Future Focus MENA

# POLICY BRIEF AUGUST 2026

## THE DEVELOPMENT ROAD AND THE NEW REGIONAL ORDER

## BYPASSING IRAN? THE DEVELOPMENT ROAD, TÜRKIYE AND THE GCC’S EMERGING CONNECTIVITY STRATEGY

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# Executive Summary

## Key Thesis

The Development Road is more than an Iraqi transport project. Together with the planned revival of the Hejaz Railway, new pipeline options and digital infrastructure, it could create an emerging connectivity architecture linking the Gulf, Iraq, the Levant, Türkiye and Europe.

This architecture bypasses Iranian territory and could gradually widen Iraq's economic room for manoeuvre. Yet it should not be mistaken for an automatic strategy of containing Iran. Tehran's influence in Iraq remains political, economic, religious and security-related. The decisive question is therefore not merely whether new routes bypass Iran geographically, but whether the emerging regional order excludes Iran politically, or provides opportunities for selective integration.

## Executive Summary

Trade routes, infrastructure corridors and regional transport partnerships across West Asia are gaining new geopolitical visibility. Disruptions in the Strait of Hormuz and the Red Sea, the wars affecting the region and the growing demand for resilient supply chains have exposed the vulnerability of existing maritime connections. At the same time, Iraq, Türkiye and the Gulf states are seeking new economic models beyond traditional energy exports.

At the centre of these developments is Iraq's Development Road: a planned road and railway corridor connecting Grand Faw Port in southern Iraq with the Turkish border. Originally estimated at approximately USD 17 billion, the project is intended to link the Gulf to Türkiye and, through Türkiye, to European markets. Iraq, Türkiye, Qatar and the United Arab Emirates signed a preliminary cooperation agreement in April 2024. In July 2026, Iraq and Türkiye moved towards the practical launch of the long-delayed project.

The Development Road is not the only initiative shaping this emerging order. Türkiye and Saudi Arabia are exploring a railway connection through Syria and Jordan modelled partly on the historic Hejaz Railway. Iraq is examining alternative pipeline routes to Türkiye, Syria and Lebanon. An Iraqi-Emirati consortium is planning a new data cable between the United Arab Emirates, Iraq and Türkiye. Together, these projects could gradually create a broader logistics, energy and digital corridor between the Gulf and Europe.

For Türkiye, this development strengthens its ambition to become an indispensable interface between Europe, Central Asia, the Levant and the Gulf. For the Gulf states, the emerging corridors offer additional investment opportunities, greater logistical resilience and new economic partnerships beyond the energy sector. Iraq could become a regional transit state and reduce its dependence on oil exports and Iranian energy supplies.

The potential, however, must not be confused with implementation. Financing, security, political stability, customs harmonisation, technical compatibility and institutional governance remain unresolved. Syria and Lebanon in particular continue to face a substantial gap between geopolitical ambition and practical implementation capacity.

# FIVE POLICY RECOMMENDATIONS

## 1. CREATE A PERMANENT DEVELOPMENT ROAD COORDINATION PLATFORM

Iraq, Türkiye, Qatar and the United Arab Emirates should establish a permanent coordination body responsible for infrastructure planning, financing, customs procedures, security and technical standards.

## 2. LINK CONNECTIVITY TO ECONOMIC DEVELOPMENT

The Development Road should not be limited to transporting foreign goods through Iraq. Logistics hubs, industrial zones, local suppliers and digital services should be developed along the route.

## 3. INTEGRATE THE LEVANT THROUGH PHASED PROJECTS

Türkiye, Syria, Jordan and the Gulf states should identify operational sections that can be rebuilt independently. Pilot routes could demonstrate demand before larger commitments are made.

## 4. DEVELOP AN INCLUSIVE APPROACH TOWARDS IRAN

The corridor should expand Iraq's strategic choices without becoming an openly anti-Iranian alliance project. Selective technical connections with Iranian transport networks could reduce incentives for political obstruction.

