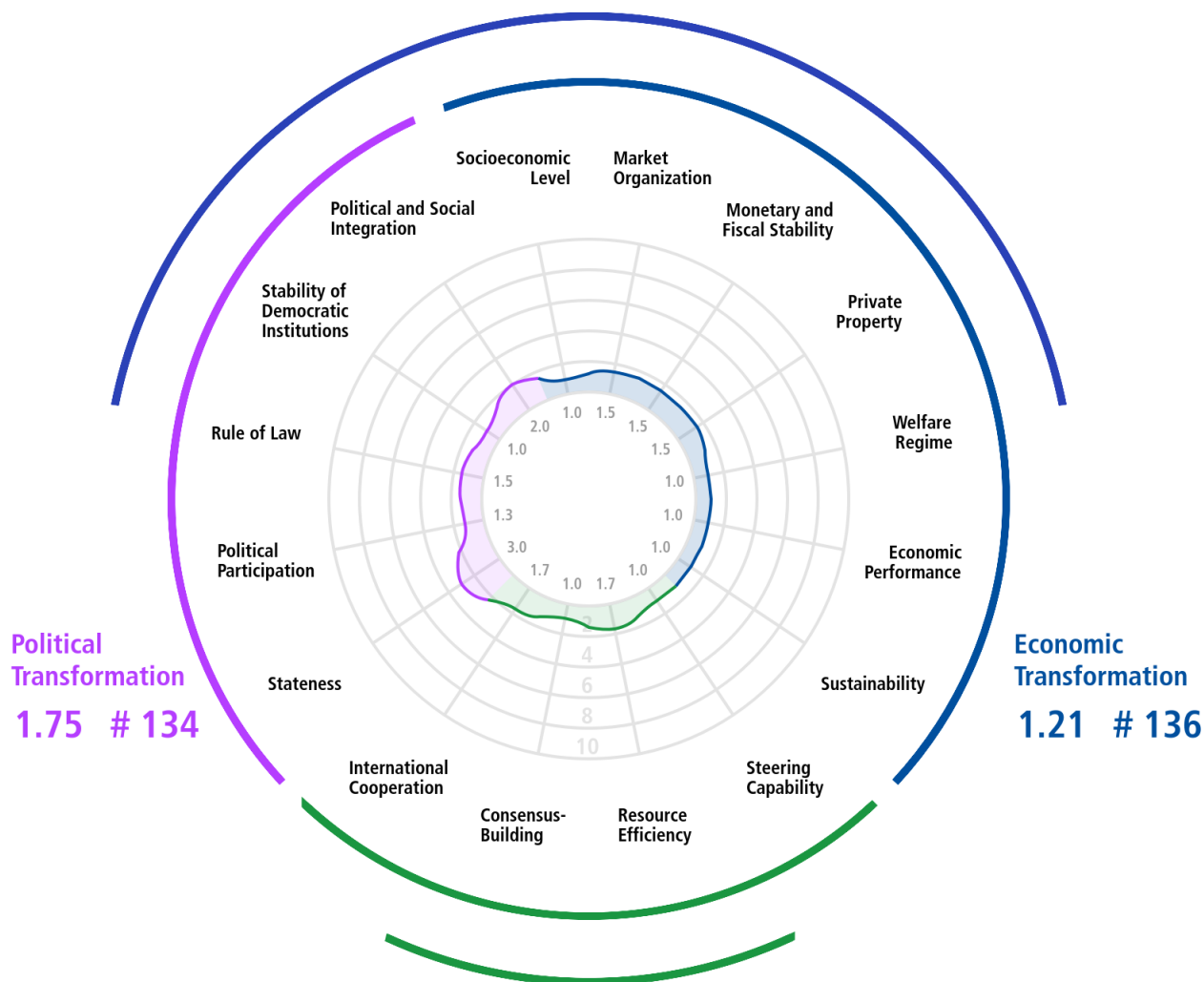


Syria

Status Index

1.48 # 136

on 1-10 scale out of 137



Political Transformation
1.75 # 134

Economic Transformation
1.21 # 136

Governance Index

1.30 # 134

on 1-10 scale out of 137

This report is part of the **Bertelsmann Stiftung's Transformation Index (BTI) 2024**. It covers the period from February 1, 2021 to January 31, 2023. The BTI assesses the transformation toward democracy and a market economy as well as the quality of governance in 137 countries. More on the BTI at <https://www.bti-project.org>.

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Key Indicators

Population	M	22.1	HDI	0.577	GDP p.c., PPP \$	-
Pop. growth ¹	% p.a.	3.7	HDI rank of 189	150	Gini Index	37.5
Life expectancy	years	72.1	UN Education Index	0.425	Poverty ³	% 11.9
Urban population	%	56.8	Gender inequality ²	0.477	Aid per capita \$	454.4

Sources (as of December 2023): The World Bank, World Development Indicators | UNDP, Human Development Report 2021-22. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.65 a day at 2017 international prices.

Executive Summary

Not much has changed in Syria politically. The country's de facto tripartition persists. In the regions it controls – primarily central and southern Syria and the capital Damascus – the regime of President Bashar al-Assad continues to rule by force and arbitrary arrests, preventing and punishing political self-organization among citizens. While it has become more authoritarian, the deepening economic crisis, fueled by rising prices for basic goods due to the war in Ukraine, makes it increasingly difficult to maintain control. Warlords and militias are competing for influence, and the level of violence once again increased in 2021/22. The patchwork of smaller fiefdoms, comprising local powerholders and warlords vying for influence in these areas, appears to be a growing problem for citizens.

Control appears to have tightened slightly in the Autonomous Administration of North and East Syria (AANES, formerly known as Rojava). Although AANES is not as significantly impacted by war-related destruction, Türkiye's water policy and bombardments have affected development in the region. The Syrian Democratic Forces (SDF) continue to advocate for their more liberal constitution, but there has been no progress in its implementation.

The extremist Hay'at Tahrir al-Sham (HTS) has taken a more conciliatory tone, but it still upholds an authoritarian leadership in Idlib, which is now home to approximately four million residents. Idlib relies entirely on aid deliveries and is plagued by poverty. In 2021/22, HTS further expanded its control over the economy. However, it does share, and at times competes for, political leadership in these northwestern territories with the Syrian Interim Government (SIG).

Throughout the country, the socioeconomic situation has significantly deteriorated due to several external factors beyond the control of the regime – including the crisis in Lebanon, the COVID-19 pandemic and price inflation, which includes rising prices for fuel and basic goods as a result of Russia's invasion of Ukraine. Despite the regime's efforts to maintain currency stability, over 90% of the Syrian population requires humanitarian assistance. While there has been a slight

increase in school enrollment in Syria, two million children aged between six and 17 are not enrolled in schools – along with noteworthy disparities. In five governorates, fewer than 10% of children attend school, and the educational experiences of children who have experienced multiple displacements have suffered particularly hard. Not only is this a tragic situation on a personal level, but it also presents significant disadvantages for Syria's future.

The impact of the extensive destruction is evident in long-term environmental challenges as well as in the health care sector. Shortages in clean water have resulted in a significant increase in the spread of waterborne diseases, including confirmed cholera cases throughout Syria. The health care sector in Syria has largely collapsed, and there are no social security measures in place to alleviate the impact on Syria's citizens. In most areas of Syria, power outages are common, with some regions having as little as two hours of electricity per day. Living standards have deteriorated, even in areas that have not been as heavily affected by the war. Despite these circumstances, the regime focuses on public relations, using campaigns to attract tourism and convey the image of a functioning state in the process of recovering from conflict.

The regime continues to appropriate land from and confiscate the property of those who fled, were exiled or arrested, thereby cementing its policies of demographic change and enhancing injustices. Syria's growing needs are not matched by either an increasing humanitarian response or future-oriented strategic planning and policies. Although structural challenges have evidently grown, the regime has made no visible effort to improve its performance in any citizen-oriented sector. Instead, clientelism has increased, while controversial efforts to achieve reconciliation in Syria or adhere to the Geneva process have ceased.

Normalization efforts are the result of particular interests – the regime wants to improve its image and show that relevant regional actors, such as the United Arab Emirates or Jordan, are back on speaking terms. However, Jordan, in particular, has not seen its expectations for joint efforts to fight drug trafficking materialize. Cooperation with multilateral institutions is not a priority for the regime, which continues to focus primarily on support from Russia and Iran.

History and Characteristics of Transformation

With the coup of 1963, Syria entered a period of “revolution from above,” in which the Ba’th party gained full economic control through the nationalization of big business and land reform. The party’s program was based on three main pillars: pan-Arabism and Arab nationalism, socialism and anti-imperialism. Hafez al-Assad, president from 1970 until his death in 2000, established a “presidential monarchy” and solidified the Ba’th party’s dominance. Al-Assad controlled the army; the security apparatus, which was primarily staffed by Alawis; and the new state-dependent class of bourgeoisie, who were appeased through limited economic liberalization. Repression, institution building, patronage and regional as well as international support played a role in consolidating the state as a whole.

Apart from a few tolerated opposition movements, the regime arrested and oppressed political opponents and largely eradicated political activism among the population through arbitrary persecution. Islamist uprisings, particularly in the late 1970s and early 1980s, were violently crushed. The massacre in 1982 in the city of Hama left a strong impression on Syrian society – 10,000 to 20,000 citizens were killed, with many more forcibly disappeared, and the city center was demolished. The resulting long-term weakness of the opposition is one of the main hindrances to developing an alternate governance structure today.

The exhaustion of Syria’s statist strategy of development forced the regime to embark on several waves of economic opening (“infatih”). Such liberalization did not achieve sustained momentum, however, as pressures for reform were periodically relieved by rent windfalls from oil revenues and foreign aid. Syria’s first infatih in the 1970s mainly helped recycle oil money. Under the second infatih, which began in the mid-1980s, the private sector was accepted as a public sector partner.

Intermarriage and business partnerships between the predominantly Sunni bourgeoisie and the elite of the state, which is dominated by the Alawi security forces, ultimately led to the formation of a military-mercantile complex. This complex functioned as the foundation of a novel upper class.

The power transition from Hafez al-Assad to his son, Bashar, in 2000 marked the initiation of the third infatih. The reforms – supported by Western countries – were limited in scope, primarily serving to bestow privileges that garnered support for the young president. As a result, a crony capitalist class emerged and grew stronger, engaging in rent-seeking behavior. This class exploited state-granted import monopolies and contracts, which would have been threatened by competition in a more open and transparent market. While poverty escalated, the redistribution of income among a small elite further oppressed a population that increasingly resented the expanding social and political injustices.

The Syrian revolution erupted in 2011 as a popular uprising on political grounds, with dignity and freedom as its core demands. The regime responded with military means. The Free Syrian Army (FSA), founded by military defectors in 2012, initially made some gains in northern and eastern Syria. However, in comparison with the regime forces, it was ill-equipped. The Syrian Arab Army's capacities rapidly decreased in the first two years – a process the regime sought to counter through Legislative Decree 55 in 2013, which allowed for the contracting of private military companies to protect infrastructure. Civilian loyalists established civil defense units, while loyal businessmen ran their own militias. Traditional allies of the regime, such as the Popular Front for the Liberation of Palestine – General Command (PFLP-GC), deployed armed personnel to safeguard areas in their vicinity. Most significant, however, was the ground support provided by Iranian-backed militias, notably the Lebanese Hezbollah, as well as Shi'a fighters from Afghanistan and Pakistan.

