



# The Current Status of Social Support in Syria

ASSESSING CONDITIONS, DYNAMICS, AND  
CHALLENGES ACROSS THE FOUR ZONES OF CONTROL

RETURNS CONTEXT MONITORING PROGRAM (RCM)

**KEY FINDINGS AND GRAPHICS**

January 2022

# CONTENTS

	<b>GLOSSARY</b>	<b>03</b>
<b>1.</b>	<b>OVERALL KEY FINDINGS AND IMPLICATIONS</b>	<b>05</b>
	Graphic 1. Population by Zone of Control – November 2021	07
	Graphic 2. Overview of Social Support Systems by Zone of Control – January 2022	08
<b>2.</b>	<b>CURRENCY KEY FINDINGS AND GRAPHICS</b>	<b>09</b>
	Graphic 3. SYP/USD Exchange Rate - 2015 to 2021	10
	Graphic 4. Overview of Currency Usage Across Zones of Control – December 2021	10
	Graphic 5. TRY/USD Exchange Rate - 2016 to 2022	10
<b>3.</b>	<b>PRICE CONTROLS KEY FINDINGS AND GRAPHICS</b>	<b>11</b>
	Graphic 6. Overview of Price Controls Across Zones of Control	12
<b>4.</b>	<b>PUBLIC SECTOR EMPLOYMENT KEY FINDINGS AND GRAPHICS</b>	<b>13</b>
	Graphic 7. Overview of Public Sector Employment Across Zones of Control – December 2021	14
	Graphic 8. Public Sector Monthly Salary Ranges Across Zones of Control – December 2021/January 2022	14
	Graphic 9. GoS Public Sector Workforce - 2010 to 2019	14
	Graphic 10. Estimated GoS Public Sector Workforce Distribution by Salary Range - December 2021	15
	Graphic 11. SSG Public Sector Employee Salary Ranges – December 2021	15
	Graphic 12. Turkish/SIG-LC Public Sector Employee Salary Ranges – January 2022	15
	Graphic 13. Self Administration Public Sector Employee Salary Ranges – December 2021	15
<b>5.</b>	<b>FUEL KEY FINDINGS AND GRAPHICS</b>	<b>16</b>
	Graphic 14. Overview of Fuel Across Zones of Control – January 2022	18
	Graphic 15. Diesel Price Ranges Across Zones of Control – January 2022	19
	Graphic 16. Gasoline Price Ranges Across Zones of Control – January 2022	19
	Graphic 17. Butane Gas Price Ranges Across Zones of Control – January 2022	20
	Graphic 18. Overview of Fuel Types, Prices, and Limits in GoS Areas – January 2022	20
	Graphic 19. Overview of Fuel Types, Prices, and Limits in SSG Areas – January 2022	20
	Graphic 20. Overview of Fuel Types, Prices, and Limits in Turkish/SIG-LC Areas – January 2022	21

	Graphic 21. Overview of Fuel Types, Prices, and Limits in Self Administration Areas – January 2022	21
<b>6.</b>	<b>BREAD AND FOOD SUPPORT KEY FINDINGS AND GRAPHICS</b>	<b>22</b>
	Graphic 22. Overview of Bread Across Zones of Control – January 2022	23
	Graphic 23. Bread Prices Across Zones of Control (Adjusted to USD per 1 Kilogram) – January 2022	23
	Graphic 24. GoS Weekly Subsidized Bread Purchase Limits – 2021 - 2022	24
	Graphic 25. SSG Weekly Subsidized Bread Purchase Limits – January 2022	24
<b>7.</b>	<b>ELECTRICITY AND WATER KEY FINDINGS AND GRAPHICS</b>	<b>25</b>
	Graphic 26. Overview of Power Across Zones of Control – January 2022	27
	Graphic 27. Monthly Electricity Costs Across Zones of Control – January 2022	28
	Graphic 28. GoS Price Ranges for Power via National Network – 2021 - 2022	28
	Graphic 29. GoS Price Ranges for Water via Public Networks – 2021 - 2022	28
	Graphic 30. Green Energy Subscription and Service Fees for Residential Power – January 2022	29
	Graphic 31. AK Energy and STE Subscription and Service Fees for Residential Power – January 2022	29

# GLOSSARY

<b>GoS</b>	Government of Syria
<b>HTS</b>	Hayat Tahrir Al-Sham
<b>IDP</b>	Internally displaced person
<b>ISF</b>	Internal Security Forces
<b>LC</b>	Local Council
<b>kWh</b>	Kilowatt hour
<b>NES</b>	Northeast Syria
<b>NGO</b>	Non-governmental organization
<b>PYD</b>	Democratic Union Party
<b>RCM</b>	Returns Context Monitoring program
<b>SANES</b>	Self Administration of North and East Syria
<b>SDF</b>	Syrian Democratic Forces
<b>SIG</b>	Syrian Interim Government
<b>SSG</b>	Syrian Salvation Government
<b>STE</b>	Syrian-Turkish Energy Company
<b>SYP</b>	Syrian Pound
<b>TRY</b>	Turkish Lira
<b>US</b>	United States
<b>USD</b>	United States dollar
<b>YPG</b>	People's Protection Units
<b>WoS</b>	Whole of Syria

# 1. OVERALL KEY FINDINGS AND IMPLICATIONS

- Social support has largely collapsed across Syria with each region of the country facing a unique set of political, security, economic, and humanitarian circumstances.
- Once chiefly an effort meant to ensure political stability, provision of social support services has become a humanitarian imperative for the GoS, newly emerging authorities, and humanitarian actors across the country.
- In the decades preceding the Syrian conflict, the Government of Syria (GoS) established an expansive social support system comprised of a sprawling public sector, key goods at subsidized or reduced prices, and cheap or free essential services.
- The social support system not only represented the cornerstone of the GoS's contract or bargain with the population, but it also continued to shape decades old expectations around governance and services.
- Today, governance and provision of social services in Syria has splintered and is currently divided into four distinct zones of control: GoS areas, Syrian Salvation Government (SSG) areas, Turkish/Syrian Interim Government-Local Council (SIG-LC)<sup>1</sup> areas, and Self Administration<sup>2</sup> areas.
- In GoS areas, which hold 66% of the national population, the GoS has attempted to maintain the existing social support system to prevent the complete collapse of the state. Nevertheless, the system has become unable to meet the basic needs of the population.
- GoS public sector salaries fall far short of the basic cost of living, subsidized good shortages are frequent, price controls are ineffective and unevenly adhered to, power and water networks are unreliable or inoperable, and the quality of public education and healthcare services continue to deteriorate.
- In Self Administration areas, which are currently home to 13% of the population, the Self Administration has partially maintained the GoS social support system.
- Despite maintaining control of Syria's key oil and agricultural resources, the Self Administration has been unable to effectively and equitably administer social support in NES, or to develop and communicate alternative policies.

