly withheld the whip, but it is live because the waivers are genuinely contingent and the Syria proposal has already introduced the threat. The path confirms if Congress moves against the waivers by a named vote, if a Syria consortium tranche is publicly delayed, or if the Lebanese Army executes a disarmament action north of its current southern posture.

Scenario 3. Backlash and coercion

LOWEST LIKELIHOOD

The voluntary frame breaks and the campaign converts into force or collapse. A Sharaa reversal or centralization failure reopens the Syrian laboratory, a Kurdish or minority flashpoint detonates the grievances the doctrine overrode, the Iraqi handover collapses into armed faction defiance, or a resumption of major Israeli strikes or an actual Syrian tasking against Hezbollah replaces the deal with coercion. The mechanism is the exhaustion of patience or the failure of a load-bearing condition: an administration that priced disarmament and stabilization as achievable through deals concludes they are not, or one of the conditions the model rests on gives way. This path is the least likely on this horizon because Washington has just left one war and every regional actor including Israel has rejected the Syria option, but it is the structural risk a compressed timeline carries when declaratory deliverables come due and actual transfers do not, and when billions ride on waivers a single vote could end. The path confirms if Syrian forces move toward the Lebanese border in any anti-Hezbollah framing, if the Iraqi deadline passes into open faction defiance met by state force, or if the Caesar sanctions are re-imposed.

An alternative explanation deserves a hearing, that Barrack personifies the doctrine rather than driving it, and that the template is an artifact of one envoy holding several files rather than a single policy. On this reading the turn is the president's and the strategy drafters', the deals are Gulf-and-Turkey-led with a thin American wrapper, and treating the files as one campaign over-fits a coincidence of personnel and vocabulary. The evidence that reading would require is partly present and partly absent. It is present in that the doctrine genuinely is codified above Barrack, and the consortium capital genuinely is Gulf and Turkish, with the American role a legal wrapper, which is why the counter cannot be dismissed. It is absent in that the deliverable is verbatim identical across the files, exclusive state control of arms, the inducement structure is identical, and one interlocutor with a direct line to the president convened the money and carried the deal. A coincidence of personnel would not produce one vocabulary, one deal structure, one geographic rationale, and one convener. The single-template reading is the better fit, and the counter sets the ceiling on how much causal weight to place on the man rather than on the policy he executes.

VII. INDICATORS TO MONITOR

The eight indicators below are observable and directional. Each names one threshold and the scenario or judgment it updates.

1. **Iraqi heavy-weapons transfer.** Iran-aligned Iraqi factions physically transfer heavy weapons into state custody at or near the stated 30 September 2026 deadline, or the deadline lapses with no verified transfer. Verified transfer confirms the model case and Scenario 1. A lapse into declaration-only tests KJ-03 and points toward stall.
2. **A US coercive instrument on Lebanon.** Washington attaches a dated conditionality or a penalty to the Lebanon file, an aid suspension, a sanctions action, or a hard deadline, departing from Barrack's stated voluntary basis. Toward Scenario 2. Tests the voluntary-basis premise and the "no whip" posture.
3. **Congress moves on the Caesar waivers.** A named congressional vote to codify or block the executive waivers inside 90 days. A move to block or re-impose points toward Scenario 2 or 3 and tests the waiver architecture the investment model rests on. A move to codify strengthens Scenario 1.
4. **A Gulf tranche moves.** A Gulf sovereign or the UCC-led consortium reaches financial close and disburses a first tranche on a named Syria project, with a public announcement. Toward Scenario 1 and the investment-model half of KJ-06. A publicly delayed or cancelled tranche points the other way.
5. **Syrian force movement toward Lebanon.** Any movement of Syrian units toward the Lebanese border in an anti-Hezbollah framing, or a formal Damascus tasking against the group. Toward Scenario 3. Falsifies KJ-04. Baseline near zero.
6. **The Zaidi Washington visit.** The mid-July 2026 visit converts into a concrete US-Iraq security and economic package or a release of part of the \$30 billion in frozen guarantees,

or it is downgraded or postponed. A package toward Scenario 1 and the Iraq success line. A downgrade toward stall.

7. **The corridor's contractor.** The Kirkuk-Baniyas consultant delivers a technical assessment naming a Western versus a regional lead contractor. The identity reveals who is meant to control the corridor and updates the energy-realignment read.
8. **A named Barrack transaction.** An SEC filing, a Development Finance Corporation or Export-Import Bank financing document, or a congressional inquiry names Barrack or a Barrack-linked vehicle in a Syria or Iraq reconstruction deal. This moves the conflict-of-interest from structural to a named transaction and updates KJ-05 upward.



CORE GROUP

ABOUT CORE GROUP

Core Group is a Beirut-based strategic foresight house. We produce decision-ready analysis and advisory for governments, diplomatic institutions, and strategic investors navigating Middle Eastern complexity. Our work integrates structured analytical products, applied strategic advisory, and analysis-informed mediation; delivered on daily and weekly cycles calibrated to the speed at which the situation changes.

We are based in Beirut. In environments where official data is systematically unreliable and remote analysis inherits every distortion in its source material, physical proximity is not a logistical convenience but an epistemological foundation of our methodology. We verify what others can only estimate.

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