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Sudan's war shifts from siege to supply lines, parallel rule and regional leverage

Executive Summary:

After months of relatively stable front lines, the Sudan Armed Forces' (SAF) late-July offensive in North Kordofan captured Bara, Jabrat al-Sheikh, Um Sayala, and reopened the Omdurman–El Obeid road. The immediate significance is that the SAF has restored a direct military and commercial link between Khartoum and Kordofan, potentially easing the movement of goods and supplies into the city. However, it does not yet amount to durable territorial consolidation; holding the roads depends on retaining the surrounding towns and preventing renewed Rapid Response Force (RSF) action. The key question is therefore whether SAF can convert the breakthrough into sustained control and civilian access, while the highly mobile RSF retains the capacity to disrupt both.

In West Darfur, RSF consolidation around Kulbus and pressure near Sirba and Bir Saliba protect its western flank and access to Chad, while sustained Joint Forces pressure in Darfur could draw RSF resources from Kordofan. Blue Nile also risks spillover along the Ethiopian frontier. Across these theaters, drones are eroding the protective value of distance by allowing both sides to target infrastructure and civilians beyond active frontlines. It has also intensified recriminations between SAF and Ethiopian federal authorities about support for rebel groups on their respective territories.

Political fragmentation is becoming more institutionalized. SAF has initiated consultations for an internal dialogue anchored in the recognized state apparatus, while Tasis is consolidating a parallel administrative order in RSF-controlled territory through decentralization laws and local structures that remain closely tied to RSF coercive power. The concern is therefore not simply political fragmentation, which has existed since the war began, but its gradual institutionalization into competing governance systems that could make eventual reunification more difficult.

Civilian forces remain organizationally divided, but their substantive positions are converging. The Declaration of Principles Forces adopted a common vision centered on ending the war, civilian transition, and accountability, while other blocs increasingly overlap around ceasefire, civilian protection, and humanitarian access. The sharper divide is over political process design, suggesting that international actors should prioritize agreement on rules and minimum principles rather than another umbrella coalition.

Humanitarian conditions are increasingly driven by systemic breakdown; damaged water, food, and health systems deepen scarcity, insecurity, and disease.

Economically, international pressure is moving closer to Sudan's war-financing architecture. New European Union (EU) and United Kingdom (UK) sanctions represent a shift from targeting commanders to disrupting the systems that sustain them. Yet adaptation and enforcement remain central: sanctions evasion is rife. Reconstruction planning in areas under firm SAF control in Central, Eastern, and Northern Sudan is also advancing before the war has ended, creating a risk that recovery financing could consolidate wartime commercial and political power if governance safeguards are not established early.

Security developments

SAF relieves El Obeid:

SAF's late-July offensive was the most consequential shift on the central front since the RSF intensified pressure around El Obeid a few months ago. On July 25, SAF and allied Sudan Shield and Joint Forces of the former Darfur movements simultaneously attacked RSF positions along the Omdurman–El Obeid corridor, capturing Bara, Jabrat al-Sheikh, Um Sayala and other locations. Forces moving north from El Obeid subsequently linked with troops advancing southwest from the Khartoum direction, restoring the direct highway to the North Kordofan capital.

The operational significance lies partly in what preceded it. The RSF control of Bara had allowed it to threaten a key water system, while pressure on roads north, south and west constrained commercial and military movement. SAF's advance therefore disrupted an RSF strategy designed to make the city increasingly difficult to sustain. Reopening the highway could lower transportation costs, increase access to food and fuel, and improve the military logistics of SAF's Fifth Infantry Division.

The breakthrough also changes SAF's offensive options, opening up a pathway for additional westward forays. Burhan signaled an eventual push toward the Central African Republic border, while forces were redeployed toward the northern desert and border triangle with Egypt and Libya. SAF control of the border triangle could, on the one hand, strengthen SAF's control of the Khartoum-Kordofan axis and support further westward operations and complicate some RSF supply routes, but is unlikely on its own to reduce RSF's western logistical depth, given its access to alternative routes and armed networks in Libya.