The Islamic State (IS) group began infiltrating northern Syria and established a caliphate, comprising parts of eastern Syria and western Iraq, in 2014. Thus, the FSA had to fight against both regime forces and the IS – an overstretch that allowed the regime to turn the tables, especially after the Russian air force decided to directly intervene to support Bashar al-Assad in September 2015.

The IS was defeated in March 2018 by an international coalition from the air and Arab and Kurdish ground forces. The United States supported the Kurdish-dominated Syrian Democratic Forces (SDF), which took control of Raqqa and Deir ez-Zor. These areas east of the Euphrates, along with the Kurdish provinces of Hasakah and Qamishli, are now administered by the Autonomous Administration of North and East Syria (AANES). In 2017, the regime and Iran established so-called de-escalation zones – besieged areas that they subsequently conquered one by one in 2017 and 2018 – leaving only the northern part of the province of Idlib under rebel control, led by Hayat Tahrir al-Sham (HTS) and the Syrian Interim Government (SIG).

The BTI combines text analysis and numerical assessments. The score for each question is provided below its respective title. The scale ranges from 1 (worst) to 10 (best).

Transformation Status

I. Political Transformation

1 | Stateness

The major challenge to the state's monopoly on the use of power is that it only controls approximately 65% of Syria's territory. This includes the coastal areas, Syria's main cities and the capital. However, strategically and economically important areas remain outside the regime's control: Hasakah, Qamishli, Raqqa and Deir ez-Zor are controlled by the Kurdish-dominated AANES. The last rebel-held area, Idlib, is host to an estimated three to four million people, half of whom have been displaced from other areas within Syria. It is mostly controlled by the extremist HTS.

External actors limit Syria's state sovereignty and the monopoly on the use of force, both directly and indirectly. About 900 U.S. troops remain in northeast Syria. In northwest Syria, Türkiye controls Afrin and the Jarablus-Azaz area through the Syrian National Army (SNA). Its role here extends far beyond military engagement, however, to post and telecommunications infrastructure, as well as HTS's decision in June 2020 to make the Turkish lira the official currency in Idlib, which enhances Türkiye's influence and control over civil affairs.

In 2021/22 alone, on more than 55 occasions, Israel carried out hundreds of air raids across regime territories. The regime and Russia continue to bombard Idlib, while Türkiye carries out attacks in the northeast.

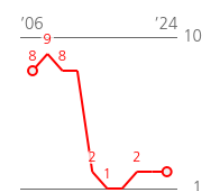
In particular, the AANES faces major internal challenges from other actors, such as the IS, which is considered responsible for a number of attacks. For example, in January 2022, IS attempted to free prisoners held by the Kurdish administration in Hasakah, which resulted in a battle lasting several days.

In regime areas, particularly in the south, there have been tensions and violence between the regime and former opposition members, with each attempting to disrupt the control of the other. Warlords, mafia structures and the 4th Armored Division's – the elite division of the Syrian Arab Army – attempts to maintain control over

Question
Score

Monopoly on the
use of force

2



business, levying taxes on transit and largely managing the regime's profitable captagon trade have established a parallel power structure that is particularly relevant in the south.

Syrians strongly identify with their nation, even though most of them do not consider the regime or other political leaders legitimate. Divisions between the different religious and ethnic groups have increased during the conflict, as a result of fear and distrust, a dynamic manipulated and encouraged by politically dominant forces.

Areas with a heterogenous composition have seen the expulsion and exodus of confessional groups; Sunnis in particular have been subject to forced demographic change in the area around Damascus and Aleppo. The Kurds of Afrin as well as the Yazidis from territories formerly controlled by IS have been displaced. The state's resettlement process actively discourages Syrians from returning and seeks to punish those who were displaced by seizing property and other assets.

The division of Syria into areas with internal borders that are nearly impossible to cross has alienated citizens in these areas from each other.

The slightly better service delivery in the AANES enhances the acceptance of the ruling party as well as of the institutions. However, the mainly Arab populations in Raqqa and Deir ez-Zor have difficulties identifying with the AANES's focus on promoting Kurdish language and culture. While the AANES does not mention autonomy (but rather promotes a federal vision of Syria), the regime's rapprochement with Türkiye at the end of 2022 has heightened fears about a joint effort to reverse Kurdish political achievements.

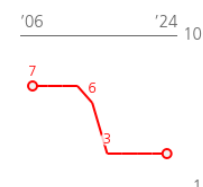
It is difficult to imagine how these internal divisions can be settled and lead to a common state identity for all Syrians.

The Syrian constitution does not include a state religion, except for stipulating that the president has to be Muslim. Syria has always been a multi-religious and multiethnic society, and the regime portrays itself as secular. However, sectarianism has always been an issue for Syria's heterogeneous society, and this has increased throughout the conflict.

Religious dogma has no visible influence and is not a point of reference in regime or AANES areas. In regime areas Idlib and Afrin, the dominant powers have a strong interest in closely monitoring Sunni religious institutions. HTS has introduced Shariah courts in Idlib.

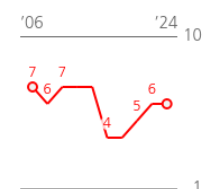
State identity

3



No interference of religious dogmas

6



Service provision is difficult all over Syria. On top of the vast destruction of infrastructure caused by the war, the continuing depreciation of the Syrian currency and COVID-19-related problems, the fallout from Russia's invasion of Ukraine has affected the availability of fuel and access to electricity, and thereby also access to sanitation and water. In AANES, Turkish water cuts and dam policies are major obstacles to the provision of water. For the whole country, the World Bank estimated in 2020 that 93.9% of households have access to at least a basic water source and 89.7% to at least basic sanitation. Meanwhile, 89.1% of people are estimated to have access to electricity, although electricity provision is unstable and unreliable.

More than 7,000 schools in Syria were damaged during the war. As a result, more than two million children are currently unable to attend school. In August 2022, the United Nations stated that 6.4 million children were in need of educational assistance. Attacks on schools have continued. In 2021 and 2022, more than 10 bombardments of schools in northwest Syria were verified. In Hasakah and Deir ez-Zor, more than 20 incidents of schools being used as military barracks were confirmed.

Teachers' salaries are still paid in AANES in the few central government schools that continue to teach the regime curriculum. Public transport continues to function in regime areas. In all other areas, transport is limited to private microbus services.

Given the uncontrolled power of the security services, many state provisions are only granted against extralegal payments. For example, citizens entering Syria seek to clear their names beforehand to avoid being arrested, and they often pay thousands of U.S. dollars for this without guarantees. Families have also paid huge amounts to learn about the fate of those who have disappeared.

2 | Political Participation

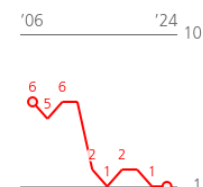
Elections in Syria serve to uphold the image of Syria as a democracy, but they are neither free, fair nor secret. Internally, they are a tool to affirm the president's legitimacy, grant privileges to particularly loyal members who may run for parliament and replace others who are considered less loyal or less useful.

Parliamentary elections take place every four years, presidential elections every seven years. The next elections are scheduled for 2024 (parliamentary) and 2028 (presidential). The most important change in recent years was to limit the mandate of the president to two terms of seven years each. According to this reform, Bashar al-Assad will not be eligible to run for another term after 2028, unless another constitutional amendment is introduced.

With more than half of Syria's population displaced and areas remaining outside regime control, the technical limits to participation for large segments of the electorate were questioned in the parliamentary elections of 2020. It is unlikely that the large-scale return of people will facilitate broader participation in the near future.

Basic administration

1



Free and fair elections

2



In the 2021 presidential elections, 24 candidates announced their candidacy. However, after being vetted by the Constitutional Court, only Bashar al-Assad and two other candidates, Abdallah Salloum Abdalla and Mahmoud Ahmad Marei, remained. Both Abdalla and Marei are representatives of the regime-tolerated opposition. According to the official count, Assad won with 95% of the vote. Observers have pointed out that the number of votes announced for Assad (11.2 million) was higher than the total number of voters in regime areas (estimated at a maximum of 10 million). The electoral law excludes candidates living in exile, holding double nationality or being married to foreigners. Furthermore, the requirement for candidates to secure the support of 35 members of parliament is a further restriction. All campaign slogans referenced “unity” and achieving things “together.”

In September 2022, local elections were held in Syria. These basically serve to establish and maintain a loyalty network, with business opportunities after being elected more of an incentive than political influence. The 2022 elections did not reveal any major changes in the already known networks.

The Syrian Interim Government held elections in Idlib in 2017. However, HTS de facto controls the area regardless of democratic legitimation through elections.

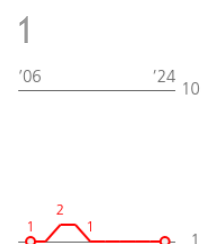
The AANES has expressed an interest in regular elections. The last local and regional elections in AANES-controlled territory took place in 2017. A third election round had been scheduled for early 2018, but this was postponed due to the Turkish military offensive. According to the PYD, no general elections have been held so far because of opposition threats to boycott the elections without a pre-arranged power-sharing agreement.

Elections have little influence on decision-making. It is a centralized system tailored to the president, in whose hands power is concentrated. The prime minister, the council of ministers and military officers are appointed by the presidency. Legislation is introduced to the parliament by ministers, with the role of members of parliament reduced to the approval of decrees. There is political interference at all levels. Constitutional provisions are overwritten by the dominant role of Syria’s competing intelligence services, the mukhabarat. They have overlapping competences, and there is neither transparency nor any institutionalized oversight. The Syrian regime has treated the protests in Syria as a security issue and has not relaxed its heavy-handed approach after regaining control over most of Syria, a setting in which the security services have expanded their power and increasingly benefited economically from it.

Iran and Russia do not have an official role in Syria. However, through their and their proxies’ presence in Syria, they are influential on the ground, particularly in creating security and stability in areas in which they are interested.

The PYD and the security services often bypass elected structures in AANES.

Effective power to govern



According to the 2012 constitution, citizens have the right to peacefully assemble and go on strike. Having experienced the regime's violent response to protests over the past decade, there are not many who risk their lives in organized gatherings. The constantly deteriorating socioeconomic situation, however, has inspired protests, particularly in Syria's south, where the Druze have negotiated a more autonomous role.

In regime-held areas, assemblies with political motivation (e.g., recurrent protests in Suwayda and Daraa) are quickly and brutally dissolved. The latest assemblies, in December 2022, left at least two people dead.

The regime has been using non-political assemblies as an opportunity to get hold of young men trying to evade military service. During the FIFA World Cup in Qatar in November 2022, regime forces raided a number of cafes and other public places where people gathered to watch the matches and forcibly conscripted dozens of young men.

Syria's northwest has faced various protests over recent years. In Afrin and Jarablus, citizens took to the streets to express their discontent with HTS advances in their areas; since these protests coincided with the interests of Türkiye and their proxies in these areas, they were tolerated. The Turkish rapprochement with the Syrian regime inspired widespread protests in HTS-controlled areas. HTS arrested several people, but interference with the right to assembly in Idlib was more strongly evident in the period of relative military calm after external challenges ceased in 2021.

Reporters without Borders (RSF) has expressed concern about deteriorating freedoms in AANES, where authorities applied lethal violence against protests in 2021, denouncing the rising cost of living.

RSF lists Syria as one of the most dangerous countries in the world for journalists. Syria's relative performance improved from rank 173 in 2021 to 171 (out of 180 countries) in 2022. However, this reflects more of a deterioration in the wider context than any improvements in Syria.

Freedom of expression is subject to strict control all over Syria. The regime has increased its already strict legislation and practice. It has always persecuted online activism but has, in several instances, released new legislation specifically regulating cyberspace.

