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CONTEXT UPDATE

Northeastern Syria | June 8, 2023

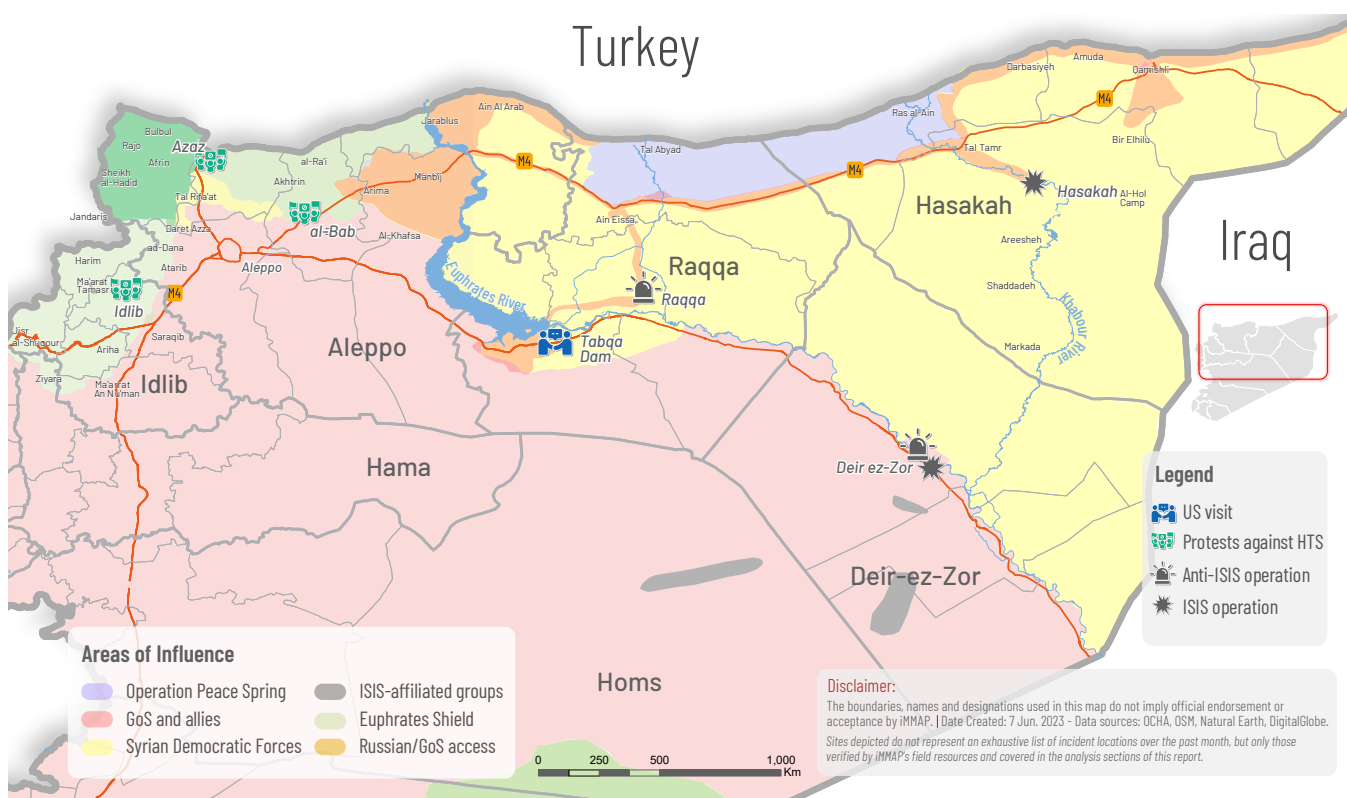


INTRODUCTION

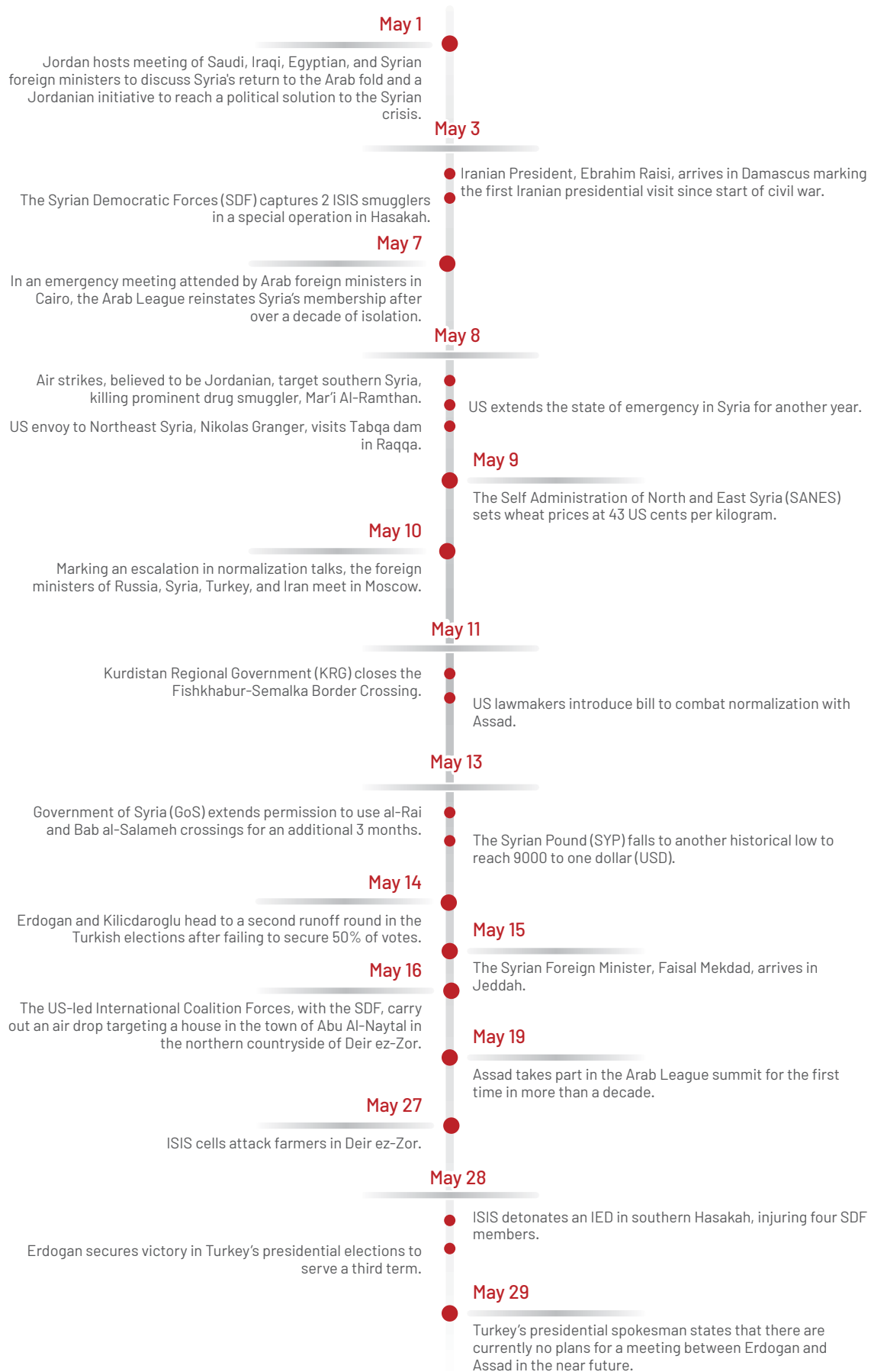
This report was generated by iMAP using a combination of data service providers, key informant interviews, and open-source research to assist donors and partners in analyzing evolving security, governance, political, economic, and other dynamics that impact conditions in Northeast Syria, as well as Whole of Syria, and the operating environment for humanitarian actors. The contents of this report solely represent the analysis of iMAP and do not represent the views or positions of iMAP's donors and partners. Moreover, the names and designations used in this report do not imply acceptance by iMAP's donors and partners.