It is unclear, however, whether SAF has sufficient manpower and logistical capacity to defend its recent gains while simultaneously opening new fronts. Bara has changed hands multiple times. Residents remain hesitant to return, citing infrastructure destruction and fear of renewed RSF incursions. An open highway is therefore not secure territory.

RSF responds to setbacks: The RSF appears to be responding to territorial reversals in Kordofan with a massive campaign of ethnic mobilization in Darfur, as evidenced by its Telegram channel,

decentralization, mobile operations, and continued capacity for remote strikes rather than a straightforward attempt to retake every lost locality.

Following the setback in North Kordofan, Hemedti authorized frontline commanders to initiate operations with greater autonomy. The shift could improve tactical responsiveness across a dispersed battlefield but may also deepen tension between central command and commanders embedded in local tribal and commercial interests. Control over checkpoints, livestock, markets, and local taxation gives some units independent revenue sources, potentially increasing reliance on local extraction after territorial losses.

RSF has continued to launch hit-and-run attacks. RSF forces attacked other localities, looting markets and homes west of the reopened corridor, and detaining civilians accused of helping SAF. On July 26, at least 12 civilians were reportedly killed by RSF fighters who later retreated in Al-Musallamiya in North Kordofan. In early August, RSF fighters raided Al-Tamid south of El Obeid, reportedly killing five civilians after residents resisted livestock theft.

Drones also allow RSF to carry out long-distance strikes. A suspected RSF drone hit electricity infrastructure at Al-Dabbah in Northern State in July, while Dilling in South Kordofan remains vulnerable to drone and artillery attacks. Such attacks can limit SAF's benefits from retaking an area.

Decentralization may make the RSF harder to defeat through conventional territorial operations and complicate enforcement of a future truce. Similar risks arise from the proliferation of SAF-aligned militias and aligned forces. Any ceasefire will therefore require clarity on sub-national chains of command, named commanders responsible for specific areas, and accountability mechanisms for violations by allied or locally mobilized forces. Without this, a national agreement could coexist with continued localized violence.

RSF seeks to secure its western flank: During July, the RSF consolidated positions around Kulbus and the northern border belt, while fighting shifted south toward Sirba and Bir Saliba, where SAF-aligned Joint Forces repelled another RSF assault on August 8, though thousands of civilians were displaced. Control of this area protects the RSF's western flank and access to the Chad frontier, while continued Joint Forces presence around Tine limits uncontested RSF consolidation. A Sudan-origin drone struck inside Chad in July, underscoring the growing risk that fighting along the border spills into neighboring territory. Sustained pressure in West Darfur could also force the RSF to divert resources from other fronts, including Kordofan.

Fighting continues on the Blue Nile-Ethiopia border: SAF recaptured Kurmuk on July 8 from the RSF-SPLM-N alliance, restoring control over a strategically important town on the Ethiopian frontier. The gain proved fragile, however, as RSF-SPLM-N forces re-entered Kurmuk in mid-August and advanced into parts of Geissan locality. Sudanese authorities continue to allege support from actors in Ethiopia for the alliance, while renewed fighting between federal and Tigrayan forces in early August increased the risk of regionalization. Local officials also claimed that graves containing civilians killed during the period of RSF control had been discovered around Kurmuk, though these allegations have not been independently confirmed. Blue Nile is therefore becoming a more fluid eastern conflict interface, where territorial control inside Sudan increasingly intersects with instability and contested alignment across the Ethiopian border.

Political developments

SAF seeks to project restoration of the state:

SAF's battlefield gains are being accompanied by a political strategy centered on projecting restoration of the state. Government institutions are returning to Khartoum, the Khartoum–Wad Medani railway has resumed operations, and SAF authorities increasingly present restoration of public institutions as evidence that state authority is being reconstituted. This carries genuine administrative value. Sudan requires functioning ministries, courts, transportation systems and public services regardless of political negotiations. But institutional restoration is not politically neutral when the authority directing it is one of the war's principal belligerents.