In addition to oppressing independent reporting from its own areas, the regime has increasingly granted visas to select bloggers and vloggers in exchange for reporting that portrays the war as being over.

In AANES, media freedom and freedom of expression became more limited as well. In March 2022, all journalists were asked to join the Union of Free Media (Yekîtiya Ragihandina Azad, YRA) in order to continue working. Given the increasing relevance of citizen journalism over recent years, this represents a clear effort to tighten control over those who work with international media. The Syrian NGO

Association /
assembly rights



Freedom of
expression



Syrians for Truth and Justice issued a report in October 2022 in which it listed a number of violations of media freedom in AANES. RSF has expressed further concern about journalists being harassed, threatened and arrested in AANES in 2021 and 2022, with cases pointing to a tightening of control.

There are several Syrian online publications and human rights associations that were founded in 2011/12 and have, through continuous work and reliable information, established themselves as relevant outlets for news and information. These include the Syrian Network for Human Rights and Enab Baladi. In particular, the bilingual Arabic-English online platform al-Jumhuriya publishes extensive articles that focus on social and political topics beyond Syria and bring together intellectuals from across the region.

3 | Rule of Law

The constitution stipulates a separation of powers. However, in practice, this is severely limited by the concentration of power in the hands of the president and the clientelist networks around the Assad family.

The parliament has very little influence over top-down policymaking. Laws and decrees are introduced by government ministers. Moreover, the judiciary in Syria is not independent. The Supreme Constitutional Court, for example, may not question laws introduced by the president. The extent of presidential interference in the judiciary means that stronger judicial influence in policymaking would make a little difference.

In 2022, the ninth round of Constitutional Committee talks – a body consisting of 150 members of pro- and anti-regime representatives, which is tasked with drafting a new constitution – were canceled. The committee has not achieved any tangible progress and has failed to agree on any constitutional principles. As such, an inclusive constitution is unrealistic in the near term.

While independent according to the constitution, the judiciary in Syria is controlled by the president, who appoints the President of the High Constitutional Court.

Judges are appointed, transferred and dismissed by the High Judicial Council, whose chairman is Bashar al-Assad. It is considered a highly corrupt system that receives directives from the government and security services. Particularly since 2011, the sheer number of arrests and trials has presented even more opportunities for corruption.

The judiciary in regime territories has been significantly changed in recent years. It is institutionally differentiated but has never been independent. The worst revision to the legal system has been the introduction of the Counter Terrorism Court (CTC). Terrorism legislation is politically driven, and used as a tool against dissidents and opponents, who the regime often refers to generally as “terrorists.” The regime has criminalized any civil act that relates to terrorists, including providing medical

Separation of powers

2

'06 _____ '24 10

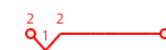


1

Independent judiciary

2

'06 _____ '24 10



1

treatment, shelter or support to opposition fighters. This is the strongest infringement of civil rights. Over 100,000 cases have been referred to the court since its establishment, with at least 13,000 death sentences issued and about 4,000 properties confiscated. The CTC quickly increased in size after 2011. Overall, however, the justice sector has, according to researcher Monique C. Cardinál, been disempowered and become subject to increasing interference from security services.

Dissatisfaction with the performance of the courts, interference and corruption in AANES led tribal leaders to establish a parallel court system. In March 2021, Kurdish, Yazidi, Arab, Syriac and Assyrian tribes announced the revival of tribal courts (“madbata”) in Hasakah province. Disputes between clans, robberies, revenge and lootings can be referred to these courts.

While prosecution for abuse of office is possible in theory, it usually only happens due to internal power disputes or state officials falling out with the regime. Even in these cases, however, individuals are often simply stripped of parts of their businesses and charged; the details of the process are not shared publicly.

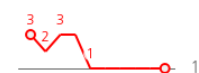
When a renowned actor publicly mentioned in August 2022 how he had paid public officials for business purposes in 2018, the municipality reacted and he withdrew his statement a few days later – an act that made many suspect that he was pressured to revoke his former statements in order to cover up the bribery. Even though all citizens experience fraud, are required to bribe officials and face extortion, the regime still has an interest in cases not being discussed publicly.

Citizens all over Syria remain deprived of their civil rights. This was an issue before 2011, but it became even more difficult after the protests started: systematic violence became the standard, while legislation undermining citizens’ rights and the institutions implementing this legislation were strengthened. The fate of more than 100,000 persons, who were subject to forced disappearance is unclear, with disappearances and arbitrary arrests ongoing. In 2022 alone, the Syrian Network for Human Rights (SNHR) documented more than 2,200 cases of arbitrary arrest.

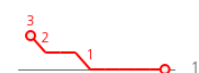
Since 2012, when the regime issued its first decree (Decree 66) legitimizing property seizures, it has constantly broadened this type of legislation. The latest example was Law No. 10 of 2018. The regime continues to confiscate properties. The Sunni majority has been hit particularly hard militarily, forcing an overproportionate exodus.

This has led to more efforts by Syrians to refer to justice mechanisms outside Syria. Under the principle of universal jurisdiction, a number of court cases have been held in third-party countries. Most of these cases address crimes committed by members of the IS or other extremist groups in Syria. However, in 2021 a court case against two regime officials identified as perpetrators of crimes against humanity in Syria concluded with a verdict in Germany. Other trials remain ongoing.

Prosecution of
office abuse



Civil rights



The question of what to do with IS members captured and held in AANES remains unresolved. There has been a discussion on whether it would be possible to try them in non-state Kurdish courts. In the absence of any timely trial or repatriation of foreign-born IS members, women and children – as well as men – continue to be held in conditions that are characterized by violence and lack any access to rights.

4 | Stability of Democratic Institutions

There are no democratic institutions in Syria. While the constitution establishes institutions on the national, provincial and local levels, access to these institutions is micromanaged by the regime, and strongly determined by sectarian and family ties. To a limited extent, the Ba’th party is considered a reservoir for recruitment, although absolute loyalty is key.

The 2012 amendments to the constitution revised the Office of the President. The practice of holding a referendum was replaced with presidential elections, limited to two consecutive terms. As such, Bashar al-Assad may not run for the 2028 presidential elections.

Idlib has local administration structures, yet there have been no elections. HTS has established itself as the dominant actor without democratic legitimation, ruling the province through authoritarian mechanisms.

In AANES, the last local and regional elections took place in 2017. General elections scheduled for 2018 were postponed and have not yet been held. The main hindrance is that the PYD has not agreed to share power with the main opposition group ahead of the elections, and thus the opposition has threatened to boycott the elections.

None of the political actors in Syria are demanding independence, and the overall identification of Syrians inside and outside of Syria with the state is strong, regardless of the respective ruling actors. However, polling is difficult, as – to varying degrees – all areas of Syria are ruled in an authoritarian way.

In the Kurdish areas of Hasakah and Qamishli, more Kurdish-nationalist policies are taking shape. However, none of the leading forces openly demand separation. This is partly because Syria’s Kurds feel threatened by Türkiye as well as the Syrian regime. At the same time, there has been no indication that the SDF would withdraw from Deir ez-Zor and Raqqa – Arab territories where Kurdish dominance is accepted and preferred over the regime, although identification with Syria is strong.

Performance of democratic institutions



Commitment to democratic institutions



5 | Political and Social Integration

The party system in Syria has witnessed few consequential changes since 2012. The most important party remains the nationalist, pan-Arab Ba'th party, which leads a coalition, the National Progressive Front (NPF), that includes several smaller parties. While the Ba'th party's leading role, previously stated in the constitution, was removed, it remains the only relevant recognized party and the majority of seats in the Syrian parliament are reserved for it.

The Ba'th party has undergone internal change in recent years. Traditionally, the party served as a pool for the recruitment of personnel, although this function weakened following the transition of power from Hafez to Bashar al-Assad, with greater emphasis subsequently placed on personal loyalty. Nevertheless, today, observers find that the party is reaching out to more younger members. While preserving its control over worker unions and similar organizations, it has strengthened its connections within society. Since the ultimate key to power is loyalty, it has purged its ranks, enabling the party to better fulfill the function of a pool from which the regime can recruit.

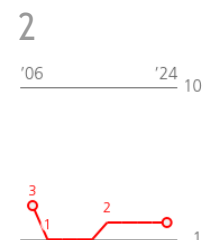
Nonetheless, the war has diversified the profiles the regime seeks to integrate and control. In the last parliamentary elections, the number of businessmen, militia leaders and retired army personnel increased, and some members of parliament are seen as representatives of Iranian interests. With the minor role the parliament has in decision-making, this aspect might be less relevant than who the regime feels it should involve. This demonstrates that political parties are just one tool among many.

In AANES, the dominant political party is the Democratic Union Party (Partiya Yekîtiya Demokrat, PYD), which is closely connected with the Kurdish Workers Party (Partiya Karkerên Kurdistanê, PKK). It managed to carefully negotiate its interests with the Syrian regime, which traditionally maintained good connections with the PYD. After several local clashes with regime forces in 2011, the PYD established its own People's Defense Units (Yekîneyên Parastina Gel, YPG), which granted it a predominant role among the political parties in the area – divided historically because of the regime's suppression of Kurdish political activism.

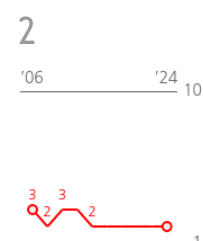
Idlib is ruled by armed factions, mainly by HTS, rather than by political parties.

Interest groups are subject to control by the regime, particularly the unions and the syndicates. With the increasing delivery and relevance of humanitarian aid, this has become much more relevant for charities and humanitarian organizations in regime territories, many of which have been set up to create the impression that social interests (including women's rights and environmental affairs) are being taken care of while in reality they are not. Humanitarian aid has, for a long time, accounted for the largest legal flow of foreign currency into Syria. In 2022, Natasha Hall quantified it for the first time in a CSIS report, assessing that 51% of humanitarian aid that

Party system



Interest groups



passed through Damascus ended up in the regime's pockets since the regime enforces an exchange rate that differs significantly from the market rate. The positioning of members and proxies of the Assad family further contributes to the diverting of humanitarian aid since the United Nations contracts a number of enterprises controlled by sanctioned regime officials.

In Idlib, there is a limited number of active NGOs and initiatives. However, control of HTS is tight, and it is mostly humanitarian issues they address.

In contrast, the Social Contract of the Democratic Federation of Northern Syria – now referred to as AANES – mentions the rights and importance of associations, syndicates and unions as long as they operate within the framework of the law. In practice, this means that tight control and bureaucratic obstacles often hinder their work, although in theory they are not restricted.

Even though there is no unified rule over all of Syria and the degree of authoritarianism differs, there are no reliable, representative surveys of any of Syria's areas.

Throughout Syria, people continue to express their political interests and grievances through protests, although these occur much less often and are smaller in size than before. In particular, Syria's south witnessed many protests against the regime in the second half of 2022, which hints at a desire for participation and democratic institutions.

The atmosphere and procedures in AANES differ in several ways from the strictly authoritarian control in regime territories and Syria's northwest: the constitution is more progressive, women's rights and female participation are explicitly mentioned, and the authorities have a sincere interest in presenting the area as more open and respectful of citizens and their rights. Ultimately, however, the dominant PYD (with its ties to the PKK) controls the region and closely monitors civil society activities. Independent reporting is almost impossible and access is difficult, although, formally, this is blamed on administrative procedures and bureaucracy.

