

Living in Damascus After a Decade of War: Employment, Income, and Consumption

Field Survey Based on a Sample of Three Neighborhoods

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Executive Summary

During the past ten years, the economy of the city of Damascus has undergone structural changes as a result of the conditions of war and the coercive security and military measures imposed by the regime on various parts of the country.

To date, there is no accurate data on the extent and size of these transformations, or of their direct consequences on people's daily lives, the ways Syrian citizens secure their livelihoods in light of the new circumstances, and the ways they cope with this "new normal."

Operations and Policy Center (OPC) researchers conducted a survey of 600 respondents in three Damascus neighborhoods, in an effort to monitor Damascenes' main economic activities: work, consumption, and spending. Divided equally between the three neighborhoods to represent social class divisions, the sample takes into account the relative distribution of age, gender, and education. These neighborhoods are Nahr Aisha (low living standards), Al-Zahirah (average), and Rukn al-Din (high).

We show that the average workweek in Damascus is among the longest in the world. Although the average workweek for men is longer than that of women, women's employment remains higher than global averages.

In this context, and although nearly half of respondents described their income level as "average," a large percentage of this group's declared spending levels fell below the global poverty line.

Job market transitions from 2011 to today show a major employment shift from the private sector to the government sector as many regime-affiliated institutions relocated to the city center from Rural Damascus (Rif Dimashq) or other areas not under the regime's military control.

Deteriorating conditions in Damascus have sharply increased residents' reliance on aid from others. A quarter of the sample said that transfers from friends and relatives abroad are a main source of income. The overall percentage claiming in-kind and cash assistance provided by relief organizations as a source of income was 41.8%. But the dependence rates on this source in the middle- and upper-class neighborhoods were particularly shocking: 37% of respondents in Rukn al-Din neighborhood said that relief organization assistance contributes to their income.

2020 witnessed a significant decline in basic goods consumption such as eggs, chicken, and clothing. Also, only 10% of the total respondents expected to be able to secure more than half the diesel they would need to warm their families during the winter of 2020-2021.

Introduction

According to United Nations statistics in May 2020, 1,829,222 people—nearly 10% of Syria’s population—live within the administrative boundaries of Damascus Governorate. As the capital and one of the two main economic centers in the country (the other is Aleppo), living conditions in Damascus can offer a good snapshot of life throughout Syria. It should have better services and job opportunities than other governorates; any problems caused by weak services or unemployment in the capital are likely to be magnified in other areas.

This study attempts to understand the daily life of residents in three Damascus neighborhoods by analyzing data related to work, income, and consumption. The data paints a picture of Damascus residents’ daily life and gives us insight into what has changed with the significantly declining economic conditions.

For example, according to the Central Bureau of Statistics, in 2004 nearly 45% of Syria’s population spent more than \$557 per month¹, equivalent to \$776 today after calculating the rate of inflation in relation to the US dollar. In comparison, using the spending tables obtained from our research, the percentage of those in 2020 who spend more than \$776 per month does not exceed 0.5% of those respondents who stated their average monthly spending in the survey.

In this study, we discover and analyze the economic transformations in Damascus and try to understand their effect on the suffering of residents, in addition to uncovering the basic factors that support residents’ lives during this difficult period.

Methodology

The study used a questionnaire with the help of a fieldwork team. But with the spread of COVID-19 in Syria, there was no “fieldwork” in the traditional sense of the term. Rather, the survey was conducted by a local team of qualified field researchers who received training from OPC researchers and conducted telephone interviews with respondents.

Standardized interviews were conducted with 600 male and female respondents living in three residential areas in the capital, as follows:

- Two hundred interviews were conducted in the area extending between the Rukn al-Din and Al-Mazra'a neighborhoods in the northern part of Damascus. This area is considered to have a relatively high standard of living; the average monthly rent for a medium-sized residential apartment during the study period ranged between 300,000 and 400,000 Syrian pounds (SYP)². This is more than ten times the average monthly lump-sum wage for government employees with university qualifications and above (about 35,000 SYP according to the latest wage scale issued by the Syrian Ministry of Finance at the end of 2019)³.

1- Syrian Arab Republic Central Bureau of Statistics, Characteristics of Household Income and Its Relationship to Housing Characteristics (Damascus, 2006).

2- Estimates by local residents.

3- Salary and Wage Scales of Workers in Syrian Government jobs [Sullam Rawatib wa Ojour Al-'Ameleen fi Al-Wadhaif Al-Hokomiyya Al-Souriyya], Al-Alam TV, 2019, accessed on February 22, 2021 <https://bit.ly/3swMQwc>

- Two hundred interviews in Al-Zahirah neighborhood, located in the southern part of the capital, which is considered a medium standard of living neighborhood. The average rent for a typical residential apartment was between 100,000 and 150,000 SYP.⁴
- Two hundred interviews in the Nahr Aisha neighborhood, an informal settlement located in the southern part of the city, considered a low standard of living area. The average monthly rent for a typical residential apartment during the study period was between 75,000 and 100,000 SYP.⁵

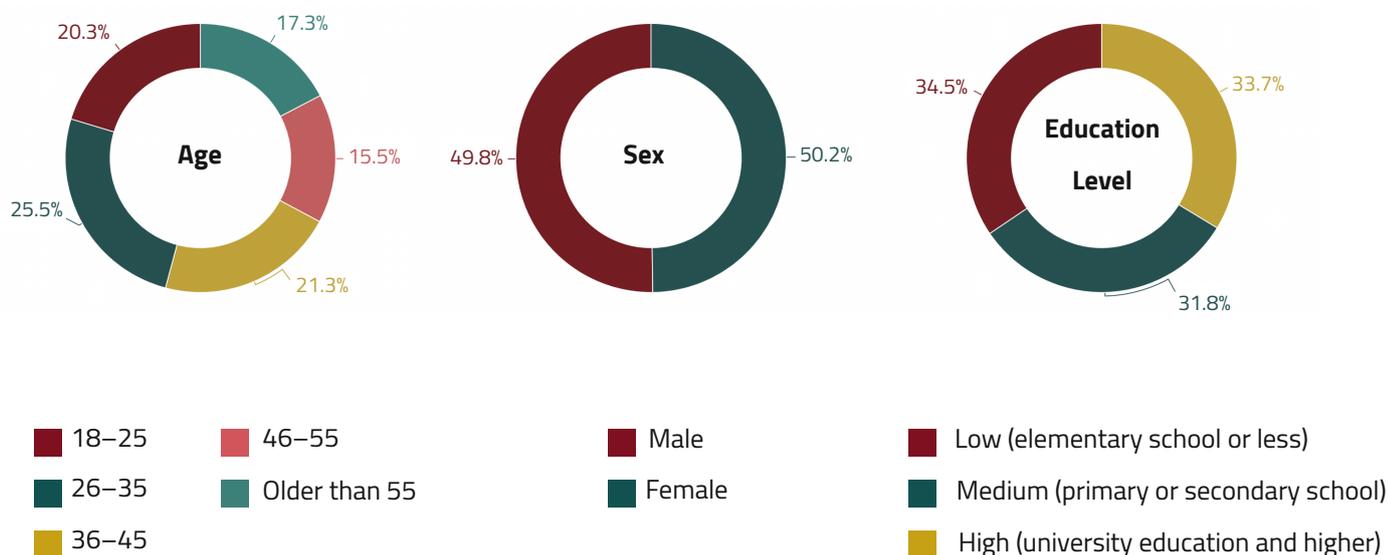


Figure 1 shows the distribution of respondents according to the variables of sex, age, and level of education

4- Estimates by local residents.

5- Estimates by local residents.

Twelve local researchers, under the supervision of OPC, participated in the data collection process lasting from 24 December 2020 until 5 January 2021. The standardized interviews were based on a 22-question survey that included the most important variables related to the study topic, based on the theoretical framework and network of concepts prepared by researchers from different backgrounds and disciplines within the Center. Survey questions were divided into two sections: the first focused on personal, social, and economic characteristics of the respondents; the second explored the respondents' work, income, and consumption conditions.