Burhan's move toward an internal dialogue illustrates the tension. By August 10, he had opened consultations on a Sudanese political process, reportedly including confidence-building measures and a preparatory body. The implicit political proposition is that the recognized state apparatus provides the legitimate framework. Pro-SAF propagandists intensified the call for a postwar political order in which Burhan, as SAF supreme commander, would serve as transitional head of state in a governance system dominated by the SAF within which national politics should resume. Somoud has warned that an army-backed process could formalize Sudan's territorial and political division, while other civilian actors have also questioned whether a process initiated under military authority can provide a genuinely independent and inclusive framework for national dialogue. The deeper concern is that SAF's military recovery and restoration of state institutions could become the institutional baseline for the post-war order before the terms of that order have been politically negotiated.

Tasis continues to consolidate parallel rule: In early August, Tasis authorities began drafting laws governing decentralized administration, the distribution of financial resources, and the status of administrative offices across Darfur and parts of Kordofan. This is significant because it defines how authority and resources should be distributed among central, regional, and local institutions—typically long-term, rather than short-term wartime concerns.

Yet this institutionalization is occurring under the shadow of RSF military authority. In early August, the RSF-aligned civilian administration launched a mobilization campaign for the Kordofan front in East Darfur, calling on local authorities, native administration leaders, and

others to support recruitment. Days later, the RSF arrested the heads of the East and South Darfur civilian administrations and summoned the head of Central Darfur's administration to Nyala. These developments suggest that the RSF retains the coercive capacity to discipline and control civilian structures. Tasis's external political posture reflects its institutional ambitions. Its decision to decline the late-July international consultations launched by the Quintet, while requesting a review of participation arrangements and direct engagement with mediators, suggests it is trying to secure a stronger negotiating position.

Thus, on both sides, political structures appear to be subordinated to military authority. A future settlement will need to disentangle military and civilian authorities—not simply integrate SAF and RSF forces —which complicates solutions.

Civilian developments

Convergence without unity among civilian blocs:

Sudan's civilian field remains fragmented, but there are signs of growing convergence on the objectives of a political process alongside persistent disagreement over its architecture. The Declaration of Principles Forces, closely allied with Somoud, approved a joint political vision centered on ending the war, accountability, and civilian transition ahead of the Quintet consultants, on ending the war, accountability, and subsequently called for an immediate humanitarian truce, unrestricted aid access, and civilian protection. The Democratic Bloc separately backed an inclusive intra-Sudanese dialogue after convergence with Somoud on elements of the peace process, while the Umma Party presented a vision that prioritizes a ceasefire, civilian protection, and confidence-building measures before a broader settlement, despite internal splits. The substantive gap on ending the war and restoring civilian politics therefore appears narrower than organizational fragmentation suggests.

That convergence became more concrete on August 23, when anti-war forces not aligned with

either belligerent issued a joint position following consultations in Addis Ababa. The group rejected Burhan's proposed internal dialogue as a process controlled by one belligerent and instead called for an independent peace process built around simultaneous humanitarian, ceasefire, and political tracks. It proposed broader representation of anti-war, SAF-aligned, and RSF-aligned constituencies, while limiting SAF and RSF participation largely to the humanitarian and ceasefire tracks and excluding the NCP and Islamic Movement from the political process. The group also endorsed the Quad roadmap as its preferred reference point and said it was willing to engage the Quintet under clearer Sudanese ownership and more unified mediation.

Divides over who designs the process, in what sequence, and on what terms remain a challenge. Somoud boycotted the Quintet consultations over participation and process design, criticizing unclear representation criteria and the role of the belligerents and their allies. This is a genuine political dilemma. Participating in a belligerent-designed process can confer legitimacy, but repeated boycotts also risk leaving negotiations open to actors willing to participate. The National Congress Party (NCP) and the Islamic Movement remain another fault line. Civilian fragmentation is therefore increasingly about legitimacy, representation, and control of the transition architecture, rather than fundamentally different visions of the desired endpoint.

International actors should recognize substantive convergence. The priority should be agreement on ceasefire sequencing, participation criteria and an independent preparatory mechanism, rather than pushing coalition formation.

