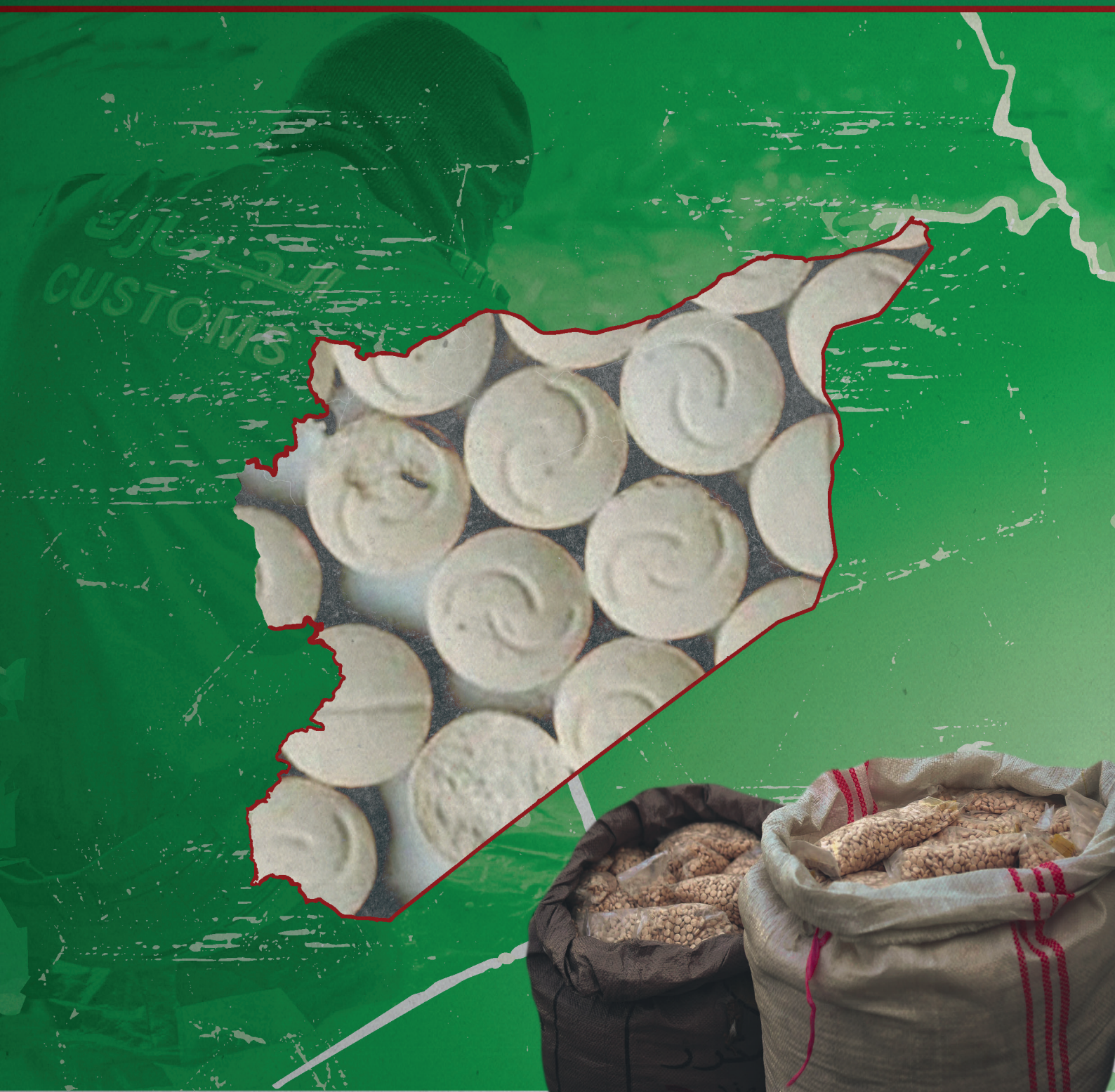


Sky High: The Ensuing Narcotics Crisis in the Middle East and the Role of the Assad Regime



Observatory of Political
and Economic Networks

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Executive Summary

The staggering scale of recent narcotics seizures in the Middle East—and Arab Asia in particular—and their ties to state and non-state actors in Syria is drawing the world's attention. The United Kingdom, the United States, and the European Union have begun sanctioning Syrian and Lebanese suppliers as part of their response, with US legislators awaiting a holistic government response. Some countries in the region have recently considered the once-unthinkable: normalising relations with the Assad regime, partly in the hope of cooperating directly with Damascus to curb the supply.

This research documents the seizure over the last three years of over a billion pills of amphetamine-type drugs commonly known as 'captagon'. It offers the most comprehensive attempt, to date, to understand the breadth and nature of the ongoing narcotics crisis and the networks sustaining much of their supply in Syria and to a lesser extent in Lebanon. While all drug types are observed, special attention is given to captagon.

Researchers constructed two databases specifically for this project. The first documents 1,251 drug seizures originating, transiting through, or reaching their destination in Arab Asian countries between 2016 and 2022. The richness of the data enables identification of how seizures vary by drug type, amount, countries of origin, countries of transit, and geolocation of seizures over time.

The second is a network database that maps actors involved in the supply of narcotics from Syria and Lebanon. It contains 712 nodes (441 individuals and 271 non-individuals) and a narrative detailing their roles and relationships within the network. The database, compiled from primary and secondary sources, is the most expansive documentation effort on the subject to date.

Three main findings emerge from the seizure database. First: while cannabis resin (hashish) seizures have increased, captagon seizures have risen far more rapidly. Second: of the 111 seizures of all drug types in the region where the seizing authority declared the country of origin, 60 (54%) originated in regime-held Syria, seven (6%) in Lebanon, and five (4.5%) in either of the two. Most seizures originating from Syria and Lebanon involve the two most popular types of drugs: captagon and hashish. For the far more harmful synthetic captagon, 36 of 50 seizures (72%) originated in regime-held Syria. Finally, a particularly worrying development over 2022 is that more captagon seizures are occurring within consumer countries' borders rather than at points of entry, which—assuming no changes in interdiction capacity—may indicate that more captagon is reaching consumers.

The network database reveals that Assad-aligned entities, such as the Fourth Armoured Division, the Military Intelligence Directorate, Lebanese Hezbollah, and the National Defence Forces, are responsible for much of the narcotics supply from Syria, with at least nine members of Assad's extended family involved. Furthermore, Iranian-backed actors in the northeast, such as the Iraqi Popular Mobilization Forces, are increasingly implicated. While elements of opposition forces are involved in narcotics production and smuggling, their role remains marginal.

The Assad regime is likely to make unreasonably high economic and political demands in exchange for cutting the supply of narcotics, an economic lifeline to it and to Lebanese actors in the region. The study estimated the profit generated by the regime and Lebanese actors using various assumptions for the period 2019–2022. Our average estimate from captagon alone is \$7.3 billion—well above any other single licit or illicit source of revenue.

Policy Recommendations

Much of the production and smuggling of captagon in Arab Asia is sponsored by the Assad regime and nonstate actors aligned with it. Given the asymmetry in information, the regime can pretend to cooperate with the world in combating the industry while continuing to sponsor it. Thus, partnering with the head of the cartel to fight the broader cartel is misguided.

Keeping low-level operational communication channels with the Assad regime open can nonetheless be useful for understanding how it operates and interacts with the sector. This contrasts with formal high-level cooperation, which should not be considered.

Given the profits generated from the industry, the Assad regime is likely to make unreasonable demands in exchange for genuinely ceasing operations. Giving in to those high demands—which may not necessarily be financial—will only empower the regime. Empowering Assad makes him yet more intransigent towards a political settlement to the Syrian conflict under internationally agreed standards. Reintegrating the regime into the international community without a stable and fair political settlement will have numerous adverse security and humanitarian impacts on the region.

The structure of narcotics supply networks makes them resilient and robust against random targeting. Selective targeting for certain network roles across actor types, however, can severely damage it.

While demand-lowering policies such as awareness campaigns continue to be essential, their impact is less likely to be felt in the near term due to the persistence of addiction.

More could be done to curb the supply, including:

- Collaboration with grassroots actors in Syria and Lebanon to help in gathering intelligence to improve interdiction efforts.
- Establishment of a joint operations room to promote intelligence sharing and coordinate the efforts of law enforcement agencies in transit and consumer countries. Like-minded Western countries, such as the United Kingdom and the United States, who are keen on curbing the flow of narcotics and disempowering Assad, can provide technical assistance.
- Establishment of a policy group comprising affected and like-minded countries to share know-how and recommend collective political, security, and health responses.
- While the impact of sanctions is limited if used in isolation from other policy tools, sanctioning authorities in the US, UK, and EU should, wherever possible, coordinate their listings and sanctions announcements to maximise their impact, minimise the misalignment, and limit sanction evasion actions in their jurisdictions.