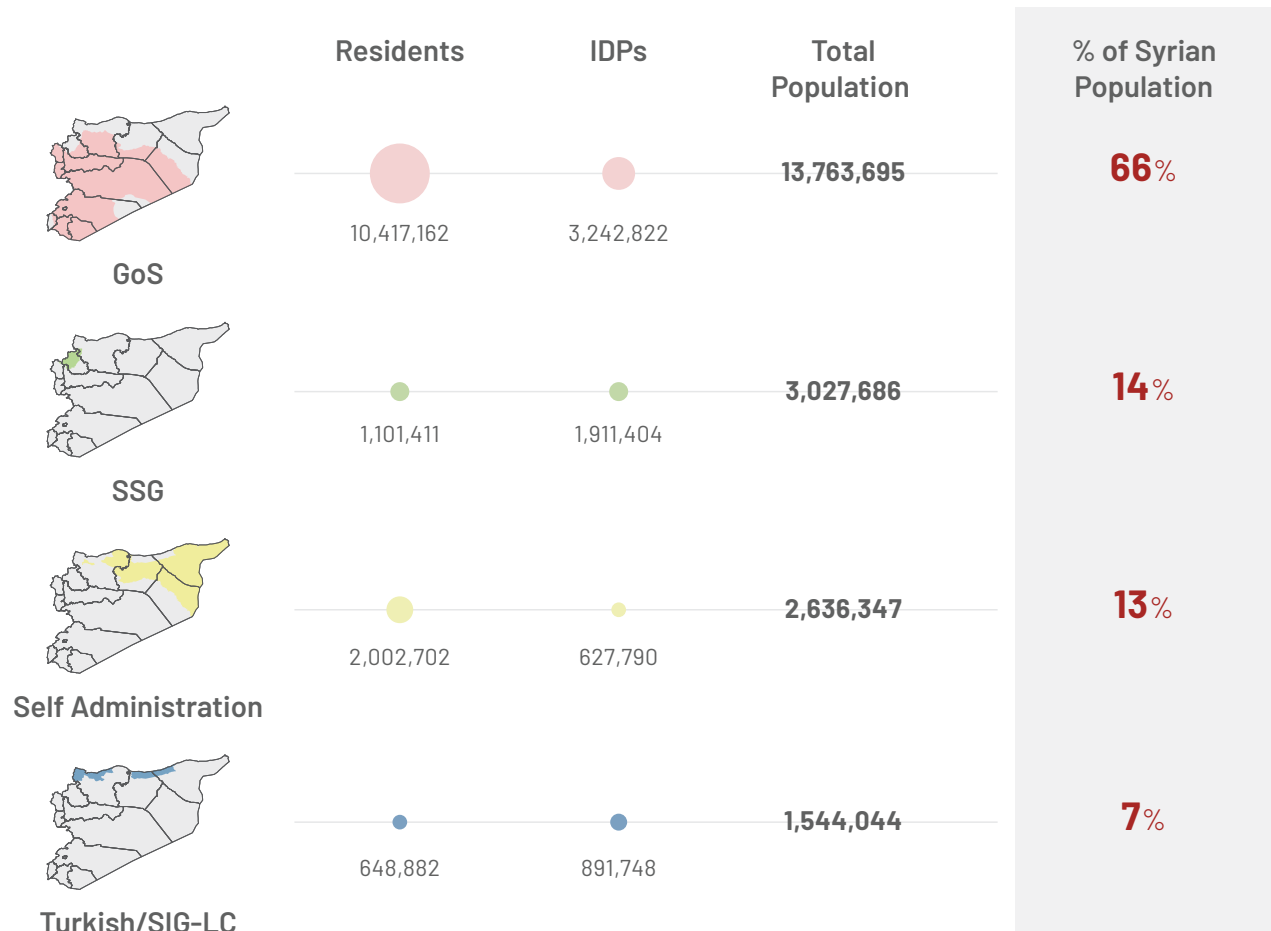
---

<sup>1</sup> Throughout this report, the term SIG-LC collectively refers to the SIG and dozens of local councils who are responsible, alongside Turkish authorities, for administering northern Aleppo, Afrin, Ras Al-Ain, and Tell Abiad

<sup>2</sup> The report uses the term Self Administration to collectively refer to the Democratic Union Party (PYD), People's Protection Units (YPG), and the set of military, political, and governance bodies established by the PYD and YPG between 2015 and 2018, including the Syrian Democratic Forces (SDF), Internal Security Forces (ISF), Syrian Democratic Council (SDC), and Self Administration for North and East Syria (SANES).

- In lieu of greater clarity around the Self Administration's long-term prospects and genuine administrative development, social support will likely remain a key component of the Self Administration's fragile bargain with constituencies throughout Northeast Syria (NES). Overall, however, social support is likely to remain unreliable and inconsistent.
- In Turkish/SIG-LC and SSG areas the GoS social support system has largely disappeared.
- Turkish/SIG-LC areas are collectively home to 7% of Syria's population. This zone of control is comprised of large parts of Afrin, A'zaz, Al-Bab, and Jarablus districts in northern Aleppo, and Ras Al-Ain and Tell Abiad, districts in NES.
- The current state of social support in Turkish/SIG-LC areas is the result of Turkey's efforts to minimize the costs and maximize the rewards of its role in the area. Social support is restricted to subsidized or free bread provision and access to free education and healthcare. Public sector employment is low and price controls are minimal with fuel, electricity, and most foodstuffs are sold at market rates.
- Turkey is unlikely to reverse this approach for the foreseeable future.
- SSG areas hold 14% of Syria's population. This zone of control is comprised of central and northern Idlib and a small part of western Aleppo governorate.
- To date, the SSG has largely foregone establishing a social support system. While it began to subsidize bread in late 2021 as a result of TRY volatility and rising prices and relies on non-government organizations (NGOs) to maintain free education and healthcare, fuel, electricity. Most foodstuffs are sold at market rates, price controls are minimal, and public sector employment is extremely low.
- The SSG is unlikely to significantly expand social services, as it lacks the resources to do so.

**Graphic 1.** Population by Zone of Control – November 2021



## Graphic 2. Overview of Social Support Systems by Zone of Control – January 2022

	GoS	SSG	Turkish/SIG-LC	Self Administration
Dominant Currency	SYP	TRY	TRY	SYP
Price Controls	Yes - Extensive	Yes - Limited	Yes - Limited	Yes - Limited
Subsidized Goods	Key fuels Normal Syrian Bread Certain foodstuffs Certain medicines	Normal Syrian bread	Normal Syrian bread	Diesel fuel Normal Syrian bread
	<i>rationed quantities</i>	<i>rationed quantities</i>	<i>rationed quantities</i>	<i>rationed quantities</i>
Size of Public Sector	~1,500,000	~5,000	~15,000-25,000	~120,000
Percentage of Working Age Population in Zone	20%	1%	1.5%	6%
Salary Range – USD Adjusted	19-92 USD	38-227 USD	30-227 USD	56-139 USD
Fuel Sources	NES and Iranian Imports	NES and Turkish Imports	NES and Turkish Imports	NES and Iraqi Imports
Subsidized Fuel – Price Regulated Fuel	Yes - Yes	No - Yes	No - Yes	Yes - Yes
Fuel Shortages	Yes	No	No	Yes
Wheat/Flour Sources	Domestic (Primary) Imported (Secondary)	Imported (Primary) Domestic (Secondary)	Imported (Primary) Domestic (Secondary)	Domestic
Subsidized Bread – Price Regulated Bread	Yes - Yes	Yes - Yes	Yes - Yes	Yes - Yes
Subsidized Bread Shortages	Yes – Regular	Yes – Irregular	Yes – Irregular	Yes - Regular
Power Sources	Syrian National Grid, Private Generators, Solar Panels, Ampere	Turkish National Grid, Ampere, Private Generators, Solar Panels	Turkish National Grid, Ampere, Private Generators, Solar Panels	Syrian National Grid, Ampere, Private Generators, Solar Panels
Subsidized Power	Yes	No	No	Yes
Water Sources	Public water networks, wells, tanker trucks, and bottled water	Public water networks, wells, tanker trucks, and bottled water	Public water networks, wells, tanker trucks, and bottled water	Public water networks, wells, tanker trucks, and bottled water
Charge for Use of Public Water Networks	Yes	Yes - Partial	Yes - Partial	No



## 2. CURRENCY KEY FINDINGS AND GRAPHICS

- The Syrian Pound (SYP) is and will likely remain the dominant currency in GoS and Self Administration areas.
- In an effort to stabilize the SYP, the GoS has sought to maintain demand, through public sector salary payments and restrictions on foreign currency usage, and reduce speculation, through crackdowns on informal foreign currency channels and foreign currency transaction regulations.
- Nevertheless, due to GoS's limited resources, exhausted foreign currency reserves, and GoS areas' limited prospects for economic recovery in the foreseeable future, the SYP is likely to continue to depreciate, with 4,000 and 5,000 SYP/1 United States Dollar (USD) acting as a magnet for future value.
- Without any influence over GoS monetary policy, Self Administration areas will remain vulnerable to continued SYP inflation and volatility.
- While the Self Administration is reportedly working to establish a monetary authority, the role of the potential authority is unclear.
- A Self Administration monetary authority is unlikely to undertake dollarization, as it does not have access to the necessary amount of USD, USD denominations exceed the price of most goods and transactions in NES, and such a move could negatively impact ongoing economic, and potential political, cooperation with the GoS.
- Unable to dollarize the economy and with no influence over GoS monetary policy, the role of a potential Self Administration monetary authority would likely be limited to developing currency and exchange regulations and, potentially, establishing Self Administration foreign currency reserves.
- The TRY is and will likely remain the dominant currency in SSG and Turkish/SIG-LC areas.
- The SSG and SIG-LC's ability to shield the local economies from TRY volatility will likely remain limited.
- While both the SSG and SIG-LC could alleviate shocks by hedging more goods to the USD and increasing trade with GoS areas over the near to mid-term, Turkey appears to generally oppose such moves.
- In all four areas, currency volatility will complicate and undermine economic recovery, as well as the feasibility and effectiveness of social support systems.