The Democratic Bloc supported an inclusive intra-Sudanese dialogue in July and later presented a roadmap combining domestic talks with a proposed US-mediated ceasefire. The Bloc is closer to SAF than Somoud and argues for a diminished role for international actors. Thus, it could potentially bridge between SAF and civilian forces. Yet there is a tension between locating the process inside Sudan in a way that would increase Sudanese ownership and reduce external manipulation, and the risk that a process in Sudan would be dominated by the belligerents.

Local civilian mediation ends deadly violence in Zalingei: In Zalingei, local mediators and the Native Administration ended deadly intercommunal violence around Al-Murain market. Such agreements matter because local disputes over land, markets, resources, and communal security can easily become absorbed into the wider war when national armed actors intervene.

Cross-border markets also continue to generate practical forms of local governance. The Riqebat market connects communities across the Sudan–South Sudan frontier despite insecurity and taxation pressure. Traditional mediation mechanisms help manage disputes that weak formal institutions cannot resolve consistently. Eastern Sudan provides a warning of the opposite dynamic. Intercommunal disputes around Ar-Ratj market exposed competition over unofficial taxation, gold-mining rights, and local authority.

These developments show that Sudan's fragmentation extends beyond the SAF-RSF divide. Local political economies can generate their own centers of mobilization where armed actors, customary leaders, and commercial interests compete over resources and authority. Future peace processes should therefore connect local conflict-management structures to national efforts without subsuming them under elite civilian coalitions. Local institutions are already managing conflicts and should be understood as part of the peace process.

Humanitarian developments

Access in Kordofan faces tremendous challenges:

SAF's reopening of the Omdurman–El Obeid Road may ease displacement and hunger in North Kordofan. By mid-July, El Obeid faced an estimated 70% water deficit caused by RSF attacks on the water supply and displacement to the city, while the World Food Programme (WFP) warned of rapidly rising food needs. Women and girls faced particularly acute risks: collecting water during daylight exposed them to drones, while movement after dark increased exposure to sexual violence. The United Nations Population Fund (UNFPA) also recorded 21 drone-related incidents between July 1 and July 19, linking attacks directly to disruption of water, sanitation and essential services. The reopened road can improve supply, but access is not equivalent to recovery. In Bara, damaged water infrastructure and continuing insecurity have deterred return, while aid delivery across Sudan remains constrained by security, administrative barriers and an overstretched logistics system.

The reopened corridor is therefore a practical test of whether civilian movement, aid delivery, and critical infrastructure can be protected without a comprehensive ceasefire.

Systems remain under stress: Continuing disease and hunger reflect the erosion of the systems that sustain civilian survival. Cholera cases in North and West Kordofan reached 1,547 by mid-July, while dengue fever killed 39 people in Blue Nile. Damaged health infrastructure, power shortages, disrupted medical supply chains, and continued attacks on health workers and facilities are amplifying these outbreaks. Similarly, rising fuel and input costs are exacerbating the effects of collapsing agricultural finance mechanisms, delayed rains, and the breakdown of veterinary services in Kordofan.

Humanitarian needs thus become self-reinforcing: damage to health, water, agriculture, transport and markets reduces households' ability to absorb shocks, while each new disruption increases dependence on a constrained aid system. Humanitarian policy therefore needs to protect the underlying systems that sustain civilian life, not only respond to the needs created after those systems fail.

Human rights developments

SAF drone strikes continue to kill civilians:

SAF's drone capability continues to put civilian lives at risk well beyond active frontlines. On July 23, a SAF drone reportedly struck displaced civilians in Blue Nile, while an August 2 strike allegedly killed at least 35 people, including several community leaders, at a customary court in North Darfur. Long-range strike systems are eroding the protective value of distance while making attribution and verification less clear. Civilian-protection monitoring therefore needs stronger strike attribution and weapons-chain analysis that link operators, platforms, munitions, and civilian impact to the procurement networks that enable these attacks.

RSF continues to violate women's rights: In Nyala, rights groups also reported deteriorating conditions for women activists detained by RSF authorities since March.