Key Takeaways

- Although Northeast Syria (NES) has seen improved levels of precipitation and prices of wheat set in USD by the Self Administration of North and East Syria (SANES), farmers remain pessimistic about agricultural conditions. The constant depreciation of the Syrian Pound, rising prices of agricultural inputs, and the SANES set price of wheat lower than hoped, indicates a continued need to address the larger structural issues contributing to crippling NES's agricultural sector.
- Syria's readmission to the Arab League has given the Government of Syria (GoS) additional diplomatic gains since the earthquakes, while Arab countries still need to push for any real concessions to be made on the issues of Captagon and refugee returns. Expanding US sanctions against the regime will complicate efforts of economically engaging GoS, highlighting the multiple levels of uncertainty underlining the implementation of agreements reached in the last month.
- Erdogan's presidential victory was bittersweet news for Syrians in Turkey and Northwest Syria (NWS). Although adopting a relatively milder, and more pragmatic rhetoric on topics of refugees and foreign policy in Syria than his adversary, the run-off round of the elections saw both contenders increase focus on the issue with Erdogan promising the return of 1 million refugees. This will require greater investment than Turkey's current plans to build housing units in NWS, particularly regarding improving wider living and security conditions in the region.
- Hay'at Tahrir al-Sham (HTS) further attempted to re-invent themselves as an anti-Jihadist entity with Idlib an area of protection for minorities in May. However, the group simultaneously conducted large arrest campaigns in Der Hassan to suppress any criticism mounted against them within their territories, leading to violent exchanges of hostilities.



TIMELINE



SUMMARY OF EVENTS

There were multiple developments of significant importance to the humanitarian landscape in Syria in May. After Syria's membership was reinstated, Assad participated in his first Arab League summit for over a decade on May 19, providing him with opportunity to address counterparts from across the region. The summit appears to have marked a tangible shift towards a regional reacceptance of the GoS, although it remains unclear which trajectories these developments could take regarding the concessions each side is willing or able to make. The introduction of a new bill into US congress suggests that sanctions on the GoS are more likely to be expanded than lifted, putting into question the Arab League's ability to lobby against western sanctions regimes in exchange for GoS action to combat the Captagon trade. Moreover, reportedly Jordanian airstrikes targeting a prominent drug smuggler and his family, as well as a drug manufacturing and storing facility in southern Syria, indicates a level of doubt that Arab League demands for assurances and action from Assad can be achieved through diplomatic channels alone.

The Turkish presidential elections on May 14 resulted in a run-off stage between Erdogan and key opposition candidate Kemal Kilicdaroglu for the first time in Turkey's history, culminating in Erdogan's victory on May 28. Owing to Erdogan's relatively milder rhetoric on the topic of Syrian returns and perceptions of a lesser likelihood that he will make any immediate concessions for greater normalization with Assad, many in NWS celebrated the eventual outcome of the elections. Turkey may double-down on their efforts of improving conditions for Syrian returnees in NWS by building more housing units, and potentially restructuring and strengthening the institutions they back in NWS. However, there will be material implications for any Ankara-Damascus normalization pathway if so, as Assad insists on a removal of Turkish presence on Syrian soil as a prerequisite for any steps in rapprochement.

Compounding poor economic conditions in NES attributed to loss in agriculture profitability and a free-falling exchange rate persist. Although SANES has taken measures to try and capitalize on improved precipitation levels relative to previous years to consolidate an improved agricultural season, many believe that such efforts will fall short of compensating for the prevailing and compounding poor conditions farmers have experienced over the last few years.

Since Arab states began moves to normalize with the regime, SANES have presented an initiative for a political resolution in Syria, welcomed Assad's return to the Arab League, and has reportedly been intensifying efforts to ensure they are not excluded from any Arab-brokered solution in Syria. However, underlining this fear is the evidence that these initiatives and attempts remain largely un-responded to by key international stakeholders within the rapidly evolving political landscape.

ANALYSIS

| SANES Response to Arab League

The reinstatement of the GoS to the Arab League was received with varying sentiment across Syria's different administrations. While NWS opposition was clear in their rejection and condemnation, SANES in NES appeared to be more receptive of this development, exhibiting a level of willingness to participate in a political solution. In a statement published on May 11, SANES noted that they "consider Syria's return to the Arab region to be highly important, as long as it does not get in the way of a political solution for the Syrian crisis."¹ Also referencing the initiative they launched in April,² SANES's statements emphasize their insistence on their involvement, highlighting its insecurity in sourcing sufficient international backing for their interests to be protected in a political solution.

