

# Syria in 2021: Forecast for a Protracted Crisis

January 2021

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## Introduction

As 2021 begins, humanitarian and development actors working on Syria must confront a host of new challenges. Donors, policymakers, and aid implementers assessing priorities for the year ahead may draw useful insights from the events of 2020. For much of the past year, conflict conditions in Syria were frozen, marking the longest period of essentially static frontlines since the conflict began, a decade ago in spring 2011. Nonetheless, the structural issues that underpin the protracted humanitarian crisis became increasingly pronounced and conditions deteriorated rapidly in spite of the military stalemate. Some drivers of Syria's immiseration were unanticipated. The mobility restrictions and economic slowdown brought on by the COVID-19 pandemic were unforeseen, and they aggravated conditions in virtually all sectors. Yet, the most impactful dynamics — among them currency depreciation, import challenges, fuel and wheat shortages, political consolidation by the Assad regime, state fragmentation, and the growing complexity of the aid environment — were set in motion long before 2020 dawned or the novel coronavirus appeared. Understanding these factors is essential to anticipating the conditions that lie ahead.

COAR began 2020 with a report identifying four key thematic areas that would guide our research and analysis: decentralisation and fragmentation, the Government of Syria's efforts to recapture territory, the evolution of Syrian civil society, and nationwide economic deterioration (see: [Syria in 2020: New Response Challenges to an Evolving Crisis](#)). The events of 2020 furnished abundant evidence that trend forecasting in a complex crisis is a humbling exercise. Nonetheless, on balance, the four subject areas we identified are still relevant to the international aid response, and, as such, they will remain key focuses of our research in 2021. This paper offers a brief overview of major developments from the past year, and it lays out our research agenda for the year to come.

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## Key Events of 2020

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**5 MARCH:** A Turkish-Russian ceasefire pauses the Government of Syria's Idleb offensive, which had displaced nearly 1 million people.

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**22 MARCH:** The first COVID-19 case in Syria is confirmed. A brief lockdown is imposed shortly thereafter. Yet, economic and social pressures impede a strict public health response, and a hands-off approach sets in as the nation careers toward rampant community spread.

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**17 JUNE:** The Caesar Act enters force. The threat of secondary sanctions looms over the Syrian economy.

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**11 JULY:** The UN Security Council reconfigures the cross-border resolution for the second time in six months, reducing its scope.

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**2 NOVEMBER:** Russia sponsors a conference in Damascus on refugee returns. Many promises are made, few have been realised.

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**19 NOVEMBER:** A faction within the Syrian opposition announces — then walks back — its willingness to prepare cadres to stand in domestic elections, sparking debate about the strategic direction of the opposition.



COVID-19 arrived in Syria in spring 2020. Image courtesy of Turkiye Hashtag.

## Decentralisation (and Fragmentation)

### What happened?

Decentralisation is a defining feature of the Syrian landscape, and it is an evolving reality with which humanitarian and development actors must contend. As we noted at the beginning of 2020, “understanding how the Government of Syria manifests its powers locally will thus be one of the critical questions facing the Syria response.” As the Syrian state atrophies and its effective presence fragments locally, overarching policies — including for aid implementation or access — are likely to weaken or disappear altogether, if they ever existed at all. The resulting changes have impact in both administrative and security spheres.

Perhaps nothing demonstrates the impact of decentralising forces in administrative matters more clearly than COVID-19. The fact that healthcare networks are divided into three parallel systems follows

from Syria’s territorial fragmentation, with different systems in operation in Government-held territory, northwest Syria, and the northeast. In Government-held areas, authorities’ unwillingness to strictly implement even rudimentary prevention measures has been a surprising development, given the security state’s omnipresence and the unrelenting efforts to consolidate power and neutralise dissent. The Government of Syria briefly experimented with strict lockdown measures, but reversed course in the face of social and economic pressures, paving the way for an approach that seeks above all to minimise economic impact and popular resistance (see: [Syria Update 4 May 2020](#)). Syrian authorities have reasoned that apparent indifference is less costly than doomed attempts to contain the virus’s spread (see: [Syria after COVID-19: No Relief for an Ailing Economy](#)). The Government of Syria’s pandemic response therefore illustrates the way in which capacity




limitations have weakened the state and shortened the reach of overarching, region-level policies. Similar economic questions loom in Syria's other regions, where additional structural vulnerabilities are also present. For instance, in northeast Syria, the evident disparity between rural Arab areas, which have limited private or institutional health capacity, and urban Kurdish or mixed Kurdish-Arab communities, which account for the bulk of 'official' public health resources, is an indicator that fragmentation, inequitable resource allocation, and even aid politicisation are concerns that are not limited to Government of Syria areas.