OPC's team of in-house and local researchers faced many challenges in collecting data within the dangerous environment of Damascus, and in light of the restrictions of social distancing. These challenges were addressed by:

- Avoiding the inclusion of any questions of a political or otherwise sensitive nature in the study questionnaire
- Adopting a secure and encrypted communication network (software and points of contact) while conducting interviews and exchanging data
- Since OPC is not authorized to operate in Damascus, the data collection process and the collection team were under the cover of other organizations authorized to practice this type of activity

The average full-time work week in the study sample was 52.5 hours,⁶ which is higher than the general average in the region and higher than the rate permitted under the Labor Law.⁷

This rate is astronomical compared to European countries such as Germany and France, where the average full-time work week is 39.5 hours in Germany and 38.9 hours in France. It is more than the average full-time work week in Turkey, despite that country's being one of the highest in the world (48.5 hours per week).⁸

In the same context, in 2004 the average full-time work week for urban residents in Syria as a whole was 46.2 hours per week.⁹

Clear differences can be seen in working hours based on gender. The average full-time work week for men in the study sample is 55.6 hours, while the full-time work week for women is 47.1. This can be partly explained by household responsibilities placed on women and the birth and parental leaves that some female employees enjoy, especially in the government sector. Despite this difference, working hours for women in Damascus remain higher than the general average in numerous countries in the region and the world; this could be a fundamentally distinguishing mark of work patterns within the city of Damascus, and may shed light on significant effects on the physical and psychological health of workers.

6- Average working hours was calculated based on the sum of the working hours of those who work full-time (35 hours or more) in one or more jobs. The arithmetic average was calculated after excluding the outliers in the survey, which the researchers estimated as 84+ hours per week (14 working hours per day), considering that commute times and breaks for lunch and tea are not counted as working hours according to standard definition. This may have confused some respondents. After eliminating the 27 extreme values, we obtained a sample of 305 individuals, which allowed us to measure the average working hours in a more accurate manner. Without dropping the outliers, we obtained a median of 50 hours, which is similar to the average of 52.5

7- The Labor Law in effect in the regime-controlled areas in Syria, issued in 2010, stipulates that a worker may not be employed for more than 48 hours per week or 8 hours per day. "Labor Law 2010, Article 106, Paragraph A," The Parliament of the Syrian Arab Republic, 2010,

[https://www.parliament.gov.sy/arabic/index.php?node=5589&nid=4598&First=0&Last=79&CurrentPage=0&mid=&refBack=.](https://www.parliament.gov.sy/arabic/index.php?node=5589&nid=4598&First=0&Last=79&CurrentPage=0&mid=&refBack=)

8- Organization for Economic Cooperation and Development (OECD), "Average Work Week By Country 2018," World Population Review, 2021,

<https://worldpopulationreview.com/country-rankings/average-work-week-by-country>.

9- Heba El Laithy and Khalid Abu-Ismail, Poverty in Syria: 1996-2004: Diagnosis and pro-Poor Policy Considerations (Damascus: United Nations Development Programme, 2005), p. 150.

The data shows that 41.1% of respondents work 41–60 hours per week, while 24.4% claim they work more than 60 hours per week.

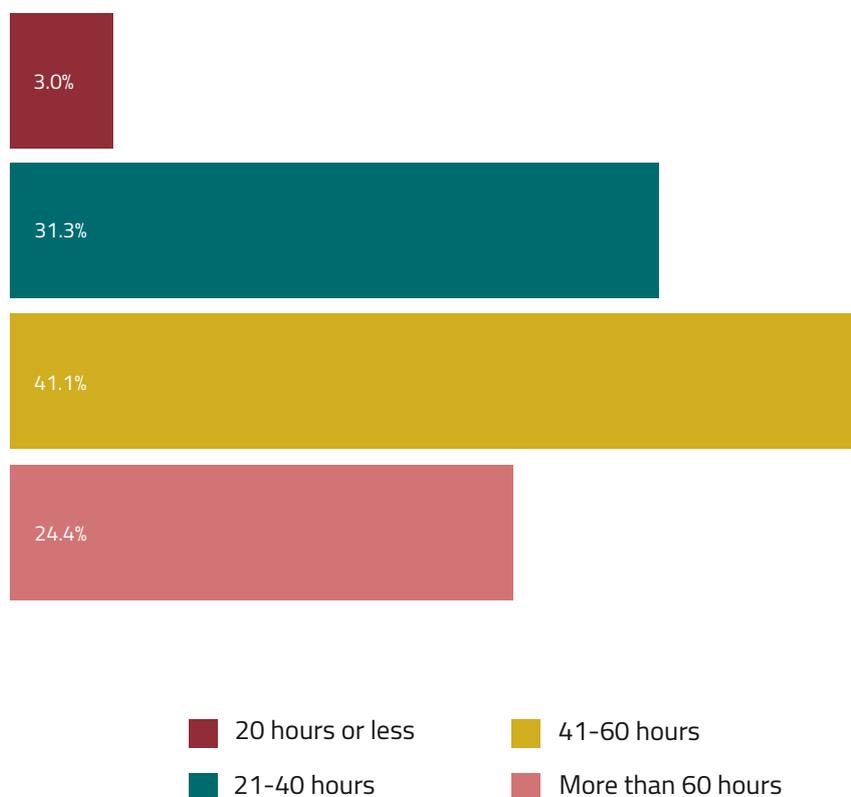


Figure 2 shows the distribution of respondents according to the variable of working hours per week

Despite the high average number of working hours, 43.7% of the respondents consider their standard of living to be “low.”

An “average” standard of living was reported by 49.8% of respondents. But when we examined self-reported information about average monthly household spending (reported by 338 of the 600 respondents), the numbers showed a different reality. In fact, 94.1% of those respondents who reported household spending live below the international poverty line, estimated at \$1.90 USD per day per person.¹⁰ In the total sample, the figures suggest that the families of 53% of all respondents live below the poverty line.

10- We set the dollar exchange rate in the period during which the data was collected (between December 2020 and January 2021) at 2,900 Syrian pounds per dollar (the exchange rate fluctuated during this period between 2,800 and 3,000 pounds per dollar). Thus, the international poverty line, in Syrian pounds according to the exchange rate at the time of the survey, was 5,510 Syrian pounds per day per person.

While the global measure of poverty depends on income, we have depended here on the variable available to us: spending. We do this assuming that most Syrians are not in a position to save (thus, income = spending). We chose to not ask the respondents about their income to avoid the sensitivities associated with this question.

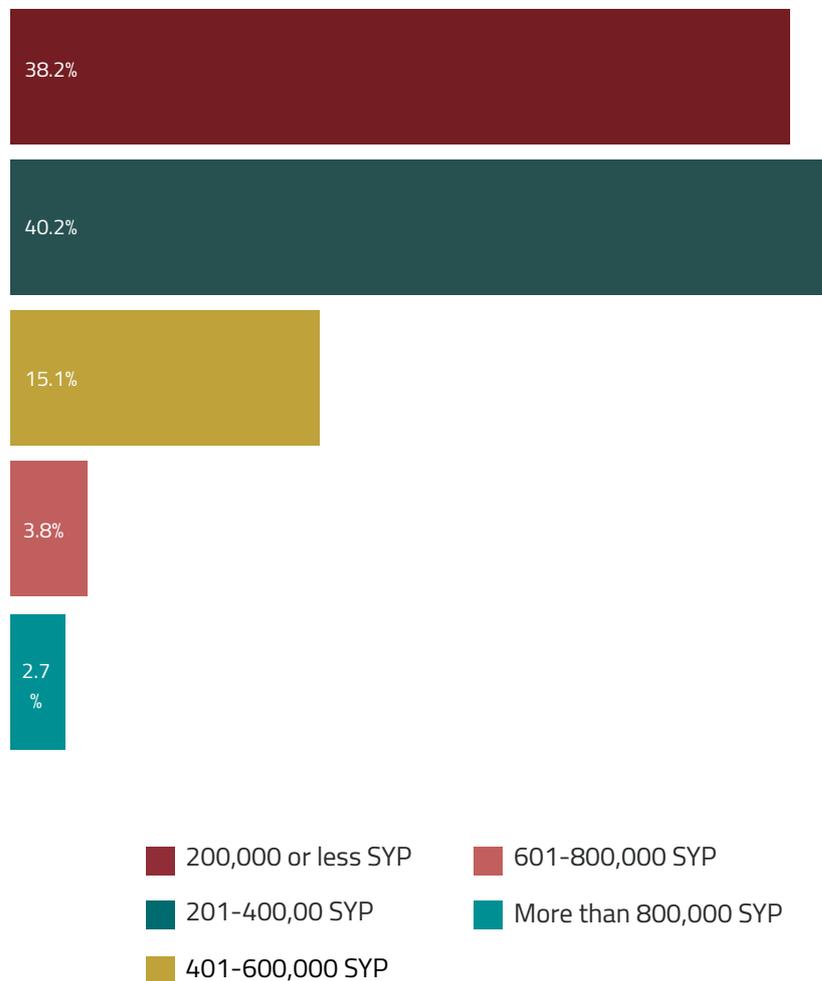


Figure 3 shows the distribution of respondents according to the variable of monthly household spending

It should be noted here that the gap resulting from the refusal of some respondents to disclose their monthly spending may lead to a reduction in the quality of this data, although those who declared their spending were distributed over the three neighborhoods. The largest data gap came from the Al-Zahirah neighborhood, assumed to be middle-class. In contrast, the highest response rate to the spending question was in the Nahr Aisha neighborhood (poor), which means that the level of actual spending for the sample as a whole is likely higher than what our study shows.