There is a low level of trust among the population of Syria, largely due to the all-pervasive role of the Syrian intelligence services, arbitrary violence, intentional efforts to divide citizens and the absence of an independent judiciary. The existence of a system that rewards denunciation and pressures individuals to cooperate with state authorities has increased suspicion among those remaining in Syria.

Among Syria's diaspora, the shared negative experience from inside Syria and solidarity experienced in the revolution, as well as common needs, interests and pledges, have led to the establishment of organizations, initiatives and movements in exile. While there are divisions and tensions among these groups, Families for Freedom in New York and the Berlin-based Caesar Families Association are particularly relevant, highly visible platforms for exchange, successful confidence-

Approval of
democracy

n/a

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n/a

Social capital

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building, interest formulation and advocacy for joint causes. This is, however, not possible inside Syria and almost impossible in Syria's neighboring countries, where most Syrian refugees reside without permanent legal status.

II. Economic Transformation

6 | Level of Socioeconomic Development

More than a decade of civil war has devastated Syria's economy. As a result, the output of the country's main sectors – agriculture and mineral extraction – has considerably declined, and much of the country's infrastructure has been damaged or destroyed.

The United Nations estimates that 90% of the population now lives below the poverty line. Persistent inflation has meant that salaries are insufficient to cover living costs. By the first half of 2022, the extreme monthly poverty line per person in Syria had risen to SYP 115,318 (up from SYP 74,157 in 2021); the lower poverty line reached SYP 181,399 (up from SYP 116,651) and the upper poverty line stood at SYP 250,402 (up from SYP 161,024), according to the Syrian Center for Policy Research (SCPR). Diminishing state subsidies have exacerbated challenges in areas controlled by the regime, while the situation is even more desperate in opposition-held areas (e.g., Idlib). Residents there are increasingly relying on children for work due to a lack of funds.

The UNDP's 2021/22 Human Development Report assigned Syria a score of 0.577 (compared to the global average of 0.732), with Syria ranked 152nd out of 191 countries assessed. Since 2018, Syria has remained within the UNDP's parameter for "medium human development."

According to the SCPR, in the first half of 2022, the Consumer Price Index witnessed a 16-fold increase in wage disparity across Syria. The AANES areas had the highest disparity, with a wage disparity rate of 11.4 times, followed by regime-held territories at 9.8 times and the opposition-held areas at 9.3 times. The primary cause of this disparity is the dominance of conflict economies.

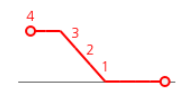
Other factors, such as gender, ethnicity and geography, play a role in the economic exclusion of people in Syria. According to the Human Development Report, Syria has a Gender Development Index score of 0.825 (compared to the global average of 0.958), with Syria ranked 150th out of 191 countries. The report estimates that Syria's gross national income (GNI) per capita to be \$4,192 (based on 2017 PPP U.S. dollars), compared to the global figure of \$16,752. Within this figure, the report estimates the female GNI per capita at \$1,285 and male GNI per capita at \$7,088

Question
Score

Socioeconomic
barriers

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(compared to the global figures of \$12,241 for women and \$21,210 for men). Consequently, female GNI per capita accounts for 15% of total GNI, slightly higher than in 2019, when it stood at \$989 for women and \$6,225 for men, with female GNI accounting for 0.13% of total GNI. Additionally, Syria is assigned a Gender Inequality Index score of 0.477 (compared to the global average of 0.575), which aligns with Syria's recent scores.

Economic indicators		2019	2020	2021	2022
GDP	\$ M	22600.9	11159.3	-	-
GDP growth	%	1.2	-3.9	-	-
Inflation (CPI)	%	-	-	-	-
Unemployment	%	8.7	10.0	9.8	9.6
Foreign direct investment	% of GDP	-	-	-	-
Export growth	%	10.7	47.1	-	-
Import growth	%	-2.2	-11.8	-	-
Current account balance	\$ M	-	-	-	-
Public debt	% of GDP	-	-	-	-
External debt	\$ M	4590.2	4763.2	5028.6	-
Total debt service	\$ M	4.5	1.3	0.4	-
Net lending/borrowing	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	15.4	11.5	-	-
Public education spending	% of GDP	-	-	-	-
Public health spending	% of GDP	-	-	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	-	-	-	-

Sources (as of December 2023): The World Bank, World Development Indicators | International Monetary Fund (IMF), World Economic Outlook | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database.

7 | Organization of the Market and Competition

The Syrian economy has become even more tightly controlled by Bashar and Asma al-Assad, who have continued to acquire stakes in companies and business projects by using certain businessmen as fronts. This presents serious hurdles for economic recovery and fair market competition.

Since 2011, Mr. Assad has strategically replaced the economic elite that accompanied his rise to power. This initial group comprised mainly sons of officers and senior civil servants. In their place, a new economic elite has emerged, primarily consisting of war profiteers who amassed their fortunes through illicit deals. Among the most influential figures in this new elite are Samer Foz, the Katerji brothers, Wassim Qattan, Khodr Ali Taher and Khaled Zubaidi.

There has always been an overlap between the military and business. However, the 4th Armored Division – headed by the president’s brother Maher al-Assad and closely associated with Iran – has expanded its involvement in drug production and smuggling. Today, the division possesses a quasi-monopoly over the captagon trade.

According to the Syria Report, this new economic elite’s lack of integration into Syrian urban and economic centers, as well as the fact that many come from poor backgrounds with few connections, has made them dependent on the presidential couple. Consequently, the presidential couple has expanded their reach over telecommunications, banking, real estate and ports. As a result, delivering economic commitments has become more challenging since few of the new economic elite possess strong networking assets.

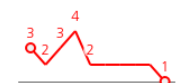
This isolation also exposes the new group to the mercy of the regime, as demonstrated by the case of Samer Afadar, a Western Union agent in Syria, who was apprehended and detained by the regime for several weeks in 2021. Alongside the example of Rami Makhoulf, a long-standing regime insider and cousin of Mr. Assad, whose assets have been confiscated by the government since 2019, such interventions convey the message that no one is exempt from becoming a target of the regime. Importantly, Mr. Assad has solidified this control through his economic adviser, Yassar Hussein Ibrahim, the prominent economic figure in Syria who oversees all major deals. Coupled with the international sanctions, this has dissuaded foreign businesses from engaging in Syria due to the fear of economic isolation.

In many opposition territories, years of hardship and deprivation (in many cases due to siege) have led to the spread of conflict economies, placing residents under the rule of local warlords. The dire economic conditions caused by the war, including the loss of male breadwinners due to fighting, injury and death, have led to a substantial informal economy, particularly among women. According to the International Labour Organization (ILO), the informal sector accounted for 48% of employment in rural areas and 31% in urban areas in 2003/2004. However, statistics are, by nature, inaccurate and difficult to obtain.

Market
organization

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In principle, free and fair competition is protected by the Syria Competition Commission under the 2008 antitrust legislation (Law No. 7), which addresses monopolies, price fixing and abuse of market power. In practice, however, no safeguards exist to protect competition, with the commission controlled by the regime. Syria is not a member of the International Competition Network (ICN).

According to the 2020 WTO World Tariff Profiles, the simple average of the most-favored nation (MFN) applied total tariffs was 10.8 in 2020. As no data has been available since 2013, this indicates a growing trend toward trade normalization between Syria and other countries and a reversion to “business as usual.” This follows a prolonged period of international reluctance to engage in trade with Syria and a tumultuous period of government-led ad hoc trade regulation and intervention.

The gradual normalization of relations with Arab states – most recently with Saudi Arabia and intensified exchange with Egypt – continues, while relations with Türkiye may improve in the near future. The Middle East Institute reported that the defense and intelligence chiefs of Türkiye and Syria met at a summit in Moscow in December 2022. Syria’s largest bilateral exports in 2020 were to Türkiye (totaling \$205 million), followed narrowly by Saudi Arabia (totaling \$202 million). Imports of goods and services dropped in 2021 by 4.9% (real change), but in 2022 they were forecast to rise by 4.0%. Likewise, exports of goods and services fell in 2021 by 0.2%, but in 2022 they were forecast to rise by 3.8%, and this increase looks set to continue.

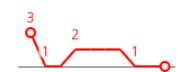
Syria’s main trading partners are Russia and Iran, with China playing a growing role, in accordance with the regime’s policy of privileging “countries that did not join the attack on Syria” (Ministry of Foreign Affairs announcement, August 2018). Türkiye is also beginning to play a greater role in trade, and Russia controls much of the oil and gas sector. Additionally, most wheat in Syria is imported from Ukraine and Russia. China is increasingly supplying the country with machinery, electronic equipment and plastics. According to the United Nations COMTRADE database, China’s exports peaked in 2019 before subsiding in 2020 and 2021. Syria formally joined China’s Belt and Road Initiative (BRI) in January 2022 in the hope of funding infrastructure repairs and increasing global trade long-term. This move also aims to increase foreign investment and boost energy sales to China.

Syria’s central bank controls all commercial and credit banks operating in Syria. To evade sanctions, it has developed the practice of conducting foreign transactions through banks in other countries, particularly Lebanon. The private banking sector is relatively small, having emerged only in 2000 under Bashar al-Assad’s leadership. However, the sector’s growth has stagnated since 2011 due to the outbreak of the conflict.

Competition policy

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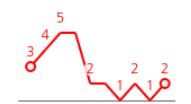
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Liberalization of foreign trade

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Banking system

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Due to sanctions, there are no foreign banks in the country. However, all private banks in Syria have foreign partners – six of them in Lebanon, three in Jordan and the others in Qatar, Saudi Arabia, Kuwait and Bahrain. Additionally, there are three Islamic banks.

The Economist Intelligence Unit (EIU) stated in January 2023 that banks in Syria are affected by exchange-rate fluctuations and currency misalignment, high inflation and a contraction in foreign exchange liquidity. Private banks face significant political interference in credit allocation. There is no available data on the bank capital-to-assets ratio or on bank non-performing loans.

According to a 2021 paper by Joseph Daher from the European University Institute, both public and private banking are now exclusive to regime-controlled areas, with “access to the banking system completely absent in heavily destroyed areas.” The banking sector has also experienced a rise in thefts and robberies, as well as sanctions, throughout the war.

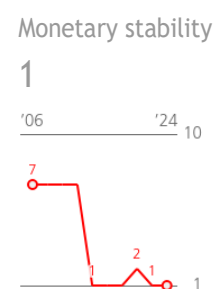
8 | Monetary and fiscal stability

The official and market exchange rates remain strongly divergent. In May 2022, the official exchange rate reached 2,512 SYP per U.S. dollar, while the market exchange rate reached 3,905 SYP per U.S. dollar. This means that the official exchange rate of the Syrian pound declined 50-fold against the dollar between 2011 and 2022, while the market rate declined 80-fold.

Besides the official and market exchange rates, there are other exchange rates in use, including the banks and financial institutions rate, used by private banks; the remittance rate, used by Syrians sending money from abroad; the United Nations rate, used by U.N. agencies operating in Syria; and the military service exemption rate, used by Syrian men to pay the conscription exemption fee. The latter three rates were set by the Syrian central bank (CBS).

Due to the multiple exchange rate system and severe foreign currency shortages, the government has reduced the list of critical goods that can be imported in order to favor the official exchange rate. Although Syria is less reliant on imports denominated in foreign currencies than it was, it still affects the value of its currency.

As a result of currency depreciation, inflation is very high. The Syrian Center for Policy Research (SCPR) measured general inflation at 113.46% in 2020, 110.90% in 2021 and 55.71% in the first half of 2022. The general price index, according to the Paasche Index 2021, increased six-fold between 2019 and mid-2022, and food prices increased by a factor of 6.7.