**Graphic 3. SYP/USD Exchange Rate - 2015 to 2021**



**Graphic 4. Overview of Currency Usage Across Zones of Control – December 2021**

	GoS	SSG	Turkish/SIG-LC	Self Administration
Daily Transactions	SYP	TRY	TRY	SYP
Large and Medium Transactions	SYP	USD	USD	SYP/USD
Wages: Public Sector	SYP	TRY	TRY	SYP
Wages: Private Sector	SYP	TRY	TRY	SYP
Wages: (I)NGOs	SYP	TRY/USD	TRY	SYP/USD
Remittances	SYP or other currencies must be converted to SYP	USD/TRY Other	USD/TRY Other	USD/ Other
Currency Controls	High	Low	Low	None

**Graphic 5. TRY/USD Exchange Rate - 2016 to 2022**



### 3. PRICE CONTROLS KEY FINDINGS AND GRAPHICS

- The GoS maintains an extensive price control regime, which includes subsidies, regulated prices, and profit limits for hundreds of goods.
- While the GoS is unlikely to roll back its price control regime, it has become increasingly ineffective over the course of the conflict.
- As declining local production and limited access to key domestic resources have led to recurrent shortages and increased diversion, SYP inflation and volatility have resulted in gradually increasing prices and regular price spikes.
- While the GoS will likely continue to update subsidized prices and price ceilings to adjust for continued inflation, their effectiveness will remain limited.
- The SSG maintains a limited price control regime. In addition to subsidizing and establishing direct price controls for bread, the SSG maintains indirect price controls on key goods covered by SSG import, trade, and production regulations, such as fuel, wheat, flour, and certain medicines.
- While the SSG has also established profit limits for fruits, vegetables, meat, and other foodstuffs, as well as certain medicines, enforcement has been undermined by a lack of capacity and TRY volatility.
- Price controls in Turkish/SIG-LC areas are extremely limited, as there is no central authority responsible for developing a price control regime and local councils have limited capacity to develop and enforce local price controls.
- Nevertheless, with NGO support, all local councils subsidize bread, and most have established price controls for key goods such as butane gas cylinders, unsubsidized bread, and certain medicines.
- The Self Administration's price control efforts are largely confined to setting the price of subsidized bread, wheat, flour, and certain fuels.
- While the Self Administration ostensibly sets and enforces price ceilings and profit limits for key unsubsidized goods, such efforts have remained extremely inconsistent and effectively absent in many areas.

## Graphic 6. Overview of Price Controls Across Zones of Control

	GoS	SSG	Turkish/SIG-LC	Self Administration
Established Price Control System	Yes-Extensive	Yes-Limited	Yes-Limited	Yes-Limited
Subsidized Goods	Normal Syrian bread	Normal Syrian bread	Normal Syrian bread	Normal Syrian bread
	Diesel, gasoline, and butane fuels			Diesel fuel
	Certain foodstuffs			
	Certain medicines			
	<i>Rationed quantities</i>	<i>Rationed quantities</i>	<i>Rationed quantities</i>	<i>Rationed quantities</i>
Price Regulated Goods (Unsubsidized)	Diesel, gasoline, and butane fuels	Diesel, gasoline, and butane fuels	Butane fuel	Certain diesel, gasoline, and butane fuels
	Breads	Breads		Breads
	Certain medicines	Certain medicines		Certain medicines
	Certain foodstuffs			Certain foodstuffs
Profit Limits	Various goods	Certain foodstuffs	Certain foodstuffs	Certain foodstuffs

## 4. PUBLIC SECTOR EMPLOYMENT KEY FINDINGS AND GRAPHICS

- The GoS currently employs 20% of the working age population, or 42% of the workforce, in areas under its control.
- When adjusted inflation against the USD, public sector salaries have fallen by nearly 75% over the course of the conflict and are insufficient to meet the cost of living in most areas.
- Nevertheless, the GoS is likely to maintain its expansive public sector for years to come, as public sector jobs remain a lifeline to hundreds of thousands of households and regular public sector salary payments are key to maintaining SYP demand and propping up the economy generally.
- The Self Administration employs 6% of the working age population in areas under its control and pays monthly public sector salaries in SYP.
- As the Self Administration continues to severely understaff key central, regional, and municipal governance bodies, teachers and low-level community representatives are believed to make up the majority of its public sector workforce.
- While Self Administration salaries are higher than the GoS, they too are relatively low when compared to the cost of living.
- The SSG currently employs less than 1% of the working age population in areas under its control, while the SIG-LC employs between 1 to 1.5% of the working age population. In both cases, salaries are paid in TRY.
- While Turkey is responsible for paying SIG-LC salaries and is unlikely to expand the public sector

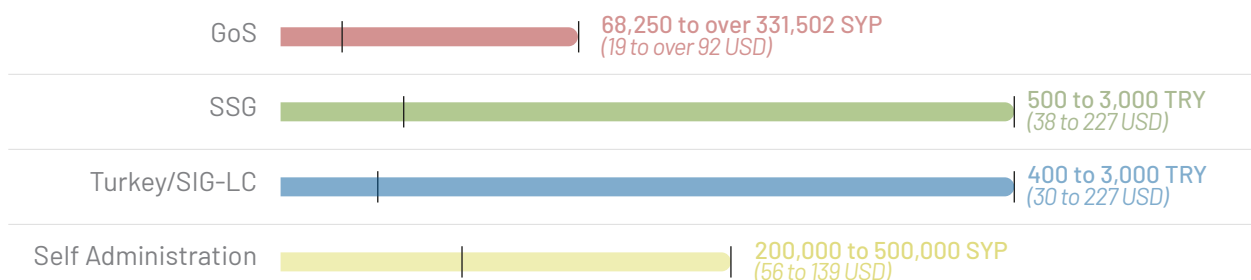
significantly, depending how relations with Turkey impact its development and resources, the SSG could potentially expand its public sector workforce.

- Nevertheless, both the SSG and SIG-LC are likely to remain small relative to the GoS and Self Administration.
- Despite declining salaries and reduced job security, the lack of private sector job creation will continue to lead to demand for public sector employment across all four zones of control.
- This dynamic will also lead to continued demand for employment in the military and security sector.

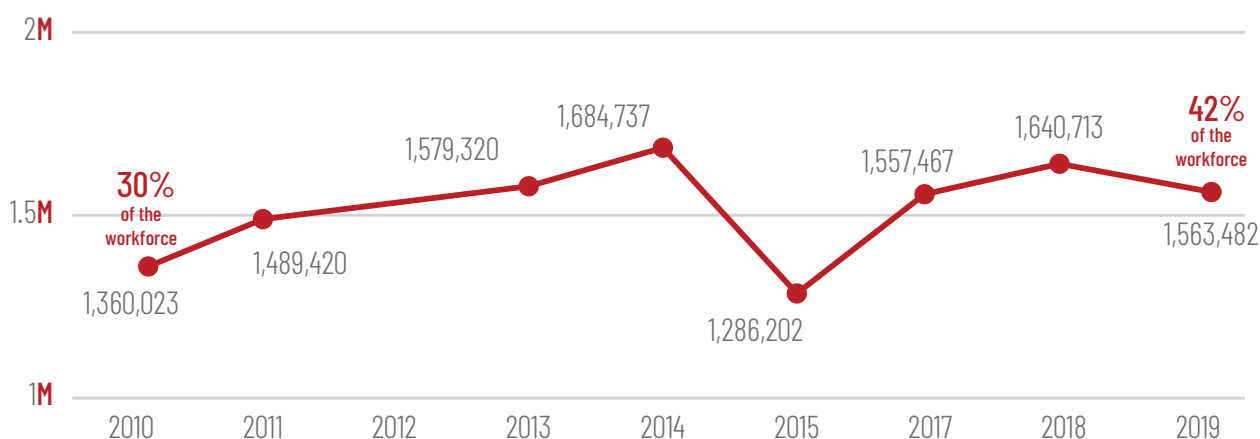
## Graphic 7. Overview of Public Sector Employment Across Zones of Control – December 2021

	GoS	SSG	Turkish/SIG-LC	Self Administration
Number of people employed in the public sector	Over 1.5 million	5,000	15,000 to 25,000	120,000
Percentage of working age population employed in the public sector	20%	1%	1.5%	6%
GoS Payments to People in Non-GoS Areas	-	Limited number receiving GoS salaries and pension payments via hawala	Limited number receiving GoS salaries and pension payments via hawala	Thousands of active and inactive GoS employees receiving salaries in person and via hawala