Looking at the standard of living self-assessment of all sample respondents, the data shows that only 6.5% consider themselves to be living at a high standard. Given that a large portion of those declaring their income actually live below the global poverty line, this means that the percentage of households living below the poverty line is greater than what respondents self-assess.

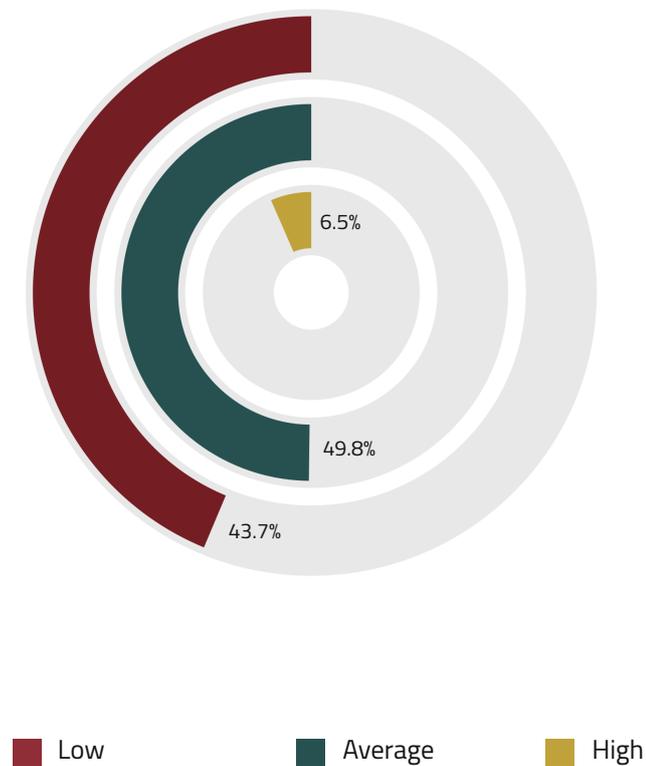


Figure 4 shows the distribution of respondents according to self-assessment of living standard

The study shows that 67.1% of sample respondents of working age work one or more jobs. The remaining percentage of the unemployed cannot be fully included in the standard definition of unemployment, however, which assumes that the unemployed person has been actively searching for work in the past six months. This is not the case for a large percentage of the unemployed within the study sample.

It should be noted that our sub-sampling by age only went as young as 18; this excludes the 15–17 years age group typically included in labor statistics. This age group usually has very low employment rates largely due to education. Ethical requirements governing the application of non-governmental surveys prevented us from reaching that age group

The 26–35 age group maintains the highest percentage of employment at 77.7%, followed by the 36–45 age group at 76.5%. This puts the largest share of economic burden on these two age groups, an unexceptional finding compared to most other countries. But the impact of the emigration movement from Syria, whose indicators show that the majority of emigrants are young people, leads to a practical decrease in the labor force among those age groups, increasing the economic burden yet further on those remaining in the country.

For example, a UNHCR-supported¹¹ study found that 26.7% of Syrian refugees in Turkey are of a similar age group, 25–45 years old. This percentage tells us much, since Turkey has the largest number of Syrian refugees in the world (more than 3.6 million of the 6.6 million Syrian refugees around the world, according to the latest census at the end of 2019).¹²

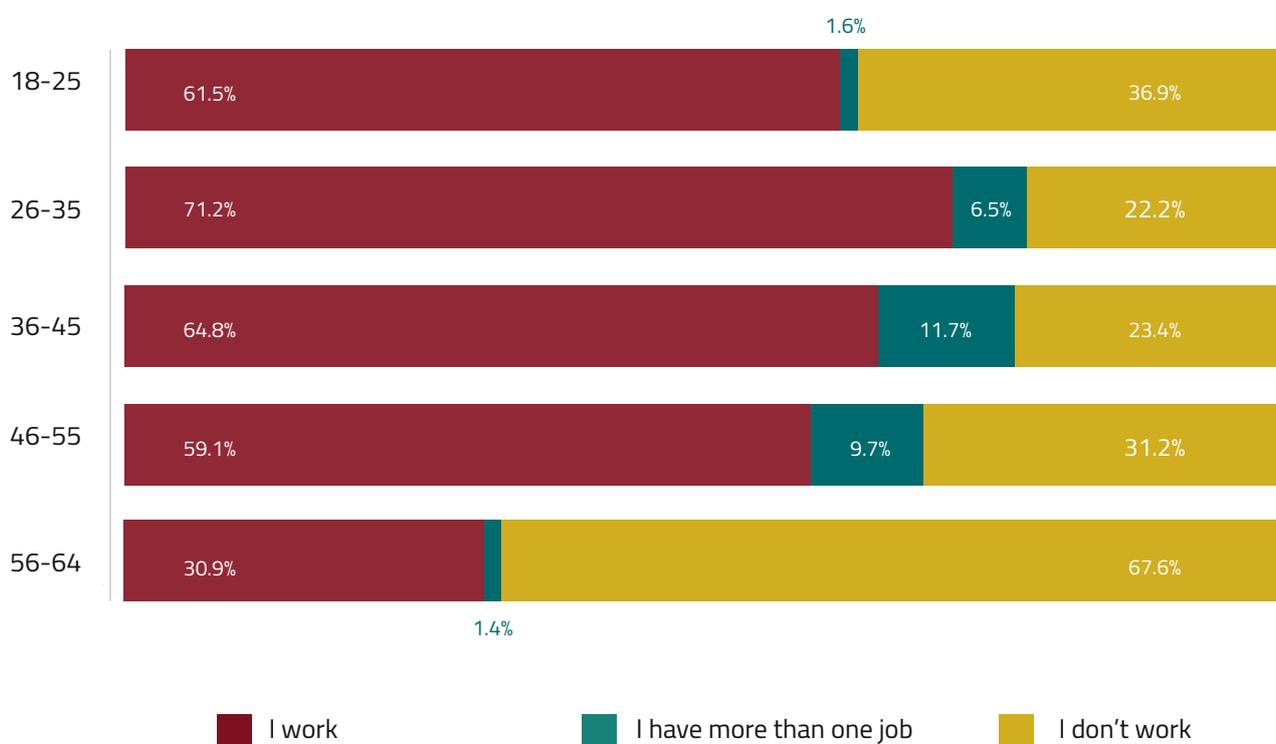


Figure 5 shows the distribution of respondents according to the variables of work status and age

11- The Pressure Index for Syrians 2019, Dr. M. Murat Erdogan, Orion Library, Ankara 2019, with the support of UNHCR. [Link](#)

12- Statistics published by the United Nations High Commissioner for Refugees. You can review it [here](#).

Reasons for unemployment fall within the standard definition; 4.3% of unemployed people of working age stated their reason for being unemployed is a lack of suitable job opportunities. A larger percentage, 14.5% of unemployed respondents 18–64, attribute their unemployment to health conditions.