1. Introduction

Arab Asia is experiencing a drug crisis—as supply networks fester and addiction spreads—with Syria and captagon at the epicentre. Captagon is the brand name for the drug compound fenethylamine hydrochloride, originally produced in West Germany in the 1960s. It is a highly addictive amphetamine previously used to treat narcolepsy, depression, and attention deficit hyperactivity disorder (ADHD). However, the drug was outlawed in most countries in the 1980s due to its negative health effects.¹

Captagon today is a spinoff of the original drug. Fenethylamine, the main ingredient in the original prescription drug, is no longer present in most drug seizures, replaced by many different amphetamines and other substances. For these reasons, captagon today is better understood as a group of amphetamine-type stimulants with little consistency in chemical composition.² Therefore, we use a lower-case 'c' when referring to it in this report.

Originally a non-issue, Syria's captagon problem has grown into a regional and global concern over the past few years. Yet recent efforts to address the situation (such as coordinated Western sanctions³ or the United States's Captagon Act⁴) have yet to make a tangible impact, primarily because of knowledge gaps on the subject. This project is a step towards filling those gaps.

Broadly unanswered questions regarding the ensuing crisis include: what types of narcotics, including captagon, are most prevalent in each Arab Asian country? How has that changed over time? What are the main smuggling routes? What are the countries of origin for each drug? Knowledge of supply networks is also patchy, inhibiting comprehensive strategies designed to tackle the supply ecosystem as opposed to targeting random nodes. And of particular significance is a lack of understanding regarding the relative role of narcotics in empowering the authorities sponsoring the industry in the Levant.

To answer these questions, this study presents an analysis of two bespoke databases collected between June 2022 and April 2023. The first documents narcotics seizures originating from, transiting through, or reaching their destination in Arab Asian countries between 2016 and 2022. The second, a network database, maps the actors involved in the supply of narcotics from Syria and to a lesser extent from Lebanon. Section Two provides more information about each database, presenting the strengths and weaknesses of each.

1- Katselou M., Papoutsis, I., Nikolaou P., Qammaz S., Spiliopoulou, C. and Sotiris Athanaselis, 'Fenethylamine (Captagon) Abuse – Local Problems from an Old Drug Become Universal', *Basic Clin Pharmacol Toxicol* 119: 133–140, <https://doi.org/10.1111/bcpt.12584>.

2- Alabdalla Mahmoud A., 'Chemical characterization of counterfeit captagon tablets seized in Jordan', *Forensic Science International* 152, no. 2-3 (2005): 185–188, <https://doi.org/10.1016/j.forsciint.2004.08.004>.

3- 'Tackling the illicit drug trade fuelling Assad's war machine', Gov.UK, Government of the United Kingdom, 28 March 2023, <https://www.gov.uk/government/news/tackling-the-illicit-drug-trade-fuelling-assads-war-machine>.

4- Hill J. French, 'H.R.6265 - Captagon Act' (Pending US Legal Statute, Congress.gov, 2021–2022), <https://www.congress.gov/bill/117th-congress/house-bill/6265>.

2. Methodology

2.1 Seizures Database

This database summarises narcotics seizures originating, transiting through, or reaching their destination in Arab Asian countries between 2016 and 2022.⁵ It documents 1,251 seizures, 1,100 of which were sourced from news articles indexed by Google in Arabic for the query ‘country name’, ‘seizure’ (ضبط), and ‘narcotics’ (مخدّر) over a specific year. Researchers identified further seizures during a review of the literature in English. Sixty-one of these seizures were added from The New Lines Institute 2022 report on captagon.⁶

Wherever possible, we identified the geolocation of the seizure, the seizing country and authority, the narcotic substance and its amount, the country of origin, and the last country of transit. Each substance was classified following the United Nations Office on Drugs and Crime (UNODC) nomenclature.

Publication date	Summary	Seizure date	Seizure authorities	Seizure country	Country of last transit	Country of origin	Geo-location of the seizure latitude	Geo-location of the seizure longitude	Domestic seizure?	Drug Group	Drug Sub-Group	Amount (pills)	Amount (kgs)	proof URL 1
4/23/2021	Saudi Customs in Jeddah Islamic Port seized 5,383,400 pills hidden inside a pomegranate shipment coming from Lebanon.	4/23/2021	General Authority of Customs	Kingdom of Saudi Arabia	Lebanon	Syria–Lebanon	21.467	39.17427	No	Amphetamine-type stimulants (excluding ecstasy)	Amphetamine	5,383,400	N/A	source1 source2 source3
4/1/2021	The Information Division at the Lebanese Security Forces in collaboration with the Counter-narcotics division at Lebanese Customs seized 861 kgs of hashish hidden in barrels of automotive grease at the Beirut port, bound for an African country.	12/1/2021	The Information Division at the Lebanese Security Forces and the Counter-narcotics division at the Lebanese Customs	Lebanon	N/A	N/A	33.90286	35.51771	No	Cannabis-type drugs (excluding synthetic cannabinoids)	Cannabis resin (hashish)		861	source1 source2
9/19/2021	The General Administration of Abu Dhabi Customs seized 38.70 kg of narcotic crystals “hidden in a new and innovative way inside a container in a truck.”		General Administration of Abu Dhabi Customs	The United Arab Emirates		N/A	N/A	N/A	No	Amphetamine-type stimulants (excluding ecstasy)	Methamphetamine		38.7	source1

5- For example, if a seizure occurred in Italy but the final destination was the Kingdom of Saudi Arabia, then it is recorded in the database. Conversely, if a seizure was reported in Italy but the final destination was Germany, it is not. Similarly, if a shipment was seized in Italy and originated in Syria, then it is recorded; if it originated in Egypt, it is not.

6- Rose Caroline and Alexander Söderholm, ‘The Captagon Threat: A Profile of Illicit Trade, Consumption, and Regional Realities’, New Lines Institute, 4 April 2022,

https://newlinesinstitute.org/wp-content/uploads/20220404-Captagon_Report-NLISAP-final-.pdf.

The seizures database has many strengths. First, the variables covered are more extensive than those reported by individual countries to the UNODC. Geolocation data collected with each entry offers one case in point: it allows researchers to determine whether a shipment was seized within a country or at the border.

Second, these data are more recent than other sources. For example, Saudi Arabia—the main final destination for captagon as implied by the seizures data collected in this study—did not report any statistics on drug seizures to the UNODC after 2019. Similarly, the Syrian government stopped reporting in 2018. In fact, UNODC lacks data entries for any narcotics smuggling beyond 2020 for the entirety of Arab Asia.

Finally, researchers took a conservative approach while collecting these data, supporting their overall validity. Recorded seizures were cross-referenced across multiple sources and followed a tightly defined set of rules. To illustrate: when it came to a shipment's country of origin, only official statements were incorporated into the database. We applied this rule even when all signs suggested the shipment originated from a specific country.

The database has at least two shortcomings. First, Google's web page indexing limits the reach of keyword research, ultimately inhibiting efforts to note all applicable entries. As a result, some drug seizures are likely to have not been recorded. However, there is a higher likelihood of those missing seizures being small, as large seizures tend to be covered extensively and by multiple sources.

Second, limited reporting from seizing authorities hampered a deeper understanding of the scale of the drug trade in Arab Asia. Even when a seizure is reported, the seizing authority may intentionally or unintentionally fail to report some critical details underpinning the incident. This could include the name of the seized drug, the intended destination, or the point of interdiction. In such cases, the conservative data collection approach prioritised accuracy over coverage.

We supplemented the individual seizures database with another documenting official statements about aggregate seizures over specific time spans. This second database contains 133 entries. While the number of captagon pills in the individual seizures database between 2016 and 2022 totals 1.03 billion pills, the aggregate database totals 0.79 billion. Reviewing this discrepancy and the claims in each dataset by country and year reveals that both contain gaps. Fortunately, each respective dataset can supplement the gaps, as some countries report only individual seizures, some report only aggregate figures, and others report both. The aggregate seizures dataset was used only to arrive at the total number of seized captagon pills per year, which informed our calculations of the overall profitability of the industry (see Section 5).

The analysis presented in Sections 3.1–3.5 relies only on the individual seizures database because of its granularity; it is the only dataset on this subject containing information on seizure locations, seizing authorities, countries of origin, and transit.

2.2 Networks Database

Researchers developed this database between June 2022 and April 2023 to map the actors (nodes) involved in the supply of narcotics from Syria and Lebanon. This mapping exercise also documented the relationships that nodes have with each other (edges). Network nodes can be individuals, business entities, public sector organisations, militias, criminal groups, narcotics production or farming facilities, or smuggling points.

Specific properties define each node type, such as date of birth (for individuals) or date of establishment (for organisations). Nodes also contain geolocation data wherever possible. A wide range of edge types connect the nodes, including but not limited to traits like family connections, friendships, and formal business relationships.

Information relating to 63% of nodes was fully or partially sourced from five primary sources covering Syria's four control areas who contributed to the project.⁷ In the remaining cases, these data stem from secondary sources, such as news articles, independent investigations, or court confessions (i.e. network members pleading guilty to smuggling crimes).

When researchers used a primary source, the reported information was included in the network after it was corroborated by other sources. For privacy and legal reasons, this report does not disclose the names of individuals and entities involved in the supply of narcotics whose information comes from primary sources. For secondary sources, the onus of proving claims was left to the original source due to the substantial size of these data. Therefore, we do not take responsibility for any of the claims presented in them.