Nowhere has security-sector decentralisation been more evident than in southern Syria. Events like the siege on As-Sanamayn demonstrated that the Government of Syria could sustain short-term shows of military force to overwhelm latent pockets of unreconciled opposition actors (see: [Syria Update 9 March 2020](#)). Nonetheless, security conditions in southern Syria steadily deteriorated throughout 2020, as assassinations and armed attacks continued. Many of these targeted Government of Syria security forces or local civil servants. Indeed, far from witnessing the reintroduction of a uniform security policy after reconciliation agreements expired, the south has witnessed further fragmentation. In eastern Dar'a, the Russian-sponsored 5th Corps expanded considerably, as reconciled former opposition fighters flocked to the Corps's 8th Brigade, a unit headed by former opposition commander Ahmad al-Oudeh (see: [Syria Update 29 June 2020](#)). In June, rare public protests erupted in neighboring As-Sweida Governorate over the state's mismanagement of the economic file. Although the area has long distanced itself from Damascus, it is notable that demonstrators publicly called for the ouster of Syrian President Bashar al-Assad (see: [Syria Update 15 June 2020](#)). Although authorities did arrest suspected leaders of the protest movement, it is noteworthy that detainees were reportedly quickly released, and the community largely avoided a harsh, punitive crackdown. Subsequent efforts by Russia to target As-Sweida for military recruitment may in part be a strategy to co-opt fighters from the predominantly Druze area in the hopes of neutralising potential dissent against the Government of Syria. However, the continued unrest in Dar'a is evidence that Russia faces limitations as a local power broker, and neither it nor the Syrian Government has yet demonstrated the capacity to pacify southern Syria.

## What next?

Administrative decentralisation will remain a paramount concern for aid implementers, donors, and decision-makers. In addition to the continuing pandemic

response, the rollout of a vaccine — or vaccines — will be a test of safeguards designed to ensure aid neutrality. How populations within each of Syria's fragmented health systems will acquire the vaccine is a foremost concern. Balance between urban and remote and rural communities is particularly important. The logistics of field distribution and efficient rollout will be equally challenging, and issues such as access will likely come to the fore. Response actors will be pressed by the need to ensure that relevant authorities do not attempt to monopolise vaccine access to reward loyalists and punish disfavored populations, whether implicitly or overtly. If Syria does manage to secure vaccine doses privately, it is likely that priority access will be given to select populations. Aid actors may be left to meet the challenge of reaching remaining beneficiary pools.

Southern Syria will remain a bellwether of decentralising and fragmenting security dynamics. Conditions on the ground in Dar'a in particular are expected to remain fluid. Southern Syria has often been used as a test case for the various phenomena that have obsessed analysts throughout the conflict. At various times, the region has been seen as the focal point of donor-funded local governance initiatives, the Western-backed armed opposition, reconciliation agreements, and the perennially discussed Iran-Russia rivalry in Syria. The fact that southern Syria has frequently been used as a case study to assess these phenomena is evidence — among other things — of the region's dynamism and its capacity to change. In all likelihood, southern Syria will remain a key battleground in Syrian decentralisation, as the state seeks to impose *fait accompli* rule in communities where competing power structures are increasingly formalised and further outside its reach. 

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## Government of Syria Recapturing Territory

### What happened?

**G**overnment of Syria advances into northern Hama Governorate and southern Idlib Governorate in early 2020 were the only significant territorial changes of the year. Time alone will tell how decisively COVID-19 has shaped the trajectory of the conflict in Syria. However, nationwide lockdowns and the accompanying freeze on major military offensives — attributed both to the pandemic itself and to the preference of Turkey and Russia to defer open conflict



On 5 March, the Russian and Turkish presidents reached a ceasefire agreement that freezes frontlines in northwest Syria. Image courtesy of IPA News.

in Idleb — have contributed to the slowdown in conflict along Syria's northern border.

Since March 2020, the interlude brought on by the raging COVID-19 pandemic has allowed a slow but significant reconfiguration of ground realities in northwest Syria. Northern Aleppo — the Euphrates Shield and Olive Branch areas — experienced no significant territorial changes, although attacks in Al Bab and Afrin sowed instability locally, likely at the hands of SDF-aligned cells (see: [Syria Update 30 November 2020](#)). All told, Turkey's efforts to cement its service, administrative, and military presence in northern Aleppo continued (see: [Needs-Oriented Strategic Area Profile – Northern Corridor](#)).