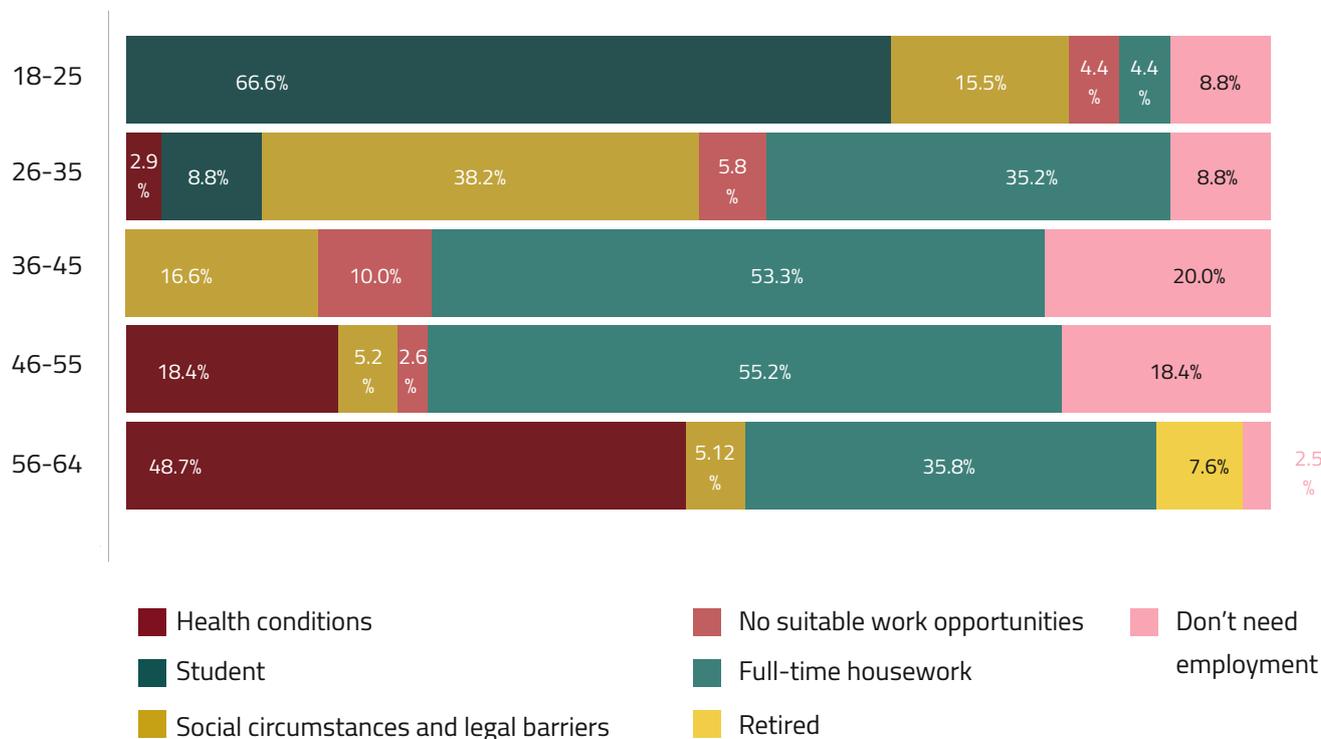


Figure 6 shows the distribution of unemployed respondents (n=186) according to the variables of the reason for unemployment and age

Tracking the period between the last job the respondent had and today, among those Damascus residents in the sample who stated that they are unemployed today, helps explain why fewer people say their reason for being unemployed is the lack of job opportunities. About 27% of currently unemployed respondents lost their jobs during the past ten years, a decade that witnessed the significant suppression of the uprising in Syria and military operations in most areas of the country. This resulted in a decline in economic activity and many people losing their jobs. The economy contracted significantly and was unable to absorb these rates of unemployment; this may have caused a general frustration resulting in unemployed persons simply not bothering to search for work in those circumstance

This factor applies to the high percentage of currently unemployed respondents who stated that they have never worked, 69.8%. This is considered a high percentage and can be generally explained by the high rate of unemployment among women, whose activities are focused on unpaid housework and childcare (See Figure 9).

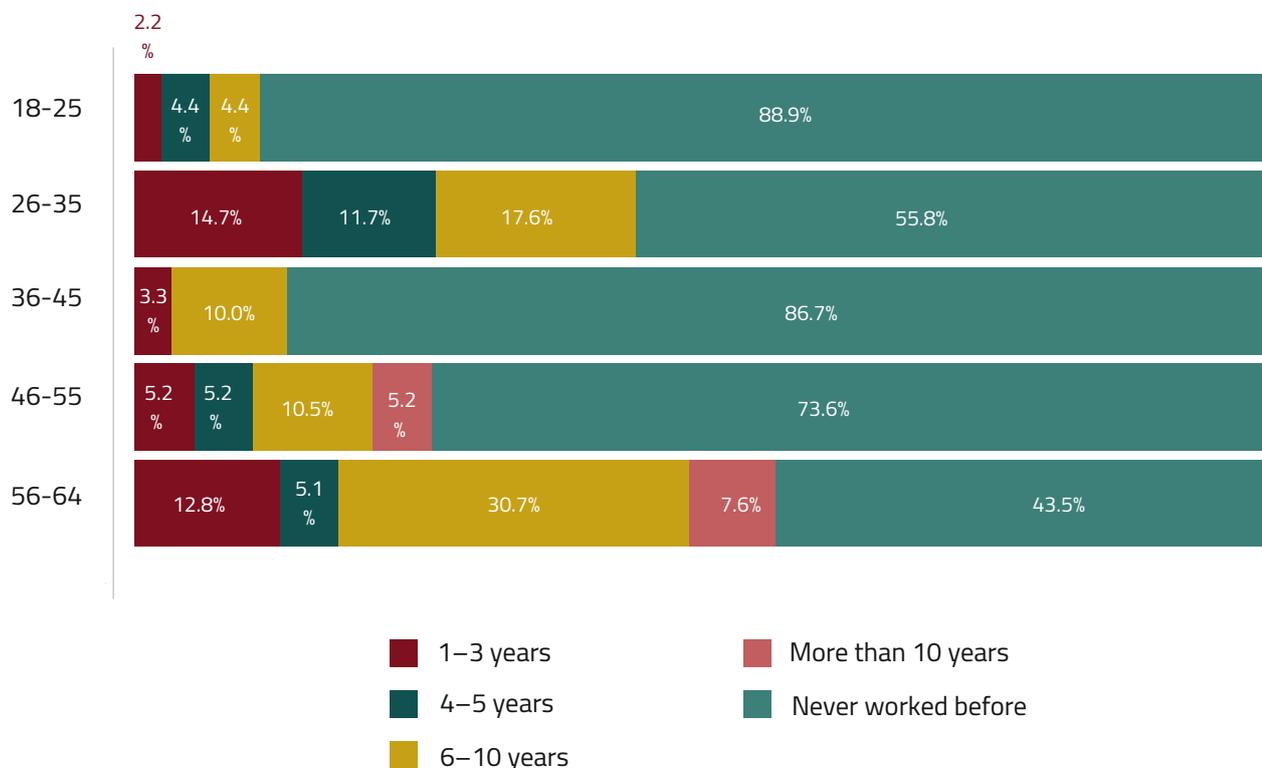


Figure 7 shows the distribution of unemployed respondents (n=186) according to the variables of the time since their last job and age

Regarding the type of work, 35% of the sample respondents have jobs in government and private institutions as “employees,” while 30.3% cite their current profession as “worker,” a category including professions such as a taxi driver (without ownership of the car), factory workers, store workers, etc. The percentage of “employers”—which includes all independent professionals like engineers and lawyers—reached 23.1%.

The transfer of several regime-affiliated institutions to the capital center from the countryside of Damascus or from other areas not under the regime’s military control resulted in increasing the percentage of “employees” (more on this in Figure 12). These institutions may be part of the government sector or may have their headquarters located in Damascus. Some transferred their headquarters to Damascus in order to preserve their ability to operate within regime-controlled areas or enjoy a better level of security during the years of conflict, due to the regime's continuous bombing of areas outside its control.¹³

13- An administrative official in the Council of Ministers in discussion with OPC to confirm the transfer of government departments, February 2021.

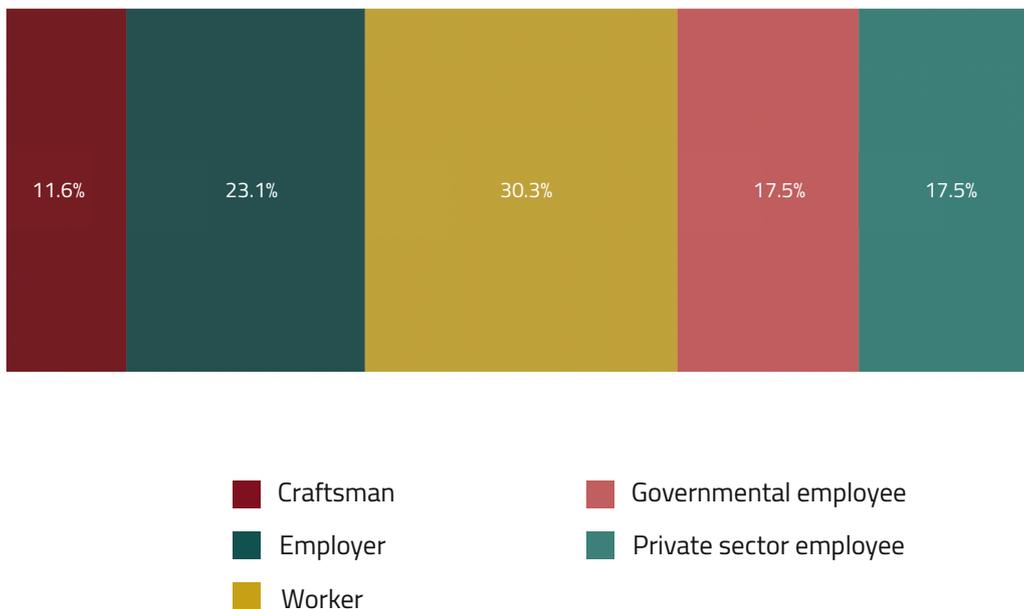


Figure 8 shows the distribution of employed respondents (n=389) according to the variable of profession type

In turn, the gender-sensitive analysis showed clear differences in the employment percentages of women and men. The data indicated that 49.2% of non-retired female respondents do not work, compared with only 21.1% of non-retired male respondents. The data also showed that 10.4% of men have more than one job, while this percentage among women does not exceed 2%. This is despite the decline in living standards in Syria, and the high percentage of the population living below the poverty line.