Close commercial and trade ties between Lebanon and Syria, as well as Syrians' reliance on Lebanese banks, meant that the Lebanese financial crisis in 2019 exacerbated the depreciation of the Syrian pound, although the correlation between the currencies has weakened since September 2021. According to the World Bank's Syria Economic Monitor, this may be because of the termination of subsidies in Lebanon, lowering demand for U.S. dollars in Syria for the purchase of smuggled subsidized goods.

In turn, this raised the Consumer Price Index (CPI). The annual CPI averaged 38% between 2011 and 2020. Food prices, as proxied by the World Food Programme (WFP) minimum food basket price index, saw a record high, rising by 97% year-on-year in 2021, having already risen by 236% year-on-year in 2020. In March 2022, adjusted using the World Bank's average exchange rate, the WFP minimum food basket price for Syria (in U.S. dollar terms) jumped by 69% year-on-year. Generally, food inflation reached 132.99% in 2020, 110.47% in 2021 and 56.71% in the first half of 2022 (compared to 2021).

According to the World Bank, the central bank has attempted to reduce currency depreciation by curtailing foreign currency demand, tightening import licensing, increasing the interest rates on Syrian pound deposits and requiring exporters to surrender foreign currency earnings to the central bank to boost U.S. dollar liquidity. This aligns with the government's interventionist stance. Additionally, the government has primarily relied on central bank borrowing to finance its fiscal deficit, exacerbating inflation. Although the ongoing depletion of foreign reserves demonstrates the government's limited ability to intervene and regulate U.S. dollar liquidity, the imposed import restrictions have played a role in partially slowing the depreciation of the Syrian pound since September 2021. As a result, the currency's value has diminished to barely 1% of its prewar value.

While official data is lacking, the EIU estimated Syria's current fiscal deficit to be SYP 4.4 trillion in 2022 (\$1.75 billion), while the World Bank estimated Syria's external debt to be \$4.76 billion in 2020 (up from \$4.59 billion in 2019). Total debt service reached \$1.3 million in 2020, a strong decline from \$4.5 million in 2019 and \$20.2 million in 2018. The latest available government consumption figure was for 2019, when consumption accounted for 14.7% of GDP, only a slight decline from 16.0% in 2018.

Despite losses being partly offset by net transfer inflows – much of which is international aid – Syria still has a persistent current account deficit, which amounted to \$34 billion between 2011 and 2019, as a result of sanctions, trade embargoes and greater imports than exports. Meanwhile, foreign exchange reserves are estimated to have been completely depleted, partly due to consistent capital flight. Still locked out of international credit markets, Syria has relied on Iranian and Russian credit for the duration of the war. However, with Iran facing its own financial crisis, Syria has now

Fiscal stability



turned to Russia. Yet, Russia has begun to use Syria as a profiteering ground. In December 2020, Syria signed a contract for a Russian export loan of \$700 million with the condition that the exports would come entirely from Russia and be paid in either euros or rubles. Almost entirely dependent on Russian aid, the Assad regime has no choice but to accept such terms.

Syria's fiscal revenues have significantly weakened. The World Bank estimates that Syria's fiscal revenues, measured in U.S. dollars, fell by 85% between 2010 and 2021. Tax revenue has declined more than overall revenue and accounted for only 34% of total budgeted revenue in 2022 (down from 48% in 2010).

9 | Private Property

In January 2021, the Independent International Commission of Inquiry on the Syrian Arab Republic reported to the U.N. Human Rights Council that “at least 40 laws relating to housing, land, and property have been passed since 2011, indicating a systematic push to reorganize the management of property rights in the Syrian Arab Republic.”

IDPs are particularly at risk of having their land appropriated and auctioned off by the state, especially land in recaptured areas and arable land producing high-value crops. In Aleppo, Hama, Idlib and Deir ez-Zor governorates, an informal system of public auctions has been established. These auctions were supposedly created to give people the opportunity to cultivate the land in the absence of the owners. However, in all likelihood, this was merely a pretext for appropriating the land.

By March 2022, land auctions had become more systematized, indicating that the government was intentionally shaping policy to legitimize land appropriation. Owners of these properties typically reside outside areas controlled by the government or outside Syria. Auction winners are often high-ranking members of pro-government militias or people with strong connections to government authorities. In many instances, the auction winners were already unlawfully occupying the appropriated land, with the auction system used as a method to legitimize the appropriation.

The fact that many IDPs have lost access to their basic civil documents – including property records – compounds their difficulty in returning to and regaining ownership of their properties. A circular adopted by the Ministry of Justice on September 15, 2021, made security clearances mandatory for those acting on behalf of absent or missing Syrians regarding their properties, which (deliberately) further complicates the possibility of displaced persons regaining ownership of their properties.

The system of security clearances and “security marks” has continued to develop in recent years. Originally a document required to enter and leave regime-controlled areas (or even move within them), it is now employed by the government to restrict the movement of refugees, displaced people and anyone flagged by intelligence

Property rights

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branches. The document is also necessary for accessing property and housing rights. The OHCHR reported in September 2022 that security clearances were withheld from former opposition members or people perceived as critical of the government. This poses yet another challenge for the reclamation of appropriated property. In some cases, people without security clearances continue to have their assets seized under National Decree No. 66 of 2012 (which serves to “redesign unauthorized or illegal housing areas”) on the pretext of counter-terrorism.

Alongside this, the Office of the United Nations High Commissioner for Human Rights (OHCHR) reported that various branches of security intelligence continue to use “unclear legal bases” to deny civilians the ability to exercise their property rights. Some individuals were prevented from returning to their property, as well as being restricted from selling or inheriting property, along with other associated rights. In addition, individuals who bear a “security mark” may also face rental denials from certain landlords.

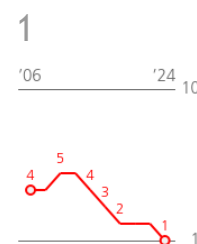
In opposition areas, the Syrian National Army (SNA) and HTS continue to seize and occupy the private property of displaced civilians. According to OHCHR, HTS is reported to have seized private property in Idlib and western Aleppo, mainly belonging to IDPs and perceived opponents of the SSG. Minority groups, such as Christians, are particularly targeted. Similarly, in northern Aleppo, Ra’s al-Ayn and Tall Abyad, the SNA continues to confiscate land and property under the pretext of “taxes.” Property owners who attempt to reclaim their property by lodging complaints risk verbal threats, beatings, abduction and, in at least one instance, death at the hands of the SNA.

The state’s priority remains its own protection, and it has not taken any steps to protect private enterprise. On the contrary, it has increasingly preyed upon the private sector.

Private enterprises are particularly at risk of being shut down or having their assets confiscated arbitrarily, and the government continues to replenish state funds through arbitrary taxes and fines on private companies. Moreover, armed actors working for the regime routinely steal and confiscate the property of small businesses, or extract bribes or “protection money.”

The government has also extracted income from the private sector by increasing the number or cost of bureaucratic steps required to start a business. In January 2023, the Ministry of Internal Trade and Consumer Protection started requiring all sellers to obtain a “commercial registry” – a bureaucratic step that costs a small business owner between SYP 800,000 and 1 million (\$119 – \$149, at the time of writing).

Private enterprise



10 | Welfare Regime

There are no social safety nets to speak of. The withdrawal of the state from its public health responsibilities has led to the gap being filled by civil society, the private sector and humanitarian organizations. Citizens receive no compensation from the state. According to SCPR's 2021 report, public health expenditure dropped by 68% in real terms between 2010 and 2020. In the wake of the war in Ukraine, the government has doubled down on its policy of austerity, which has driven up the costs of essential goods. The government has tightened the supply of essential food commodities, increased the administrative prices of essential services, subsidized prices of essential food and fuel products, and reduced the number of families eligible for subsidies by approximately 600,000 (from four million) – mostly families comprising doctors, lawyers and other higher-income earners.

UNHCR estimates that 14.6 million people in Syria were in need of humanitarian assistance in 2022, with a projection that this figure might rise to 15.3 million in 2023. The most pressing categories of need are water, sanitation and hygiene (WASH).

The disintegration of central health authorities has led to hundreds of civil society associations and initiatives concerned with humanitarian services stepping in to fill the gap, particularly in the field of health care and reproductive health services. This has coincided with the expansion of the international sector – especially U.N. agencies and INGOs – in addition to the growing role of local NGOs and the private sector.

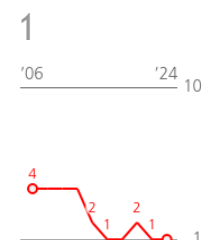
The World Bank measured life expectancy at birth in Syria at 73.7 in 2020, which marked an increase over previous years (72.7 in 2019 and 71.8 in 2018). Despite a decline in conflict-related deaths, GCSP estimates that the number of conflict-related deaths between 2019 and 2021 was 570,000, while the number of indirect conflict-related deaths was approximately 102,000.

Malnutrition remains a significant issue in Syria, fueled by ongoing food insecurity. According to the Syrian Humanitarian Needs Overview in 2021, an estimated 12.4 million people (60% of the population) in Syria experience food insecurity, with 1.3 million facing severe food insecurity. In November 2020, the price of the World Food Programme's national standard reference food basket was 251% higher compared to November 2019. As a result, numerous individuals are unable to afford essential items.

SOHR estimated in June 2021 that 2.1 million civilians had been injured or permanently disabled due to the conflict.

Public health infrastructure has significantly suffered as a result of the destruction and lack of maintenance of health care infrastructure, the emigration and targeting of health care professionals, and the collapse of the pharmaceutical industry. These factors, combined with substandard living conditions, increase the risk of disease

Social safety nets



outbreaks. According to the SCPR, the most common communicable diseases between 2012 and 2019 were influenza-like illnesses (ILI), followed by acute diarrhea (WHO, EWARS, 2012 – 2019). Nevertheless, the number of cases is gradually decreasing. In May 2020, most COVID-19 measures were lifted due to the low transmission of the virus. However, a second wave of COVID-19 from July to September 2020 severely strained the health care system. Due to the lack of transparency from the Syrian government in reporting cases, the true extent of COVID-19 in Syria remains challenging to determine.

More than half of the population is unable to access the health services they need, according to the World Health Organization (WHO). By the end of December 2020, only 48% of the 113 assessed public hospitals were reported as fully functioning, while 28% were partially functioning and 24% were non-functioning. Similarly, 48% of the 1,790 primary health care centers that were assessed were reported as fully functioning, with 21% partially functioning and 31% non-functioning. The deliberate targeting of health care infrastructure by the regime is a significant factor in the poor functionality of many hospitals, particularly in opposition areas that have been intentionally targeted. Consequently, these areas have low immunization rates and poor sanitation.

In addition, the number of health care professionals continues to decline. In 2020, the World Health Organization (WHO) estimated the country-wide ratio of public medical doctors per 10,000 inhabitants to be eight. In Damascus, Latakia and Tartous, the ratio reached 24, 22 and 20 per 10,000, respectively, compared to only six, five and two medical doctors in Aleppo, rural Damascus and Daraa, respectively.

According to a U.N. Human Rights Council report in March 2021, numerous displaced Syrians are unable to access medical care because they lack or are unable to update their basic civil documents.

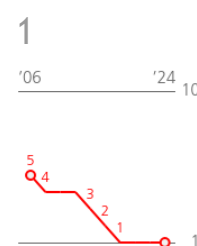
While the 2012 constitution stipulates that “the state shall guarantee the principle of equal opportunities among citizens,” major discriminations persist.