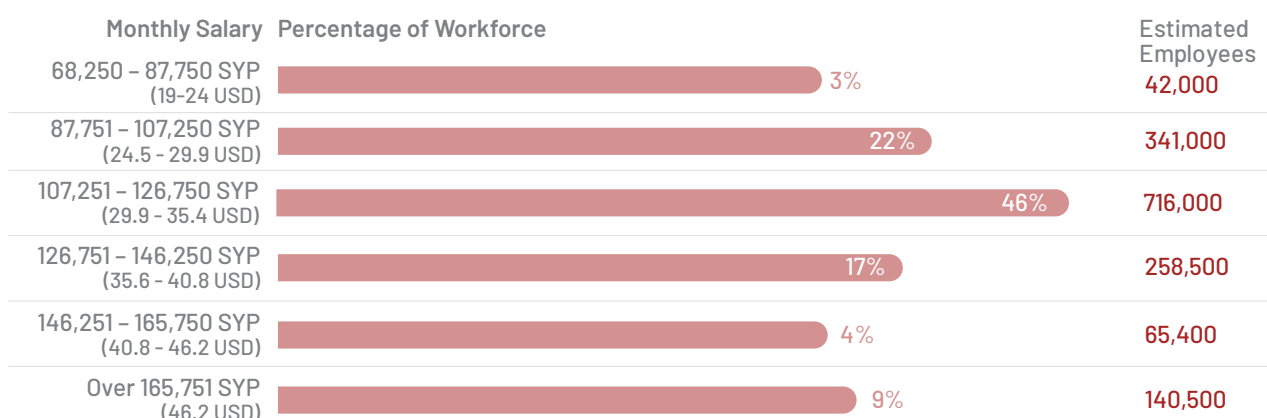
## Graphic 8. Public Sector Monthly Salary Ranges Across Zones of Control – December 2021/January 2022



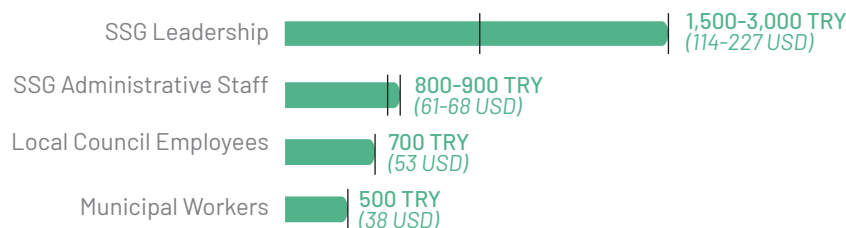
## Graphic 9. GoS Public Sector Workforce - 2010 to 2019



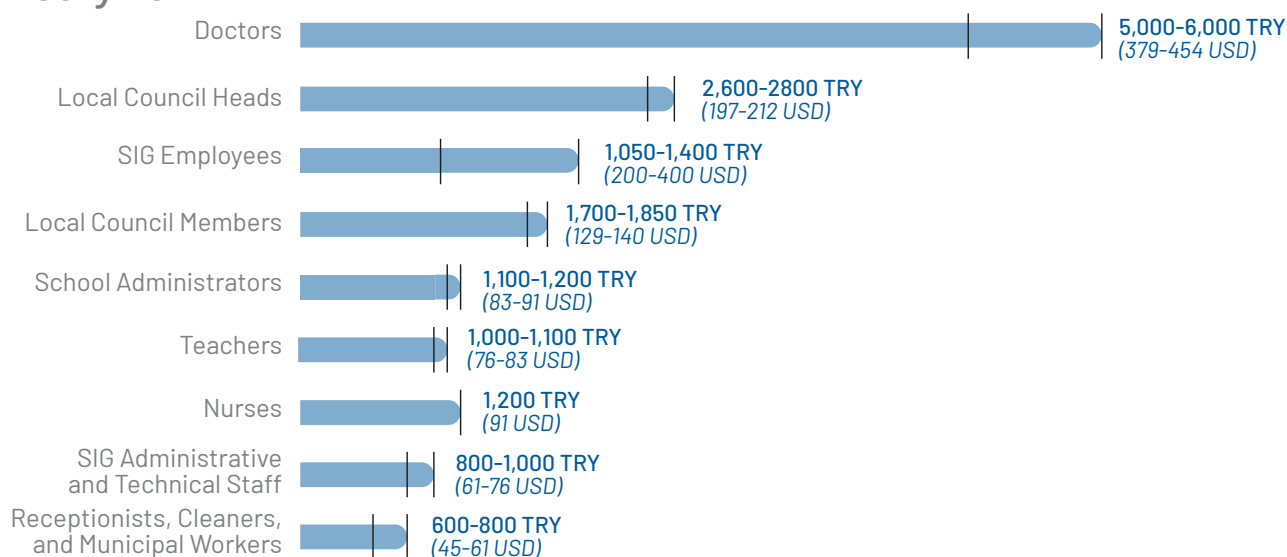
## Graphic 10. Estimated GoS Public Sector Workforce Distribution by Salary Range - December 2021



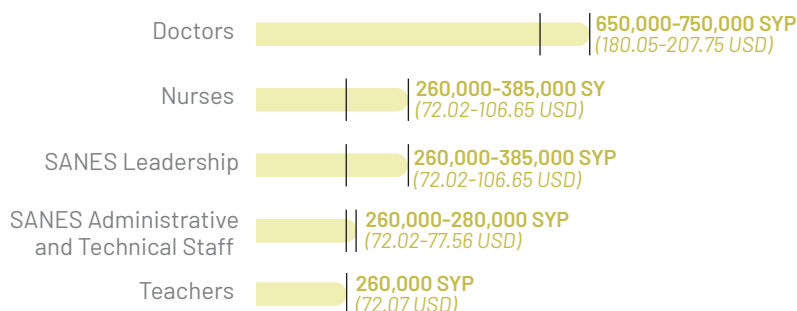
## Graphic 11. SSG Public Sector Employee Salary Ranges – December 2021



## Graphic 12. Turkish/SIG-LC Public Sector Employee Salary Ranges – January 2022 <sup>3</sup>



## Graphic 13. Self Administration Public Sector Employee Salary Ranges – December 2021



<sup>3</sup> As of early January 2022, Turkish authorities had not confirmed salary increases for doctors and nurses. However, similar to other salaries, local sources report that the figures listed in the graphic are expected to increase by 30 to 40%.

## 5. FUEL KEY FINDINGS AND GRAPHICS

- The GoS heavily regulates the fuel sector in areas under its control and maintains subsidies and price controls well below international rates on all types of fuel.
- According to GoS statements, fuel subsidies consume approximately 30% of the GoS's annual budget.
- The GoS no longer has access to Syria's largest oil fields and is reliant on agreements with the Self Administration and Iran to obtain oil. As these agreements are vulnerable to political disputes, resource competition, and logistical challenges, GoS areas have continued to suffer from recurrent fuel shortages.
- Shortages have both incentivized diversion of fuel to the parallel market and led to skyrocketing parallel market fuel prices.
- While the GoS may develop approaches to reduce diversion, ultimately, its reliance on external fuel will lead to recurrent shortages and undermine the effectiveness of its expansive fuel subsidy system for the foreseeable future.
- Controlling Syria's major oil fields and several gas fields, the Self Administration subsidizes certain fuels in areas under its control, with current Self Administration subsidized diesel prices standing at approximately 1/10 of GoS subsidized diesel prices and 1/20 of diesel prices in SSG and Turkish/SIG-LC areas.
- For reasons that remain unclear, Self Administration areas continue to witness recurrent subsidized fuel shortages. Consequently, individuals across Self Administration areas are frequently required to purchase unsubsidized fuel from the loosely regulated open market.
- While it is unclear if the Self Administration will improve subsidized fuel distribution and eliminate shortages, it is unlikely to rollback subsidies, as they are a pragmatic way to use excess fuel to shore up local support and buoy the local economy.