The gender disparity can be explained by several factors, the most important of which is the household and childcare responsibilities placed on women, which was considered a key employment obstacle for women in Syria even before the uprising; it seems to still affect the proportion of working women. Also, a number of respondents indicated that women are explicitly prohibited from working outside the home by fathers or brothers, evidence of discrimination within the family that is likely to spill over into discrimination in the labor market.

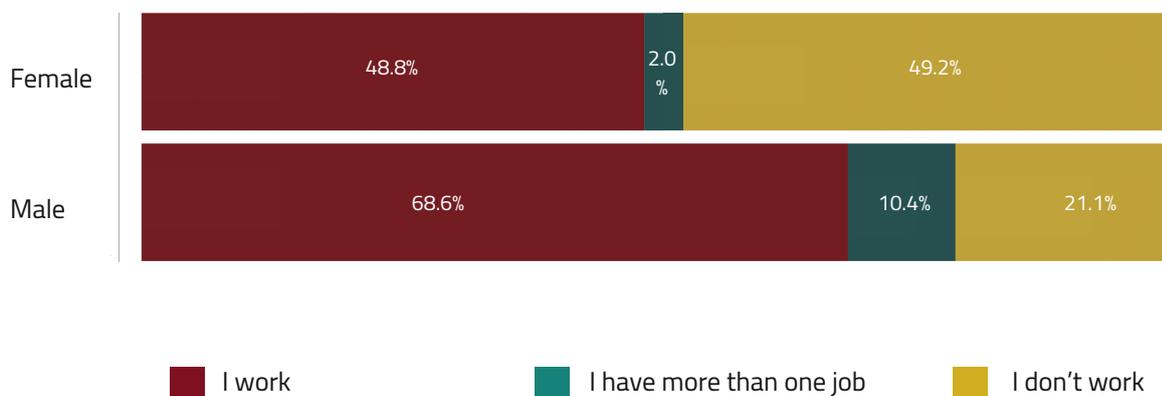


Figure 9 shows the distribution of respondents according to the variables of gender and employment

The data collected also shows that 45.3% of female respondents stated that their reason for being unemployed was full-time housework, while none of the male respondents chose this option.

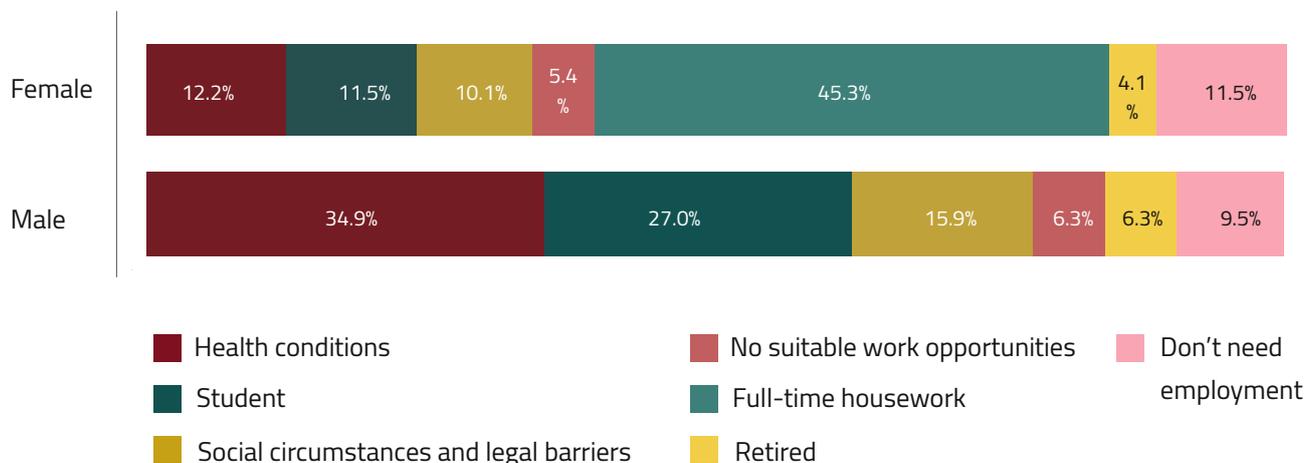


Figure 10 shows the distribution of unemployed respondents according to the variables of gender and unemployment

The distribution of place of residence also shows a clear association with the employment status of respondents. The highest employment rate in our sample was for residents of Al-Zahirah neighborhood at 72%; before 2011 most Al-Zahirah residents belonged to the middle class. The employment rate among the residents of Rukn al-Din Neighborhood, the upper middle- and upper-class neighborhood, reached 62.5%. The lowest employment rate was in Nahr Aisha neighborhood at only 60%; these residents have the least income among the three neighborhoods, which is an extra burden on them.

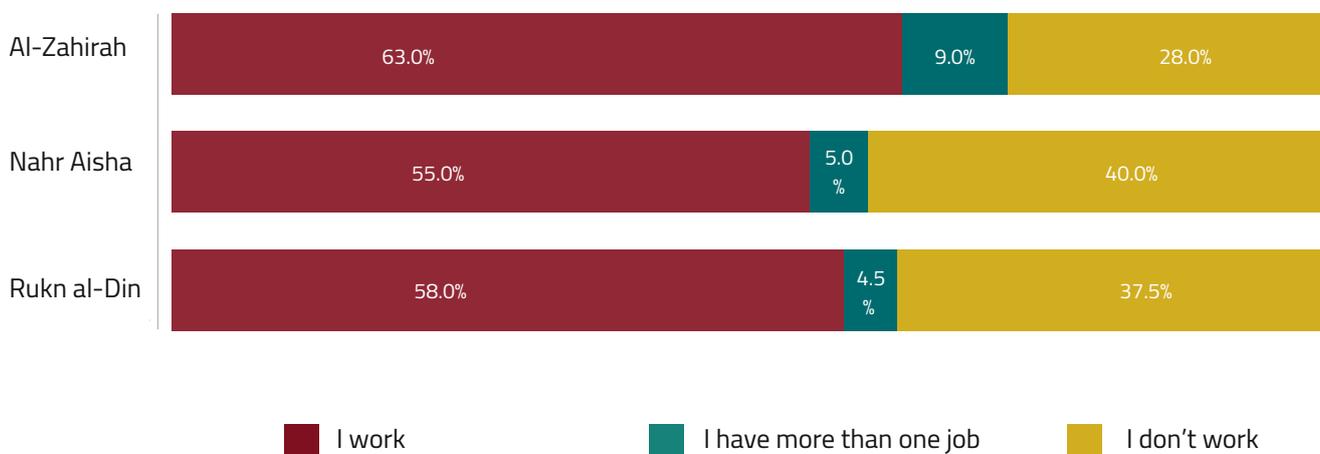


Figure 11 shows the distribution of respondents according to the variables of the place of residence and employment status

In addition to the previous indicators, an analysis of movement between jobs during the past ten years¹⁴ sheds light on the war's impact on the economy and work patterns of Damascus.

Private-sector employees working before 2011 were significantly affected; 20% of them moved into the "worker" category during the ensuing years. Another 20% moved to work as government employees, which may be an indication of the deterioration of economic activity and job security in the private sector. That deterioration pushed many private-sector employees into salaried government jobs, despite the lower wages government institutions tend to pay compared to the private sector.

Those already employed in the government sector showed greater stability; 54.2% of respondents who worked as government employees before 2011 have continued their work, with only 10.2% moving to the private sector.

The employer category—professionals such as doctors and lawyers, merchants, and factory owners—had the least movement between jobs during the past decade. However, the job movement of 8.2% of them to the "worker" category, while not a significant percentage, may deserve to be noted and studied.

In addition, the distribution of the newly employed (those who were not working before 2011) in the various categories during the past years helps in examining the changes in each category. In the survey, 11.7% of newly employed respondents said they are "workers," 15.5% are employees in the private sector, and only 8% are government employees.