The OHCHR reported that women face discriminatory inheritance practices, whereby property documents are often registered in the name of male family members, rendering women unable to secure tenure or access inheritance rights.

Cases of gender-based violence (GBV) against women have increased due to the conflict, and women are affected by more frequent incidents of underage marriage, customary marriage, trafficking and other forms of exploitation.

In particular, in territories under the control of the Syrian Interim Government (SIG), women’s rights activists have been targeted by violence and threats of violence. Members of the SNA and official religious figures have used violence when women have attempted to engage in public life. Female activists of Kurdish origin have been especially impacted. As a result of this hostile environment, organizations working on GBV increasingly struggle to provide support.

Equal opportunity



As of February 2021, only 11.2% of seats in the parliament were held by women – a reduction from 13% during the previous legislative period.

The World Bank reported in 2021 that the Gender Parity Index (GPI) for enrollment in public and private schools showed a 1.0 ratio of female to male enrollment in primary and secondary education and a slight advantage for girls in tertiary education with a ratio of 1.1. In 2021, the gross enrollment ratio was 81.7% for primary education, 52.5% for secondary education and 43.0% for tertiary education. No information on the literacy rate has been available since 2004, when the World Bank reported an overall adult literacy rate of 80.8%, with male literacy at 87.8% and female literacy at 73.6%. Regarding the labor force, women constituted 18.4% of the labor force in 2021, a figure consistent with recent years (18.6% in 2019 and 18.2% in 2020).

Relations between sects have changed considerably, having become more politicized.

Especially in the security sector, the number of Alawites in the upper ranks has increased. In a 2020 report, analyst Muhsen al-Mustafa reported that the top 40 posts in the Syrian Arab Army were filled by Alawites – the situation is similar with sensitive positions in the state security services. Meanwhile, Syria's tiny Jewish community seems to have disappeared, and IS's attacks on the Yazidi community have forced many to flee. The percentage of Christians, estimated to be 10% before the conflict, seems to have shrunk by two-thirds.

The regime consistently maintained direct connections with notable figures from various religious communities, granting them significant power and influence within these specific communities. The authority of the Sunni Grand Mufti was weakened in 2017 and ultimately abolished in 2021.

HTS leader al-Julani has tried to present himself as more open and willing to reach out to religious minorities. For example, in August 2021, the first mass since 2011 was held in the village of Yacoubia.

In terms of ethnicity, an estimated 200,000 to 500,000 Syrian Kurds – the country's largest minority – remain stateless as a result of a controversial 1962 census and therefore lack citizen rights. Most Kurds live in AANES territory in the northeast of Syria.

Palestinian refugees in Syria, including those born in Syria, are considered Palestinian nationals by the state and are thus de facto stateless. Although they have integrated more smoothly into the wider population than other minorities, poverty remains more prevalent among Palestinian communities. Palestinians are not allowed to own more than one home or purchase arable land, vote, or stand for election. Instead of a passport, they are issued a Palestinian travel document for travel purposes.

Syria's Druze population, numbering approximately 700,000, primarily resides in Suwayda Governorate. Throughout the conflict, they have largely avoided direct engagement and maintained a relatively neutral stance. Nevertheless, the deteriorating economic conditions have compelled residents to voice their discontent with the regime, notably in June 2020, February 2022 and most recently in December 2022.

11 | Economic Performance

Syria's economic performance has deteriorated quickly due to several factors. In addition to the destruction of economically relevant infrastructure, which has seen little to no reconstruction, the longer-term impact of COVID-19 and the ongoing banking crisis in Lebanon are also contributing factors. In addition to the Lebanese financial crisis, new U.S. sanctions under the Caesar Act, as well as macroeconomic instability and a significant reduction in agricultural production caused by drought, have compounded the problem. More recently, price spikes caused by the war in Ukraine have added to Syria's challenges.

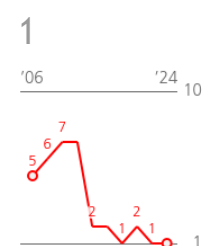
With the government lacking access to international debt markets and dependent on finance from Iran and Russia, foreign reserves have run extremely low and may have been exhausted. Foreign direct investment is miniscule. No official GDP figure after 2018 exists, when GDP stood at \$21.45 billion. However, the World Bank estimated that due to extreme uncertainty, Syria's real GDP would contract by 2.6% in 2022 (amounting to \$15.5 billion in constant 2015 prices) after experiencing a decline of 2.1% in 2021.

The official exchange rate has devalued fourfold since mid-2022, but the real exchange rate remains overvalued, posing a severe currency risk. Inflation is acute, with public sector salaries unable to cover living costs. The overall price index in Syria recorded annual year-on-year inflation of 110.90% in 2021 and 55.71% in the first half of 2022 (compared to 2021). Food inflation reached 132.99% in 2020, 110.47% in 2021 and 56.71% in the first half of 2022 (compared to 2021).

No data is available for the country's account balance or public debt, but the World Bank estimated Syria's external debt to be \$4.76 billion in 2020 (an increase from \$4.59 billion in 2019), while the total debt service was \$1.3 million in 2020 (a significant decrease from \$4.5 million in 2019 and \$20.2 million in 2018). The World Bank also projected that the current account deficit would rise from approximately 4% of GDP in 2021 to 5% of GDP in 2022.

The official unemployment figure for 2021 was 10.6%, compared to 10.3% in 2020 and 8.8% in 2019.

Output strength



12 | Sustainability

Prior to the war, there were some environmental regulations and policies in place, but enforcement was weak and there were concerns about the level of industrial pollution in the country. Currently, Syria is significantly affected by numerous environmental concerns, including deforestation, soil erosion, desertification, water pollution and poor air quality.

The heavy use of explosives during the war has had a significant environmental impact. Toxic weaponry, such as mortar bombs, artillery shells, barrel bombs, aircraft bombs and missiles, leave behind toxic metal compounds and chemicals. Similarly, the chemical weapons used by the government are likely to have a long-lasting toxic effect.

The 10th Five-Year Plan (FYP) for 2006 to 2010 and subsequent 11th FYP identified the Ministry of Agriculture and Agrarian Reform (MAAR) as a key stakeholder in combating desertification. It also proposed sustainable development management initiatives for both rural and urban areas in Syria. Syria is also party to numerous multilateral environmental agreements. Most recently, the country participated in the U.N. Conference to create the Sustainable Development Plan in 2012. However, in 2015, the United Nations determined that the war had rendered the plan's success unattainable. The current constitution explicitly designates sustainable development as a goal. Additionally, Syria has signed the United Nations Framework Convention on Climate Change (UNFCCC).

The WHO ranked Syria the 18th worst out of 92 countries for air pollution in 2019, with PM2.5 concentrations exceeding the WHO recommended exposure level by a factor of three. The increase in particle matter since 2015 is possibly the result of Syrian and Russian aerial bombardments against rebel groups and chemical attacks used by the government.

Forest fires have increased in frequency and intensity. In 2020, according to an OCHA report, fires eradicated 9,000 hectares of agricultural and forested land, impacting 140,000 individuals. The bombing campaigns of various parties stand as one of the primary causes of these fires.

During the war, the strain on potable water intensified due to the large number of displaced persons and increased migration to cities, which not only resulted in reduced water supply but also heightened the risk of waterborne diseases for a larger population.

The destruction of buildings by bombing and the burning of waste during the war (after government-operated waste management services shut down) released high levels of toxins into the air, soil and groundwater. It is estimated that solid waste production reaches 850 tons per day.

Environmental
policy

1

'06 '24 10



The war has caused a significant decline in enrollment and a sharp drop in the number of people with access to education, as many schools and universities have been damaged or destroyed, and many teachers have been displaced. The UNDP gave Syria a U.N. Education Index score of 0.425 from 2017 to 2021 (on a range of 0.00 to 1.00).

In August 2022, UNICEF estimated that approximately two million children were out of school, with an additional 1.6 million at risk of dropping out, many of whom are internally displaced persons (IDPs). It also acknowledged the growing number of children who have never been enrolled in school. UNICEF's estimation further revealed that one-third of Syrian schools had been damaged or destroyed, with the situation even more dire in territories not controlled by the government. In the northwestern region, out of 1,017 assessed IDP sites, only 196 had functioning schools.

No statistics are available for public expenditure on education. However, in 2015, the World Bank estimated that 0% of GDP was spent on research and development.

The adult literacy rate in 2014 was 80.8% (the latest available figure). It is likely that this rate has significantly decreased due to the widespread disruption to education caused by conflict and displacement. According to the 2021/22 Human Development Index, the mean years of schooling were only 5.1 (compared to a global average of 8.6), while the percentage of the population with at least some secondary education was 37.1% for women and 43.4% for men (compared to a worldwide average of 64.2% and 70.3%, respectively). Children also face other barriers to education, such as limited access for disabled or vulnerable children, as well as gendered social norms. These norms result in early marriage for girls and boys being withdrawn from school once they reach working age.

The war has had a severe impact on the research and development sector in Syria. Instability and a lack of resources have halted research activities and publishing. Additionally, many researchers have been compelled to flee the country. In terms of funding and knowledge providers, the education and research sectors in Syria were primarily funded by the regime prior to the war. However, with the government's resources heavily strained, funding for education and research has significantly diminished.

Education policy /
R&D

1
'06 _____ '24 10



Governance

I. Level of Difficulty

more than 10% since 2020. Aside from this, the most recent and particularly grave addition to Syria's structural constraints derives from the banking crisis in Lebanon, which has had a severe impact on the Lebanese finance sector and economy. The United Nations concluded in December 2022 that fuel and energy were scarcer than ever and that mobility had further decreased. Due to energy shortages, in December 2022, the regime had to close the offices of state agencies for several days. In 2022, Bashar al-Assad claimed that Syria had lost between \$20 billion and \$42 billion due to Lebanon's banking crisis.

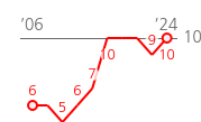
It is difficult to assess the impact of COVID-19 on Syria. According to the World Health Organization (WHO), by January 2023, about 57,400 infections and 3,163 COVID-19-related deaths had been reported. However, it can be assumed from earlier reporting on excess mortality as well as satellite imagery of earth movements around cemeteries that the figures are much higher. Only 14.4% of the population have received at least one COVID-19 vaccination dose, and COVID-19-related measures have accelerated Syria's economic decline.

Significant parts of Syria are covered by deserts, and droughts have affected fertile lands. In the northeast, Turkish manipulation of water flows has created problems for harvests and access to clean water. In all provinces, cholera cases have been confirmed since September 2022, and, by December, about 100 people were confirmed to have died due to cholera. Damage to water infrastructure and extensive electricity shortages, which prevent clean water from being pumped, along with damage to Syria's health care infrastructure, make it difficult to address this additional challenge. Approximately 30% of Syria's hospitals are unable to function, with the situation particularly acute in Idlib, where hospitals are operating at minimum capacity with very few doctors remaining.

Prior to the war, oil and gas resources were a major source of income for the regime. However, nearly all oil and gas resources are situated in the areas controlled by AANES. Furthermore, production and exploration have not recovered due to the damage to infrastructure, difficulties in maintenance and the absence of international partner companies.

Structural
constraints

10



1

With the economic strain felt by the regime's main international backers, Russia and Iran, it is possible that they will try to obtain benefits from Syria, where they have already secured licenses for a wide range of businesses. This would further negatively impact the Syrian population.