The year began with an intense military offensive in Idleb, yet the relative calm that prevailed for most of 2020 has allowed Turkey to cement its position in that governorate as well (see: [Syria Update 28 September 2020](#)). On 5 March 2020, Russia and Turkey reached a pivotal ceasefire agreement that froze frontlines and established joint patrols in a 12 km-wide corridor surrounding the M5 highway (see: [Syria Update](#)

[9 March 2020](#)). The agreement held for nearly 10 months. Thus far, it has survived deliberate attempts — presumably by armed opposition or radical factions — to sabotage joint patrols or reignite open conflict with Russia and the Government of Syria. It has also weathered the intermittent clashes, exchanges of direct fire, shelling, and bombardment that continue at frontlines in southern Idleb, northern Hama, and Lattakia. Beginning in August 2020, Turkish Armed Forces began to systematically withdraw from a string of observation posts encircled by Government of Syria territory (see: [Syria Update 26 October 2020](#)). By pulling stakes and retrenching within opposition-held territory, particularly in the Jabal al-Zawiya stronghold, Turkey has established a formidable presence in Idleb.

No significant changes in territorial control took place in northeast Syria in 2020. Russia and the Government of Syria sought — with little apparent success — to widen their power bases, recruit local proxies, and gain influence over the Self-Administration (see: [Syria Update 7 September 2020](#)). However, persistent speculation among analysts over Turkish military pressure against the SDF did not force significant changes. That said,


the year ended with uncertainty over the fate of SDF-controlled Ein Issa, where Russia and the Government of Syria are leveraging Turkish military pressure to compel the SDF to allow the Syrian Government to take control of the community (see: [Syria Update 7 December 2020](#)).

## What next?

The impediments to Government of Syria territorial expansion are arguably as formidable now as at any point since Russia's direct military intervention in 2015. Olive Branch and Euphrates Shield areas remain out of reach for the foreseeable future, unless Russia and the Government of Syria forego caution and risk a direct confrontation with Turkish forces and their local proxies in the areas where they are most firmly entrenched. In Idleb, the ground realities that took root in 2020 now raise the potential cost of efforts by the Syrian Government to break the current stalemate. Turkey has fortified Idleb and its forces are now the chief barrier to Government advances into the opposition-held northwest. Turkey's relative success during rapidly escalating direct confrontations with Russia in February and March 2020 will likely embolden Ankara to hold current positions, or make greater demands of Russia in exchange for territorial concessions.

The relationship between Russia and Turkey is complex, and the parties' tactical goals are frequently irreconcilable. However, Russia has not yet shown a willingness to challenge Turkey's redoubled presence in the northwest. On the contrary, in early 2020, Russia reportedly called off support for further Government of Syria military operations in the northwest, ostensibly due to the pandemic. Apparently acquiescing to this reality, widespread military recruitment campaigns by the Syrian Government throughout territories under its control have reportedly slowed. In parallel, Iran has reportedly announced its willingness to withdraw the Fatemiyoun forces from Syria, likely in response to diminished need along current northwest Syria frontlines. That said, Damascus's goal of reclaiming "every inch" of Syrian territory has not changed. The displacement of nearly 1 million people at the height of the Syrian Government's last northwest offensive offers an object lesson in the dire humanitarian costs that will accompany a scorched earth campaign by Damascus to advance into Idleb.

Dynamics in northeast Syria are likely to converge at the nexus of internal, national, and regional pressures. Internally, rapprochement between the ruling Democratic Union Party (PYD) and rival Kurdish factions is likely to remain a priority. Likewise, the

PYD's declared intention to link arms with the Syrian opposition — an entity, or entities, it has yet to clearly define — will likely be a key feature of its political agenda. The PYD's talks with the Government of Syria stalled when the Trump administration abandoned its plan to withdraw troops from Syria. Emboldened by the prospect of ongoing international support, the PYD leadership has little reason to cut a deal with Damascus, although Turkish military pressure may yet test their resolve. Finally, how the Self-Administration navigates Turkey's sensitivities will be a defining challenge for 2021. Turkish military pressure still has the power to force the Self-Administration to make unwanted concessions. 

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## Syrian Civil Society

### What happened?

As 2020 began, we highlighted the shortcomings of the prevailing narratives about shrinking civil society space in Syria. As we noted at the time, independent and formal civil-society organisations and NGOs have largely been forced to disband or move underground. However, this inconvenient truth does not definitively settle the matter of 'space' and 'access' for the international response. Now, as before, the challenge "facing the international community is not limited to finding the means to utilise civil society organisations in Syria to conduct service delivery, humanitarian aid, and development work — although this remains an important issue. The challenge increasingly revolves around the need to find the means to work with, support, and empower various civil society entities that are not primarily focused on service delivery. Many of these entities are not formally registered, do not have bank accounts, or lack defined structures; as such, direct support in a traditional sense is likely not feasible."