The database contains 712 nodes (441 individuals and 271 non-individuals). However, only 310 nodes (202 individuals and 128 non-individuals) are analysed in this report after removing fringe actors, the primary information we could not corroborate, and the information presented in secondary sources that was proven factually inaccurate. The proprietary network map is by far the largest available on the supply of narcotics in Syria and Lebanon.

7- Some locations can be used by the general public; revealing the exact location of others might hamper interdiction responses.

3. Prevalence, Countries of Production and Consumption, and Delivery Routes

3.1 The Big Picture: Prevalence of Drugs in Arab Asia by Type

Drugs are measured in varying units (pills, grams, etc.), presenting a challenge when analysing narcotics prevalence in the region. Even when measured using the same unit, the potency variance complicates efforts to understand the prevalence of a given drug. Given this challenge, researchers observed the number of drug seizures to determine the prevalence, assuming that all types of narcotics are equally likely to be intercepted.

Figure 1: Seizures of various drug types in or related to Arab Asia



As shown in Figure 1, captagon and cannabis resin (hashish) are the two most common drugs in Arab Asia, though recent seizures increasingly involve methamphetamine (crystal meth) as well. Cannabis resin, long known as the region's drug of choice, has remained relatively consistent over the past seven years, with minor sustained growth in seizures barring 2021. The relative newcomer 'captagon' witnessed similar growth between 2016 and 2019 but shot up in 2021 and 2022.

3.2 The Big Picture: Where Do These Drugs Come From?

Figure 2 highlights that seizing authorities do not always declare a seizure’s country of origin. A declining share of seizures originate from a known origin country, especially over 2022; ‘unknown origin’ is now almost exclusively the norm. Assuming no policy changes related to declaring the origin of seizures, the decline in the share may reflect suppliers’ improved ability to disguise their identities. However, it’s also possible that some states are avoiding public criticism of Syria’s narco-system, which is behind much of the supply of drugs (as shown in the following section). This would be due to geopolitical calculations, such as negotiating with the Assad regime to stem the flow of drugs.

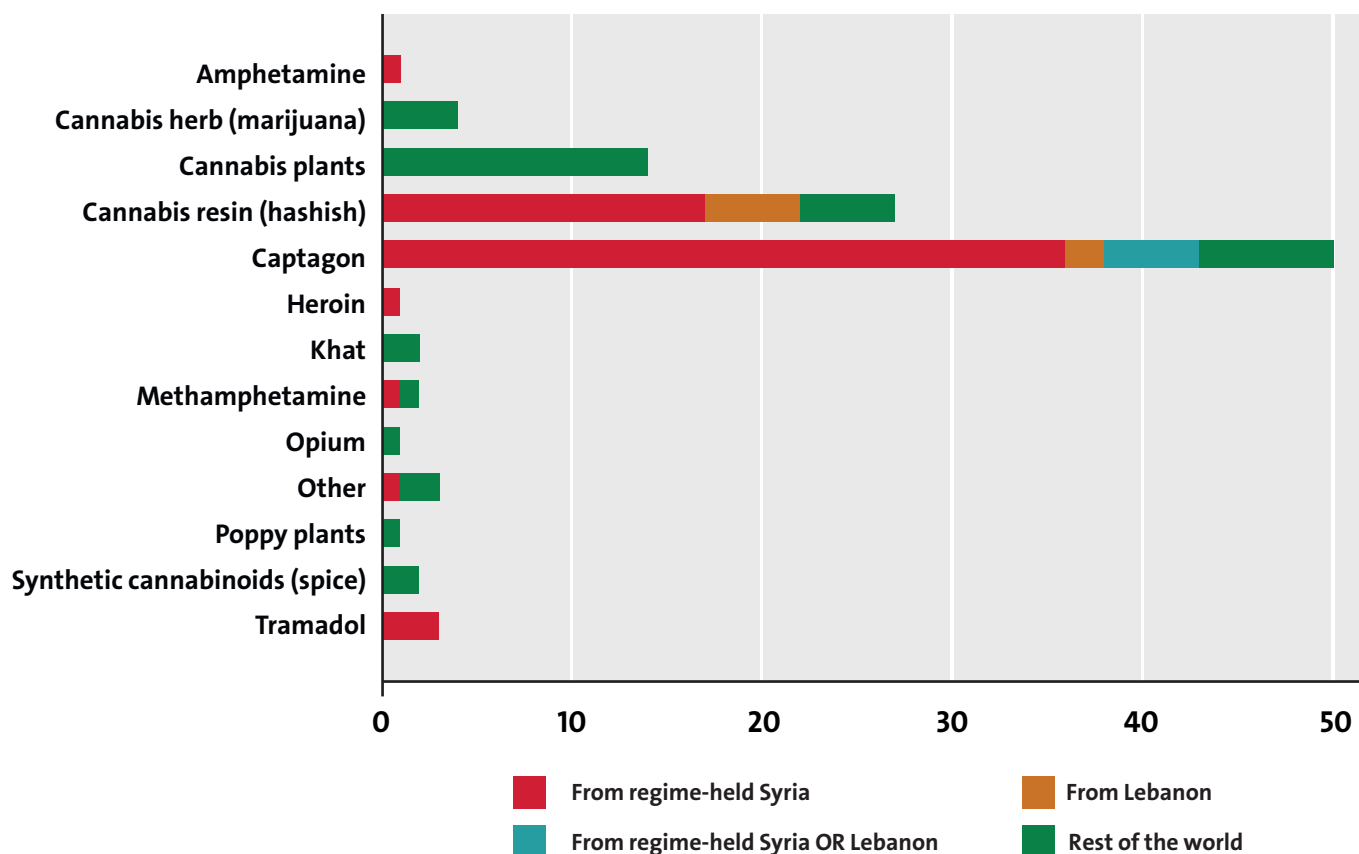
Figure 2: Seizures of various drug types in or related to Arab Asia



Nonetheless, focusing on seizures with a known country of origin provides useful insights. As shown in Figure 3, over 2016–2022, of the 111 seizures in the region where the seizing authority declared the country of origin, 60 (54%) originated from regime-held Syria, seven (6%) from Lebanon, and five (4.5%) from either of the two locations.

Most seizures originating from Syria or Lebanon involve the two most common types of narcotics in the region: captagon and cannabis resin. For captagon, 36 of 50 seizures (72%) originate from regime-held Syria. Another three originate from Lebanon, and five from either of the two, according to seizing authorities. Apart from Syria and Lebanon, where 86% of identifiable captagon seizures originate, there is little evidence of captagon originating from other regions. The remaining 14% of captagon seizures originate from Turkey, Hayat Tahrir al-Sham (HTS) areas in northwest Syria, Jordan, India, Yemen, and Greece.

Figure 3: Number of seizures from known origin (2016-2022)



Note: seizures in or related to Arab Asian countries only

The lower prevalence of drug production in Arab Asian countries other than regime-controlled Syria and Lebanon can be attributed to a variety of factors. The first is purely economic: production costs are cheaper in Syria and Lebanon, primarily due to the low cost of labour. Authorities in Gulf States’ main consumer markets are also more likely to crack down on potential production in their countries—due to a more robust rule of law and generally less corruption—compared with the state sponsorship in regime-controlled Syria. Finally, there may simply be a lack of the knowledge necessary for the production of synthetic drugs.

3.3 The Case for Focusing on Captagon

Captagon will remain the sole focus of this section due to its significance, highlighted by three factors. First, the sharp rise in its prevalence is concerning, as evidenced by the amounts seized (Figure 1) and official statements from countries in the region. Captagon is now the region’s most popular drug, overtaking cannabis resin’s historical role by a wide margin in a short period of time. In Saudi Arabia, nearly 58% of addicts in treatment facilities in 2020 were treated for amphetamine-type addictions, such as captagon.⁸

8- United Nations Office on Drugs and Crime, 'dataUNDOC: Country List', 2020. <https://dataunodc.un.org/content/country-list>.

Second, as a synthetic amphetamine-based drug, captagon has disastrous health effects, especially when compared to natural alternatives such as cannabis resin. Negative impacts include euphoria, derealization, autopsychic and somatopsychic depersonalization, hallucination, agitation, and a decrease in pain perception.⁹ Furthermore, the ever-changing chemical profile of captagon, supported by the various colours of pills seized in the region, also means that the health impacts are difficult to predict.

Third, the profit margins for captagon are significantly higher than those for other popular drugs. This creates greater opportunities to scale illegal operations as well as larger monetary benefits for smuggling networks. The higher revenues for suppliers in Syria and Lebanon are critical to understanding the broader regional political economy, especially in light of the Syrian conflict.

3.4 Captagon Seizures and Delivery Routes to Consumption Markets

Captagon smuggling routes have evolved in recent years with the growing prevalence of the drug. While Saudi seizures declined in 2022 from 2021 highs, Lebanon and Jordan witnessed increases, suggesting they are shouldering more of the interdiction burden. Yet Saudi Arabia remains the leading country in terms of captagon seizures—nearly three times that of Jordan in 2022—adding further evidence that Saudi society is the main consumer market for the drug.

Regime-held Syria, where most captagon originates (see Section 3.2), seizes relatively few amounts. This brings into question the regime's seriousness in curbing supply, despite the significant media coverage and its public narrative claiming to fight narcotics. In this regard, the regime consistently argues that drugs do not originate from its areas of control, but from other countries or 'terrorist group areas'.