## 5. DEVELOP A EUROPEAN CONNECTIVITY OFFER

The EU should examine how the Development Road can connect to European rail, customs, energy and data networks. European involvement should focus on standards, digitalisation, sustainable finance and institutional resilience.

# A New Regional Infrastructure Order

West Asia is experiencing a renewed competition over trade routes, transport corridors and economic connectivity. Roads, railways, pipelines, ports and data cables are no longer simply economic projects. They increasingly determine which states become transit hubs, which markets are connected and where new political and economic dependencies emerge.

The war-related disruption of maritime chokepoints has accelerated this development. The vulnerability of the Strait of Hormuz, Bab al-Mandab, the Red Sea and the Suez Canal has increased the strategic value of overland connections. Although land corridors cannot fully replace maritime transport, they can create additional options for time-sensitive goods, regional trade, energy transport and digital infrastructure.

The Development Road is at the centre of this emerging connectivity debate. The approximately 1,200-kilometre corridor is designed to connect Grand Faw Port in southern Iraq with the Turkish border through a new railway and parallel motorway. From Türkiye, goods could continue towards European markets. Iraq, Türkiye, Qatar and the United Arab Emirates signed a preliminary cooperation agreement in April 2024. [1]

In July 2026, Iraq and Türkiye launched a new implementation phase for the long-delayed project. The initiative is intended to accelerate Gulf–Europe trade, integrate Iraq more closely into regional supply chains and establish Türkiye as the principal northern gateway of the corridor. [2]

The project is also supported by investments in Iraq's existing transport infrastructure. In June 2025, the World Bank approved USD 930 million for the Iraq Railways Extension and Modernization Project. The programme will rehabilitate and modernise approximately 1,047 kilometres of existing railway between Umm Qasr and Mosul. By 2037, the modernised route is expected to carry 6.3 million tonnes of domestic freight, 1.1 million tonnes of imports and exports and 2.85 million passengers annually. [3]
Operational reforms are advancing alongside physical infrastructure. Iraq implemented the international TIR transit system in April 2025, allowing freight to cross borders under harmonised customs and monitoring procedures. According to the International Road Transport Union, one road shipment from Poland to the United Arab Emirates via Türkiye and Iraq was completed in twelve days. A comparable multimodal journey through the Red Sea would have taken at least 21 days, according to the operator. [4]

These figures do not yet demonstrate the commercial viability of the entire Development Road. They do, however, show that Iraq can already function as an overland transit route when customs procedures, security arrangements and logistics providers are coordinated.

# Türkiye as the Hub of a New Regional Infrastructure Order

Türkiye has become one of the central actors in the infrastructure politics of the Middle East. Ankara seeks to translate its geographical position between Europe, Asia, Central Asia and the Gulf into a lasting geo-economic advantage. Türkiye does not rely solely on individual transport projects. Instead, Ankara is attempting to connect bilateral and multilateral initiatives into a broader transport, energy and logistics network. Through this approach, Türkiye is positioning itself as an interface between Europe, Central Asia, the Levant and the Persian Gulf.

The Development Road forms an important pillar of this strategy. The planned road and railway corridor could establish a powerful land connection between the Gulf and Türkiye. It could accelerate the movement of goods towards Europe, integrate Iraq more closely into regional supply and value chains and reinforce Türkiye's position as the most important northern transit state of the emerging corridor.
Türkiye could benefit in several ways. It would obtain a more direct land connection to Gulf markets, strengthen its logistics and manufacturing sectors and enhance its strategic value for European supply chains. Ankara has also expressed the ambition to double its trade volume with the Gulf states from approximately USD 20 billion to USD 40 billion. [2]

The potential relevance of Türkiye for European markets is already reflected in existing trade figures. The EU–Türkiye Customs Union has enabled bilateral trade in goods to reach a record value of more than EUR 217.6 billion in 2025. Türkiye remained the EU's fifth-largest trading partner, representing 4.2 per cent of the EU's global trade in goods. [5]

The planned revival of the Hejaz Railway complements this strategy. The historical railway connection between Anatolia, the Levant and the Arabian Peninsula could bring Syria and Jordan back into regional transport networks and create another north-south axis between the Gulf and Türkiye.

