



# The economic situation for individuals and communities in Syria

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## Question

- How is economic activity (including the war economy) and the economic situation in Syria affecting the lives of individuals and communities?

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# 1. Summary

This report records the literature that emerged through rapid search on the impact of the war economy on day-to-day life for Syrian citizens and the economic situation for individuals and communities.

Academic literature on the war economy tended to focus on political implications rather than everyday lives. NGO and humanitarian literature has more of a focus on everyday lives but does not link directly to the broader economy or war economy. The war economy is illicit and informal so by its very nature is not discussed by Syrian inhabitants and details are not reported. Section 14 reports on data limitations discussed in the literature identified during this helpdesk review.

Some macro level economic data are outlined in section 3 to give some background on what communities are dealing with, the effects of vastly reduced gross domestic product (GDP) per capita and lower investment. Section 4 details the unemployment situation. Unemployment is high, and those who work do so with insufficient pay and in poor conditions. High inflation has reduced purchasing power which exacerbates poor living conditions. Literature on the war economy in Syria is outlined in section 5. Details of the impact on communities were not available within the scope of this report.

An informal economy has emerged as business and trade networks have been destroyed (Section 6). Looting, kidnapping and smuggling have become important sources of income although this is less prominent now that the intensity of conflict has reduced (Eaton et al., 2019). Access to resources has become politicised (Section 7).

Information identified on the industrial, agricultural and public sectors are reported in Sections 8, 9 and 10 respectively. Wide-scale devastation of industrial units has been experienced and therefore with associated job losses. Factory owners are attempting to rebuild and express a need for tax exemptions, access to finance and skilled labour. Agriculture has become a larger proportion of the economy due to the vast reduction in the contribution of manufacturing. Problems in the agricultural sector include access to water, destruction of farmlands, shortage of inputs and transportation problems.

Coping mechanisms (discussed in Section 11) include selling assets such as furniture, a resurgence of traditional professions, and selling humanitarian assets. Women and children who were not part of the workforce pre-war are looking for economic opportunities. Female headed-households are more common where husbands have been killed in the fighting and these households are increasingly vulnerable.

Humanitarian aid was estimated to be 2.2 billion US dollars in 2018 (Eaton, et al., 2019). The World Food Programme (WFP) are running a variety of projects to support livelihoods in Syria.

Mercy Corps (2018) analyse livelihood adaptation in Syria and identify a number of enabling factors: 1) functioning markets, 2) access to cash and capital, 3) social capital and networks, and 4) female and youth income earners; (Section 12).

Many Syrians are reliant on remittances (Section 13). In 2018 the World Bank estimated remittances to be 1.2 million United States Dollars.<sup>1</sup> However refugees face unemployment and structural challenges in neighbouring countries. The United Nation Development Programme (UNDP) run several support programmes in Egypt, Lebanon, and Jordan.

## 2. Introduction

The livelihoods of individuals and communities in Syria is an important area of focus. The World Bank (2017) reports that the conflict has cast a large proportion of the Syrian population into poverty and pushed people into livelihood sectors that will not be sustainable post-war. A United Nations Economic and Social Commission for West Africa (UNESCWA) (Abu-Ismaïl et al, 2016) report estimates that 13.5 million need human assistance and 12.1 million lack access to WASH (Water, Sanitation and Hygiene) facilities.

The key impacts of the conflict at a household level are unemployment, and inflation which has led to a decrease in purchasing power (ACAPS and MapAction, 2013). Syrians struggle with the pound depreciating whilst wages are staying the same (Tokmajyan, 2016). With inflation not being matched by wage increases Syrians are facing a five-fold reduction in purchasing power (SEBC, 2019). Syrians now need to earn many times the average salary to meet basic requirements (Tokmajyan, 2016). In turn this increases poverty, gives rise to negative coping mechanisms, and decreases access to basic needs (ACAPS and MapAction, 2013). The 2018 Humanitarian Needs Overview (UNOCHA, 2017) records 6.5 million food insecure (approximately one third of the population<sup>2</sup>) and another 4 million at risk of food insecurity. The government is having to borrow to spend on public service provisions rather than investing in the economy (Frontier Economics et al., 2016).