Syria's Ambassador to Russia stated that the Syrian Arab Army came across copious amounts of drugs during the 'liberation' of areas controlled by groups labelled 'terrorist' by the regime.¹⁰ He further posited that the spread of narcotics is due to increased terrorist activities, intimating that terrorist organisations promoted and smuggled narcotic substances in order to raise funds that would be used later to finance and support terrorism and to purchase weapons. The data, however, suggest that areas outside the regime's control produce limited amounts of captagon and do not feature among the top ten regions in terms of captagon seizures in Arab Asia (Figure 4).

9- Preve, M., Casigliani, S., Godio, M., Suardi, N. E., Traber, R., and R.A. Colombo, 'Fenethylamine (Captagon) abuse: Case report and literature review', *European Psychiatry* 41, no. 1 (2017): 393-394. DOI: <https://doi.org/10.1016/j.eurpsy.2017.02.448>.

10- Ruaa al-Jazaeri, 'Terrorist organizations relied on drugs to finance their crimes, Ambassador Hadad affirms', *Syrian Arab News Agency (SANA)*, 24 June 2021, <https://www.sana.sy/en/?p=239057>.

Figure 4: Top ten countries in terms of captagon seizures in or related to Arab Asia

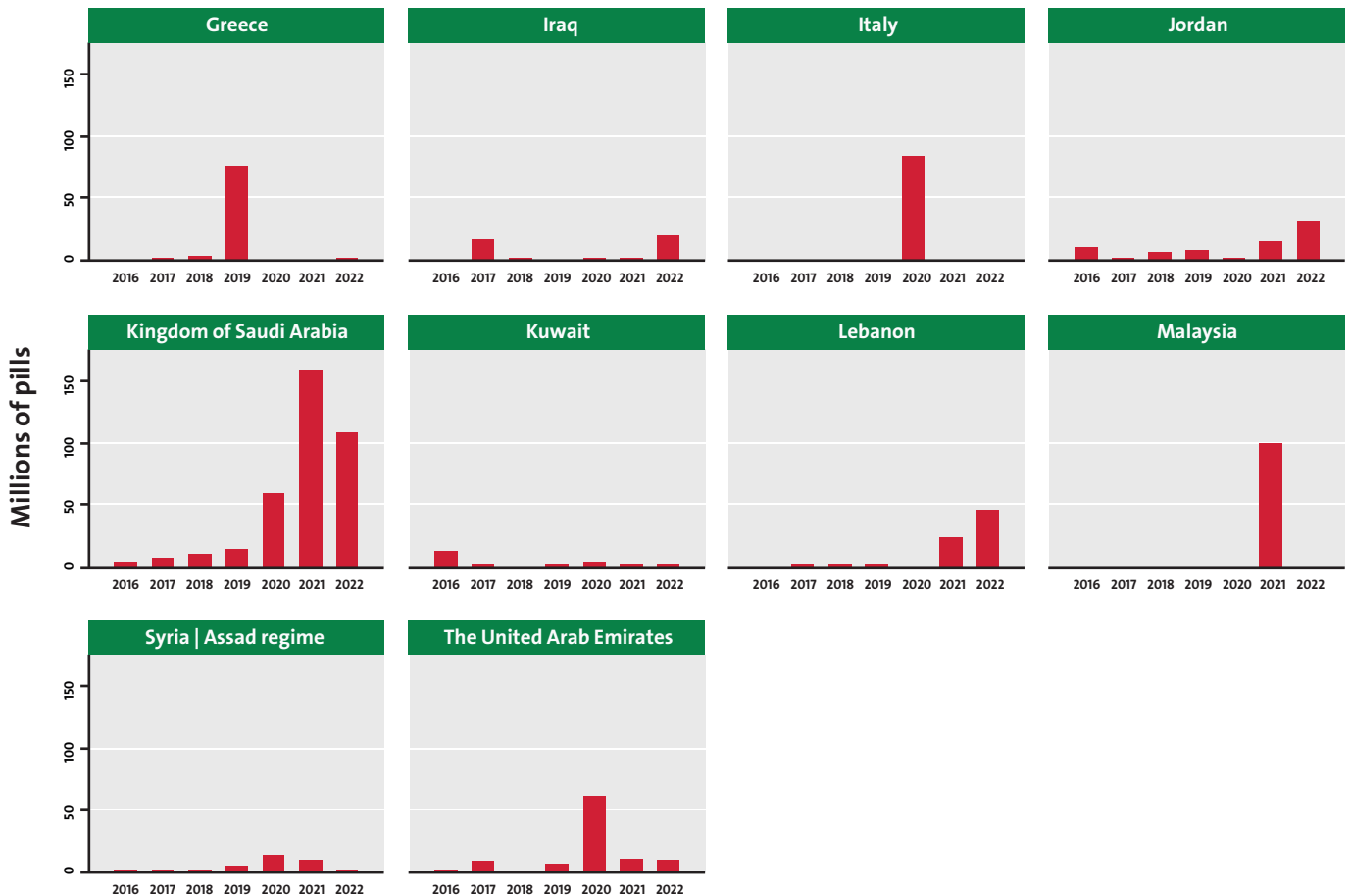


Figure 5 shows that shipments routed through distant third countries tend to be larger. This is likely the case, given the higher freight, insurance, and smuggling costs. Shipments through Greece, Italy, and Malaysia are prime examples of this practice.

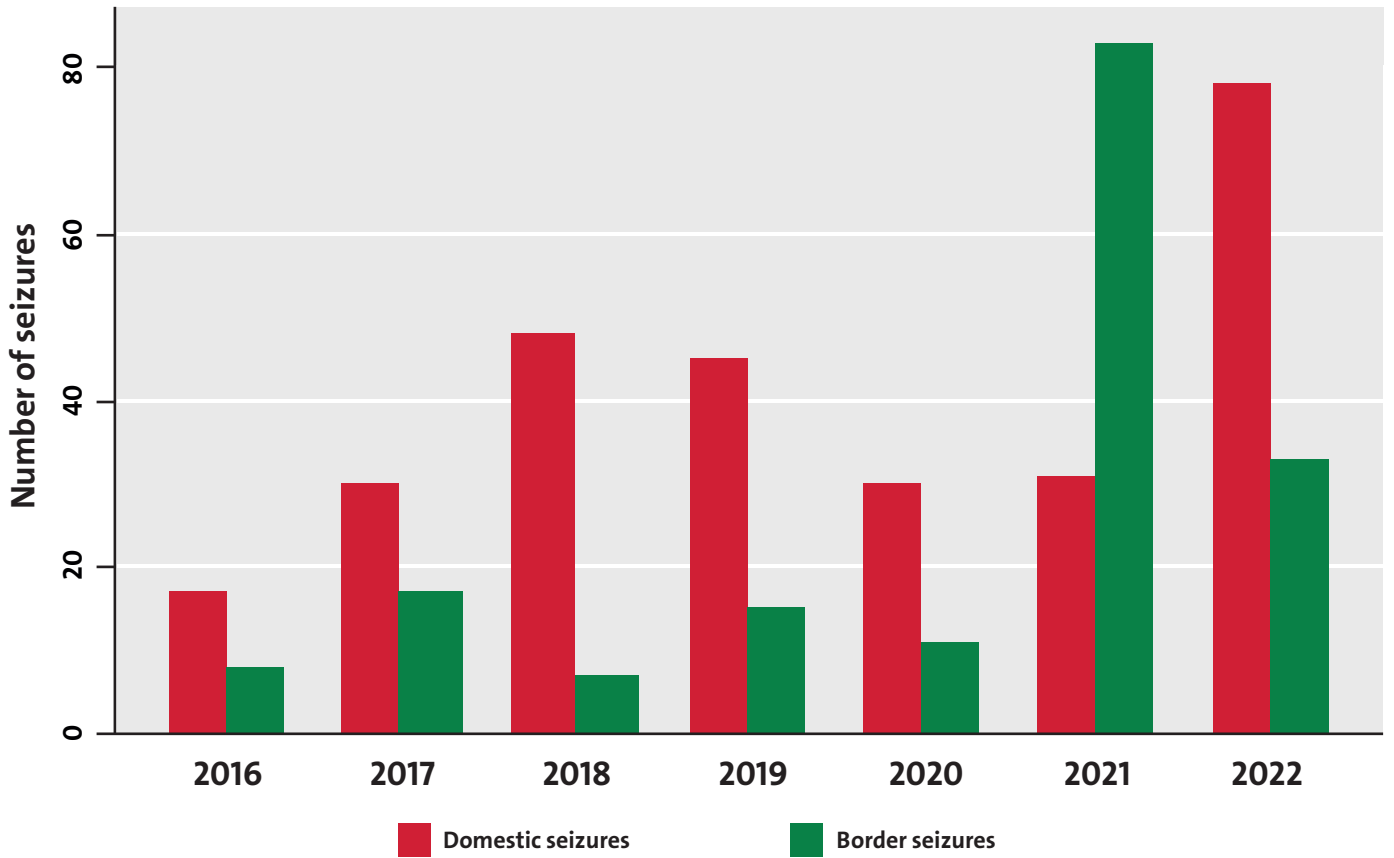
Interestingly, while the average number of pills seized in Saudi Arabia hovered between 3 and 10 million over the past three years, those seized in Jordan averaged fewer than one million pills per bust, with an uptick in 2022. Although numerous piecemeal smuggling operations happen at the Syria–Jordan border (often involving humans, mules, and drones), further investigation of individual incidents shows that overland shipments reaching Saudi Arabia from Jordan tend to be larger than those seized by Jordan at its border with Syria. This brings into question the overall effectiveness of Jordanian interdiction efforts despite recent improvements, as well as regime efforts to stymie networks.