Just as the conflict itself was frozen for much of 2020, important social and political developments were also put on hold. Donor-funded conferences, capacity-building workshops, training sessions, and other venues for identifying and cultivating relationships with and among civil society actors were canceled or forced online. There is little doubt that important opportunities to advance a civil society agenda in Syria were lost or rendered less effective due to COVID-19. However, the pandemic has also forced Syrians to improvise in unexpected ways, including by creating networks to distrib-





The UN Security Council meets in December 2019 to discuss the renewal of the cross-border authorization for Syria. Image courtesy of Tass.

ute oxygens cylinders, facilitating potentially lifesaving medical intervention.

Social, political, and aid initiatives suffered setbacks in myriad domains. The Syrian Constitutional Committee registered no substantive progress (see: [Syria Update 31 August 2020](#)). In June, Russia withdrew from a (largely defunct) deconfliction system designed to safeguard aid workers (see: [Syria Update 6 July 2020](#)). In July, UN Security Council Resolution 2533 managed to salvage the cross-border response, but only by reducing its geographic scope (see: [Syria Update 13 July 2020](#)). July parliamentary elections were correctly viewed as an exercise in managed democracy, but they also cast light on the Government's strategy to cement its power and co-opt a wartime business elite into formal government (see: [Syria Update 27 July 2020](#)). In that respect, the parliamentary elections highlighted a major throughline of civil society in 2020: the Assad regime's efforts to consolidate its control and neutralise or co-opt potential threats or independent voices. Two such developments were of particular importance.

First, the analytic community was engrossed by the public collapse of Rami Makhlof, cousin of Syrian President Bashar al-Assad and once Syria's most prominent businessman. Rumors of a rift within the innermost circle of the Assad regime surfaced in late 2019, and Makhlof's fortunes changed irreversibly when he was targeted for asset seizure in April 2020 (see: [Syria Update 27 April 2020](#)). In short order, Makhlof's business and charitable empire was systematically dismantled and parceled out. Notably, Asma al-Assad absorbed Makhlof's al-Bustan Association into her own network of social enterprises, and now heads it under the name al-Areen (see: [Syria Update 2 November 2020](#)). Makhlof has continued to release occasional video messages decrying his treatment and criticising heavy-handed rule by the Assad regime of which he was, until recently, an indispensable part.

Second, in December, Bashar al-Assad made a provocative address to the Sunni religious establishment (see: [Syria Update 14 December 2020](#)). The speech specifically criticised 'neoliberalism',

Western values, and religious extremism. Al-Assad's speech characterised Syria foremost as an Arab, Sunni nation. In that sense, the address was made to curry support among a conservative religious establishment. Al-Assad's foray into religious jurisprudence is also a further step toward the establishment of Syrian state authority over religious affairs. Yet, it implicitly alienates liberals, religious and ethnic minorities, and many of the constituencies that the Assad regime has cultivated as a social base throughout the conflict.


## What next?

Significant political and structural challenges will face the Syria response in 2021. Foremost among them is the Syrian presidential election, which is expected in spring 2021. Opposition-aligned civil society organisations have vehemently protested that elections cannot proceed without prior constitutional reforms. Likewise, much of the international community also views the Syrian Constitutional Committee's work as a vital precursor to legitimate presidential elections, as per UN Security Council Resolution 2254. Without constitutional reforms, elections are illegitimate, they contend. Russia and the Government of Syria have a different interpretation, although the Kremlin has reportedly pushed for lesser reforms that could be interpreted as a superficial attempt to legitimise the electoral process. Local sources indicate that Moscow reportedly advocated — and failed — to amend Syrian electoral laws concerning eligibility and the number of MP signatures required for candidacy. This failure diminishes the prospect that al-Assad will face a serious challenger. There is wide agreement among analysts: barring unforeseen intervention or a major change in the context, al-Assad will win re-election. Should this happen, the international community will have to square its approach to Syria to meet the reality that Russia and the Government of Syria will likely adopt a triumphalist posture, and they will most likely consider the election a mandate that satisfies a key stipulation of Resolution 2254.

Reauthorisation of the UN cross-border resolution in July may be a litmus test of the international community's position on Syria — albeit a test in which status quo maintenance is more likely than a major change. Given that northeast Syria's Ya'robayah crossing was scrapped during renewal debates in 2020, only northwest Syria is covered by the measure, which allows UN cross-border convoys to deliver aid without the assent of Damascus. Among analysts, there are some who believe that the measure's renewal will be a key test of the new Biden administration's position on Syria. Likewise, they fear that Russia may view the resolution as a proving ground

for its Syria policy in the Biden era. However, any debate is likely to be more smoke than fire. It is important to note that Moscow's strategic partnership with Ankara limits its willingness to push to end UN cross-border convoys, which Turkey views as a buffer against a refugee crisis on its southern border.