In June 2026, Türkiye and Saudi Arabia signed memoranda of understanding on railway and logistics cooperation. Their longer-term objective is to create a rail connection between the two states through Syria and Jordan. According to the Turkish transport minister, most of the railway infrastructure in Türkiye and Saudi Arabia already exists, while approximately 400 kilometres of track between Syria and Jordan still need to be constructed or restored. Ankara has indicated that it intends to invest approximately USD 100 million in rebuilding the Turkish–Aleppo–Damascus connection. [6][7]

The project follows parts of the historical route of the Hejaz Railway but serves new geo-economic purposes. It could facilitate the transport of containers, agricultural products, construction materials, industrial equipment and passengers. It could also support religious and heritage tourism. Yet it would not provide an equivalent substitute for maritime oil exports, which require substantially greater transport capacities. [6]

Türkiye presents these infrastructure initiatives through different political narratives. Towards the Gulf states, Ankara emphasises historical trade relationships and economic integration. Towards Europe, it highlights resilient supply chains and alternative transport routes. Towards Central Asia, it promotes economic integration across the Turkic world.

These narratives serve the same geo-economic objective: establishing Türkiye as an indispensable node within the emerging regional infrastructure order.

# The Economic Reintegration of the Levant

With the development of new land corridors between the Gulf and Europe, the states of the Levant are gaining importance as potential transit and logistics spaces. Their strategic relevance derives less from the size of their economies than from their geographical location between the Arabian Peninsula, Anatolia and the Mediterranean. Their possible economic reintegration is therefore not simply the result of domestic reconstruction. It is also an expression of a changing regional geo-economy.

Iraq could develop from a predominantly resource-based exporter into a regional transit, logistics and data hub. Greater connectivity would allow the country to participate more substantially in regional supply and value chains while generating non-oil revenue through transport, logistics, industrial zones and associated services.

Syria and Jordan could gain strategic importance as transit states between Türkiye, the Arabian Peninsula and the Mediterranean. A modernised Hejaz Railway could strengthen their integration into cross-border trade networks and complement the Development Road with a second north-south connection. [6][8]

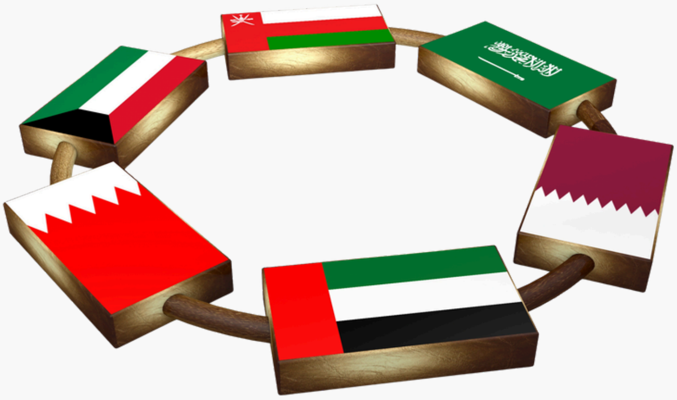
For Syria, the project offers the prospect of becoming a strategic land bridge between the Gulf and Europe. Infrastructure investment could contribute to reconstruction and generate transit revenue. At the same time, Syria remains the most vulnerable section of the planned route. Fragmented authority, Israeli military operations, the danger of renewed militant activity and weak institutions create substantial security and investment risks. Long linear infrastructure would remain vulnerable to sabotage, smuggling and political disruption. [6]

Lebanon could also benefit from the emerging infrastructure order. The port of Tripoli and a possible rail connection to the Syrian border could connect northern Lebanon to regional trade routes. At the same time, Beirut and Baghdad have renewed discussions about reviving the historical Kirkuk–Tripoli oil pipeline. Lebanon has presented the route as a possible Iraqi outlet to the Mediterranean that would reduce dependence on the Strait of Hormuz. [9]

Such plans remain preliminary. The pipeline has been inactive for decades and would require extensive technical assessments, financing, security guarantees and cross-border agreements involving Iraq, Syria and Lebanon. It should therefore be understood as a strategic option rather than a confirmed infrastructure project.