Individuals often transition from civilians to combatants as the formal economy contracts (Abboud, 2017). Reports suggest the Islamic State of Iraq and Syria (ISIS) has taken advantage of economic destitution to encourage citizens into its ranks (Khatib, 2015). They are reported (in the 2015 report) to be offering fighters USD300 per month with additional allowances for wives and children, compared to USD50 per month for living expenses offered by the Danish refugee council. Citizens go against their values to support their family.

## 3. Economic overview

The UN Economic and Social Commission for Western Asia (ESCWA) estimates the Syrian GDP to be 25 billion USD in 2016, down from 60 billion USD in 2010 (Eaton et al., 2019). Estimated economic impact of the conflict between 2011 and 2015 is an 11.6 percent reduction in per capita growth rate with an absolute impact on GDP per capita of minus 45.1 percent (Frontier

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<sup>1</sup> <https://data.worldbank.org/indicator/BX.TRF.PWKR.CD.DT>

<sup>2</sup> Using FAO population estimate

Economics et al., 2016). This is due to destruction of assets, capital flight, business closure and bankruptcy.

A large amount of capital has been moved from Syria to establish business in Turkey (Abboud, 2017). A World Bank (2017) scenario study suggests that investment is 80 percent lower than pre-conflict levels. This is due to lower overall productivity, destruction of physical capital, decrease in available labour (due to out migration). The precise impact of lower investment on individuals and communities is not explicit but undoubtedly reduces employment opportunities. The study estimates impact on GDP but not how changes in GDP affect communities on the ground.

A UNDP study on livelihoods and employment in Syria (Syrian Economic Sciences Society, 2018) describes the situation before and after the conflict. It describes the general economic and social situation to have clearly impacted livelihoods and employment in many ways with trade restrictions; destruction of production and service facilities; and displacement of businessmen, technicians, and highly educated personnel.

Lack of productivity has meant Syrians are reliant on imports which are taxed and controlled according to territorial fragmentation (Abboud, 2017). Traders have to form relations with intermediaries to move goods through checkpoints. Taxes levied at checkpoints increase the price of goods to the consumer.

Reports discussing the macro level economy were more readily available than reports describing the micro-level, details of the impact on every-day lifestyles. Much of the impact on daily life is somewhat implicit.

Abboud (2017, p98) describes “a complete collapse of household life, as reduced food availability, high prices and unemployment have created conditions in which 80 percent of households do not have enough food or lack the money to buy any.”

## 4. Unemployment

According to the 2017 Humanitarian Needs Assessment (UNOCHA, 2016) unemployment stood at 53 percent. As a result, individuals are increasingly getting involved in the military according to World Bank (2017). The report continues to say the very small proportion of those that find employment do so in the informal or war economy. The jobs are often labour-intensive, low-skilled and low-paid. Even those in stable employment are worse off as living expenses are rising with the depreciating currency.

A UNDP study on livelihoods and employment in Syria (Syrian Economic Sciences Society, 2018) reports unemployment figures have risen from 14.9 percent in 2011 to 30 percent in 2018 (Syrian Economic Sciences Society, 2018). Women are making a larger contribution to the labour market fulfilling tasks that were previously limited to men. Child labour had also increased from 10 to 20 percent in the same time period. The study estimates the workforce to have decreased to 51 percent of pre-crisis level. A need for training was identified. Most community leaders surveyed believed that upcoming demand for workers will mostly be in the construction sector.

The study estimates that 830,000 are in need of work. There is a discrepancy between the offer of the workforce and the needs of the labour market with regards to education, vocational status, specialty, geographical distribution and gender. There is a new section of the population previously economically inactive now wanting to take part including 'housewives', the retired, and children under the age of 15. There are also those that were active at the time of the survey looking for additional work to secure livelihoods for their families. The report makes a number of recommendations with regards to coordination, training, and support provision. Suggestions are also made to improve the enabling environment.

Syrians who usually migrate for seasonal work have been unable to do so due to travel restrictions (ACAPS and MapAction, 2013). There are few alternative job opportunities, and many end up staying with extended families. Often those who want to remain in the country have had no choice but to become involved in the war economy as there are few other options (Abboud, 2017).