Figure 5: Average pills per seizure in the top ten countries in terms of captagon seizures



Analysing which shipments are seized at points of entry and which make it through to domestic consumer markets can reveal useful information about smugglers’ success at getting closer to final consumers. This also illuminates the relative capacity of various authorities to interdict shipments, as well as the susceptibility for corruption. Generally speaking, with the exception of 2021, more seizures tend to happen within countries’ borders than at points of entry (See Figure 6).

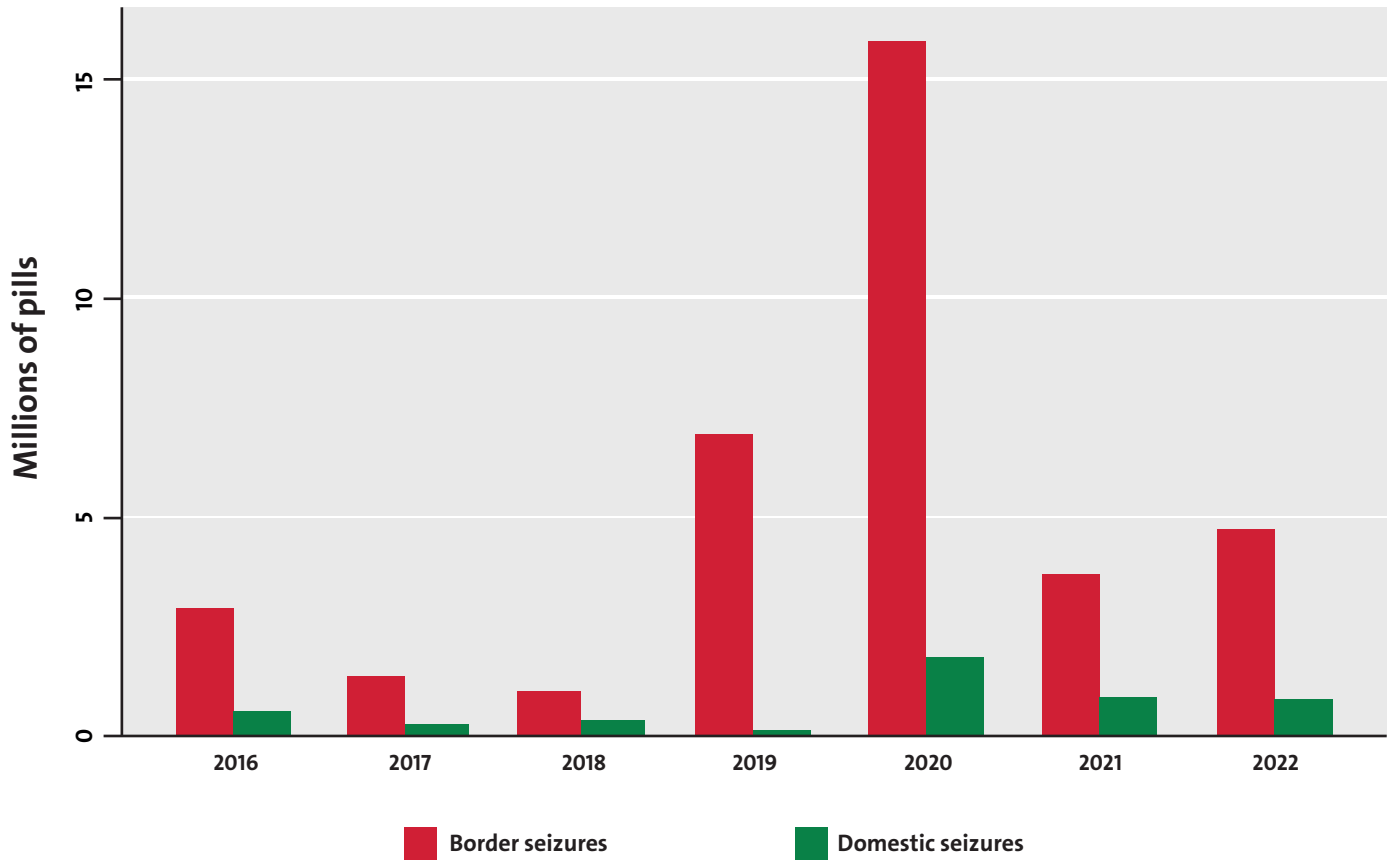
Figure 6: Number of captagon seizures by year and point of interception



Note: seizures in or related to Arab Asian countries only

However, domestic captagon seizures across Arab Asia tend to involve smaller quantities (Figure 7). This dynamic is less surprising and is likely to apply to other countries, since wholesale smuggling is broken down into smaller distribution sub-networks before reaching consumers. In other words, domestic seizures tend to capture only the tentacles of distribution networks.

Figure 7: Average number of seized captagon pills by point of interception



Note: seizures in or related to Arab Asian countries only

Yet sources in consumer countries, as well as efforts to track prices in various countries using secondary data, show that captagon's price has not seen considerable variation within each country in recent years. This suggests the supply and demand balance is relatively stable. Given that drug seizures both at the border and domestically have fluctuated in recent years while the captagon price point has remained steady, the likelihood is high that large quantities of pills are reaching consumer markets and consumers undetected.

4. Narcotics Networks in Syria and Lebanon

4.1 Production

Researchers geolocated 44 narcotics production facilities, 36 of which are captagon production labs or factories and eight are cannabis plantations. Only one of these locations is in Lebanon; the remaining 43 are in Syria.¹¹ While the evidence from seizures discussed in Section 3 highlights the outsized role of Syria relative to Lebanon, the number of production facilities presented here also reflects our focus on Syria more than Lebanon and on captagon more than cannabis.

It should also be noted that some captagon production facilities are highly mobile. Actors operating between the Lebanon–Syria border often seek to move smaller, more mobile laboratories over the border when the threat of interdiction is high. This blurs the line between Syria and Lebanon, but Syria is still the top production hub.

In Syria, the highest concentration of these facilities is in the governorate of Daraa. There are various reasons for this, including Daraa’s fragile security arrangements, the established smuggling and patronage networks along the desert landscape of the Daraa–Jordan border region, and Daraa’s proximity to consumer markets in the Gulf. The number of facilities in the region spiked particularly after 2018, following the regime’s successful bid to retake large swathes of the governorate.¹² In the south, many of the locals involved in production are affiliated with Lebanese Hezbollah and the Fourth Armoured Division.

The second highest concentration of production facilities is in the governorate of Deir al-Zor in eastern Syria. The governorate’s proximity to Iraq explains in part the recent spike in the number of production facilities and overall narcotics activity in the region, since Iraq has recently morphed into not only an alternative route to consumer markets in the Gulf but a consumer market in and of itself.¹³ Deir al-Zor also offers geographic proximity to the al-Qaim highway from Syria into Iraq, which is tightly controlled by Iran-aligned militias and has been used for smuggling in the past. Iranian-backed Syrian and Iraqi militias stand behind most of the activities in Deir al-Zor (see Section 4.2).

The role of Homs governorate, which contains the third highest concentration of drug manufacturing entities, has been on the decline in favour of Daraa and Deir al-Zor. Given its adjacency to the Lebanese border, Lebanese Hezbollah plays an outsized role in this area alongside the Fourth Armoured Division headed by Maher al-Assad.

Primary and secondary sources also identified one manufacturing site in Hayat Tahrir al-Sham’s (HTS) Idlib governorate, and four in the Turkish-backed Syrian National Army’s (SNA) territory. While there is no evidence that senior HTS leaders are involved in drug production, there is evidence of involvement among SNA leadership. Both actors, nonetheless, remain marginal in the production of captagon relative to regime actors. Smuggling, which is harder to stop, remains present throughout the country.

11- To note, this research identified major manufacturing hubs rather than smaller-scale production efforts. Captagon can be produced in makeshift facilities, as it does not require sophisticated equipment or advanced experience in fields like chemistry. That said, low-capacity operations also produce less product, suggesting that a focus on larger efforts is more relevant.

12- ‘Lessons from the Syrian State’s Return to the South’, International Crisis Group, 25 February 2019, <https://www.crisisgroup.org/middle-east-north-africa/eastern-mediterranean/syria/196-lessons-syrian-states-return-south>.

13- Caroline Rose, ‘Iraq and Turkey: Two Transit Countries to Watch in the Captagon Drug Trade’, New Lines Institute, 4 April 2023, <https://newlinesinstitute.org/syria/iraq-and-turkey-two-transit-countries-to-watch-in-the-captagon-drug-trade/>.

4.2 Key Persons and Entities

Strict steps were taken to protect the privacy of actors and entities reportedly involved in the supply of narcotics. Within the final text of the report, named actors have either been sanctioned over their roles or covered in the literature, and our research team has confirmed the stated claims are accurate. In all other cases names have not been included, and descriptions have been kept to a minimum so that individuals cannot be identified.