Iraq is simultaneously examining several alternative oil-export routes. In July 2026, the Iraqi cabinet authorised preliminary feasibility studies comparing the proposed Basra–Haditha–Kirkuk–Ceyhan and Basra–Haditha–Baniyas routes. The United States has also expressed support for efforts to revive an Iraqi pipeline towards the Syrian Mediterranean coast. [10][11]

Together, these developments go beyond individual infrastructure projects. Earlier connectivity initiatives frequently focused on maritime transport, the Suez Canal or routes involving Israel. The emerging plans place Iraq, Syria, Jordan and potentially Lebanon back at the centre of regional land connections. The Levant could therefore gradually evolve from a geopolitical buffer and conflict zone into a geo-economic connection space between the Gulf states, Türkiye and Europe.



# Opportunities for the Gulf States

For the Gulf states, the emerging connectivity order offers three strategic benefits: economic diversification, additional transport options and political influence along new trade axes.

The participation of the United Arab Emirates and Qatar in the Development Road corresponds directly with their economic diversification strategies. Both seek to consolidate their positions as logistics, investment, technology and service centres beyond the export of oil and gas.

For Emirati companies, potential opportunities exist in ports, logistics hubs, railways, customs technologies, industrial zones, data infrastructure and investment management. Qatar can combine its financial resources, close political relations with Türkiye and experience in regional energy and infrastructure projects.

The digital dimension is becoming increasingly important. In February 2026, an Iraqi-Emirati consortium announced plans for a USD 700 million subsea and terrestrial data cable connecting the United Arab Emirates with Türkiye through Iraq. The WorldLink project would begin at the Faw Peninsula and follow an overland route to the Turkish border. [12]

Saudi Arabia is not currently a formal partner in the Development Road agreement. Its planned railway cooperation with Türkiye nevertheless constitutes a complementary connectivity strategy. A rail link through Jordan and Syria could eventually connect Saudi infrastructure with wider Turkish, Iraqi and European networks. [6][7]

The new routes cannot replace the Strait of Hormuz, the Suez Canal or maritime freight. Their strategic value lies in redundancy. They provide alternative options if maritime chokepoints, attacks on commercial shipping or political blockades interrupt established transport connections.

The new infrastructure order may also transform the relationship between the Gulf states and the Levant. Gulf investment in Iraq, Syria, Jordan and Lebanon would no longer be understood solely as reconstruction assistance or political stabilisation. It could become part of a long-term logistics, technology and investment strategy.

The Gulf states would therefore not merely finance individual projects. They could become co-designers of the region's future economic geography.

# Does the Development Road Reduce Iranian Influence?

The Development Road bypasses Iranian territory. It is therefore capable of widening Iraq's economic options and gradually reducing its dependence on Iran. This does not mean, however, that the project automatically constitutes an anti-Iranian containment strategy.

For Baghdad, the primary advantage is diversification. New trade, energy, transport and data links to Türkiye, the Gulf states and the Mediterranean could reduce dependence on individual neighbours, markets and maritime routes.

This issue is particularly relevant in the energy sector. In March 2025, an adviser to the Iraqi prime minister stated that approximately 43 per cent of Iraq's electricity was generated using imported Iranian gas. Repeated supply interruptions and sanctions-related difficulties have encouraged Baghdad to explore LNG imports from Qatar and Oman, domestic gas projects and new energy partnerships. [13]

The depth of this vulnerability became apparent again in December 2025, when the suspension of Iranian gas supplies reportedly removed between 4,000 and 4,500 megawatts from Iraq's electricity generation. After another disruption in March 2026, Iranian gas deliveries resumed initially at approximately five million cubic metres per day – far below the contracted level of around 50 million cubic metres. [14][15]

A stronger integration of Iraq into Turkish and Gulf economic networks could therefore gradually reduce Tehran's economic and political leverage. New transport connections could also diminish the relative importance of Iranian transit routes.