		Current Profession					
		Don't work	Craftsman	Employer	Worker	Gov. employee	Private sector employee
Previous job before 2011	Craftsman	22.2%	74.1%	0.0%	0.0%	0.0%	3.7%
	Employer	13.1%	0.0%	75.4%	8.2%	3.3%	0.0%
	Worker	24.5%	24.5%	6.1%	54.1%	4.1%	2.0%
	Don't work	49.8%	4.2%	10.8%	11.7%	8.0%	15.5%
	Gov. employee	30.5%	0.0%	3.4%	1.7%	54.2%	10.2%
	Private sector employee	20.0%	0.0%	5.0%	20.0%	20.0%	35.0%

Figure 12 shows the distribution of respondents of working age in 2011 (n=478) according to the variables of employment before 2011 and current employment

14- Figure 12 analyzes the phenomenon of shifting between jobs for those who were of working age in 2011 (15 years and over). The size of this sample is 478 individuals, or 79.6% of the original sample of 600 individuals.

The massive departure of Syrians from the country as refugees, and the decline in traditional economic activities, have contributed to several consequences. One important consequence is a change in the patterns of Syrians' sources of income.

In this study, 70.7% of respondents said their household depends on two or three main sources of income, while 19.2% said their household depends on only a single income source.

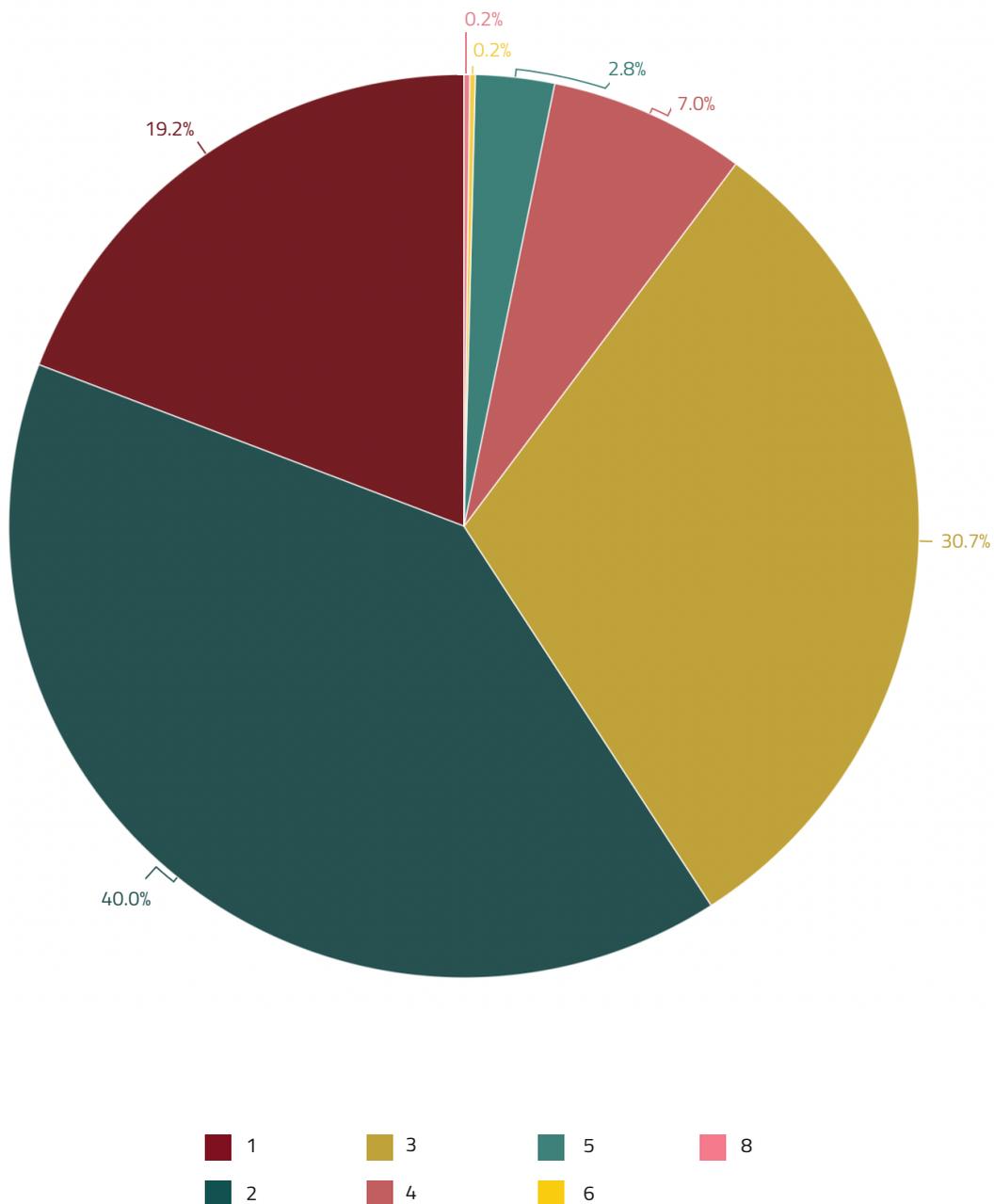


Figure 13 shows the distribution of respondents according to the variable of the number of household sources of income

While most households depend on the employment of one or more household members to secure their main income, the data also shows very high reliance on support coming from abroad and on the work of relief organizations inside the country. In practical terms, the local economy is far from being able to sustain its residents. Much of the population is in dire need of assistance provided by another party, whether from a Syrian living abroad or a relief organization working to provide humanitarian assistance inside the country.

The percentage of respondents who stated that their own paycheck is one of their main sources of household income was 64% (which corresponds to the percentage of public employment); 25.8% of respondents said that remittances from friends and relatives abroad are a main source of income. The percentage of respondents indicating that in-kind and cash assistance provided by relief organizations is a main source of income was 41.8%.

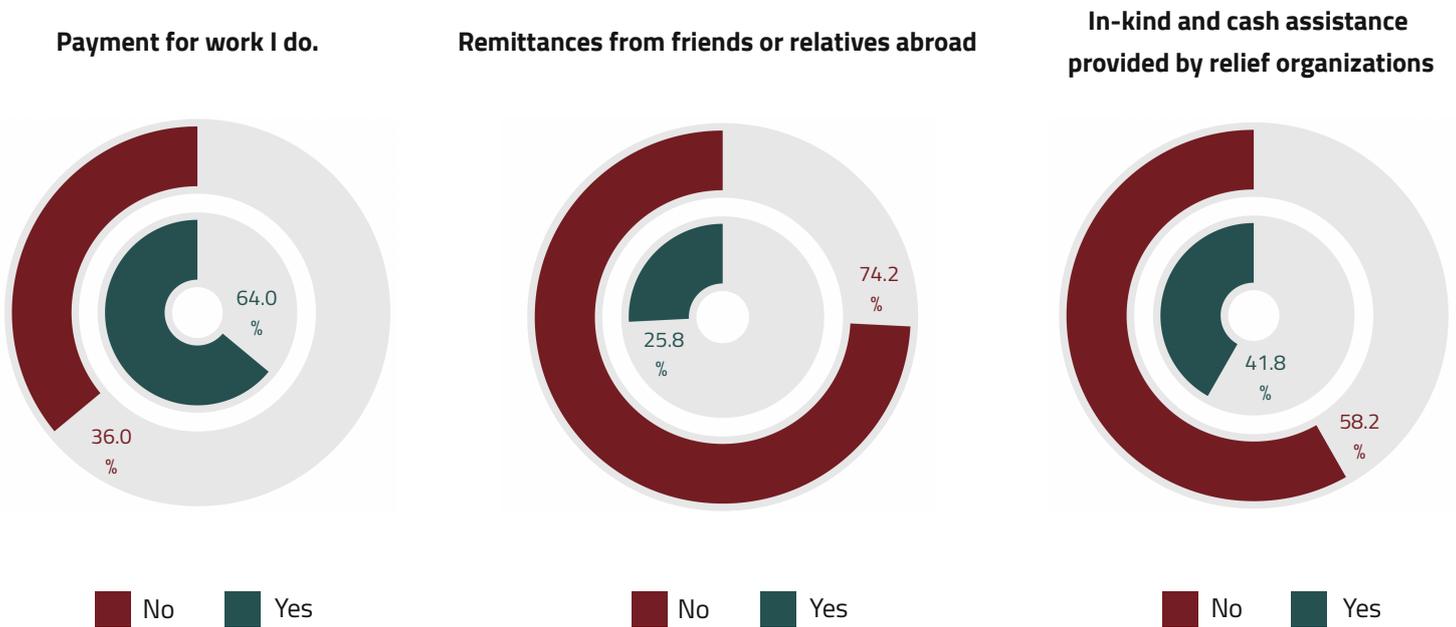


Figure 14 shows the distribution of respondents according to the variable of income source type

When we analyze this data based on the gender variable, an increase appears in the dependence of households in Damascus on men’s income for their livelihood more than women’s, a clear result of the apparent disparity within the labor market as discussed earlier. This leads to several consequences, including a decrease in the living standard of households with fewer males.