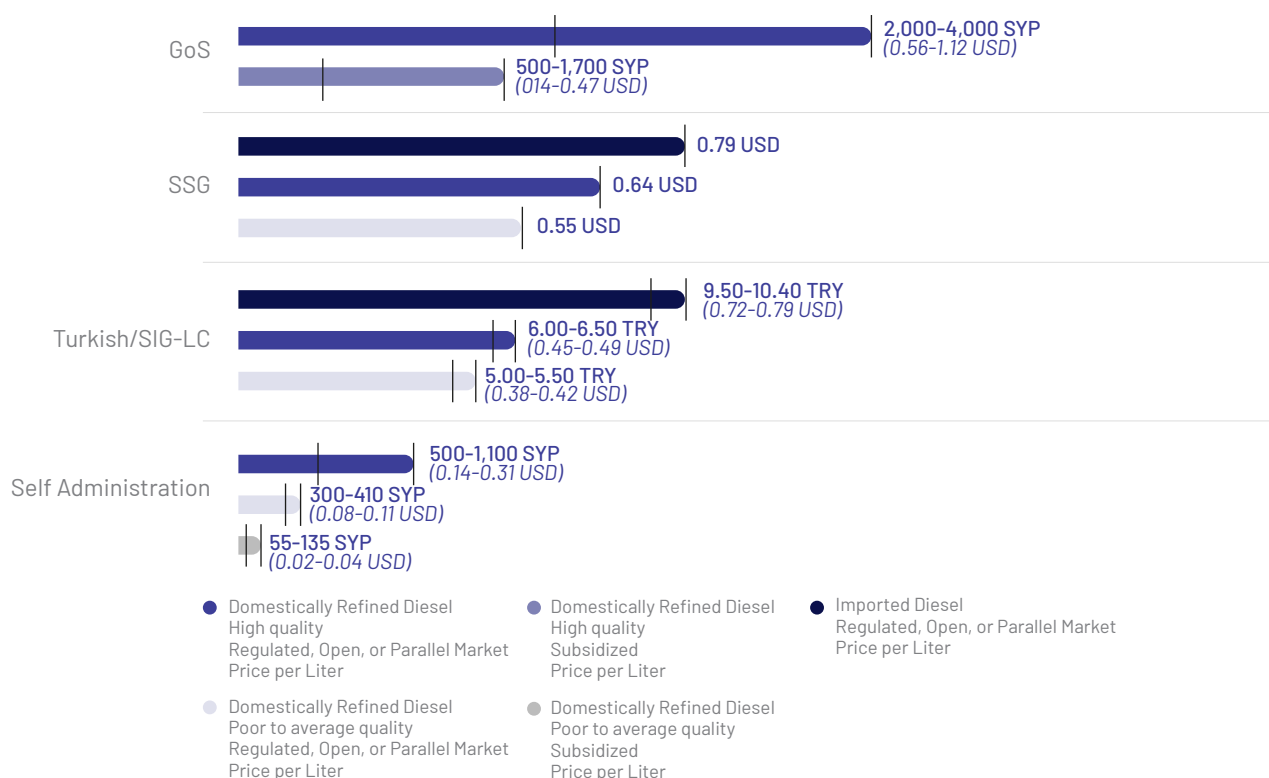


- SSG areas are nearly wholly reliant on fuel supplied by the SSG and Hayat Tahrir Al-Sham (HTS) affiliated Watad company via Turkey. Without direct access to fuel smuggled from Self Administration areas, this dynamic is unlikely to change.
- With strong access to Turkey and Self Administration areas, Turkish/SIG-LC areas are home to a variety of imported and domestic fuel.
- Although Turkey may be interested in weaning Turkish/SIG-LC areas off domestic fuel to deprive the Self Administration of a crucial income source, the negative economic impact and enforcement challenges considering the price disparity between domestic and imported fuel likely prevent it from doing so permanently. Nevertheless, Turkey may seek to intermittently disrupt domestic fuel smuggling to maintain pressure on the Self Administration.
- While fuel prices are significantly higher in SSG and Turkish/SIG-LC areas than the rest of the country, availability is strong, and shortages are extremely rare.
- As rising fuel prices and fuel shortages in GoS and Self Administration areas have led to rising costs of transportation and power from private generators, they continue to negatively impact the delivery of social support and undermine economic recovery across the country.
- impact the delivery of social support and undermine economic recovery across the country.

## Graphic 14. Overview of Fuel Across Zones of Control – January 2022

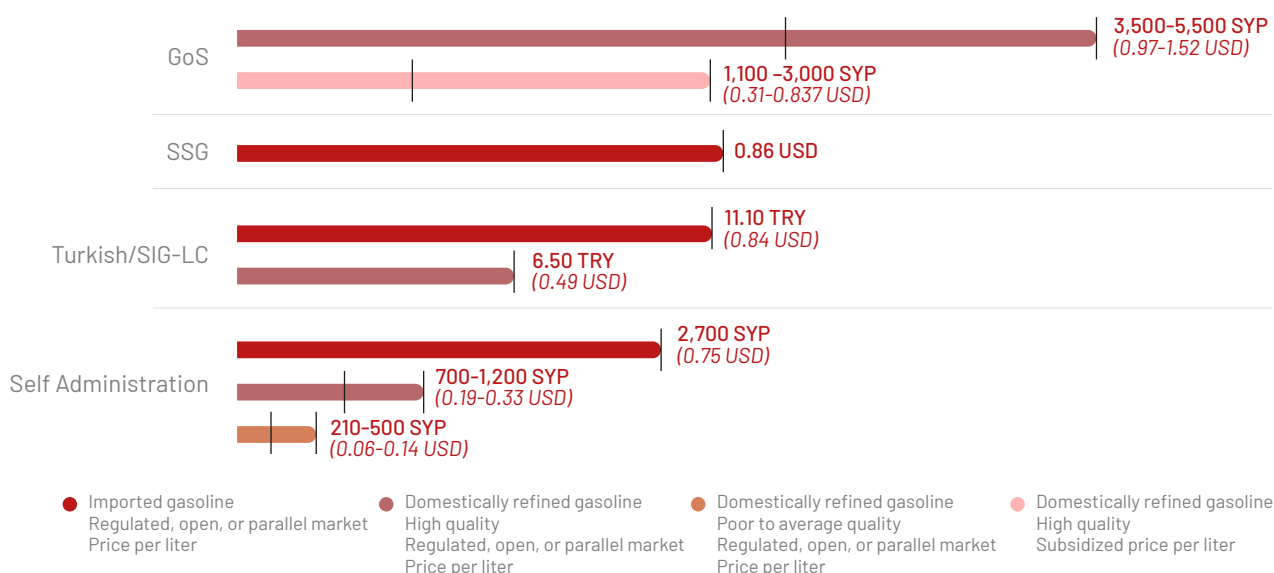
	GoS	SSG	Turkish/SIG-LC	Self Administration
Fuel Sources	NES and Iranian Imports	NES and Turkish Imports	NES and Turkish Imports	NES and Iraqi Imports
Subsidized Fuel	Yes	No	No	Yes
Price Regulated Fuel	Yes	Yes	No	Yes
Open or Parallel Market Fuel	Yes - Officially Illegal	Yes - Discouraged	Yes - Legal	Yes - Legal
Fuel Shortages	Yes	No	No	Yes
Common Fuel Types				
Imported Diesel	Unavailable	Available	Available	Unavailable
Regulated, Open, or Parallel Market Price per Liter	N/A	0.79 USD	9.50-10.40 TRY (0.72-0.79 USD)	N/A
Subsidized Price per Liter	N/A	N/A	N/A	N/A
Domestically Refined Diesel – High Quality	Available	Available	Available	Available
Regulated, Open, or Parallel Market Price per Liter	2,000-4,000 SYP (0.56-1.12 USD)	0.64 USD	6.00-6.50 TRY (0.45-0.49 USD)	500-1,100 SYP (0.14-0.31 USD)
Subsidized Price per Liter	500-1,700 SYP (0.14-0.47 USD)	N/A	N/A	N/A
Domestically Refined Diesel - Poor to Average Quality	Unavailable	Available	Available	Available
Regulated, Open, or Parallel Market Price per Liter	N/A	0.55 USD	5.00-5.50 TRY (0.38-0.42 USD)	300-410 SYP (0.08-0.11 USD)
Subsidized Price per Liter	N/A	N/A	N/A	55-135 SYP (0.02-0.04 USD)
Imported Gasoline	Unavailable	Available	Available	Available
Regulated, Open, or Parallel Market Price per Liter	N/A	0.86 USD	11.10 TRY (0.82 USD)	2,700 SYP (0.75 USD)
Subsidized Price per Liter	N/A	N/A	N/A	N/A
Domestically Refined Gasoline – High Quality	Available	Unavailable	Available	Available
Regulated, Open, or Parallel Market Price per Liter	3,500-5,500 SYP (0.97-1.52 USD)	N/A	6.50 TRY (0.49 USD)	700-1,200 SYP (0.19-0.33 USD)
Subsidized Price per Liter	1,100 –3,000 SYP (0.31-0.84 USD)	N/A	N/A	N/A
Domestically Refined Gasoline – Poor to Average Quality	Unavailable	Unavailable	Unavailable	Available
Regulated, Open, or Parallel Market Price per Liter	N/A	N/A	N/A	210-500 SYP (0.06-0.14 USD)
Subsidized Price per Liter	N/A	N/A	N/A	N/A
Butane Gas 10-12 kg Cylinder	Available	Available	Available	Available
Regulated, Open, or Parallel Market Price per Liter	30,600-60,000 SYP (8.54-16.62 USD)	12 USD	150 TRY (11.36 USD)	20,000 SYP (5.60 USD)
Subsidized Price per Liter	9,700 SYP (2.71 USD)	N/A	N/A	2,500 - 5,000 SYP (0.70-1.40 USD)