Naturally, Syrian civil society organisations and individual actors will also be forced to confront these issues. Equally critical will be their response to the apparent rise of a 'counter-civil society'. Russia, Iran, and Asma al-Assad have all sought to realise parochial interests through civil society initiatives in Syria. Russia continues to fund and support scattershot, highly politicised civil society and aid activities, including through religious organisations. Iran has also vied for greater influence via local rehabilitation, aid activities, religious outreach, and military recruitment in southern Syria, Rural Damascus, Aleppo, and Deir-ez-Zor. Although they sometimes meet with community resistance, these efforts become more likely to succeed as Syrians grow more destitute. Whether Russia and Iran will rise to the occasion to provide greater support to needy Syrians will be a test of their Syria strategies. Unwillingness to step up as needs worsen will damage their prestige and standing among the population, but large-scale or coordinated efforts are unlikely. Finally, Asma al-Assad's leadership at al-Areen highlights her increasing influence over civil affairs; the first lady's new role makes it clear that the Assad regime will continue to seek ways to harness aid and social support in its own interest.

Finally, pressures concerning refugee return are also likely to grow. Although November's refugee conference has not sparked the wave of spontaneous returns that Moscow and Damascus had suggested it might, Syrian refugees do face mounting pressures. Among major regional host nations, only Jordan enters 2021 unburdened by a major national political or economic crisis. Nonetheless, the World Bank **estimates** that 1.1 million Syrian refugees in Lebanon, Jordan, and Iraq have been plunged into poverty during the COVID-19 pandemic. The pandemic has also had a pronounced impact on the flagging economy of Turkey, which hosts 3.6 million Syrian refugees. In each of these contexts, flashpoints for tensions with host communities are already a concern, while labour opportunities, social stigma, protection issues, and even basic stability will likely grow more troubling. Support to host communities will therefore remain vital in order to stabilise countries with significant refugee populations and alleviate the pressure to return. 



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## Economic Deterioration

### What happened?

Throughout 2020, much of the Syrian analytic community focused its attention on the country's worsening economic destitution. The Syrian economy entered 2020 at a historic low point, and by nearly every relevant metric it deteriorated steadily throughout the year. The exchange rate plummeted from roughly 900 SYP/USD in January 2020 to roughly 2,750 SYP/USD 12 months later, making 2020 the worst year on record for the Syrian currency. WFP assessments show nationwide food prices have increased by 236 percent since December 2019. The liter price of fuel rose markedly, as subsidies were progressively walked back throughout the year (see: [Syria Update 26 October 2020](#)).

Structural weaknesses were pervasive. The Government of Syria's 2021 budget is the smallest since the onset of the conflict (see: [Syria Update 5 October 2020](#)). At least in part due to financing challenges, Damascus lost out in a wheat bidding war with the Self-Administration, thus compounding the wheat and bread shortage that has bedeviled Government-held Syria (see: [Syria Update 8 June 2020](#)). Foreign currencies came into wider circulation in outlying areas as the national economy fragmented (see: [Cash Crash: Syria's Economic Collapse and the Fragmentation of the State](#)). In May, the Syrian Government announced a list of new import restrictions, using protectionism as a guise for policies designed to prevent foreign currency outflows (see: [Syria Update 26 May 2020](#)). In June, al-Assad sacked Prime Minister Imad Khamis and appointed Hussein Arnous in his place. Khamis was seen as a scapegoat offering to demonstrators, who turned out across the country in protest against dire economic conditions — following the lead set by protestors in As-Sweida (see: [Syria Update 15 June 2020](#)). Driven by salary expectations and the (often false) promises of foreign recruiters, Syrians continued to mobilise with domestic armed groups, and, in a worrying development, thousands deployed as mercenaries to foreign battlefields (see: [The Syrian Economy at War: Armed Group Mobilization as Livelihood and Protection Strategy](#)). Fighters were sent to Libya in growing numbers, and they attracted attention fighting on both sides of the Nagorno-Karabakh conflict (see: [Syria Update 12 October 2020](#)). The Caesar Act entered full force in June (see: [Syria Update 22 June 2020](#)). The threat of secondary sanctions is now a major hurdle to foreign direct investment and private business initiatives in Syria.

### What next?

Worryingly, every economic trend will likely continue on its current trajectory, or worsen, in 2021. COAR will continue to deepen its economic analysis to provide operational insights into the overlapping drivers of economic destitution in Syria. We will also continue to follow emerging thematic trends, such as the expansion of the crime-conflict nexus. In a worrying turn, the conflict continues to force Syrians of all backgrounds to contend with or engage in predatory economic activities. Some of these activities — such as military service and the routine demands by local security forces for protection money or checkpoint crossing fees — are overtly violent. Others are less obvious; these include bribes demanded by civil servants, or the coercion of women and girls into sex work. Gender-disparate impacts of economic conditions may be especially concerning. Potentially reduced employment opportunities in military and security services — or overall salary deflation — may bring women into greater competition for livelihood opportunities with demobilizing men, for instance (see: [The Business of Empowering Women](#)).