To mitigate fears of exclusion, SANES's strategy appears to be limited to repeated reminders stakeholders of their willingness and benefits they can offer to support Arab states' demands from the regime, such as hosting refugee returnees.³ This was demonstrated in late April, when NES received seven families made up of 50 refugees, including women and children from Lebanon as anti-Syrian sentiment has flared in recent months in the country as its economic crisis continues⁴. However, SANES's initiative appears to have not yet been directly recognized or acknowledged by any key international stakeholders. Previous reports suggested that SANES was seeking the support of individual Arab countries, particularly the UAE, to safeguard its interests, including to protect their administrative model and the status of the SDF in the region, in any potential political resolution with the GoS.⁵

Although the US anti-normalization bill passed through Congress in aiming to curb serious attempts at economically re-engaging Assad, as SANES's main backer the US has refrained from any public involvement or condemnation of the administration's appeal to be included within a political solution with the GoS. However, SANES will likely be cautious to commit to any concrete agreement with the GoS prior to an indication from the US as to what the consequences may be for its continued security backing and broader relations. This leaves little option for the administration but to wait for further outcomes of and reactions to Turkish and Arab normalization with the regime to materialize.

However, it is important to note that SANES's initiative may not be universally representative of broad sentiment within NES, both in popular opinion and within the administration itself. Field reports suggest that the initiative has gained very little traction within NES, noting that most people are not aware of it. Those who have, generally exhibit a lack of trust in SANES's ability to influence the trajectory of future developments in Syria. Moreover, although SANES may strive to retain a degree of autonomy, there is likely discrepancy in the level of which certain factions of the administration are willing to accept. Particularly with Erdogan's re-election for another term, the notion of total Kurdish autonomy in Syria is even more untenable if Assad remains incentivized to follow through with normalization.

| Living Conditions in NES

Syria's economy has rapidly deteriorated since the beginning of the year, with trends drastically accelerated following the earthquakes in February. This month, rising levels of food insecurity and worsening living conditions have continued as a result of further depreciation of the Syrian pound. WFP reported that between 2020 and 2022, food prices in Syria increased by 532%.⁶ Many families have struggled to adapt to such price increases within a labor market characterized overwhelmingly low wages, with more than 90 percent of Syrians living under the poverty line.⁷ Such severe living conditions result from a conjunction of structural domestic and international issues which are difficult to address by the local governance systems in NES, such as persistent exchange rate volatility and continued pressures on agricultural inputs.

Exchange rate mismanagement. As outlined in [IMMAP's March Context Update](#), Syria's Central Bank raised the USD exchange rate to its highest rate in history from 7,100 to 7,200 in March. These trends have since worsened, with May witnessing the Syrian Pound (SYP) falling to another historical low to reach 9000 SYP to the dollar, with predictions of further depreciation in the future.⁸

Local perceptions of SANES's management of the issue remain poor with accusations that measures implemented by SANES to address currency depreciation fall short of what is needed. On May 9, SANES issued new guidelines for the licensing of exchange and remittance companies and offices in their areas.

Existing enterprises were given two weeks to issue new licenses and comply to the new conditions, one of which requires them to pay large sums of up to one million USD in some cases as “minimum capital.”⁹ The sheer unaffordability of such requirements would likely lead to dozens of companies being forced to close due to failure to pay these large amounts of money or to comply with other newly introduced rules. The SANES stated these measures were implemented with the purpose of regulating the currency exchange sector. However, some have accused the changes to licensing as being yet a further attempt for SANES to exert more control and monopolize the sector for personal profit.¹⁰ These requirements therefore bolster increasing public sentiment over the critically low administrative capacity or willingness of SANES and its ability to effectively govern the region, providing further evidence that it does not understand the structural causes and consequences of the severe economic context.

Potential for improved agricultural season. According to the Syria Economic Monitor of the World Bank, agricultural production decreased in 2023 to a record low for the second consecutive year. Wheat production in 2021 and 2022 was estimated at around 1 million tons, compared to 2.8 million tons in 2020.¹¹ Low rainfall levels have been a key contributor to the water crisis in NES, with severe consequences for the crippled state of its agricultural sector. This year, however, higher rainfall levels have helped farmers revive their hopes of a better season.

SANES has also begun to address policy concerns around agricultural outputs, implementing a more effective pricing of wheat for this season. The purchase prices of wheat, in particular, have witnessed continuous fluctuations in previous years, with the price determined either in USD or in SYP. This month, SANES have set wheat prices at 43 US cents per kilogram,¹² while stating that they will pay farmers’ dues in US dollars to mitigate the impact of currency depreciation.