## Graphic 15. Diesel Price Ranges Across Zones of Control – January 2022



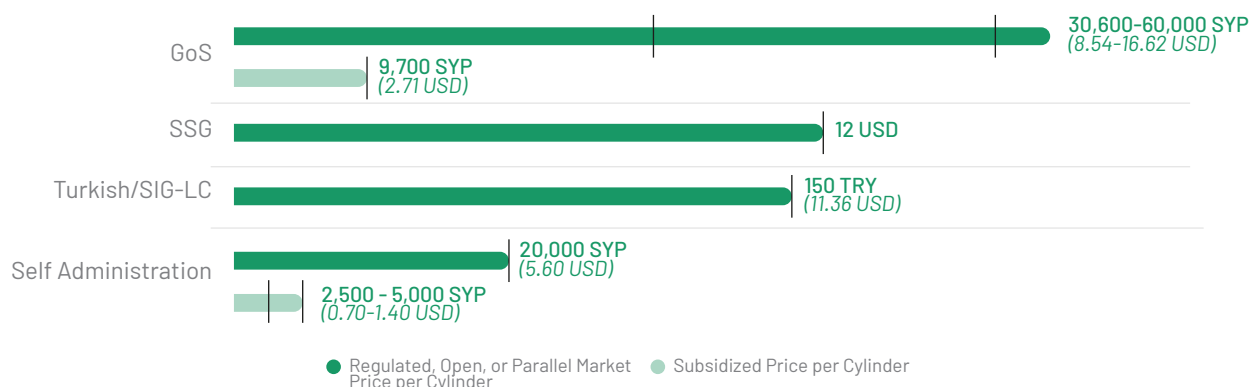
Primary Uses: Heating homes, powering generators, fueling vehicles

## Graphic 16. Gasoline Price Ranges Across Zones of Control – January 2022



Primary Uses: Fueling vehicles, powering small household generators

## Graphic 17. Butane Gas Price Ranges Across Zones of Control – January 2022



Primary Uses: Cooking

## Graphic 18. Overview of Fuel Types, Prices, and Limits in GoS Areas – January 2022

Fuel Type	Subsidized Price per Liter – Households	Subsidized Price per Liter – Commercial /Industrial/Bakeries	Subsidized Price per Liter – Private Vehicles	Subsidized Price per Liter – Public Vehicles	Free Market and Regulated Price per Liter	Parallel Market Price per Liter
Domestically Refined Diesel – High Quality	500-750 SYP (0.14-0.21 USD) Limit: 200 liters/year	500 – 1,700 SYP (0.14 - 0.47 USD) Limit: 1,500-4,000 liters/month	500-750 SYP (0.14-0.21 USD) Limit: 25 liters/week	500-750 SYP (0.14-0.21 USD) Limit: 25 liters/4 days	1,700 SYP (0.47 USD) Limit: 40 liters/month	2,000-4,000 SYP (0.56-1.12 USD)
Domestically Refined Gasoline – High Quality (90 Octane)	N/A	N/A	1,100-1,800 SYP (0.31-0.50 USD) Limit: 25 liters/week	1,100-1,800 SYP (0.31-0.50 USD) Limit: 25 liters/4 days	2,000 SYP (0.56 USD) Limit: 40 liters/month	3,500-5,000 SYP (0.97-1.39 USD)
Domestically Refined Gasoline – High Quality (95 Octane)	N/A	N/A	3,000 SYP (0.84 USD) Limit: 25 liters/week	3,000 SYP (0.84 USD) Limit: 25 liters/4 days	N/A	4,000-5,500 SYP (1.11-1.52 USD)
Butane Gas Cylinder	9,700 SYP/cylinder (2.71 USD) Limit :1 cylinder/3 months	N/A	N/A	N/A	30,600 SYP/cylinder (8.54 USD) Unlimited	40,000-60,000 SYP/cylinder (11.08-16.62 USD)

## Graphic 19. Overview of Fuel Types, Prices, and Limits in SSG Areas – January 2022

Fuel Type	Watad/SSG Regulated Price per Liter
Imported Diesel	0.79 USD
Domestically Refined Diesel – High Quality	0.64 USD
Domestically Refined Diesel – Average to Poor Quality	0.55 USD
Imported Gasoline	0.86 USD
Butane Gas Cylinder	12 USD/cylinder

## Graphic 20. Overview of Fuel Types, Prices, and Limits in Turkish/SIG-LC Areas – January 2022

Fuel Type	Open Market Price per Liter
Imported Diesel	9.50-10.40 TRY (0.72-0.79 USD)
Domestically Refined Diesel – High Quality	6.00-6.50 TRY (0.45-0.49 USD)
Domestically Refined Diesel – Average to Poor Quality	5.00-5.50 TRY (0.38-0.42 USD)
Imported Gasoline	11.10 TRY (0.82 USD)
Domestically Refined Gasoline – High Quality	6.50 TRY (0.49 USD)
Butane Gas Cylinder	150 TRY/cylinder (11.36 USD)

## Graphic 21. Overview of Fuel Types, Prices, and Limits in Self Administration Areas – January 2022

Fuel Type	Subsidized Price per Liter - Households, Generator Operators, and Farmers	Subsidized Price per Liter - Public and Contracted Private Bakeries	Subsidized Price per Liter - Private Bakeries and Industry/Manufacturing	Regulated (Unofficial) Price per Liter - Public	Open Market Price per Liter
Domestically Refined Diesel - High Quality	N/A	N/A	N/A	N/A	500-1,100 SYP (0.14-0.31 USD)
Domestically Refined Diesel - Poor to Average Quality	85 SYP (0.02 USD) Limit: 440 liters/per year	55 SYP (0.015 USD)	135 SYP (0.04 USD)	300-410 SYP (0.08-0.11 USD)	N/A
Domestically Refined Gasoline - High Quality	N/A	N/A	N/A	N/A	700-1,200 SYP (0.14-0.33 USD)
Domestically Refined Gasoline - Poor to Average Quality	N/A	N/A	N/A	210-500 SYP (0.06-0.14 USD)	N/A
Imported Gasoline	N/A	N/A	N/A	N/A	2,700 SYP (0.75 USD)
Butane Gas Cylinder	2,500 - 5,000 SYP/cylinder (0.70-1.40 USD) Limit: 1 cylinder/3 months	N/A	N/A	N/A	20,000 SYP/cylinder (5.60 USD)