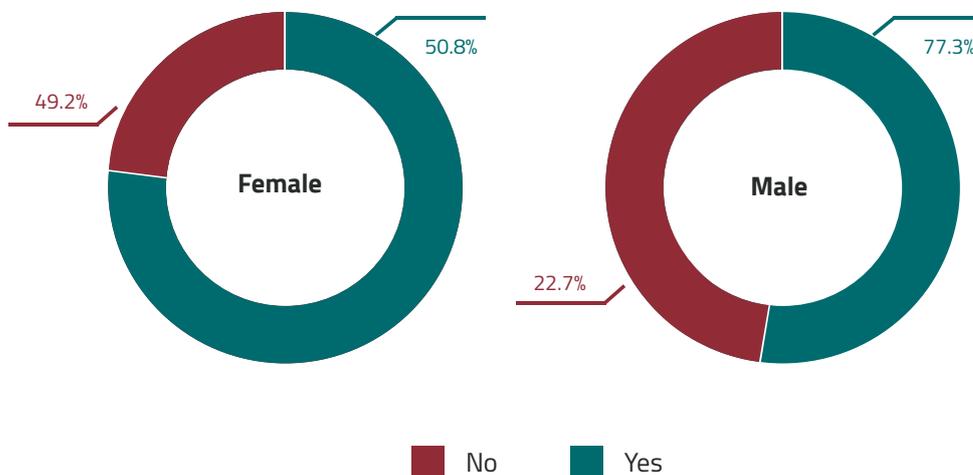


Figure 15 shows the distribution of respondents according to the variables of “payment for work I do” as the type of income source and gender

In the same way, age has an impact on considering the work of the respondent as a main source of household income. The percentage of those 26–35 years and 36–45 years who stated that their paycheck is a main source of household income is 74.5% and 75.8%, respectively. This indicates that the work of these two age groups is essential for Damascus residents.

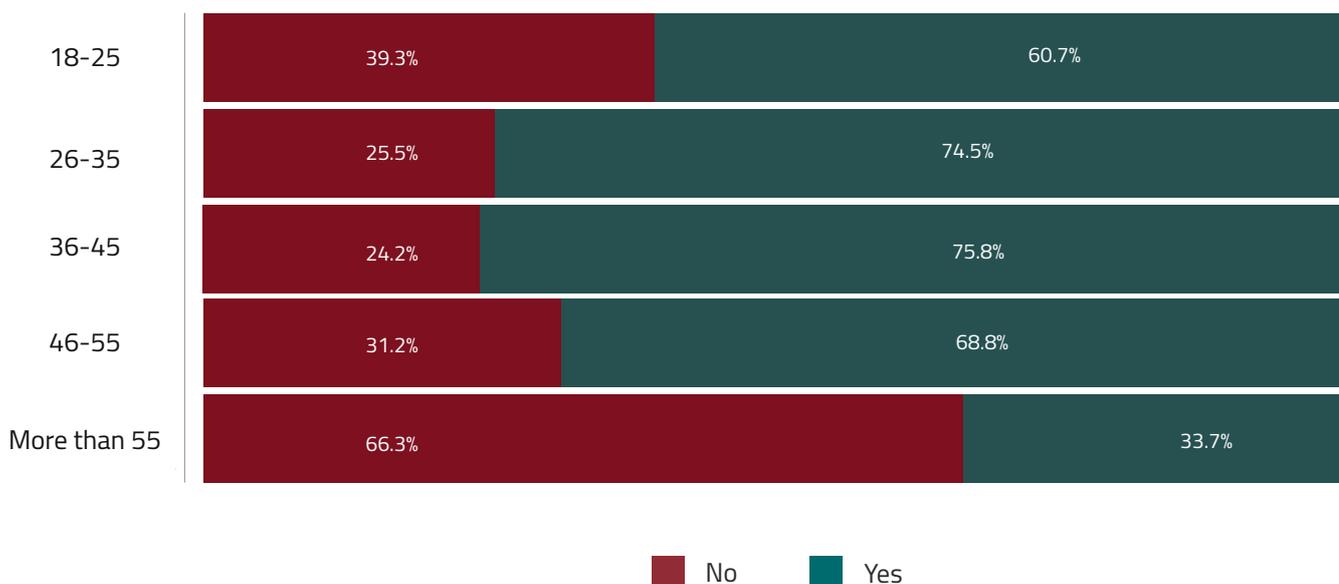


Figure 16 shows the distribution of respondents according to the variables of “payment for work I do” as the type of income source and age

The data also shows that respondents who live in the Nahr Aisha neighborhood depend on more sources of income (42.5% rely on three sources of income), while the largest percentages of respondents of the Al-Zahirah and Rukn al-Din neighborhoods depend on just two sources of income, at 49% and 42% respectively.

It is evident that the greater number of income sources for residents of Nahr Aisha neighborhood can be attributed to their lower wages, and the higher tendency of benefiting from aid provided by relief organizations that focus their work on neighborhoods in each area with the least income.



Figure 17 shows the distribution of respondents according to the variables of the number of income sources and place of residence

Likewise, the residents of the Nahr Aisha neighborhood are the most dependent on remittances from friends and relatives abroad, relying on them for survival. The high reliance on foreign remittances in Rukn al-Din neighborhood shows the role of these remittances in raising or maintaining the standard of living, which aids in survival but also allows for living in a more expensive neighborhood.

Finally, we find that Al-Zahirah neighborhood is the least dependent on foreign remittances at only 16%.

Therefore, we can infer that inhabitants of the poorer and richer neighborhoods depend more on external remittances than inhabitants of the middle-class neighborhoods, who rely more on employment for their income and livelihood, as discussed earlier.

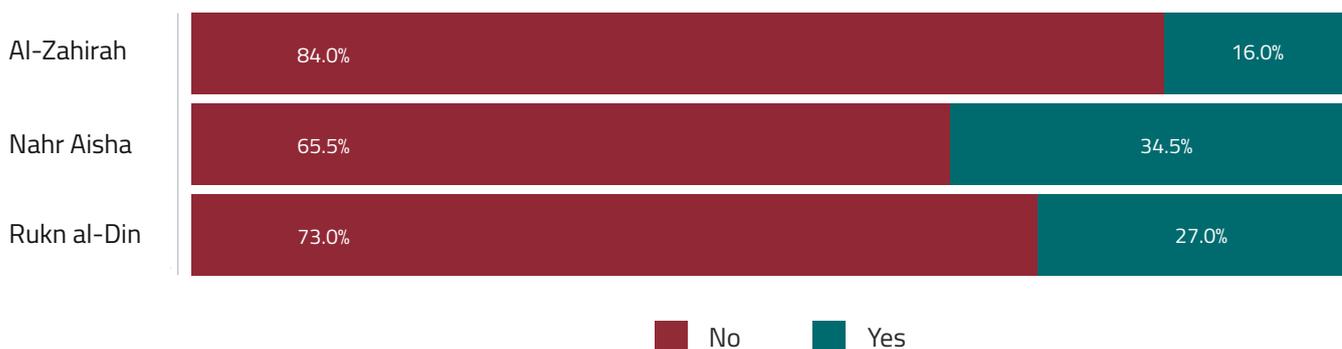


Figure 18 shows the distribution of respondents according to the variables of Income source type: Remittances from friends or relatives abroad and the place of residence

Assistance provided by civil organizations working in the relief field constitutes a significant percentage of household income for Syrians. The percentage of respondents who receive such assistance as one of their main sources of income reached a whopping 57% in Nahr Aisha neighborhood. But the rates of reliance on this source in the middle- and upper middle-class neighborhoods was still shocking. According to the survey, 37.5% of the respondents in Rukn al-Din Neighborhood said that in-kind or cash assistance provided by civil organizations contributes to their income, and 31% of Al-Zahirah respondents said so. These rates reach one-third of the sample, which shows how much the Syrian economy is affected; everyone needs aid in order to maintain their standard of living, even those who live in supposedly privileged neighborhoods.

These high percentages may also indicate that many middle- and upper middle-class people have experienced financial setbacks over the past years, which has pushed them to rely on external sources of income such as aid in order to stay in their homes.