## 5. War economy

The "war economy" that has emerged in Syria largely revolves around territorial restrictions which are used to levy taxes on goods, resources and people moving around the country. Abboud (2017) emphasises plurality and refers to war *economies* involving a complexity of different activities, actors, and geographies. Short-term opportunism and predatory behaviour includes looting, taxation, kidnapping, and aid theft and diversion. Violence as a form of protection is also commodified.

Various sectors are thought to be living and thriving off the conflict (Yazigi, 2014). The Syrian economy has become fragmented as areas controlled by the regime or opposition are disconnected. Opposition controlled areas are worse off. New business structures (illicit) are emerging.

A "reverse" supply chain operates where production and procurement of goods occurs outside of the country and then needs distributing inside (Abboud, 2017). Different actors are then tied to the conflict such as those procuring the goods in other countries, border guards, and those running checkpoints to reap material benefits. These actors "are links in the wider supply chains that are essential not only to the survival of average Syrians living under conflict and siege, but to fuelling the violence." (p105). Control over the border crossings is extremely lucrative. Smuggling from Turkey includes mobile phones, vegetables, tea, cannabis, and cigarettes (ACAPS & MapAction, 2013).

Tokmajyan (2016) makes a distinction between the war economy and the coping economy but notes the difficulties in separating them. ISIS businesses (such as oil production) that sustain the war are an important source of income for poor and vulnerable Syrians.

Communities are noted to be affected at a micro level, but details are not described in the literature on the war economy in Syria. War economy papers are dominated by political discourse and some description of how the war affects the economy at the macro level.

## 6. Informal sector

Destruction of business and trade networks has given rise to illegal and informal activities and networks (Eaton et al, 2019).

Yazigi (2014, p4) describes:

“As security has collapsed, an informal economy comprising looting, kidnapping, and smuggling has become an important source of income. Entirely new business networks, often illicit, are emerging and new groups and individuals are being empowered at the expense of the traditional business class.”

Disruption of agriculture and oil supply in Aleppo has led many to turn to transporting, refining or trading crude oil and its products (Turkmani, 2015). Illegal oil trade is reported in Deir-ez-Zor in eastern Syria (ACAPS and MapAction, 2013). Tribal fighters have seized production facilities and pipelines. Local entrepreneurs use homemade refineries to produce low-grade petrol for people facing shortages.

In some areas casual labour is prevalent and the war economy is only benefiting a few. ACAPS and MapAction (2013) notes that “casual work and informal trade appear to have become more important sources of income” (p5) but that formal figures are hard to define. They estimate that 80 percent of the workforce were engaged in informal activity by the end of 2012. Illicit extraction of oil and smuggling of goods “have been widely reported” (p5).

The informal private sector was estimated at 30-40 percent of GDP before the conflict estimated to have risen to 80 percent by the end of 2012 (ACAPS and MapAction, 2013).

## 7. Oil and resource control

War has affected transport routes impacting oil transportation and increasing the cost of oil (World Bank, 2017). This impacts an economy reliant on oil.

Islamic State in Iraq and Levant (ISIL) installed water pipes in villages for agricultural use to restore livelihoods in rural areas (Turkmani, 2015). People are dependent on ISIL who control all resources oil, power plants and water. They take over these strategic resources to gain control (Khatib, 2015).

ISIL have made strong efforts to provide electricity to populations to gain favour in Deir Al Zour (Turkmani, 2015). However, provision of water and electricity does not translate into the creation of a durable economy.

## 8. Industry

The manufacturing sector, a key source of jobs, had reduced in size by 35.4 percent by 2016 (Frontier Economics et al., 2016). Syria’s main manufacturing bases have been hardest hit by the war - Aleppo, Homs, and the suburbs of Damascus (Gobat & Kostial, 2016). In Alsheck Najjar,

Aleppo, and Adraa 90 percent of industrial enterprises had closed by the end of 2013 (Frontier Economics et al., 2016). Those remaining were estimated to be running at less than 30 percent capacity. Many entrepreneurs have left the country and allegedly set up in Turkey (Gobat & Kostial, 2016).

A UNDP study surveyed remaining service facility owners who expressed desire for expansion and need for financing (Syrian Economic Sciences Society, 2018). There was also a need for training, particularly for engineering activities and textiles.