Silencing watchdogs on civic space: Pressure on media sharpened in SAF-controlled areas as prosecutors issued warrants against 47 journalists and other media workers reporting on corruption. Another journalist was targeted using cybercrime laws. These cases sit within a restrictive environment for freedom of expression and civic activity. The timing is consequential: as SAF-aligned authorities rebuild administrative systems, constraints on journalism weaken one of the few independent checks on public spending and corruption. Civic space is therefore becoming a test of whether institutional restoration is producing accountable state authority or consolidating repression. The Sudanese national dialogue process proposed by Burhan in initial consultations included recommendations to end judicial and media campaigns against opponents. Without civic space, public participation and public confidence will be weak.

Engagement without recognition: On July 26, the International Committee of the Red Cross (ICRC) clarified that it is engaging separately with SAF personnel in Khartoum and RSF forces in Nyala on international humanitarian law issues, but that such contact doesn't confer political recognition in line with recognized international law principles and its practice elsewhere in the world. Additionally, SAF authorities called on families to report missing or detained relatives in preparation for a possible detainee exchange with the RSF. Such engagement requires an operational contract between the parties, but it need not confer political legitimacy.

Economic developments

Sector sanctions introduced:

In July, the EU and UK introduced a new approach to Sudan's conflict-financing networks by targeting the gold trade. The EU restricted the purchase of gold from Sudan and the sale of mining inputs, while the UK sanctioned 11 actors related to the sector. The shift recognizes that interconnected commercial, logistical, and financial networks have greater influence than commanders alone.

The central challenge is adaptation. On August 9, the Minerals Minister reported that official gold exports in the first half of 2026 had already matched the full 2025 total, despite a continuing gap between production and formal exports. Increased formalization may improve state access to foreign exchange, but it does not demonstrate civilian control over revenues nor account for the full scale of smuggling. On the RSF side, reporting described how Sudanese gold may be remelted and re-documented in South Sudan for onward export, exposing the difficulty of applying country of origin restrictions in practice.

It remains to be seen whether these sanctions will be more effective than the prior ones. Enforcement increasingly needs to track origin laundering, successor and shell companies, and network substitution.

Interlocking pressures of currency and fuel: Sudan's currency, gold and fuel markets are increasingly interdependent. By early August, the parallel-market dollar had exceeded SDG 6,000, reportedly driven by speculation by oil importers who need it to secure fuel supplies. Raw gold prices also rose sharply. Several states reduced fuel prices in late July following changes in import arrangements, although it remains to be seen if this change will be durable. Dependence on imported refined products remains high after damage to Al-Jaili refinery and other oil infrastructure. Sudan also signed an agreement with Türkiye for a gas terminal in Suakin, increasing the strategic importance of Red Sea trade infrastructure.

These sectors should be read as one wartime system: gold supplies foreign exchange, which in turn funds fuel imports; fuel shapes transport and production costs; and currency depreciation shifts advantage toward actors with privileged access to hard currency, import licenses, and

strategic infrastructure.

SAF and allied seek to capture recovery efforts: Reconstruction planning is advancing even though the war has not ended. Sudanese authorities and the Arab League announced reconstruction priorities, while the Ministry of Finance outlined reforms including electronic procurement, automated payrolls, and a unified treasury. The Central Bank also restored the national electronic payment switch.

These measures could improve administrative capacity and citizens' access to cash and banking service, but reconstruction will also redistribute contracts, capital, and political influence. In a wartime economy where military-commercial actors remain powerful, recovery governance may shape the post-war balance of power. Beneficial-ownership disclosure, competitive procurement, sanctions screening and civilian fiscal oversight should therefore precede major reconstruction financing.

Fuel scarcity and everyday corruption: abuses in Sudan's wartime fuel distribution system

The conflict has caused extensive damage to Sudan's petroleum infrastructure, including the destruction of the Al Jaili refinery near Khartoum, increasing dependence on imported petroleum products. Foreign-exchange shortages, rising import costs, and disruptions linked to the war in Sudan and government policy have contributed to recurrent fuel shortages in SAF-controlled areas. Long queues at filling stations prompted authorities in several states to deploy security and military personnel to regulate distribution.