The consolidated networks database built for this research was analysed across all relevant actors (nodes) and relationships (edges) involved in the supply of narcotics from Syria and to a lesser extent from Lebanon. The analysis identified a wide range of actor types, such as:

- Private companies
- Public sector organisations
- Border guards (who facilitate smuggling)
- Customs agents and brokers
- Domestic distributors
- Transporters and logistics experts
- Street distributors and dealers
- Pharmaceutical companies
- Commission-seeking facilitators (people involved in matching producers, smugglers, and distributors)
- Raw materials providers
- Money launderers
- Organised crime groups
- Paramilitary groups and militias

For the purpose of this study, researchers took a considerable subset of information from the network database. The subset network has 330 nodes and 458 edges, mainly composed of informal organisational relationships among individuals (132 relationships, 30% of all edges), and a mixture of formal and informal cooperation relationships among organisations (111 relationships, 25% of all edges). Hybrid cooperation relationships, in which one side is an individual and the other is an organisation, represent 22% of all edges. Kinship and influence relationships represent 6% each of all edges. The remaining 14% of edges are distributed across ownership, commercial partnership, enmity, friendship, and formal organisational ties. These patterns warrant further analysis.

To understand the meaning behind the distribution of these relationships, this research tried to identify the stages through which the Syrian narcotics ecosystem evolved in order to establish itself at its current level. It most likely started with a small core narcotics subnetwork backed by authoritarian actors like the Fourth Armoured Division. Next, informal and cooperative relationships attracted and onboarded other local and marginal actors. Some of these relationships were dynamic and self-organised. With time, certain dynamics emerged to introduce an equilibrium in which the ecosystem started to mature. This is witnessed in the existence of powerful hub actors, various actor types, and the formation of functional subnetworks.

By generally comparing how regional and global narcotics ecosystems evolved, and given the identified progression of the Syrian ecosystem, the distribution of relationship types indicates that the narcotics ecosystem in Syria has passed its infancy stage and is steadily evolving and maturing, taking shape and moving from disorder to order. Alliances and cooperation relationships among organised crime groups, smugglers, and others are fluid.

Some nodes can exist in multiple functional networks simultaneously while playing a different role in each. For example, Waseem al-Assad is a regional hub in the narcotics 'organisational' subnetwork in Syria, while simultaneously acting as a local hub in the 'finance' subnetwork and a key facilitator in the 'operations and logistics' subnetwork.

The map generated for this research shows many individuals and entities playing functional roles in the supply chain. It highlights individuals affiliated with formal security branches while also holding formal IDs as 'collaborators'. It also includes individuals affiliated with paramilitary groups who have high ranks in the National Defence Forces. The role of official government entities, the Syrian army, and regime-backed militias like the Baath Brigades are evident in the network, whether directly or one step away from drug-related individuals and entities.

Former opposition fighters are on the map as well alongside smuggling networks backed by the Fourth Armoured Division strategically placed in certain geographical areas (like the Ghassan Abu Zuraiq Group). The map shows certain production facilities close to shipping ports, as seen in al-Shilfatiyah and Ayn al-Bayda.

Kinship networks are common on the map, and are usually functionally symbiotic, like in the case where one family member heads a militia and the other leads a distribution network.

Moving closer to the borders of Syria's control map, the map shows various crossings, some of which are controlled by the Fourth Armoured Division to secure smuggling operations. One example includes the Euphrates River crossings at Hawajj Thiab Shamia and Hawajj Boumasa. Along the borders, a few tribes and Bedouin groups are involved in the supply network as their knowledge of informal crossings is leveraged.

Key businesspeople in the network are directly linked to the Presidential Palace, like Hussam Qaterji and Khodr Ali Taher. Other businesspeople discovered in this research are not widely known, but play key roles in the supply network at the regional level.

One of the major points highlighted in the research map is the involvement of certain opposition factions in the narcotics supply network, such as a commander in the 3rd Legion of the Syrian National Army (SNA) who allegedly receives logistical help from his brother, a merchant based in A'zaz. Another SNA leader directly involved in the narcotics supply in opposition-held areas is a commander of one of the brigades forming the Sultan Malakshah Division. Some reports even indicate that a member of the opposition delegation to Astana has indirect control over a captagon raw-materials manufacturing facility in al-Basouta.

Liaisons are essential on the opposition side as well, bridging the subnetworks even among political rivals. The map shows that a leader in the opposition's Sultan Murad faction, who is involved in drug trafficking, has had ties with the Fourth Armoured Division. Two other individuals have direct links to the Syrian Democratic Forces (SDF) and the tribal militia al-Baqir Brigade, to oversee narcotics supply activities in the countryside of Deir al-Zor. Another liaison who is, according to primary and secondary reports, directly involved in the drugs trade is a military coordinator between local armed groups and Turkish authorities, which gives him a particular advantage over other traffickers in the region.

The map also shows smuggling crossings and hashish farms under the control of opposition factions, like the Rashu Atiyah farms located within the Ras al-Ayn area in the northern countryside of al-Hasaka.

Returning to the regime's side of the network, primary and secondary data collected for this research reinforced prior perceptions regarding the pivotal roles of the Fourth Armoured Division and the National Defence Forces (NDF), presented as large clusters in the network. Regional aspects are most visible in the involvement of Iranian-backed actors, most prominently Hezbollah but also the Iraqi Popular Mobilization Forces (PMF). These regional actors' deep involvement brings into question their roles beyond narcotics. For example, there is evidence of active money laundering and corruption in Iraq, as well as an illicit outflow of dollars from the same. Given this evidence, as well as various front companies affiliated with the Islamic Revolutionary Guard Corps (IRGC) in the region, it's possible these non-Syrian narcotics actors based near the northeast border could be among the hubs laundering the proceeds of Syrian narcotics actors.

In terms of quantity, the majority of nodes in this network (individuals or entities) perform the transport, shipping, storing, smuggling, and distribution of drugs, as well as liaison activities.

Further analysis of the map's structure using graph algorithms supported the hypothesis that the narcotics supply network has evolved in a manner that enhances its resiliency. The current network lacks a direct or formal hierarchy, indicating that it can absorb potential shocks and adapt to new market realities or constraints. By analysing the web of formal and informal relationships among nodes, the research found some actors have unique network roles, positions, and influence that render them specifically the guardians of it. Those network roles include:

- **Hubs:** well-connected nodes that have numerous relationships with other nodes, holding the whole structure together
- **Boundary Spanners:** actors who play a functional role in linking different actor types and subnetworks together domestically and regionally
- **Logistics/Information Brokers:** actors who are closer to most actors in the network and play key roles in maintaining the resilience of the network through information, financing, protection, and logistics sharing.

At a collective level, the research identified certain network structures:

- **Common Trait Clusters:** well-connected subnetworks in which the actors have some common trait, like belonging to the same tribe
- **Functional Clusters:** well-connected subnetworks in which the actors have a common function, like smuggling through specific border crossings
- **Support Networks:** strategically woven subnetworks that maintain the status quo, guard the whole industry, and keep everyone in check (intelligence and spying).

Although the network built for this research is the largest available on the supply of narcotics in Syria and Lebanon, it is far from complete and requires further corroboration. As a result, this research will not share the influence scores of the network roles and structures that were calculated by applying the graph algorithms on the network. Instead, the research has only shared the findings of the network's visual and exploratory analysis.

Still, efforts to continue mapping the actors with more breadth and depth offers an opportunity. For example, mapping the wealth managers, lawyers, bankers, money launderers, and accountants who would be part of this industry can offer additional findings not highlighted in this report. Moreover, applying graph algorithms and longitudinal analysis to identify the most influential entities that should be targeted by sanctions and other measures may be fruitful. Finally, future efforts could centralise a what-if analysis to highlight how the network can behave after the elimination/isolation of certain entities. This would be a useful decision-support mechanism for policy designers and decision-makers.

4.3 The Overlap with Sanctions

Among the network subset of 330 nodes (202 persons and 128 non-persons) analysed for this research, a total of 36 entities are under UK, US, or EU sanctions (25 individuals and 11 organisations). This represents only 10% of the entire narcotics ecosystem used in this network research (33 out of 330 entities). Of those sanctioned, 25% are listed for sanctionable behaviour other than narcotics.¹⁴

Notable sanctioned individuals include Bashar al-Assad's relatives, such as Samer al-Assad and Waseem al-Assad,¹⁵ as well as prominent businessmen like Hussam Qaterji¹⁶ and Amer Tayseer Kheiti.¹⁷ Among those sanctioned for their role in the supply of narcotics, the vast majority are Syrian nationals, further highlighting the relative significance of the country in the supply of narcotics. Two notable non-Syrian exceptions are Noah Zuaiter¹⁸ from neighbouring Lebanon and Hasan Daqqou,¹⁹ who formally holds Syrian and Lebanese citizenships.