Naturally, the role of the Syrian state will also be critical. While the Assad regime retains its lock on power, the Syrian state itself is crumbling. The Government of Syria remains the nation's largest single employer, and a traditional labour guarantee has underwritten the social compact between citizens and state in Syria. The conflict itself did obvious damage to this relationship, but the state's fiscal collapse threatens what shreds of this agreement remain. Public sector salaries are now tantamount to starvation wages. An employee at the highest pay grade earns a base salary starting at 57,495 SYP, less than \$20 — well below the global poverty line. Commensurate cuts to service quality and the basic functions of the state will also remain key concerns. As of writing, Damascenes experience several hours of power outage for every hour of service. Acquiring subsidised fuel and bread has become a humiliating ordeal. Ramping up domestic oil production is unlikely in the foreseeable future. In parallel, the state is increasingly reliant on the population itself as a revenue stream, monetised through exorbitant fees demanded for state services and documentation. A passport now costs as much as \$800, while the state sells military service waivers for as much \$8,000 (see: [Syria Update 21 December 2020](#)). Remittance channels are tighter than ever, as the Government of Syria manipulates conversion rates to capture incoming revenues. As such, large swathes of the population are at risk of being cut off from one of the nation's most important economic lifelines.



File photo of the Syrian parliament. Image courtesy of Al-Araby.

In some sense, Syria is ‘criminalizing’. Shabiha gangs and local militias continue to run roughshod over communities with impunity. Syria is now the nexus of the regional amphetamine trade. Electoral procedures have been deployed to mint a new governing class drawn from the wartime power elite and conflict entrepreneurs. Meanwhile, daily life in Syria has become unsustainably challenging. Even areas that were untouched by direct conflict are now feeling the bite of worsening economic conditions. Syrians will struggle to find work. Many who do have full-time employment earn salaries that are virtually worthless. One in 10 families relies on child labor as a source of household income. For the international Syria response, the challenge is not identifying the specific areas of concern — for virtually every indicator is troubling. Rather, the challenge is to identify ways to implement in accordance with these sobering realities. ❁



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## Appendix

We asked outside Syrian researchers to provide their insights on the events of 2020 and what they expect for the year to come. Responses were provided in Arabic and translated by COAR. Two sources requested anonymity as a condition for participation.

### Outlook for the Syrian Economy in 2021

**Anonymous — Syrian economic researcher**

The challenging economic legacy that began with the years of the crisis and deepened in 2020 will continue in 2021. This has already been manifest in the early days of the new year, where we have seen economic headlines concerning electricity rationing, the fuel crisis, and shortages of bread and other household goods. Adding to this are waves of price rises for consumer goods, which will remain expensive.

Accordingly, the Government's attempts to adopt policies and procedures to manage the crises (not resolve them) will remain the prevailing mentality in the future. Despite leaks that some economic conditions will improve in light of the upcoming presidential election, whether through actions by the Government itself or through the largesse of its allies, Russia and Iran, these matters do not appear well-founded. At best, if this does come to pass, it will be a 'safety valve' to manufacture the appearance of economic success as a means of generating renewed support for the Assad regime. Likewise, the economic cost will be huge, especially because it will push prices higher. In particular, in the event that state employee salaries are raised, it will also increase the price of services and the consumer goods, especially fuels.

All of these observations and others suggest that the Syrian economic situation will worsen, especially as the authoritarian mentality is becoming fiercer as it responds to the interests of war profiteers and the economic elites. This is particularly true as state plunder (as seen in Syria's economic history) gives way to robbing citizens directly, by instrumentalising power to the benefit of the ruling economic system.

### The Future of Control Maps in Eastern and Western Syria

**Manhal Barish — Researcher with the WPCS project at the European University Institute/ Middle East Directions programme**

Following a lull in Idleb Governorate, which lasted approximately 11 months after the signing of the accord between Erdogan and Putin, or what became known as the "Moscow Agreement" – an attempt to revive the 2018 Sochi Agreement between the two countries — signs of escalation at frontlines have recently appeared, especially in the Ghab Plain and Jabal Al-Zawiya, south of the M4 motorway. During this period, Russia boycotted joint military patrols with Turkey several times, and it has ceased participating altogether since October. Since last March, Turkey has not been able to fulfill its obligations to open the road for commercial movement, eliminate radical organizations, and establish a 6 km-deep security corridor on both sides of the road free of opposition factions.