The price has been considered reasonable by some in comparison to those set by GoS at 2300 SYP per kilogram, the equivalent to 26 US cents.¹³ However, field reports indicate that many farmers remain dissatisfied due to the persistent increases in costs of wheat cultivation in recent years, both in agricultural inputs and transportation costs. Farmers had therefore hoped for a minimum price of 52 cents per kilogram. The decision to issue payment in USD has, however, been universally well-received. Should SANES deliver on this, farmers will retain a certain degree of protection against a continuously free-falling exchange rate.

| WoS Developments:

Syrians in NWS and Turkey Respond to Erdogan Victory

Throughout the Turkish presidential campaigns of Erdogan and his rival candidate Kemal Kilicdaroglu, and particularly leading up to the run-off vote, the topic of Syrian refugees and Turkish foreign policy in Syria were featured prominently. Notably, Kilicdaroglu appeared to intensify his tone against Syrians before the run-off vote, exhibiting a belief that drawing on existing anti-Syrian sentiment in Turkey would provide a winning strategy after falling behind Erdogan by only an approximate 5% in the first round. In a series of speeches, he referred to Turkey as “a warehouse of refugees” and committed to returning all refugees to Syria within two years, calling on voters to make their choices in the election on the issue.¹⁴ Relative to such explicit derogation, Erdogan’s tone took the appearance of being more measured and considered as he proposed that a “road map for the return of refugees” would be soon constructed with the assurance of safe return.¹⁵ Despite ongoing questions about the feasibility of such a plan, Erdogan’s victory was widely received with a measure of relief by Syrians in Turkey.

Erdogan’s re-election and plan for the safe return for refugees will likely have consequences Syrian humanitarian landscape, although not to a level of severe and immediate disruption that a Kilicdaroglu victory would have created. Although still planning to return 1 million refugees back to Syria,¹⁶ this will likely be more gradual and calculated, with near term plans seeming to rely on continued, and perhaps increasing, construction of housing units in NWS for returnees.¹⁷

However, the continuously deteriorating economic conditions in NWS, particularly after the earthquakes, may render these efforts insufficient. Due to inter- and intra-factional violence and ever-worsening humanitarian needs, general living conditions in NWS can be described as unstable at best and still a significant factor in preventing any material levels of voluntary return.¹⁸ As such, serious plans for refugee returns to NWS will need to be coupled by steps towards improving humanitarian conditions and local governance institutions. In the near term, this may result in continuing Turkish efforts to restructure the Syrian National Army (SNA) and the Syrian Interim Government (SIG), although these trends have decelerated since the beginning of the year, likely due to the earthquakes and Turkish elections.

Turkey's doubling down on their presence and influence in NWS could provide a barrier to normalizing relations with Damascus, with the regime upholding its conditions of Turkish withdrawal from Syrian territory as a pre-requisite for any real re-engagement. After reaching a significant milestone following the quadrilateral meeting of Russian, Iranian, Turkish and Syrian Foreign Ministers on May 10,¹⁹ the pace of Ankara-Damascus normalization has slowed. Initial reports noted that the meeting in Moscow led to an agreement to work on a roadmap to advance relations between Syria and Turkey.²⁰ However, Mekdad reaffirmed tangible progress remains out of reach until Turkey ends its presence in NWS.²¹ A day after Erdogan's win, the Turkish presidential spokesman Ibrahim Kalen stated that there are currently no plans for Erdogan and Assad to meet in the near future.

Erdogan's win was also celebrated by many in NWS, with the Syrian Opposition Coalition (SOC) issuing a statement extending their congratulations to him, as well as they Turkey as a whole.²² Leaders of multiple factions within the SNA also congratulated him on his victory.^{23 24} Similarly, widespread public celebrations within NWS took place within areas including Afrin, Azaz, and al-Bab.²⁵ Such celebrations, however, were understandably absent in NES with Erdogan's win renewing fears of Turkish escalation of hostilities in the areas under the SANES control.

Syria's Return to the Arab League.