The US, UK, and EU sanction programs are better aligned in terms of the mutual entities they designate. However, 7 individuals are sanctioned only by the UK and EU programs, like Lu'ai al-Ali, head of Military Intelligence Branch 217 located in Sweida,²⁰ and Taher al-Kayali,²¹ owner of the marine carrier Noka. In December 2018 the Noka was seized by Greek authorities, who found it loaded with a huge cargo of captagon.²²

On the other hand, 10 entities are sanctioned only by the United States. This includes Ghayath [alt. sp. Ghiath Dala, commander of the Brigade 42 Special Forces within the Fourth Armoured Division, Hezbollah Brigades in Iraq,²⁴ and the Fatemiyoun Brigade.²⁵

Wherever possible, sanctioning authorities in the US, UK, and EU should coordinate sanction listings and announcements to maximise their impact, minimise the misalignment, and limit sanction evasion actions in their jurisdictions.

Reviewing the overall network and specific roles that each actor plays begs the question: who are the key persons and entities not currently listed?

14- Note that these two groups are not mutually exclusive.

15- Natalie Ecanow, 'New European Sanctions Target Assad Regime Narco-Traffickers', Foundation for Defense of Democracies website, 26 April 2023, <https://www.fdd.org/analysis/2023/04/26/new-european-sanctions-target-assad-regime-narco-traffickers/>, accessed 1 June 2023.

16- 'Hussam Al Qatarji', OpenSanctions.org, 28 September 2022, <https://www.opensanctions.org/entities/NK-PWU43vVQrJskXs8gXVkaBH/>.

17- Ecanow, 'New European Sanctions Target Assad Regime Narco-Traffickers'.

18- 'Noah Zaitar', OpenSanctions.org, 28 March 2023, <https://www.opensanctions.org/entities/NK-eS5hNUoxzHb9u4e5T8PSbs/>, accessed 1 June 2023.

19- 'Hassan Muhammad Daqqou', OpenSanctions.org, 28 March 2023, <https://www.opensanctions.org/entities/NK-agaRKWtyPdgGfLK8v67bRr/>, accessed 1 June 2023.

20- 'Lu'ai al-Ali', OpenSanctions.org, 15 November 2011, <https://www.opensanctions.org/entities/NK-KL3dUnws5wCf7saseAJgMJ/>, accessed 1 June 2023.

21- Ahmed Eid Ashour et al., 'Greek Captagon Bust Leads to a Criminal Gang and the Port at the Heart of Syria's Booming New Drug Trade', OCCRP, 16 June 2021, <https://www.occrp.org/en/investigations/greek-captagon-bust-leads-to-a-criminal-gang-and-the-port-at-the-heart-of-syrias-booming-new-drug-trade>, accessed 1 June 2023.

22- Ashour et al., 'Greek Captagon Bust Leads to a Criminal Gang and the Port at the Heart of Syria's Booming New Drug Trade'.

23- 'Syria Sanctions Designations - United States Department of State', U.S. Department of State, 1 December 2020, <https://2017-2021.state.gov/syria-sanctions-designations-2/index.html>, accessed 1 June 2023.

24- 'U.S. Sanctions Iranian Proxies in Iraq', The Iran Primer, 3 October 2019, <https://iranprimer.usip.org/blog/2019/mar/05/us-sanctions-iranian-proxies-iraq> accessed 1 June 2023.

25- 'Fatemiyoun Division', OpenSanctions.org, 21 June 2019, <https://www.opensanctions.org/entities/NK-3WKG6Wixe9FmZo8zYvKhBJ/> accessed 1 June 2023.

As argued, the narcotics supply network in Syria exhibits a scale-free structure, meaning it is resilient and robust against random (non-systemic) targeting. In this regard, '...effective networks can be neither too dense nor too sparse, neither too centralized nor too decentralized. Instead, they must land somewhere on a continuum between the two sets of extremes.'²⁶

However, selective targeting for certain network roles and structures across actor types can severely damage the network. This can be operationalized via simple human judgement, with the aid of network algorithms, to identify who to target with sanctions or isolate from the network in order to inflict the highest impact. Thus, policymakers should shift their attention towards the systemic nature of these networks and target actors with specific network roles. From a graph algorithm's point of view, the two network roles discussed in Section 4.2 (the Boundary Spanners and Logistics/Information brokers) can be calculated and used as a 'surveillance metric' for the former role, and a 'targeting metric' for the latter.

Although sanctions can be useful for deterring future actors from entering the sector, they cannot be detrimental to narcotics networks unless used in conjunction with other pressure tools. Sanctions should be but one part of a comprehensive policy to have a meaningful impact (see the Policy Recommendations section).

Various network dynamics continuously ensure and reinforce the resiliency of the network; this should be taken into account during and following the imposition of sanctions. Sanctions should be constantly revised and adapted in light of emerging realities, as follows:

- **Self-organisation:** When sanctions target an entity and its subnetwork, there are always other subnetworks that can evolve and fill the gaps. They could be long-term networks or temporary and mission-driven, and the result of dynamic coalitions, merging, and spinoffs.
- **Deliberate formation:** Some networks are action-based, designed with clear reporting structure, hierarchies, and governance to perform certain functions after sanctions have crippled other essential networks.
- **Activation of weak ties:** It is very common in clandestine networks to activate weak ties with other members of the larger network when a subnetwork is targeted. Weak ties are the infrequent relationships someone has with acquaintances. Such relationships become crucial bridges in difficult times and help re-attach the targeted subnetwork (e.g. a sleeper cell) with the larger network clusters.

Outside of these dynamics, this research identified the importance of considering the emerging culture, traits, and value systems of actors within these networks. Are connections formed based on respect and loyalty? Simple greed and wealth? Perhaps political ambitions? How tightly are network connections anchored in affective ties, such as among family members, co-ethnics, or co-sectarians? Answers to these questions are crucial to any selective targeting policy, as the researchers envision it to include a wide set of non-kinetic tactics.²⁷

26- Sean F. Everton, *Disrupting Dark Networks* (New York: Cambridge University Press, 2012), p.167.

27- George Popp, 'Kinetic and Non-Kinetic Tactics of Competing Powers Over the Coming Decade', PDF, NSI, Inc., September 2019, https://nsiteam.com/social/wp-content/uploads/2019/09/Future-of-Global-Competition-and-Conflict-ViT-Ta-Q2-Report_final.pdf.

4.4 The Centrality of Bashar al-Assad

While the analysis of seizure data highlighted that the bulk of narcotics in Arab Asia originates from regime-held Syria (Figure 3), Section 4 has shown that entities who are either part of or intimately connected to the Assad regime are responsible for various pieces of the supply chain. But what is the role of President Assad?

Analysis of the network reveals that the four biggest hubs are those of the Fourth Armoured Division, Lebanese Hezbollah, the National Defence Forces, and the Military Intelligence Directorate. Except for Hezbollah, which coordinates closely on the ground with the Fourth Armoured Division and is headed by Bashar's brother, Maher,²⁸ the other three entities are direct subordinates to the president, making him the most influential actor in the network and reasserting the notion that the decentralised nature of the network does not imply that hierarchies of power have been destabilised.²⁹

In fact, this research reveals that nine of the individuals in the supply network are Bashar's relatives, four of whom are already sanctioned by one or more Western jurisdictions: Maher, Samer, and Waseem al-Assad as well as Rami Makhlof.

Syrian Law warrants harsh sentences on those producing, trafficking, or distributing drugs—amounting to capital punishment—particularly for state employees tasked with combating the industry. Yet drug kingpins and facilitators, whether civilians or state employees, Assad's relatives or not, roam the country with near-total impunity. With the ongoing window-dressing drug seizures in regime-held Syria and arrests of only fringe actors, Assad leaves little to the imagination that he guards and sponsors the industry.

28- Shahhoud Annsar and Muhanad Abulhusn, 'Syria's Parastate: The 4th Division', New Lines Institute, March 2023, <https://newlinesinstitute.org/wp-content/uploads/20230328-Intel-Briefing-4th-Division-NLISAP.pdf>.

29- Syrian Parliament, 'Act 2 of 1993 Drugs Act', Government of the Syrian Arab Republic. <http://www.parliament.gov.sy/arabic/index.php?node=5584&cat=6011>.

5. Economic and Political Implications

Multiple complicating factors make it difficult to put a price tag on the captagon industry (the market value of consumed pills). There is scarce data on consumption in the region, given the stigma associated with narcotics use, limited research funding, and the lack of public transparency. Furthermore, the amounts seized in different countries are not always publicly available. Yet even when available, they are a poor proxy for consumption data.³⁰

Unlike previous estimates, this research focuses on the profits generated by the Assad regime and Lebanese actors rather than the market value, in order to better deduce the political economy implications for the region. While examining market value is difficult, assessing profitability is even more so. Production costs are negligible, as evidenced by the selling price in producing countries of less than half a dollar per pill, but estimating the smuggling and distribution costs is notoriously difficult.³¹

Given the various uncertainties, presenting upper and lower profitability bounds is the best option. Researchers applied this method for the three years from 2020 through 2022, combined to average out the outliers in prices and seized quantities observed in yearly data.

Merging and reconciling individual seizure and aggregate seizure databases (see Section 2.1) shows that 1,042,015,086 pills were seized in, en route to, or originating from Arab Asia over the period of interest (2020–2022). In light of Section 3.3, we further assume that the Assad regime and Lebanese actors are responsible for the supply of 86% of the captagon consumed in Arab Asia. Moreover, the cost of producing a pill over this period is assumed to be USD 0.20, which is slightly less than half the selling price of the admittedly lower-quality pills in the Syrian market. Finally, we calculate that the simple average price of a captagon pill outside of Syria and Lebanon for 2020–2022 is \$8.06 as calculated from various publications and seizure announcements.