Now, the regime's military build-up in the Idleb region and the commencement of artillery shelling and rocket attacks on Ariha city indicate that fighting is near. That said, the Turkish military deployment in the Jabal al-Zawiya region south of the M4 will make any military operation launched by the regime and its allies difficult. Yet, it certainly won't stop it. In the event that such an attack begins, the scenario of a clash between regime forces and Turkish forces will be repeated, as happened in February 2020, when dozens of Turkish soldiers and thousands of regime forces were killed. Naturally, Moscow will not object to a mild confrontation between the two sides as long as Turkey ultimately imposes a ceasefire.

It is possible to draw out many scenarios for the attack plan in Idleb, but the nature of what is happening on the ground may alter conditions significantly. Russia's goal of controlling transit roads indicates that any attack will be focused, with the aim of controlling the main transit road and imposing security in the area to the north of the road at a depth that may exceed 6 km. At the same time, it is important to recall that for various political reasons, the Bab al-Hawa crossing is now the main entry point for cross-border humanitarian aid under UN Resolution 2533 of 2020, which stipulated that aid convoys be permitted for a one-year period that ends next July. This adds weight behind the alternate scenario in which Russia seeks to channel aid distribution through Damascus, by controlling the Bab al-Hawa crossing.



In the event that the regime controls the Bab al-Hawa crossing, the humanitarian file and the need to deliver humanitarian aid to more than three million people in need in northern Syria will change in important ways, as will other factors.

Turkey and the Syrian opposition may be forced to accept the entry of UN aid in northern Syria via coordination with the regime government. In turn, this has implications for the normalization of relations between the regime and Turkey. It also impacts relations between the regime and the opposition, as Turkey would lose the exclusive ability to provide aid to the displaced in northern Syria. The regime's presence in the western countryside of Aleppo, 18 km from the Bab al-Hawa crossing, may facilitate its ability to launch such an offensive, making it less costly militarily for the regime, while controlling the crossing would give it more important political gains than controlling Jabal al-Zawiya and the M4 road. Additionally, it would not lead to a large wave of displacement, but would separate Idlib from Afrin and the Euphrates Shield areas.

To the east of the Euphrates, the situation is heading towards a calm at the regional level with the start of Biden's term, as his administration presents an obstacle to Ankara concerning an attack east of the Euphrates River. This is especially true with the appointment of Brett McGurk as the Middle East and North Africa Coordinator on the National Security Council. Ankara has interpreted this as a negative message from Biden. McGurk served as the Special Presidential Envoy for the Global Coalition to Counter ISIS. He had an unfriendly relationship with Ankara because of his support for the Kurdish People's Protection Units (YPG). The YPG hopes that McGurk's arrival will lead to an improvement in conditions east of the Euphrates, concerning the Russians, the regime, or against Turkey. The expected return of ISIS also contributes to the rise in the SDF's stock in Washington, considering that it is seen as the military arm of the international coalition on the ground.

In the *badia* region west of the Euphrates, ISIS moved from operating in isolated security zones to imposing its control over several pockets in the Syrian *badia*, especially near the Palmyra-Deir-ez-Zor road. It has launched dozens of attacks on the road, the last and most violent at the end of last year, killing 40 members of the 4th Division, led by Maher al-Assad, brother of the Regime's president. The fight for control of the road is considered an important issue for the regime's allies. ISIS's cutting off the road would effectively lead to the siege of Deir-ez-Zor Governorate, as happened in 2013, and would lead to the regime's reliance on the Self-Administration for vital resources, while crude oil

will be prevented from reaching the Homs and Baniyas refineries. Moreover, the Tehran-Damascus road through Iraq and Deir-ez-Zor will also be cut off. In other words, Iranian support for militias in the center of the country will stop, along with gasoline and diesel that Iran sends in daily from the Abu Kamal crossing to Damascus.

Apart from the roads, Russian interests will be exposed to their greatest threat since their intervention in Syria at the end of 2015. Blocking the roads will, over time, lead to an ISIS blockade on the oil and gas fields in Deir-ez-Zor, while the phosphate mines in Khunayfis and Al-Suwana will remain under the constant threat of ISIS attacks, which will disrupt its already slow operation.

## Varying Conditions across Northeast Syria

### Anonymous — A northeast Syria researcher

The SDF controls a wide swathe of Syrian territory. This territory can be subdivided into regions, some of which, such as Al-Hasakeh Governorate and Kobani city, have an Arab-Kurdish mixture and are more amenable to serving as an SDF power base. By contrast, Ar-Raqqa Governorate and rural Deir-ez-Zor will be affected by the fluctuations in the political and social context. The issue of Kurdish minority rule in the latter areas will remain a primary factor in the population's position vis-à-vis the existing power structure, and it will factor in their willingness to cooperate with it, as will economic, political, and other factors. To a large extent, the SDF is synonymous with the Self-Administration, and although it has cemented itself as the dominant power in the area, it remains deeply linked to the International Coalition. To that end, few of Russia's efforts to impose its vision on the Self-Administration in 2020 bore fruit, and any expected scenario for 2021 will be tied to both its posture and the new American administration's vision for the region. Looking ahead, conditions will vary in each of these regions.