Iranian influence in Iraq, however, is not based solely on trade and energy. It is embedded in religious, social and political networks and in Tehran's relations with armed groups and Iraqi parties. Physical infrastructure alone will not transform this network of influence.

The most accurate assessment is therefore that the Development Road could increase Iraq's strategic room for manoeuvre towards Iran. It will not automatically remove Iran from the Iraqi political or economic system.

# Iranian Counterstrategies and Possible Reactions

Iran is likely to regard the emerging corridors as both economic competition and strategic pressure. Tehran's most probable response is not necessarily an open rejection of the Development Road. It is more likely to accelerate competing or connecting infrastructure projects.

One such project is the approximately 32-kilometre railway between Shalamcheh in Iran and Basra in Iraq. Construction formally began in September 2023. The line is intended to connect the Iranian railway system with southern Iraq and could eventually facilitate travel and freight movement towards Syria and the Mediterranean. [16]

From Iran's perspective, the railway could prevent its exclusion from Iraq's developing infrastructure architecture. It would also strengthen physical connections across a regional space in which Tehran has long maintained political and security influence.

Iran could therefore pursue two parallel approaches. First, it may attempt to connect its own railway and trade networks to Iraqi infrastructure. Second, if the Development Road is perceived as an exclusive Türkiye-GCC project directed against Iranian interests, Tehran could use its political partners in Iraq to delay decisions, financing arrangements or regulatory implementation.

Local security threats could also increase investment and insurance costs along the corridor. Yet an explicit strategy of Iranian sabotage should not be assumed without evidence. Tehran's response will depend significantly on whether the Development Road is designed as an open regional platform or as an exclusionary strategic axis.

The decisive question is thus not merely whether the route geographically bypasses Iran. It is whether the emerging regional architecture politically excludes Iran.

# Europe and Cyprus: Destination, Partner or Observer?

For Europe, the Development Road offers an additional connection to markets and production centres in the Gulf and Asia. Its value lies not in replacing the Suez Canal but in diversifying transport options and strengthening resilience.

Türkiye is the critical link. It already has a customs union with the EU, an extensive manufacturing base and established road and rail connections to Southeast Europe. However, without modernised border crossings, interoperable customs data and sufficient railway capacity in Türkiye and Europe, the Iraqi corridor would effectively terminate at the EU's south-eastern periphery.

The EU should therefore not treat the Development Road solely as an Iraqi or Turkish initiative. European participation could focus on technical standards, customs harmonisation, digital freight documentation, sustainable financing, railway interoperability and transparent procurement.

Cyprus is not located directly on the Development Road. Nevertheless, the island could gain importance within a broader Eastern Mediterranean energy and logistics architecture. Its geographical position connects the Levant, Türkiye, Egypt and the European market.

In July 2026, Eni and TotalEnergies reached the final investment decision for the Cronos gas field in Cyprus's exclusive economic zone. The project is expected to bring the first Cypriot gas to market in 2028. Gas from the field will be transported to Egypt, processed through existing infrastructure and marketed as LNG. [17]

This project does not form part of the Development Road. It nevertheless illustrates how land corridors, Mediterranean ports, electricity interconnections and energy infrastructure could become complementary elements of a wider regional connectivity system.

The unresolved division of Cyprus, Türkiye's non-recognition of the Republic of Cyprus and disputes over maritime boundaries and energy resources remain significant obstacles. A regional connectivity strategy can only realise its potential if it does not simply reproduce existing political fault lines through competing infrastructure projects.

Europe therefore faces a dual task. It should support additional corridors that enhance resilience while preventing competition between Türkiye, Greece, Cyprus, Israel and alternative projects such as the India–Middle East–Europe Economic Corridor from creating further fragmentation in the Eastern Mediterranean.