In Syria's authoritarian context, civil society has always been tightly monitored, and independent activism, either forbidden or co-opted. The regime was averse to critical discussions or allowing organizations to promote the impression that the state did not take care of the needs and interests of the entire population. After 2000, there was a significant increase in the creation of "first lady organizations" – a network of NGOs run by Asma al-Assad that has become increasingly powerful, especially after taking over part of the charity business previously run by the president's cousin Rami Makhlouf in 2020. These organizations serve the regime by acquiring foreign funding and ensuring that the funds benefit the inner circle of the regime.

With the revolution, initiatives and organizations started to spread. However, many had to stop or change operations because of the deterioration in overall conditions and lack of funding, as well as displacement. Nevertheless, the organization IMPACT, which has been mapping civil society organizations in Syria for several years, has reported an increase in civil society organizations. These are small organizations, run mostly by men and operating with limited funds. Given Syria's divisions, they are mostly confined to working in only one of the territories. Only 1% of the 776 organizations identified and surveyed by IMPACT operate in more than one territory. The fields of operation are driven by needs, with humanitarian and development affairs, education and health care being the main sectors. While most of the organizations covered in the report are registered somewhere, in all areas of Syria there are grassroots initiatives that operate in cultural fields as well as in the media.

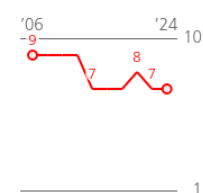
Due to the stalemate and absence of serious military offensives intended to take military control of more territory, while still intense, the conflict has changed shape. The regime continues to shell Idlib. More prominent, however, are the bombardments and the threat of force by external powers. Türkiye has been shelling northeast Syria, while Israel carried out hundreds of airstrikes in regime areas in 2021 and 2022, and there are occasional attacks by the remnants of IS. Structural violence is present in all areas of Syria.

Citizens are subject to harassment, arbitrary arrest, torture and death in custody, as well as extortion, in order to access government services.

Regime territories in particular are haunted by in-fighting between different regime-affiliated militias, the expanding business interests of Syria's elite forces and the 4th Armored Division, as well as assassinations, abductions and aggressions between the local, mostly Druze population, and the regime in Daraa and Suwayda.

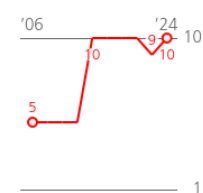
Civil society traditions

7



Conflict intensity

10



There have been no serious reconciliation efforts. The regime has dismantled even the inefficient structures it had previously established under that title. Its policy has been to force areas to capitulate in order to dictate the conditions of surrender.

In any case, the relevant ministry's work did not result in overcoming the conflict. Instead, it served to establish a victors' peace in areas retaken by the regime.

The only mechanism partly trusted in this capacity is located at Hmeimim Air Base and is operated by Russia. None of the conflict parties has come forward with a systematic approach to relaying information on Syria's disappeared, which would be a first confidence-building step and is particularly relevant for relations between the regime and citizens since most disappearances were forced by the regime. In 2022, an international mechanism was established to that end.

However, the division of the country into areas that have hardly any civil interaction with each other and distrust, hostilities or experience of violence at the hands of the others persist. These factors will make it ever more difficult to overcome the conflict, especially in the absence of justice and accountability.

II. Governance Performance

14 | Steering Capability

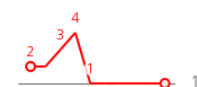
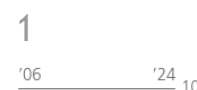
The very few strategic priorities the regime has set are all focused on its own survival, both domestically and on the international level. This includes plans to “showcase” redevelopment projects that suggest a “return to normality.” Other than that, decision-making is short-term and directed toward acute needs. A number of important policy areas, such as education and health care, are not addressed at all, and the regime did not have a consistent strategy to fight COVID-19 nor has it come up with one to address cholera. There is no strategy of reconciliation, and there have been few visible efforts to strategically address unrest, such as in Syria's south. In the end, efforts have relied more on the use of military force and threats than on negotiations, and, in some instances, short-term political interests are clearly visible.

The regime's only priority is its own survival, which has been successfully achieved. Militarily, Assad has, with the help of his allies, reconquered most of Syria. On the international level, he has been successful in obstructing the Geneva Process and evading any progress in this regard and in international forums, including the constitutional committee.

However, there are certain limits to what can be implemented based on these achievements. The regime does not have access to most of the country's resources. Even with significant help from Iran, Russia and Hezbollah, the regime has not been able to create stability and control on the local level. It has not implemented any of

Question
Score

Prioritization



Implementation



its redevelopment plans, such as its plans for Marota City and Basilia. Furthermore, there has not been any notable example of reconciliation or reconstruction that could be strategically leveraged to inspire trust among potential investors or on the diplomatic level.

In light of dwindling resources and the continuing depreciation of the Syrian pound, the regime has welcomed regional states' normalization initiatives as a way to enhance its diplomatic standing and be re-accepted to the Arab League summits. This has helped in terms of scaling up cross-border trade with Jordan. However, there are no investors for its long-announced development projects. It has joined the Belt and Road project in exchange for normalization with China and announced normalization with regional states, including the United Arab Emirates. Yet, there have not been any reports to suggest that the diplomatic gains have been translated into visible achievements.

The regime has also not responded to priorities dictated by humanitarian needs, such as shelter. On the contrary, the destruction of housing in the areas surrounding Damascus and in Aleppo continues. In December alone, the regime issued 1,500 eviction orders to residents in different parts of Aleppo, despite the acute need for housing and rehabilitation. Most examples of addressing Syria's domestic problems are based on plans by the United Nations or its institutions, such as humanitarian aid and health care.

AANES has not made significant progress in Raqqa and Deir ez-Zor, presumably because its priorities are in Hasakah and Qamishli. In Hasakah and Qamishli, AANES has progressed with the implementation of a Kurdish curriculum. At the same time, changes in the curriculum were met with criticism in Raqqa and Deir ez-Zor since it contains elements of the ideology of Abdulla Öcalan and is perceived as too secular.

The regime's survival has reinforced its commitment to the main strategies it followed throughout the conflict. These include the arbitrary use of violence against dissidents and publicizing its violence in order to deter others, as well as the playing off of parties against each other on the national and international level. These examples clearly illustrate the authoritarian lessons the regime has learned.

The entire history of its chemical weapons use starting in 2012 has taught the regime that – as long as it has Russia shielding it in the U.N. Security Council – it can breach important international norms with impunity.

By now, the regime is not concerned about any negative international reaction threatening its existence. On the contrary, the normalization of relations with important and mainly authoritarian states within the region serves as a confirmation for the regime that there are like-minded dictatorships with which it can negotiate. With the heavy impact the Syrian war has had on neighboring states, the regime might be encouraged to continue using refugees as a means to pressure Türkiye and Jordan, in particular.

Policy learning



All of this aligns with the regime's logic. However, the consequences are highly problematic, as they imply that the interests and needs of large segments of Syrian society will continue to be marginalized in the near future.

15 | Resource Efficiency

The regime does not use any of its resources efficiently. This is due to the need to bind loyalists while resources are dwindling. Clientelism, patronage and dependencies are the main characteristics of these structures. Competition has increased with regard to charities. All over the country, citizens have to pass through checkpoints when moving around. These do not exclusively serve security purposes but are another way of extracting money and generating income for regime forces.

Syria has lost many of its qualified young people; many have been killed, forced into exile or displaced. Male citizens eligible for military service have left the country to evade conscription.

Displacement and the deliberate targeting of education infrastructure have created gaps in the education of millions of children. Many of those who live in harsh conditions as IDPs and refugees have been out of school for many years. The Syrian education system enjoyed a fairly good reputation before the war. However, it will now be difficult to overcome the economic crisis given the lack of qualified personnel.

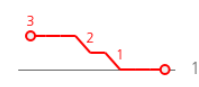
In AANES, budget planning for 2022 set four priorities: health care, education, agriculture and infrastructure. However, a recent setback has been the closure of numerous schools, since many schools follow the regime curriculum. The authorities in AANES intend to introduce a Kurdish curriculum and Kurdish-language teaching for which there are not enough qualified teachers and adequate teaching materials. The United Nations has repeatedly reported on the closure of schools in northeast Syria due to schools following the regime curriculum. In contrast with the stated priority of education, school graduates in northeast Syria will face questions regarding the national and international acceptance of their qualifications.

All parties in Syria follow a hierarchical top-down approach to coordinating policies. In regime areas, the focus is on the person of the president and the security apparatus with which the regime seeks to control the population. The regime uses arbitrary violence to create and uphold a situation in which no citizen can ever feel safe. So instead of consistency, coordination and transparency, security institutions dictate their rules; anything related to civic affairs is treated as secondary.

Distrust and competition between state institutions are intentional given the regime's interest in maintaining control at the presidential level. Especially when it comes to the task of creating security – a prerequisite for investment and reconstruction – competition between Iran and Russia also plays a role since both fundamentally disagree on how to establish this. Neither Russia's more hierarchical centralist preference nor Iran's more local and decentralized vision serve a unified strategy and are consistently implemented by the regime.

Efficient use of assets

1




Year	Score
'06	3
'07	2
'08	1
'24	1

'06 '24 10

Policy coordination

3



Year	Score
'06	5
'07	4
'08	3
'24	3

'06 '24 10

5 4 4 3 1

While protesting against sanctions, the regime has not made any effort to address human rights violations. At the same time, Syria's official news agency SANA constantly promotes news about new tourism projects and attracts foreign visitors.

In Idlib, HTS is also mainly concerned with security issues, and, to a lesser extent, this holds true for AANES. In the latter, however, instead of coordinating policies, the PYD has adopted a centralizing approach.

Corruption has always been an issue in Syria but has increased further during the conflict due to increasing poverty, the depreciation of the Syrian pound and the diversification of opportunities. The government lacks any political will to fight it. As such, there are no integrity mechanisms in place. Syria is one of very few countries that has not ratified the United Nations Convention Against Corruption (UNCAC).

There have occasionally been highly publicized anti-corruption initiatives. However, these are largely politically motivated and directed against those who have fallen out with the regime or whose resources the regime wants to control. To suppress uncontrolled public debate on corruption, the Ministry of the Interior has established a branch for combating cybercrime and has criminalized social media accounts that discuss corruption. In 2022, it issued a new cybercrime law, bolstering the cybercrime decree of 2012.

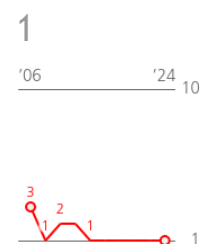
Bribery has more and more been replaced with centralized and decentralized forms of extortion, including imposing new taxes, increasing the price of essential services (e.g., the issuance of passports) and asking families to pay for information on disappeared family members. Armed gangs have taken over and invented new businesses. For example, a shady and expensive shadow business has emerged around graves in Damascus, as illustrated in one podcast episode by the Center for International and Conflict Studies.

16 | Consensus-Building

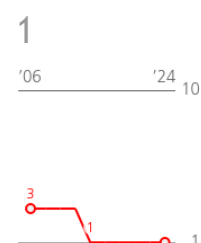
In all areas of Syria, the actors in charge have implemented systems based on extensive control, which are primarily focused on security issues and demonstrate little regard for democratic values. While officially a republic and keen to regularly hold elections, these are not democratic, and the violent response to calls for reform and democracy has demonstrated the regime is committed to its authoritarian form of governing.

For AANES, it seems to be extremely relevant to be perceived as open, democratic, pluralistic and inclusive. However, this only works in areas that are mainly Kurdish. In Raqqa and Deir ez-Zor, protests have emerged in response to policies perceived as straying too far from social and religious values, with citizens expressing discontent about a lack of participation. Even in Kurdish areas, the PYD has positioned itself as the dominant political force and lacks legitimacy.