**Al-Hasakeh Governorate:** It is unlikely — for the foreseeable future — that a major reconfiguration will occur, or clashes will take place between the local population and the SDF, as the region is relatively stable. The Self-Administration's view of the governorate and the concentration of its institutions in its towns and cities — such as Al-Hasakeh, Quamishli, Amuda, Al-Malikeyyeh — have together contributed to the creation of labour opportunities for the population. So too has the

concentration of humanitarian organisations. Notably, this has been to the benefit of direct beneficiaries and the labour market itself, and it has led to conditions that are 'less bad' when compared with other regions, whether under SDF control or under the control of the Syrian government. This will be of particular importance in light of the difficult economic situation in Syria. The greater presence of Kurds in the region will also be critical, as will the region's demographic and social balance, which is amenable to the SDF, and will aid authorities in containing protests or responding to challenges to its prerogative.

Meanwhile, Darbasiyah, Tel Hmis, and other areas that abut the Turkish Operation Peace Spring area will remain potential areas for the Turkish military action, although this possibility is remote for the foreseeable future.

**Ar-Raqqa Governorate:** In the past year, Raqqa witnessed a clear intensification in reconstruction — by local actors and by international organisations — including the rehabilitation of infrastructure in Raqqa city and its countryside. The return of IDPs to the region reinvigorated the city, which in the past year became an important commercial center. Its importance now approaches that of Quamishli and Menbij. However, with the exception of Ein Issa and its surrounding area, perhaps no area is a more likely target for Turkish military activity. Indicators point to stability over the near to medium term. This contributes to a positive outlook among the local population concerning the economic status of the city, service availability, and so on.

**Rural Deir-ez-Zor Governorate:** The month of August is a point that will be seen as a critical juncture in the discussion of any tensions or major shocks that may take place in the region. August witnessed the assassination of several powerful tribal sheikhs and socially influential individuals, for which the public blamed the SDF. This was the culmination of escalation and protests that had increased in the preceding months due to the deteriorating economic situation and the shortage of services and goods, especially fuel. It was notable that after these events, the SDF's policy shifted from its approach of seeking to contain the protests, promising to resolve issues, and wooing leaders in the region. Instead, it has since sought to impose a fait accompli. This led to a strong response by the tribes, including tribal meetings and the issuance of critical statements rejecting SDF policy. We should take into account that the causes of these protests remain unresolved and have been compounded by other factors, including the growing shortage of fuel, the SDF's

widening recruitment under the 'self-defense duty' (i.e. mandatory military service), and the local population's rejection of some of the educational curricula imposed by the Self-Administration, which are contrary to local customs. These populations continue to view the Deir-ez-Zor military council negatively, and they rejected its new leadership. This is in addition to the factor of ethnic difference, in particular the view that the SDF is a ruling minority, despite the participation of Arab elements inside it. Considering all these factors, there are multiple scenarios that may stem from the continuous tensions and confrontations between the local population and the SDF, which the Syrian government will attempt to exploit to its advantage by playing the tribal card, in addition to potential Turkish actions.

During the past year, local reports and media investigations concerning corruption in the Self-Administration's activities, institutions, and general modus operandi have grown. It is possible to note a general trend shared by various constituencies in the region over these issues. The Self-Administration tried to contain this anger by arresting civilian and military figures accused of corruption, but the quick release of these figures due to a lack of evidence, and the failure to take significant measures against them increased the popular anger. This has been compounded by the absence of oversight and transparency and general labour conditions. The perceived widespread nature of corruption during the few years of Self-Administration rule may affect its support base, even among Kurds, which the Self-Administration views as its natural constituency. This comes in parallel with increasing Kurdish-Kurdish conflict alongside failed attempts at reconciliation between them. This follows attempts by the coalition to narrow the gap and reduce the intensity of the inter-Kurdish conflict. However, this opens the possibility for an increase in support for the parallel Kurdish party (linked to the Barzani family in northern Iraq), including the potential that it will gain support at the expense of the Self-Administration.

The general picture in the areas controlled by the SDF is full of disjunctures that can be exploited by various regional and international parties to undermine the SDF's authority. However, resolving some of these contradictions is up to the Self-Administration itself, especially the corruption file. The biggest challenge will be in the way it deals with issues that have no clearly defined edges, such as the ethnic challenge presented by regions with a largely Arab population. The same is true of the Turkish-Russian understanding regarding the region.

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