These arrangements, however, also created opportunities for corruption

The most commonly reported practice involved members of regular forces or allied militias obtaining fuel without queuing and reselling it on the parallel market. A public-transport driver in Gedaref said that during the most recent shortage, drivers frequently purchased petrol from members of the regular forces for around SDG 12,000 per liter (2.40 USD) compared with an official price of about SDG 7,000 (1.4 USD) (Interview with a public-transport driver in Gedarif, July 2026). A resident of Wad Madani described a similar practice, reporting purchases at approximately SDG 11,500 (2.3 USD) per liter compared with an official price of around SDG 6,900 (1.3 USD) (Interview with a resident of Wad Madani, July 2026). A retired officer in Gezira State said that allocating a dedicated filling station to members of the regular forces did not eliminate the practice; personnel continued to resell fuel obtained there on the black market (Interview with a retired officer in Gezira State, July 2026). The media has also reported similar practices.

Sources also described corruption at filling stations. Four interviewees in Khartoum, Gedarif, Gezira, and Kassala said they paid between SDG 5,000 and 10,000 to personnel supervising queues in exchange for priority access (Interviews with four sources in Khartoum, Gedaref, Gezira, and Kassala, July 2026). Two sources in Khartoum and Gezira reported that some personnel offered to drive customers' vehicles into stations for SDG 15,000–20,000 (3-4 USD), while some petroleum-administration employees allegedly issued emergency fuel authorizations to ineligible recipients in exchange for payments (Interviews with two sources in Khartoum and Gezira, July 2026). STPT could not obtain an official response to these allegations.

Taken together, these accounts point to weaknesses in fuel-distribution governance, where an artificially low standard price can create informal markets for access, allowing individuals with institutional authority to convert regulatory power into private income. This can compound the economic burden of shortages, undermine confidence in state institutions, and normalize corruption.

These practices also sit within longstanding concerns about transparency and financial governance in Sudan's petroleum sector. An International Monetary Fund (IMF) assessment

previously highlighted institutional weaknesses, limited transparency, and governance challenges in the sector. Reducing these risks requires greater transparency across the petroleum supply chain, clearer oversight of emergency distribution arrangements, digital systems that track fuel allocation and movement, and enforceable accountability mechanisms for officials and security personnel involved in distribution. Emergency measures designed to manage scarcity should reduce discretion rather than create new opportunities to monetize access to public resources.

This piece is part of a series documenting everyday corruption during Sudan's war, examining how weakened institutions, declining oversight, and the erosion of the rule of law have embedded corrupt practices in daily life. By focusing on often-overlooked forms of corruption, it highlights their role in sustaining broader systems of abuse and impunity.

International developments

Continued contention over chemical weapons allegations:

Sudan and the United States continued to trade allegations related to chemical weapons use. The US expanded sanctions based on the allegations in July, banning the export of most US products, although humanitarian needs are exempted. The US imposed more limited sanctions after the initial determination in April 2025. The US says that SAF refused to acknowledge its chemical weapons use and engage to avoid further sanctions. SAF authorities said the United States had not taken them up on its offer to investigate allegations of chemical-weapons use.

US Congress is re-engaging on Sudan: Human Rights Watch highlighted two Sudan-related bills, while a bipartisan group of senators urged stronger leverage over alleged external support to the RSF, including possible restrictions on some arms transfers to the UAE, which continues to deny supplying the RSF. This engagement marks a shift from deference to the administration's approach in its early days.

US unveils new peace proposal: In mid-July, the US proposed a new humanitarian truce. The

plan includes five points: humanitarian aid access; protection of civilians; permanent ceasefire negotiations; launching a civilian-led political dialogue; and reconstruction. The RSF accepts a truce in principle but rejects withdrawal from territory it controls; SAF insists on withdrawal from occupied population centers. The gap reflects material incentives, not simply negotiating positions. Territory provides revenue, logistics, and political leverage, while continued external resupply preserves fighting capacity.