More than 95,000 industrial units have been destroyed in the past seven years (SEBC, 2019). Border closures have restricted businesses reliant on cross-border trade. Street marketplaces have been destroyed. Businesses rely on illegal money-transfer through the war economy and are then prone to blackmail.

A personal account from the owner of two factories is given in a recent London School of Economics conference paper (Unspecified, 2019). The Syrian man was employing 45 people in 2011 in small basalt and marble cutting factories in al-Waer, Homs. He refused to leave after the area was sieged and grew vegetables in his garden for subsistence. His factories were bombed and looted. The siege was lifted in 2017 and he worked for a year and half to resurrect the smaller factory which now employs two people. The man has struggled as there is poor access to loans. In addition to bills the factory owner must pay fees, taxes and social insurance costs to the government. His product has a limited market. He has difficulty finding skilled labour because most of these people have left the country. He needs skilled labourers, tax exemptions and accessible loans to rebuild his business to be able to offer employment. Income tax exemptions are available for the years that a facility was unable to operate due to security conditions.

The literature emphasises that the large-scale economic losses of war come less from destruction of physical productive factors but more from low utilisation of production factors (World Bank, 2017). The disruption of economic organisation is estimated to be around 20 times costlier than capital destruction alone (ibid.). Production becomes difficult with reduced connectivity, higher transport costs, supply chain disruptions, and loss of trust within networks. Conflict increases rent-seeking and cronyism and breaks economic networks and supply chains.

## 9. Agriculture

An overview of the conflict from 2013 describes agriculture as continuing but at reduced levels (ACAPS and MapAction, 2013). Agricultural production accounted for one fifth of GDP before the conflict and has suffered from destruction of farmland, shortages of inputs, and transportation problems (Gobat & Kostial, 2015). Despite wide-scale disruption of agriculture the sector remains somewhat active in some cities in 2015 including: ad-Dana, Atareb, Armanaz, Afrin, Salqin, Idlib and Azaz (Turkmani, 2015).

Agricultural wheat production halved between 2011 and 2014 (Frontier Economics et al., 2016). Stocks of sheep, goats and cattle have been reduced by 30-40 percent since 2010. Poultry production fell by more than 50 percent. Although shrinking in size, agriculture has become more dominant as other sectors have shrunk more significantly. The sector accounted for 24 percent of GDP in 2013 compared to 16 percent in 2010. Agriculture as a source of income has become

increasingly important as physical capital has been destroyed. According to an FAO needs assessment in 2018 it was around 60 percent of GDP (Lazarus, 2018).

The 2018 needs assessment aimed to gather data to inform policy making to rebuild agricultural livelihoods. Rain-fed wheat was the most important crop grown. No significant changes in crop type since before the crisis were reported. Tools and agricultural assets (such as seed and fertiliser) were in short supply. There was less livestock owned and shortages of animal feed, pasture, vaccines, veterinary care and water were reported. Farming input costs have risen dramatically giving rise to inferior and counterfeit products. Certain markets still rely on Damascus for inputs, but new trade flows have emerged, for example from

Dar'a, As-Sweidaa, and Quneitra. Transport costs for traders have increased. The most often cited reason for market price increases was higher fuel costs, followed by costs (time and money) of barricades and checkpoints, reduced availability of vehicles, and road conditions.

Abboud (2017, p98) states that "intentional destruction of crops, the targeting of water supplies and the high cost of agricultural inputs have fuelled the crisis".

## 10. Public sector

In 2013 public sector accounted for around 30 percent of the workforce (ACAPS and MapAction, 2013). Prior to the conflict 67 percent of Syrians were employed in the services sector. The public sector is still employing but there are major disruptions to tourism, financial services and transport. The public sector includes civil administration, public health and the military; and was paying the highest salaries. The government increased public sector wages by 30 percent, but this was not enough to account for inflation.

More recent figures show a difference from around 25 percent of the workforce working in the public sector in 2010, to approximately 64 percent in 2017 (Eaton et al., 2019). This shows a trend in the opposite direction from the ACAPS and MapAction (2013) so either the situation has changed in more recent years or data are difficult to rely upon.