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# LIMITS AND STRATEGIC CONTRADICTIONS

## FINANCING AND COMMERCIAL VIABILITY

The Development Road and the Hejaz Railway require substantial capital expenditure. Their commercial viability will depend on freight volumes, transit prices, insurance costs and their ability to compete with maritime shipping.

## SECURITY OF LINEAR INFRASTRUCTURE

Railways, highways, pipelines and data cables extending across Iraq and Syria would remain vulnerable to sabotage, armed groups, smuggling and regional military escalation.

## TECHNICAL AND REGULATORY FRAGMENTATION

Different railway gauges, customs procedures, safety requirements, data systems and national regulations could prevent the emergence of a seamless corridor.

## COMPETING NATIONAL INTERESTS

Iraq, Türkiye, the Gulf states, Iran and the states of the Levant do not necessarily share the same strategic objectives. Transit fees, route selection and control over infrastructure may generate political competition.

## CORRIDORS ARE NOT ECONOMIC INTEGRATION BY THEMSELVES

Infrastructure creates the possibility of trade. It does not automatically create productive industries, competitive exports or regional value chains. Connectivity must be accompanied by investment, governance reforms and economic development.

# POLICY RECOMMENDATIONS

## 1. CREATE A PERMANENT DEVELOPMENT ROAD COORDINATION PLATFORM

Iraq, Türkiye, Qatar and the United Arab Emirates should establish a permanent body responsible for financing, technical standards, customs procedures, transit tariffs and infrastructure security. Saudi Arabia, Jordan and relevant European institutions could participate in selected working groups.

## 2. LINK CONNECTIVITY TO ECONOMIC DEVELOPMENT

The Development Road should not be limited to transporting foreign goods through Iraq. Logistics hubs, industrial zones, local suppliers, maintenance facilities, training programmes and digital services should be developed along the route.

## 3. INTEGRATE THE LEVANT THROUGH PHASED PROJECTS

Rather than waiting for a complete restoration of the Hejaz Railway, Türkiye, Syria, Jordan and the Gulf states should identify operational sections that can be rebuilt independently. Pilot routes could demonstrate demand before larger commitments are made.

## 4. DEVELOP AN INCLUSIVE APPROACH TOWARDS IRAN

The corridor should enhance the strategic autonomy of Iraq and the Gulf states without becoming an openly anti-Iranian alliance project. Technical interfaces with Iranian railway and trade networks could reduce incentives for obstruction while preserving Iraq's diversification.

## 5. DEVELOP A EUROPEAN CONNECTIVITY OFFER

The EU should combine financing, regulatory expertise and technical cooperation. Its contribution should focus on customs digitalisation, railway interoperability, sustainable infrastructure, critical infrastructure protection and transparent procurement.

# Conclusion:

The Development Road is more than an Iraqi transport project. Together with the possible revival of the Hejaz Railway, new Mediterranean pipeline routes and digital networks, it could reshape the economic geography of West Asia.

Türkiye is positioning itself as the main link between the Gulf, the Levant and Europe. The United Arab Emirates, Qatar and increasingly Saudi Arabia gain new investment and transport opportunities. Iraq has the chance to reduce its dependence on oil exports and develop into a regional transit state. The countries of the Levant could gradually be defined less exclusively by conflict and more by their economic function as connection spaces.

The potential, however, must not be confused with implementation. Financing, security, political stability, customs harmonisation, technical compatibility and reliable governance remain unresolved. In Syria and Lebanon in particular, a wide gap persists between geopolitical visions and institutional feasibility.
The thesis of “bypassing Iran” also requires a differentiated assessment. The corridor bypasses Iranian territory and could reduce some Iraqi dependencies. Yet it will not automatically displace Iran from Iraq or end Tehran’s political, economic and social influence.

The success of the Development Road will therefore not be measured solely in kilometres of railway constructed. It will depend on whether competing national projects can be transformed into a commercially viable, politically sustainable and institutionally connected regional economic space.

If successful, the emerging regional order may no longer be shaped primarily by military alliances. Ports, railway lines, pipelines, data cables and control over transport standards could become equally important sources of regional influence.


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