International actors still seeking coordination: International actors continue trying to rationalize their approaches to Sudan diplomacy. The Arab League and United States established a regular coordination framework, while the Intergovernmental Authority on Development (IGAD) convened another forum of special envoys and Quintet representatives. This coordination can help to consolidate leverage among international actors. However, coordination alone is not enough. A coordinated mechanism will still fail if Sudanese actors do not trust it. The meaningful test is whether mediators can both coordinate leverage and promote trust.

Expanding the arms embargo: The G7 and EU foreign policy chief called for extending the Darfur arms embargo across Sudan. The case is increasingly compelling as drones and weapons move through national and regional networks far beyond Darfur. But geographic expansion alone will not constrain supply chains that operate through civilian aircraft, commercial companies, and intermediary jurisdictions; they must also be effectively enforced. An effective international policy on Sudan must embrace a variety of tools—sanctions, arms controls, diplomacy, humanitarian negotiations, and political facilitation—deployed as part of a coherent strategy. A more effective strategy would align them around a single sequence: constrain external resupply, protect civilians and critical infrastructure, secure a verifiable humanitarian truce, and use economic and diplomatic leverage to shift the belligerents from battlefield competition toward negotiation.

Regional dynamics

Possible spillover to Chad: The Sudan–Chad frontier is linked to RSF supply routes, and as noted in the security section above, fighting has increasingly focused on the border area. A Sudanese drone strike inside Chad in July exacerbates the risk. Chad's decision to withdraw from the International Criminal Court (ICC) could also weaken regional cooperation on accountability. The key issue has been resource flows. Aircraft, cargo, border crossings, and financial transactions provide more useful indicators of conflict enablement than political declarations alone.

Increasing tensions in the Horn increase the risk of regionalization: Burhan's July visit to Eritrea highlighted deepening SAF–Asmara ties amid regional polarization. Relations with Ethiopia remain sensitive amidst accusations of supporting rebel forces on both sides of the border. In addition, Sudan attributed a temporary Nile-level decline partly to the Grand Ethiopian Renaissance Dam (GERD), while experts renewed calls for a binding operational framework. In early August, Ethiopian federal–Tigrayan fighting also spilled toward Gedaref, reportedly affecting refugee communities. Amidst accusations from SAF that the federal authorities are supporting the RSF and federal authority accusations that SAF is supporting Tigray, this violence also increases incentives to take sides, increasing the risk of regionalization

Delayed elections increase tensions in South Sudan and the risk of spillover: Abyei remains a potential source of bilateral friction as residents protested electoral arrangements and civil society urged renewed dialogue between Juba and Khartoum. This comes as South Sudan faces the risk of violence associated with slate elections (whether they are actually help, while cross-border trade and alleged gold laundering create additional economic interdependence. Sudan–South Sudan relations are therefore increasingly a border-governance and political-economy issue: Abyei, trade, migration, and gold flows can reinforce one another, making localized disputes harder to contain.

Houthis threaten Red Sea access: The closure of the Strait of Hormuz since the start of the

Iran War has increased international reliance on the Red Sea. Houthi leaders declared a naval blockade against Saudi Arabia in July, potentially threatening access to the waterway. For SAF, this creates diplomatic leverage by allowing it to present itself as the recognized security authority of a strategically important Red Sea state. Maritime cooperation should therefore be kept distinct from political recognition: Sudan's geographic importance should not allow functional security partnerships to predetermine the question of postwar political authority.

Regional outlook: Sudan's war is regionalizing primarily through flows of weapons, gold, and refugees, rather than formal intervention. Regional diplomacy therefore needs to address these enabling systems—rather than treating neighboring countries only as mediators standing outside the war.

Forward look: from territorial gains to systemic leverage

The next phase of the war will hinge on whether SAF can convert its Kordofan gains into durable territorial control, and whether the RSF can offset those losses through mobility, drones, a secure base, and external supply. The Omdurman–El Obeid Road will be an early test: sustained commercial and humanitarian movement would signal consolidation of SAF gains; continuing insecurity would show their vulnerability.

Current frontlines are hardening over time, leaving civilian actors a narrowing window to shape the transition before these institutions become too entrenched

International actors are showing willingness to engage in a wider range of policies, but need a clearer, more cohesive approach to significantly impact the situation on the ground.