## 11. Coping mechanisms

Dr Omar Imady, a Senior Fellow and Deputy Director of the Centre for Syrian Studies at the University of St Andrews describes positive response to reconstruction by creative and resilient Syrian people (Imady, 2019). Some have found alternative means of power, built hospitals and stocked an underground library with books. Older children have stepped up into teacher roles to educate younger children. There are many Syrian women who are actively engaging in reconstructing a life for themselves. Details of 'how' are largely not described. An image of a boy who has dropped out of school to sell flowers on the street is shown in the report as one example.

A common coping mechanism, identified in a 2013 impact analysis, is to sell assets including the sale of furniture from vacant houses (ACAPS and MapAction, 2013). There has been some resurgence in traditional professions in response to hard times. These include the repairing of

kerosene ovens and wood heaters. There are also reports of humanitarian assets being sold to cover other living expenses.

Eaton et al. (2019) note that kidnapping for ransom has become an important revenue stream for criminals but no details are provided on the impact of this. They also note that as the intensity of the conflict has reduced, looting, kidnapping and trading in antiquities has decreased.

## **Women and Children**

Pre-crisis employment opportunities for women were very low (ACAPS and MapAction, 2013). Now female-headed households are particularly vulnerable. Female headed households reported higher levels of hunger and negative coping strategies in the Mercy Corps (2018) survey. The economic empowerment of women should be a priority since many households have become female-headed following the loss of husbands and fathers in the fighting (Abu-Ismael et al, 2016). Female income earners potentially do better in more communities more inclusive towards female participation in society (Mercy Corps, 2018).

Cases of widowed women being taken in by ISIL who offer them financial support and security were reported (Turkmani, 2015). ISIL do not provide livelihood opportunities for women; they focus on their role as a mother.

Unemployment among youth reached 78 percent in 2015 as a larger proportion are looking for work to support their household (UNESCWA, 2016). However, a greater proportion of young people reported earning an income, 26 percent in 2018 compared to 13 percent before the conflict (Mercy Corps, 2018).

A World Vision report looking at the cost of the war for children describes the social costs for children particularly loss of education (Frontier Economics et al., 2016). A case study of a 12-year-old child working long hours labouring to support his family is presented as an example of how children are contributing to households.

Mercy Corps (2018) describe female and youth income earners to have increased esteem and self-reliance.

## **Aid support**

Humanitarian aid to Syria in 2018 was estimated to be 2.2 billion US dollars (Eaton, et al., 2019). The Syrian regime are reliant on aid money to make up for shortfalls in funding and supplies.

The World Food Programme (WFP) are active in supporting Syrian livelihoods (Kern, 2017). In 2016, 33,350 beneficiaries received livelihood support including training, inputs to households, capacity enhancement for small-scale food processors, and rebuilding of community assets such as bakeries. Projects include honey value chain enhancement; provision of kitchen garden kits and training to improve production; and training vulnerable women in sewing, tailoring and entrepreneurship. WFP packaging and warehouse facilities has provided 1,500 jobs in Damascus, Homs, Tartous and Latakia. WFP are also providing fortified flour to rehabilitated bakeries.

## 12. Livelihoods enabling factors

Syrians who have been adapting their livelihoods throughout the conflict to improve their welfare do so through a variety of enabling factors. Mercy Corps (2018) explores this area with a mix of quantitative and qualitative methods. The research found that those closer to **functioning markets** have greater adaptive capacity. The markets must also be robust. Market functioning must be coupled with stable food prices for wellbeing to be established. Another factor associated with wellbeing in Syria is **access to cash and capital**. Decreases in the formal banking sector and cooperatives have reduced saving and borrowing opportunities. Syrians with access to borrowing scored 35 percent better on the Household Hunger Scale<sup>3</sup> and better on coping measures. Remittances were an important source of funds.

**Social capital and networks** were found to be positively associated with livelihood security. Those who interacted with someone outside of the community at least once a week had better food security and higher spending on daily needs. Some communities report closer social cohesion and sharing since the conflict began. Some reported that prolonged hardship had meant they felt less able to support each other. Those with access to technology for networking and exchanging information about job opportunities had lower hunger levels and used less negative coping strategies.