In light of these assumptions, the presented profit ranges are bounded by the following:

- The Assad regime and Lebanese actors are responsible for the whole supply chain—this includes production, smuggling, and distribution in local Arab Asian markets. Alternatively, they are responsible for production only.
- The amounts of captagon consumed and seized are equal. Alternatively, three times as much as the amount seized finds its way to final consumers.³²

30- When a country seizes more drugs over time, should this be attributed to improvements in interdiction capacity or to an increase in incoming drug shipments while interdiction stays constant? By the same token, if two countries seize the same amount in a given year, does this mean the level of consumption in each is the same? Or is one a bigger market with weaker interdiction capacity?

31- 'The Drug Enforcement Administration seizes half a ton of Captagon pills, worth 1.5 billion pounds', Electronic Media Center (EMC), 18 February 2020, http://www.emediatc.com/?page=Details&category_id=10&id=69361&lang=ar.

32- For illustration, assuming three times the amount seized reaches final consumers in Saudi Arabia, this means that nearly 300 million pills were consumed in 2022 alone. In 2018, the Ministry of Health said there are 200,000 addicts in the country. Other sources suggest that 40% of addicts are hooked on captagon. Assuming that the number of addicts has doubled in 2022 (i.e. 400,000 addicts), each of them would get over 5 pills per day. Field research highlighted that this is a reasonable upper bound for addicts' consumption. This is also perceived to be the upper bound because consuming 5 pills per day would cost around 4200 Riyals per month at an average pill price of 28 Riyals (\$8), constituting a third of the median income for a whole family.

Sources: The assumption that 40% of addicts in Saudi Arabia are hooked on captagon comes from Anchal Vohra, 'Saudi Arabia Is the Middle East's Drug Capital: Despite draconian laws, the region's biggest economy is hooked on amphetamines', Foreign Policy, 20 December 2021, <https://bit.ly/3A3UaFh>, accessed 17 April 2023. 'A Country Nation Without Drugs: The Biggest Saudi Campaign to Counter Methamphetamine', Alkhaleej alJadeed, 14 May 2023, <https://thenewkhalij.news/article/294962>, accessed 17 April 2023. Average family income in Saudi Arabia, <https://www.ceicdata.com/en/saudi-arabia/average-monthly-income/average-monthly-income-family>, accessed 19 April 2023.

	The Assad regime and Lebanese actors are responsible for the whole supply chain, from local production to the delivery to final consumers	The Assad regime and Lebanese actors are responsible for production only.
The amount of captagon reaching consumers' markets is as much as the amount seized	\$7,043,605,175	\$259,878,562
Three times as much as the amount seized finds its way to final consumers	\$21,130,815,526	\$779,635,687

The wide range of estimates is emblematic of the level of uncertainty surrounding the economics of captagon more broadly. From the table above, we estimate the profit captagon generates for the actors in regime-held Syria and Lebanon to have a midpoint of \$7.3 billion for the period 2020–2022 (\$2.4 billion per year).

The risks to this midpoint estimate seem balanced. Downside risks include the fact that for simplicity our estimates assume no costs for smuggling from producing to consumer countries, including the costs of seized pills. On the upside, however, much of the evidence suggests that regime affiliates are heavily involved in smuggling operations and are, therefore, likely to be receiving more than the price charged per pill in the domestic market.

Even estimates close to the lower bound are considerable enough to have serious political economy ramifications. To put the midpoint of \$2.4 billion per year in context, Syria's expected state revenues from taxes and levies for 2023 stand at \$0.7 billion.³³ In fact, the total budget for 2023 is \$2.3 billion, which includes public spending from money printed to cover the deficit.

Yet the profits generated from the sector do not accrue in full to the head of the regime—let alone the state, which is not likely to see any of it. In fact, while ample evidence suggests that Assad sponsors the industry, a considerable share likely goes to the actors on the ground to cover the risks they bear. This still serves the interests of the regime: those involved in the supply of drugs enrich themselves with the aid of regime-backed security services, but they also protect the regime because their very existence depends on it. A threat to the regime would be a direct threat to their own business.

33- Revenues from taxes and levies for 2023 are expected to be around 5.1 trillion Syrian pounds at an average black market exchange rate of 7,088 from 1 Jan 2023 to 20 Apr 2023. Black market exchange rate data is sourced from <http://www.karamshaar.com/exchange-rates>.

With the world scrambling to address the captagon crisis, and with consumer countries mulling the idea of normalising relations with the precondition of curbing the supply,³⁴ Bashar al-Assad has never uttered the word ‘captagon’. The official narrative consistently touts that the area under the regime’s control is only a transit route for narcotics, with production occurring in ‘terrorist-held’ areas only. Assad, who is unlikely to be aware of the exact details surrounding the industry, achieves three goals by sponsoring it: he keeps the regime afloat economically; he buys the support of the powerful narcotics producers; and he can squeeze out political concessions from consumer countries. Future policy responses to the ensuing narcotics crisis in Arab Asia should take these into account.

The mapped narcotics ecosystem of the research’s network database shows the centrality of Bashar al-Assad and the fact that there are no rivalries or fierce competition among major actors (i.e. no distinguished cartels and no competing cartels). Occasional skirmishes are possible and already happen, like the fight between two narco-related groups in Qardaha³⁵ and the recent arrest of two drug gang members in rural Homs that prompted the gang to attack a police station in Talbiseh. But despite these skirmishes, there is no indication that a major competing cartel has emerged to loosen Assad’s upper hand overall. This may offer a crucial chance to undermine the narcotics ecosystem, given the centrality of Bashar al-Assad.

With that in mind, future policy responses should consider a scenario in which Bashar al-Assad is provided some concessions in favour of dismantling the narcotics ecosystem, and in response the other beneficiaries in the network resist and retaliate. The regime could eliminate them by force, or allow them to grow in a decentralised fashion. Bashar al-Assad can even use this to his advantage to keep milking global support, claiming that he is trying—by conducting cosmetic seizures and arrests of small actors—but in reality is allowing the narcotics network to flourish.

Unfortunately, the lack of proper mitigation could leave the door open for catastrophic scenarios in the near future. As the ecosystem matures and continues without internal and/or external mitigation, rivalries and cartels could emerge. It is difficult to predict the tipping point that would accelerate the transition to a higher maturity level where the multipolarity of actors materialises. However, there are a few indicators and dynamics that can help to identify any accelerated transition, like the increase in the formation of non-traditional or unconventional alliances; the movement towards more dense hubs and well-networked communities; and successful efforts by small entrepreneurial actors to emerge and acquire market shares with novel logistics and distribution dynamics. During this possible transition, the ecosystem will be more of an open market. Needless to say, the level and type of violence could escalate in the zero-sum games among rivalries. Big fish eat the smaller ones and, like many drug mafias and cartels from Mumbai to Mexico, each cartel can distinguish itself through violence and elimination tactics.

34- (in Arabic) ‘Talk about Saudi Arabia’s intention to invite Assad to the Arab summit. Will he move away from Iran in return, and what about the opposition file?’ Arabic Post, 4 March 2023, <https://arabicpost.net/%d8%aa%d8%ad%d9%84%d9%8a%d9%84%d8%a7%d8%aa/2023/04/03/%d8%a7%d9%84%d8%b3%d8%b9%d9%88%d8%af%d9%8a%d8%a9-%d9%88%d8%b3%d9%88%d8%b1%d9%8a%d8%a7/>.

35- (In Arabic) ‘Al-Qardaha is full of rumors on communication platforms.. What is the story of the security chaos in Qardaha, Assad’s stronghold?’ Media NA, April 2023. <https://medianae.com/%D8%A7%D9%84%D9%82%D8%B1%D8%AF%D8%A7%D8%AD%D8%A9-%D8%AD%D8%A7%D9%81%D9%84%D8%A9-%D8%A8%D8%A7%D9%84%D8%B4%D8%A7%D8%A6%D8%B9%D8%A7%D8%AA-%D8%B9%D9%84%D9%89-%D9%85%D9%86%D8%B5%D8%A7%D8%AA-%D8%A7%D9%84/>.

6. Conclusion

This report was motivated by the increasingly dire nature of the captagon crisis in Arab Asia and existing gaps in the literature on the subject. It is critical to fill such gaps, as captagon and the smuggling networks facilitating its production, sale, and consumption solidify and expand their operations. Bashar al-Assad's Syria, and to a lesser extent Lebanon, encapsulates this issue and the destabilising effects it has on the region. For that reason, researchers hope these data and analyses help to illuminate the problem.

The report's methodology relied on data collection to build two core databases. The seizures database summarises narcotics seizures originating from, transiting through, or reaching their destination in Arab Asian countries between 2016 and 2022. The network database maps actors involved in narcotics supply from Syria and Lebanon. Both databases proved invaluable in filling gaps in the literature that deter policymakers from re-thinking how to address the captagon crisis.

Sky High: The Ensuing Narcotics Crisis in the Middle East and the Role of the Assad Regime



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