After 12 years of suspension and following a reportedly unanimous vote, Arab states decided to reinstate Syria's membership to the Arab League on May 7, providing the latest in a recent string of diplomatic gains made by Bashar al-Assad. The decision, which went into immediate effect, was made by Arab foreign ministers at an emergency meeting at the League's headquarters in Cairo, where all 13 of the 22 member states that attended the session endorsed the decision.²⁶ The readmission served to demonstrate a clear shift in regional approach towards dealing with Assad. Although a change in strategy had been getting traction over the past few years through advocates such as the UAE, this trend accelerated after the February earthquakes provided a politically acceptable opportunity for Arab leaders to re-engage Assad. In his speech, Assad claimed the world was witnessing a change in the political environment the region, taking aim at the "west" through accusations of external interference for the unstable state of Arab countries, including Syria. More explicitly, Assad's speech made direct references to threats posed by Israel, and Turkey.²⁷

Although the meeting in Amman attempted to formulate a tit-for-tat framework before the full re-embrace of Assad, the Arab League's statement did not establish precise conditions on Syria's return to the League. It merely welcomed Syria's willingness to cooperate with Arab countries to implement issues relevant to Arab concerns, including implementation of the commitments reached at the Amman meeting on May 1.²⁸ Syria's readmission appeared to build on stated intentions in this previous agreement, such as the decision to form a ministerial joint liaison committee of Jordan, Saudi Arabia, Iraq, Lebanon, Egypt, and the Secretary-General of the League following in the Amman statement.²⁹ However, there remains ambiguity over the level of guarantees, and on what issues, extracted from Assad for readmission. Early reports sourcing diplomats in attendance of the meeting referenced elections as one of the conditions discussed, although were later removed from narratives, instead framing the issue of a political solution under the terminology of Resolution 2254.³⁰ There remains no clear enforcement mechanism for these commitments, causing many to speculate on GoS's actual ability or willingness to deliver on them.

Currently, there does not appear to be unanimity within the Arab League on the readmission of Syria, markedly noted by the high absence rate during the vote in Cairo. Commentary provided by some Arab countries, including Qatar, clearly demonstrated that while their own personal position on Damascus remains unchanged, they would not stand in the will of the league. As Assad participated in the Arab League summit in Saudi Arabia for the first time since Syria's membership was suspended more than a decade ago on May 19, Qatar's Emir Sheikh Tamim bin Hamad Al Thani reportedly left before Assad gave his speech.³¹ Although the conditionality of the Arab League readmission was notably absent from following statements, all Arab states will at some point require concessions to be made from the GoS in exchange for any role they play in rehabilitating Syria's image or the country's infrastructure to uphold diplomatic credibility.

US sanctions continue. The "Assad Regime Anti-Normalization Act of 2023," passed on May 17, House Foreign Affairs Committee in an effort to expand on the Caesar Syria Civilian Protection Act.³² In response to Syria's readmission to the Arab league, on May 11, US lawmakers introduced the bill to reiterate the need to hold the Assad regime accountable for its crimes against the Syrian people and illustrate the human cost of normalization with the GoS.³³ It provided a distinct message that the US has no plans to tangibly change strategy in Syria

or normalize relations with Assad, and will not support states in doing so. This move represented the adoption of a slightly harsher US position on recent events, as past months have been characterized by a “wait and see” attitude towards Arab rapprochement. However, the anti-normalization bill provides a level of legal commitment by US policymakers that sanctions against Assad are unlikely to be lifted or alleviated anytime soon, but rather potentially increased with further sanctions put forth. This is a clear sign that proposed Arab League moves to lobby against western sanctions systems are likely to face clear resistance, questioning either Arab countries willingness or ability to invest in Syria’s reconstruction or the US’s own appetite to hold regional powers to account.

Captagon trade. Considered a “financial lifeline” for al-Assad’s regime, and with some estimates valuing it at “approximately 3 times the combined trade of the Mexican cartels,”³⁴ Captagon trade remains a main topic of contention between Arab countries and the Assad regime. Although it remains unclear what concessions Assad is willing to make to stem drug trade in region, Arab countries are already implementing differing strategies to tackle the spread of Captagon across borders, exhibiting varying trust in GoS adherence to stated concessions. Although denied by the Saudi Foreign Ministry, reports in May claimed that Saudi Arabia had offered Assad \$4 billion in exchange for halting the drug trade, a figure based on Riyadh’s estimation of the trade’s value.³⁵