Anti-corruption policy



Consensus on goals



The Syrian economy is showing growing signs of crony capitalism – a market economy in which business is possible for those who belong to a network closely affiliated with the regime.

The regime has confiscated properties, mainly of those who have fled. It has created a number of laws to legitimize this practice. In February 2021, it was revealed that conscription legislation had been modified to allow the Ministry of Finance to immediately confiscate the property of people who are deemed to have evaded conscription and do not pay a fee of \$8,000.

Syria is ruled by non-democratic actors, some of whom are challenged by other non-democratic actors such as IS, which has carried out attacks mainly in Deir ez-Zor, Hasakah and Homs. Democratic actors have been killed and forced into exile, and the militarization of the conflict has empowered armed factions that have taken over or dominated democratic structures that were emerging, such as local councils. The regime has given more leeway to Syria's Druze in the south but has reacted violently when challenged. All the changes in legislation serve to cater to the regime's needs, not to respond to citizens' demands, and there is no readiness for reforms that would lead to democratization. On the contrary, the empowerment of local warlords and the ever more powerful links between business and the security sector are unlikely to be reined in any time soon.

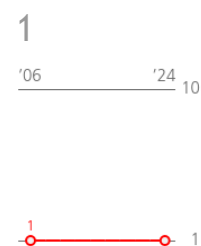
In Idlib, the dominance of HTS with Türkiye's consent, and Türkiye's direct interference in Afrin and Idlib, clearly favor anti-democratic actors. While HTS has tried to appear less extreme, this has mainly reflected a policy of distancing itself from al-Qaeda that is directed at the international community. Internally, it has maintained its authoritarian approach.

AANES has given itself a democratic constitution-like "social charter." However, in practice, PYD is not interested in opening up and allowing for real participation, especially not in the non-Kurdish areas it controls.

The political leadership, as well as external actors, have increasingly enhanced existing cleavages. From the beginning of the conflict, the regime has stoked fear – particularly among Syria's minorities – of "the others" and used demonizing and dehumanizing language. As a result of this and given expectations of sectarian violence, it is believed that two-thirds of Syria's Christians have left the country.

Sunni Muslims have borne the brunt of the conflict. The targeting of opposition areas has left entire cities in the area around Damascus depopulated. The vast destruction in these areas, as well as in east Aleppo and Baba Amr in Homs, means that it is unlikely many people will return. The regime has also banned citizens from returning and continues to evict people and demolish properties. This has led to major demographic change, calling into question whether Sunni Muslims still form the majority of the population.

Anti-democratic actors



Cleavage / conflict management



The sensitive relationship between Kurds and Arabs in northern Syria has deteriorated due to Türkiye's control of Afrin and the Azaz-Jarablus corridor through the SNA, as well as bombardments of and threats against AANES.

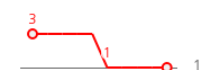
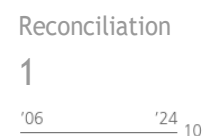
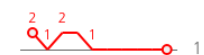
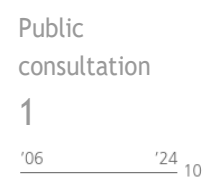
Calls by Turkish President Recep Tayyip Erdoğan for the regime and opposition in Syria to reconcile have enhanced fears among Syria's Kurds that they will face a coordinated campaign from both the regime and Türkiye.

Neither the regime, HTS nor the leadership of AANES consider civil society a significant force to pay attention to, consult or include in decision-making. They are all suspicious of independent activism. While HTS and AANES tolerate civil society activism in the humanitarian field to a certain degree, they do not consider it an asset.

In areas retaken by the regime, any engagement in administration, the medical sector or education while territories were outside its control has been considered an offense. The harsh response toward civil society is driven by economic as well as political interests – since the regime wants to ensure funding is absorbed only by organizations close to or actually part of the regime.

After retaking opposition strongholds, most prominently Aleppo in 2016 and Ghouta in 2018, the regime forced citizens who remained in these areas to settle their status with the regime. They have to share information on their role during opposition control of the areas. Marika Sosnowski's extensive research reveals how the notion of "reconciliation" in Syria changed because the regime used it as a euphemism for bringing territories and people under its control by force. These processes continue and mostly include humiliation, with the regime trying to dominate the narrative and force citizens to publicly show "relief" over the settlement by "chanting national slogans that praise the victories of the Syrian Arab Army."

The Ministry for Reconciliation was abolished in 2018. There is the Russian-operated Center for Reconciliation in Hmeimim. However, the center has been more visible in aid delivery than in mediating conflicts between the regime and parts of the population after 2019.



17 | International Cooperation

In 2022, the Center for International and Conflict Studies (CSIS) published a report analyzing the mechanisms through which the Syrian regime manages to directly avail itself of a large share of international humanitarian assistance. The study found that at least 51% of international humanitarian aid to Syria is siphoned off by the regime, which enforces exchange rates entirely detached from the market rate.

In addition, the regime benefits from U.N. procurement. In many instances, the United Nations pays for the services – logistics, security, distribution – of organizations run by regime officials or proxies, as a study by the Syria Legal Development Program of the United Nations’ most relevant suppliers detailed.

While there is corruption in all conflict contexts, the scale and the systematic way in which the regime manages to benefit from humanitarian assistance are unique.

The regime has not gained credibility in recent years. This is particularly evident in the lack of cooperation with the Organization for the Prohibition of Chemical Weapons (OPCW). Likewise, the United Nations Disarmament Affairs Office (UNDAO) has repeatedly stressed the lack of compliance and response from the Syrian regime regarding the dismantling and destruction of Syria’s chemical weapons arsenal. This extends to the investigations of past chemical weapons use, some as recent as 2018.

There have not been any Geneva conference meetings. The format has boiled down to meetings of the constitutional committee. U.N. Special Envoy Geir Pedersen has expressed dismay at the lack of progress, with no agreement even on constitutional principles having been reached.

This is a pattern also visible in the regime’s domestic negotiations with adversaries, where deals have been breached and negotiation efforts have been interrupted by violence. There are many examples of the regime failing to adhere to its agreements regarding local cease-fires, as analyzed by researcher Marika Sosnowski.

The PYD has proven to be a reliable partner in fighting IS. However, in light of a possible Turkish military offensive in late 2022, it suspended its cooperation. The fact that hardly any progress has been achieved with Western countries to repatriate IS fighters and family members currently held in SDF-guarded prisons undermines Western credibility here. While the SDF has been eager to design a constitution and implement a political vision different from the one possible for Kurds in Syria before 2011, as well as form a shadow government, it is clear that all achievements are fragile and depend on outside actors.

HTS finds itself increasingly dependent on Türkiye and facing a devastating humanitarian situation. The crucial factor will be the degree to which HTS can afford discord with Türkiye.

Effective use of support



Credibility



Cooperation with Russia and Iran, as well as the Lebanese Hezbollah, has been crucial for Assad. Relations are based on Assad's need for international backing, coinciding with Russian and Iranian interests in stabilizing him for reasons beyond Syria. Russia has used Syria as a tool to pressure Western countries. Meanwhile, Iran has used Syria to project regional power and keep open connections with and transfer routes to Hezbollah in Lebanon.

While the regime could not have prevailed without them, it has not been able or willing to pay them back. For Hezbollah, the return of refugees from Lebanon to Syria is politically relevant, but the regime has kept this to a minimum. Furthermore, the regime barely protested against the hundreds of Israeli aerial bombardments that targeted Iranian positions in Syria. Russia only half-heartedly protested against Türkiye's aerial bombardments in 2018, even though it controls the airspace.

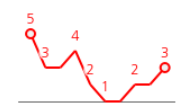
As of 2021, regional states had started normalizing relations with Syria. Jordan, one of the first countries to normalize relations with Syria, expected cooperation in two fields: for the Syrian regime to curb captagon smuggling into Jordan and to prevent arms smuggling to Jordanian oppositional tribes. However, publicity about drug smuggling and captured drugs increased significantly after normalization. In late 2022, the United Arab Emirates started normalization. While Assad expects to improve his image by re-establishing diplomatic ties, it is difficult to imagine that he would engage constructively.

It is likely that regional rapprochement with Syria is driven by various political interests. Türkiye's President Erdoğan used it to show domestically ahead of the elections that he is committed to sending Syrian refugees back. Meanwhile, the United Arab Emirates and Jordan hope to curb Iranian influence, which is unlikely given the regime's continued dependency on Tehran.

Regional cooperation

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Strategic Outlook

Syria is likely to remain divided among several factional territories, including AANES and Idlib, for the foreseeable future. It is essential for all parties to remain committed to finding a political solution in Syria in accordance with U.N. Security Council Resolution 2254. However, in the absence of any progress on this, it is important to identify ways to address civilians' needs. This includes finding a way to help the approximately 10,000 people trapped in Rukban on the Jordanian border, who have practically no access to health care and no systematic humanitarian provisions.

All across Syria, the humanitarian situation has drastically deteriorated, especially after the massive earthquake that hit southeast Türkiye and northern Syria on February 6, 2023. This earthquake particularly affected Idlib, Aleppo, Latakia and Tartous. By March 2023, more than 7,200 people on the Syrian side were reported to have died. The extensive destruction has impacted some of the most vulnerable segments of the Syrian population, resulting in tens of thousands of injuries with limited health care access and the further destruction of housing. International donors should continue to fund humanitarian responses for all areas of Syria, as well as for refugees in neighboring countries, especially Lebanon, where the situation could quickly escalate and contribute to further destabilization in the region. Without a transfer of power, the safe return of refugees is unachievable. Although military conflict is confined to a few regions, the absence of effective governance and the unchecked violence perpetrated by Syria's security services and armed groups means that it is infeasible for millions of people to return.

In light of the drastic deterioration of socioeconomic conditions in Syria and the potential for escalation, Europe should prepare to accept more refugees and provide greater support to neighboring states.

As long as there is a U.S. military presence in northeast Syria, it is likely that this will remain the country's most stable area with prospects for development. It has valuable resources as well as fertile land. For external actors, it would be worth exploring how to best support more inclusive governance in Raqqa and Deir ez-Zor, strengthen civil society, as well as encourage the further democratization of the regional administrations. Diplomatic efforts to address Türkiye's and the Kurds' security needs and mediate in the water conflict are further options. Finding a solution to the custody of IS prisoners in AANES would be a confidence-building step with the administration and would simultaneously address a significant security concern for the region, Türkiye and Europe.

If normalization between the Turkish government and Assad continues, it will raise questions for Syria's entire north. For Türkiye, a key motivation is the interest in restraining Kurdish ambitions – something with which the regime agrees. However, its relations with PYD – perceived as the most problematic actor – are relatively good. Assad's expressed interest in bringing all of Syria back under his control clashes with Türkiye's interest in occupying and maintaining influence in

northwest Syria. This area is completely dependent on humanitarian aid, with approximately four million people who have experienced repeated displacement living there. The humanitarian, educational and health care needs are even greater than in other areas. The Security Council must ensure that cross-border aid will continue in order to address these needs. Preventing further Turkish military offensives in Kurdish territories will be crucial to avoiding further mass displacement.

The biggest challenge will be maintaining humanitarian assistance to regime territories, given the intransigence of the regime and the ongoing large-scale human rights violations. Here, all efforts should be dedicated to making humanitarian aid needs-based and ensuring that external support does not enable further human rights violations. Europe and the United States should focus on continuing to sanction targeted individuals and avoid normalizing relations until tangible efforts toward achieving a lasting transition are evident.