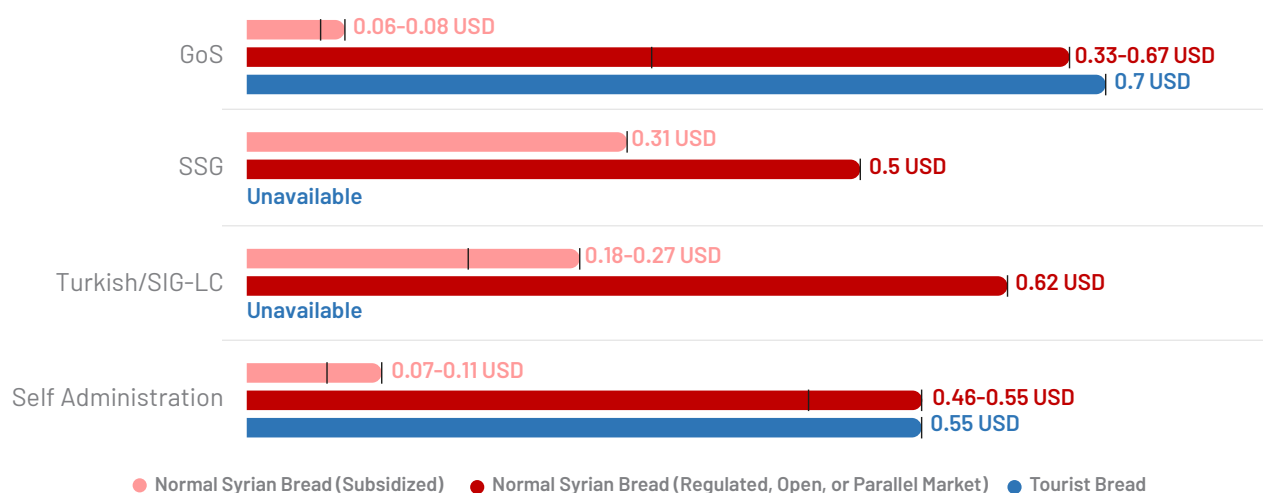
## 6. BREAD AND FOOD SUPPORT KEY FINDINGS AND GRAPHICS

- The GoS maintains subsidies and price controls on bread throughout areas under its control.
- According to GoS statements, bread subsidies consume approximately 8.5% of the GoS's annual budget.
- Like fuel, the GoS no longer has access to Syria's key wheat producing areas and is reliant on limited wheat yields from areas under its control and imported wheat to produce flour for subsidized bread.
- As domestic wheat yields have become increasingly vulnerable to poor climate conditions, and access to domestic and imported wheat has been subject to political disputes, resource competition, and logistical challenges, GoS areas have continued to suffer from recurrent subsidized bread shortages and declining subsidized bread quality.
- Shortages have both incentivized diversion of wheat, flour, and bread to the open market and led to skyrocketing parallel market bread prices.
- While the GoS may develop approaches to reduce diversion, ultimately, its lack of reliable access to wheat and maintenance of expansive subsidies, as well as an inadequate number of bakeries, will lead to recurrent shortages for the foreseeable future.
- Controlling Syria's key wheat producing areas, the Self Administration subsidizes bread in areas under its control at rates slightly above those seen in GoS areas. The Self Administration is likely to maintain these subsidies.
- Between 2020 and 2021, poor climate conditions undermined local wheat production across the country, including in Self Administration areas. With a 50-60% decline in yields during the 2021 growing season, Self Administration authorities report that local wheat is no longer sufficient to meet demand.
- Reduced yields have reportedly further incentivized diversion of local wheat and subsidized flour and bread to the local open market, GoS areas, and Iraq, which continue to lead to subsidized bread shortages and declining subsidized bread quality.
- Both the SSG and SIG-LC subsidize bread in areas under their control, the latter with NGO support.
- As local wheat yields fall significantly short of local demand, both SSG and Turkish/SIG-LC areas are heavily reliant on wheat imported by international and Turkish NGOs and local traders.
- While temporary suspensions of imported wheat and flour have occasionally led to short-lived bread shortages in SSG and Turkish/SIG-LC areas, generally bread availability has remained strong.
- Nevertheless, subsidized and unsubsidized bread in both areas has remained relatively expensive when compared to local wages and the price of bread in other parts of Syria.
- In all four areas, SYP and TRY volatility and increased fuel prices have also led to frequent bread price increases.

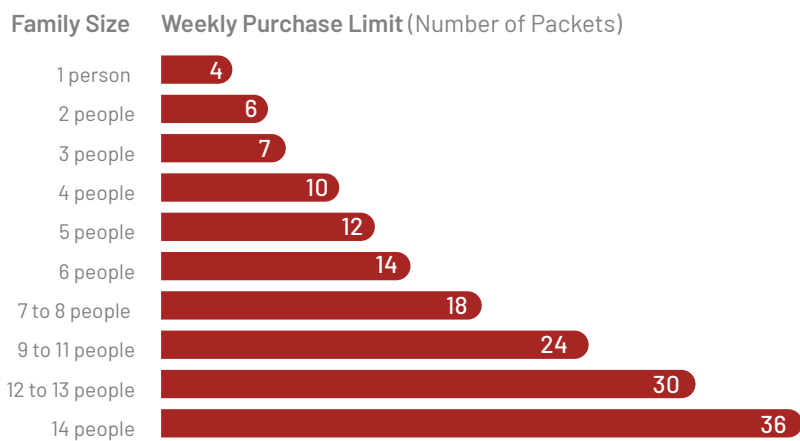
## Graphic 22. Overview of Bread Across Zones of Control – January 2022

	GoS	SSG	Turkish/SIG-LC	Self Administration
Wheat/Flour Sources	Domestic (Primary) Imported (Secondary)	Imported (Primary) Domestic (Secondary)	Imported (Primary) Domestic (Secondary)	Domestic
Subsidized Bread	Yes	Yes	Yes	Yes
Price Regulated Bread	Yes	Yes	Yes	Yes
Subsidized Bread Shortages	Yes – Regular	Yes – Irregular	Yes – Irregular	Yes – Regular
Common Bread Types				
Normal Syrian Bread				
Availability	Available	Available	Available	Available
Regulated, Open, or Parallel Market Price	1,200-2,400 SYP (0.33-0.67 USD) per 1 kg packet	5 TRY (0.38 USD) per 750-gram packet	5 TRY (0.38 USD) per 600-gram packet	1,000-1,200 SYP (0.28-0.33 USD) per 600-gram packet
Adjusted Price USD-1 kg	0.33-0.67 USD	0.50 USD	0.62 USD	0.46-0.55 USD
Subsidized Price	200-300 SYP (0.06-0.08 USD) per 1 kg bread packet	2.5 TRY (0.19 USD) per 600-gram packet	2-3 TRY (0.15-0.23 USD) per 700/850-gram packet	300-500 SYP (0.08-0.14 USD) per 1,250-gram packet
Adjusted Price USD-1 kg	0.06-0.08 USD	0.31 USD	0.18-0.27 USD	0.07-0.11 USD
Tourist Bread				
Availability	Available	Unavailable	Unavailable	Available
Regulated, Open, or Parallel Market Price	2,500 SYP (0.70 USD) per 1 kg bread packet	N/A	N/A	1,200 SYP (0.33 USD) per 600-gram packet
Adjusted Price USD-1 kg	0.70 USD	N/A	N/A	0.55 USD
Subsidized Price	Unavailable	N/A	N/A	Unavailable

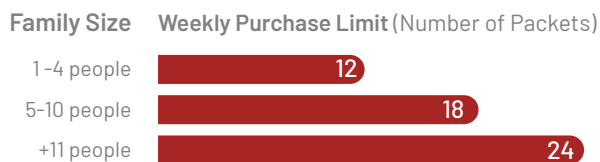
## Graphic 23. Bread Prices Across Zones of Control (Adjusted to USD per 1 Kilogram) – January 2022



## Graphic 24. GoS Weekly Subsidized Bread Purchase Limits – 2021 - 2022



## Graphic 25. SSG Weekly Subsidized Bread Purchase Limits – January 2022





# 7. ELECTRICITY AND WATER KEY FINDINGS AND GRAPHICS

## ELECTRICITY

- The primary source of power in GoS areas is the national power grid, which is powered by 12 power stations, including eight in GoS areas and four in Self Administration areas.
- As two major power stations were destroyed during the conflict, and only three of the remaining 12 stations are fully functional, power generation has dropped by nearly 50%.
- The national grid also suffers from severely damaged and neglected transmission infrastructure.
- As a result of reduced generation and transmission capacity, most GoS areas receive between two and 12 hours of power a day from the national grid and endure regular outages.
- The GoS reportedly allocated 1.3 trillion SYP (~360 million USD according to current rates) to supporting the electricity sector in 2021 and has touted Russian and Iranian support for the grid repairs.
- Nevertheless, GoS support falls far short of full rehabilitation cost estimates, and external support has been slow to materialize.
- The GoS continues to charge for power from the national grid. Although it increased rates in late 2021, power through the national grid is still inexpensive.
- Despite public pressure, the GoS has refused to permit ampere service in most areas, with availability confined to Aleppo, Tartous, and, and Homs cities.
- The primary sources of power in both SSG and Turkish/SIG-LC areas are the Turkish national power grid and ampere service.
- While the SSG General Electricity Establishment sets ampere service rates, SIG-LC authorities play a limited role in regulating the power sector. Neither authority subsidizes power.
- Turkish-Syrian companies, Green Energy in SSG areas and AK Energy and the Syrian-Turkish Energy Company (STE) in Turkish/SIG-LC areas, have connected local power grids in both areas to power plants in Turkey and have gradually extended service.
- AK Energy and STE service is available in the majority of Turkish/SIG-LC areas. With efforts ongoing to extend coverage to all SSG areas, Green Energy service is currently only available in densely populated communities.
- The primary sources of power in Self Administration areas are the national power grid and ampere service.

- The national grid in Self Administration areas is overseen by regional SANES power directorates, in coordination with the GoS, and powered by five power stations.
- Like GoS areas, the national grid in Self Administration areas continues to suffer from inadequate power generation capacity and transmission infrastructure.
- Through the national grid, communities generally receive eight to 12 hours of power a day in northern Al-Hasakeh and Kobani/Ain Al Arab, two to six hours a day in Ar-Raqqa, Tabqa, and Manbij, and two hours a day in western Deir-ez-Zor, while communities in central and eastern Deir-ez-Zor receive no power through the national grid.
- The Self Administration does not charge for power from the national grid but does collect a small service fee for use in certain areas.
- Due to heavy reliance on ampere service throughout NES, the Self Administration provides subsidized diesel fuel to ampere service operators and sets service rates.