**Female and youth income earners** adding to household income was also associated with better conditions and access to resources as would be expected.

Based on the survey Mercy Corps recommends:

- Unconditional cash assistance
- Strengthening local markets and small-scale producer capacity
- Improving market functionality and developing diverse business
- Use of aid to strengthen social networks
- Targeting livelihood programmes for women and youth (whilst making sure not to ignore men)
- Supporting technology-based skills development.

The Mercy Corp (2018) survey of 124 communities in Syria found that 17 percent were receiving remittances compared with 6 percent in the pre-conflict period. Those receiving remittances had better food security and were more likely to have adapted their livelihoods.

## 13. Refugees

World Bank (2017) report that refugees mostly flee from Syria for personal safety rather than for economic reasons. Employment opportunities for refugees are limited and many cannot afford to send large amounts of money home, but even small amounts make a difference (Tokmajan, 2016). Reportedly it is remittances that kept the economy alive between 2012 and 2014 (ibid). The economy of the northwest is strongly dependant on Turkey. Many traders, businessmen and

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<sup>3</sup> <https://www.fantaproject.org/monitoring-and-evaluation/household-hunger-scale-hhs>

smugglers survive on cross border activities. Businesses moved from Aleppo to establish themselves in safer areas. Quality of life has therefore increased in some border towns.

Of the population in Syria estimated to be 23 million in 2010, 7 million are now internally displaced and 6 million have fled to other countries (Chamsi-Pasha, 2019). The educated, skilled and semi-skilled of the population make up a large proportion of those who have sought refuge in other countries. The Syrian business community in the diaspora are estimated to be worth USD 200 billion but are restricted in moving funds.

Informal estimates of remittances from a Syrian National Bank source are USD 1.5 billion<sup>4</sup> and are higher than the annual total for salaries and wages. Wages account for 42.3 percent of income and remittances, 57.7 percent of Syrian income in 2018. World Bank estimates that in 2018, remittances were made to the value of 1.62 billion USD.<sup>5</sup>

Refugees face high unemployment and structural challenges in economies such as Turkey and Jordan with large informal sectors (Bellamy et al. 2017).<sup>6</sup> Supporting refugees will support the flow of remittances. United Nation Development Programme (UNDP) livelihood response plans for Syria are aimed at refugees in Egypt, Lebanon, and Jordan (UNDP RBAS Sub-regional Response Facility, 2016). The UNDP have organised a number of activities: rapid income generation programmes, targeted self-employment support, upgraded basic municipal services for jobs, and provided demand-driven training.

## 14. Data limitations

It is inherently difficult to collect data and information in conflict situations. Data from Syria are sparse and, where available, variable in quality (World Bank, 2017). Gobat & Kostial's (2016) IMF working paper describes extreme limitations of information whilst researching Syria's war economy with the government publishing little economic data.

ACAPS and MapAction (2013) describe top level impact of destruction on the economy but not individual level. Limitations are described:

“Evaluating the real state of the economy has proved to be extremely problematic. Tight Government control and lack of international integration resulted in a general lack of transparency regarding many aspects of the Syrian economy prior to the crisis. This has been exacerbated during the conflict as the Government tries to present a picture of normalcy and according to analysts, is very reluctant to publish anything negative about the conditions of the economy. Regular publishing and verification by third parties of key economic data has been

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<sup>4</sup> [https://syrianobserver.com/EN/news/21059/value\\_annual\\_remittances\\_syria\\_1\\_billion.html](https://syrianobserver.com/EN/news/21059/value_annual_remittances_syria_1_billion.html)

<sup>5</sup> <https://data.worldbank.org/indicator/BX.TRF.PWKR.CD.DT>

<sup>6</sup> See Bellamy et al. (2017) for a survey report on livelihoods of Syrians displaced in Turkey and Jordan.

unable to take place leading to a reliance on estimates and projections. No records exist on the large and increasingly significant informal economy.” (ACAPS and MapAction, 2013, p1).

Abboud (2017, p105) notes that “the micro level of conflict and post-conflict zones is too often invisible to international donors and practitioners. “Increased engagement with partnerships and organisations on the ground is advised for post-conflict reconstruction planning.

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## About this report

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