Taking a different approach, on May 8, reportedly Jordanian airstrikes targeted a drug factory and the home of a suspected drug dealer, Marai al-Ramthan. The drug dealer, his wife, and six children were killed in airstrikes in the east of Sweida southern Syria, near the Syria-Jordan border. Al-Ramthan was considered the most prominent drug trafficker in the region, particularly for the smuggling of Captagon into Jordan.³⁶ A second attack targeted a building containing a drug factory in Daraa, reportedly used by Iranian-backed groups to produce and store drugs before smuggling them into Jordan.³⁷ Comprising the most hard-line position out of all of the Arab states, the attacks had followed threats made by Jordan’s Foreign Minister Ayman Safadi the previous week in an interview with CNN that the country was willing to use force against drug smuggling from Syria to its territories.³⁸ Following the attacks, it was reported that Jordanian forces subsequently sent warning text messages to suspected drug dealers in southern Syria urging them to hand themselves over to Jordanian authorities or face a similar fate to Marai al-Ramthan.³⁹

HTS focus on its external audience. HTS continues efforts to distance themselves from their previous Jihadi affiliations this month. Allowing a journalist from France24 into to Idlib in early May, the report claimed HTS had given the reporter unprecedented access to meet and speak with key figures including al-Golani and Abu Maria al-Qahtani.⁴⁰ The visit aimed to showcase HTS’s moderacy and secular acceptance, framing Golani as a “sworn enemy of Jihadists” and accompanying the reporter into communities where Christians were repairing churches to illustrate claims of the group’s religious tolerance.⁴¹

The visit hoped to convey an image of HTS as a reforming group to regional and international audiences whereby the Syrian Salvation Government (SSG) is a governing body “trying to make something from nothing.”⁴² As normalization trends continue, and HTS and the SSG remain left out of any such discussions, it marks continuing efforts to present themselves as ready and capable to be parties to negotiations around the future of Syria. Moreover, as pressures around sanctions regimes fluctuate and among the widespread destruction faced by NWS infrastructure following the earthquakes, distinguishing the SSG from the HTS’s jihadist roots will be essential to increase donor appetite to address structural issues in the region’s living conditions.

In contrasting spirit to the France24 report, May also saw the severe crackdown of HTS on communities such as Der Hassan. With entities like Hizb al-Tahrir, and Hurras al-Din increasingly and publicly criticizing HTS in recent months, HTS responded by conducting various arrest campaigns against protestors and activists. This further fueled dissatisfaction with HTS across various areas in NWS, leading to protests in areas of Der Hassan, Azaz, Mare’a and the Atmeh Camps. However, it seems that HTS was largely successful in squashing any demonstrations of public satisfaction, with field reports indicating a return to relative calm following the mass-arrests and violent clashes. As such, though HTS might attempt to change their public image to be more palatable to the international community, their methods of establishing order within their locales may serve to undermine these efforts.

CONCLUSION

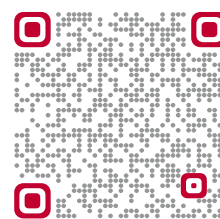
Several major developments in the Syrian context took place in May at an increasingly rapid pace. Erdogan's victory in the Turkish elections may have given Syrians greater room to breathe than that of his rival, but his campaign nevertheless still ran on promises of "voluntarily" returning Syrian refugees. Although there is a real need for dignified shelter in NWS, more efforts need to go into improving the general living and security conditions that define the NWS landscape before it is considered suitable, by any measure, to receive returnees.

At the same time, Syria's return to the Arab League also touches on the issue of refugee returns from neighboring Arab countries. Although there were signs that Syria's re-embrace would be a conditional one, it seems that such conditions will be agreed upon in the weeks and months to come and could be negotiated unilaterally by different Arab countries. A potential risk is that this pace and insistence in bringing Syria back into the Arab fold, as part of larger regional reshuffle of political and economic interests, would come at the expense of haphazardly returning refugees to areas where their lives would be endangered.

Different opposition areas outside of GoS control all continue to react differently to these changes. Although SANES is hedging its bets by presenting a constructive attitude towards a political solution in Syria, their calls remain largely ignored and any concrete agreement will continue to depend on the US position. Opposition forces in NWS however continue to condemn any engagement with GoS. HTS continues to try to present themselves as a moderate entity that should be included in any negotiations on a Syria solution, while violently cracking down on any dissidence within the areas they control.

The weeks and months to come will better enable us to ascertain the impact these developments will have on the aid landscape in Syria, as well as the conditions Syrian refugees will face. However, it is important to acknowledge the renewed attention Syria is receiving from its regional partners, and the increasing momentum attempts to "fix Syria" might build. Humanitarian actors, and activists, should be wary of eager attempts to sweep the proverbial political dust under the rug, at the detriment of the political and human rights of Syrians in the country and refugees abroad.

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