## WATER

- Households and businesses across all four zones of control receive water from four main sources: public water networks, wells, tanker trucks, and bottled water.
- In GoS areas, areas where the public water network was not heavily impacted by the conflict, often receive water through public networks for several hours a day, while areas where public networks have been directly impacted by the conflict may receive no water through public networks, or for only several hours a week.
- In most GoS areas, the GoS continues to charge customers for water from public networks, however, rates are extremely low.
- In SSG areas, most densely populated communities receive water through public networks for several hours one to three times a week.
- In communities where the water network is supported by NGOs, households and businesses do not pay for water, however, in communities where the network is managed by the SSG without NGO support, households and businesses must pay a monthly service fee.
- Since mid-2021, the SSG has started to discuss introducing water meters and usage-based fees in several densely populated communities.
- In small, rural communities and Internally Displaced Person (IDP) camps in SSG areas wells and households obtain water from public pumps, purchase water from tanker trucks, or rely on small private wells.
- The situation in Turkish/SIG-LC areas is similar to SSG areas, with densely populated communities receiving water from public networks for several hours one to three times a week and rural, and some small communities relying on water from wells, tanker trucks, or small private wells.
- In most communities with access to water from public networks, local councils have started to meter water usage and collect monthly usage payments. As payment enforcement has proven challenging,

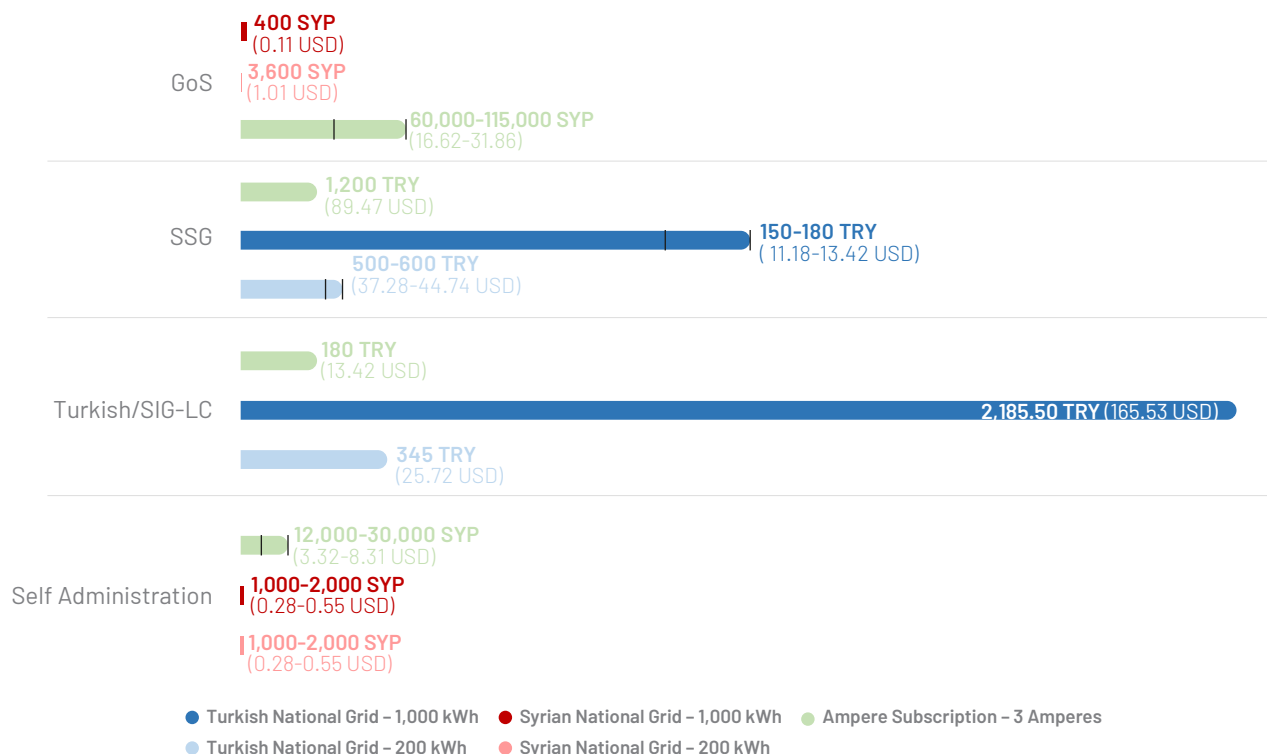
local councils have developed several enforcement mechanisms over the past year, including cutting water and electricity.

- In Self Administration areas, Quamishli city and Kurdish-majority communities along the Syrian-Turkish border often receive water from public networks for several hours a day, while most other areas either receive water from the public network several hours a week or not at all.
- In Al-Hasakeh city and communities to the west, the lack of water from public networks is due to limited local water resources and Turkey's frequent, prolonged cuts to the Alok water pumping station, which is the main source of water for the city's public network.
- Meanwhile, in Deir-ez-Zor, Raqqah, and Manbij, the lack of water from networks is due to a continued lack of power for water pumping stations, as well as unaddressed conflict related pumping station and network damages.
- In most Self Administration areas, pumping stations continue to lack adequate treatment capacity and thus regularly pump untreated water into networks.
- In Self Administration areas without access to water from public networks communities rely on water from public wells, purchase water from tanker trucks, or, in rural areas, small private wells.

## Graphic 26. Overview of Power Across Zones of Control – January 2022

	GoS	SSG	Turkish/SIG-LC	Self Administration
Power Sources	Syrian National Grid, Private Generators, Solar Panels, Ampere	Turkish National Grid, Ampere, Private Generators, Solar Panels	Turkish National Grid, Ampere, Private Generators, Solar Panels	Turkish National Grid, Ampere, Private Generators, Solar Panels
Subsidized Power	Yes	No	No	Yes
Monthly Power Prices				
Syrian National Grid – 200 kWh	400 SYP (0.11 USD)	N/A	N/A	1,000-2,000 SYP (0.28-0.55 USD) Service Fee
Syrian National Grid – 1,000 kWh	3,600 SYP (1.01 USD)	N/A	N/A	
Turkish National Grid – 200 kWh	N/A	396 TRY (30 USD)	345 TRY (26.14 USD)	N/A
Turkish National Grid – 1,000 kWh	N/A	1,980 TRY (150 USD)	2,185.50 TRY (165.53 USD)	N/A
Ampere Subscription – 3 Amperes	60,000-115,000 SYP (16.62-31.86 USD) 8 to 20 hours per day	150-180 TRY (11.36-13.66 USD) 4 to 10 hours per day	180 TRY (13.66 USD) 4 to 6 hours per day	12,000-30,000 SYP (3.32-8.31 USD) 4 to 10 hours per day

## Graphic 27. Monthly Electricity Costs Across Zones of Control – January 2022



## Graphic 28. GoS Price Ranges for Power via National Network – 2021 - 2022

kWh Range	Price per kWh	Maximum Cost per Individual kWh Range	Maximum Cost of Cumulative kWh Range
1-600 kWh	2 SYP (~0.001 USD)	1,200 SYP (0.33 USD)	1,200 SYP (0.33 USD)
601-1,000 kWh	6 SYP (~0.002 USD)	2,400 SYP (0.67 USD)	3,600 SYP (1.01 USD)
1,001-1,500 kWh	20 SYP (~0.006 USD)	10,000 SYP (2.79 USD)	13,600 SYP (3.79 USD)
1,501-2,500 kWh	90 SYP (~0.025 USD)	90,000 SYP (25.10 USD)	13,600 SYP (28.90 USD)
2,501-3,000 kWh	150 SYP (~0.042 USD)	75,000 SYP (20.92 USD)	178,600 SYP (49.82 USD)

## Graphic 29. GoS Price Ranges for Water via Public Networks – 2021 - 2022

Monthly Water Consumption	Price per m <sup>3</sup>	Maximum Cost per Individual m <sup>3</sup> Range	Maximum Cost of Cumulative m <sup>3</sup> Range
1-5 m <sup>3</sup>	Free	Free	Free
6-15 m <sup>3</sup>	 15 SYP (0.001 USD)	150 SYP (0.04 USD)	150 SYP (0.04 USD)
16-25 m <sup>3</sup>	 22 SYP (0.006 USD)	220 SYP (0.06 USD)	370 SYP (0.10 USD)
26-35 m <sup>3</sup>	 30 SYP (0.008 USD)	300 SYP (0.08 USD)	670 SYP (0.19 USD)
36-50 m <sup>3</sup>	 40 SYP (0.01 USD)	600 SYP (0.17 USD)	1,270 SYP (0.35 USD)
51-80 m <sup>3</sup>	 50 SYP (0.016 USD)	1,500 SYP (0.42 USD)	2,770 SYP (0.77 USD)
81-120 m <sup>3</sup>	 60 SYP (0.017 USD)	2,400 SYP (0.67 USD)	5,170 SYP (1.43 USD)

## Graphic 30. Green Energy Subscription and Service Fees for Residential Power – January 2022

Item/Service	Fees
Meter Price	350 TRY (26.52 USD)
Subscription Price	100 TRY (7.58 USD)
kWh Price	1.98 TRY (0.15 USD)

## Graphic 31. AK Energy and STE Subscription and Service Fees for Residential Power – January 2022

Item/Service	Fees
Meter Price	300 TRY (22.73 USD)
Subscription Price	300 TRY (22.73 USD)
1-150 kWh Price	1.15 TRY (0.09 USD)
151 + kWh Price	2.30 TRY (0.17 USD)