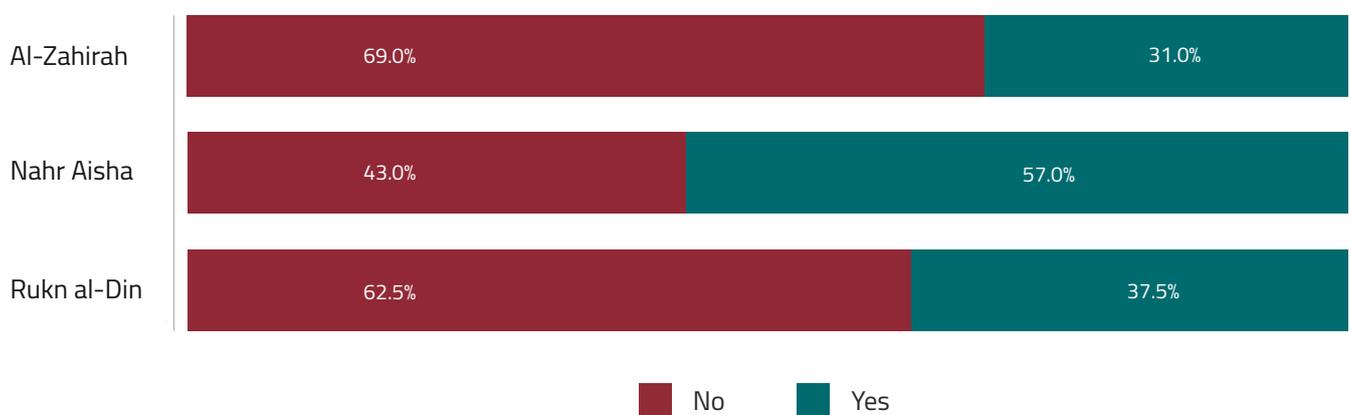


Figure 19 shows the distribution of respondents according to the variables of place of residence and Income source type: In-kind or cash assistance from civil organizations

These same remittances from Syrians abroad also clearly contribute to an increase in spending for Damascus city residents. For respondents who spend 601,000–800,000 SYP monthly, the percentage of those relying on remittances from abroad reached 61.5%. Conversely, the percentage of those relying on remittances decreased to 15.5% among the lowest spending group. In other words, the residents who are still able to have a reasonable living standard are able to do so primarily because of these remittances from abroad.

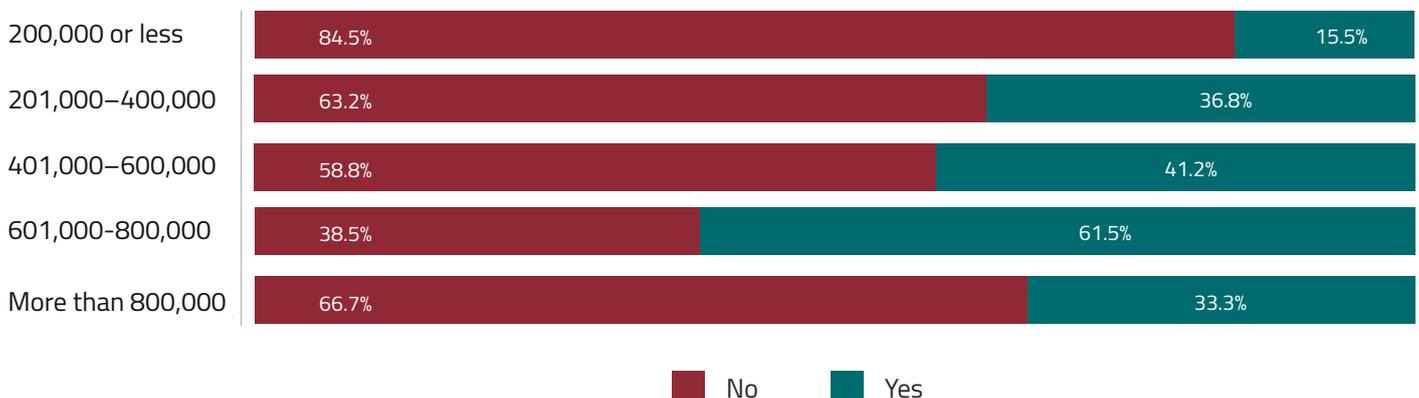


Figure 20 shows the distribution of respondents reporting monthly spending (n=338) according to the variables of average monthly spending and Income source type: Remittances from friends or relatives abroad

Syria's regime-controlled areas witnessed several economic crises in late 2019 and 2020: the spread of COVID-19, the acceleration of Western economic sanctions, the financial and security crisis in Lebanon, and the increase in internal conflicts among the inner circle of the regime. The combination of these factors led to deteriorating economic conditions for the population.

During the implementation of our survey, we asked respondents about their consumption patterns of major commodities during 2018 and then during 2020. This chapter is based on an analysis of the differences in those consumption patterns relating to several other factors surveyed, such as income level and monthly spending, which helps us form a picture of how those crises impacted the daily life of Damascus residents. Respondents were also asked about their ability to secure necessary fuel during the winter of 2020/2021, and the impact of the smart card distributed by the government to regulate support for goods and services.

Eggs are an inexpensive source of animal protein in Syria. The significant decrease in their consumption in Damascus, especially in light of the low levels of legume crops produced in the agricultural sector, presents a danger to the general health of the population and may be one reason for the aggravation of the food crisis, especially among children.

In February 2021, the United Nations World Food Program announced that 12.4 million people in war-torn Syria are struggling to find enough food, a significant increase that the statement described as "worrying."¹⁵

By analyzing the correlation between monthly spending and the change in egg consumption, we can see that those with the lowest incomes (who are therefore the lowest spenders) are most impacted. Egg consumption in 2020 decreased to less than half that of 2018 among the lowest spenders (200,000 or less SYP per month) and those spending 201,000–400,000 SYP per month, at 45% and 46.3% respectively.

Respondent groups who spend the most (because of higher income) were less affected. Consumption of eggs did not change for 45.1% of the group spending 401,000–600,000 SYP per month, and for 46.2% of the group spending 601,000–800,000 SYP per month.

15- Deutsche Welle, "Alamem Alemthedh: 12 Melyewn Sewrey Y'eanewn An'edam Alamen Alegheda'ey [UN: 12 Million Syrians Are Food Insecure],"

DW.COM, February 13, 2021, accessed March 15, 2021, [URL](#).

The following table shows the intersection between household spending (declared by only 338 respondents) and egg consumption. The following tables related to spending volume use that partial figure (338) as a total. The change in consumption will later be intersected with the total sample to show more comprehensive data.

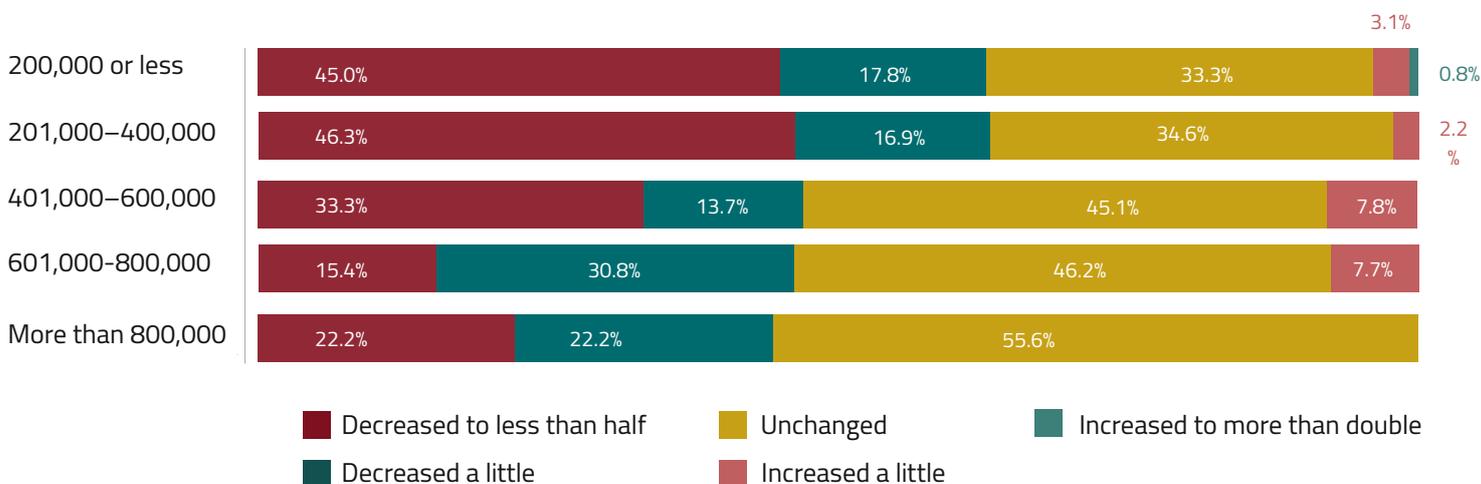


Figure 21 shows the distribution of respondents reporting monthly spending (n=338) according to the variables of household monthly spending and change in monthly egg consumption between 2018 and 2020

When we expand to the total sample of 600, we see an overall decrease in egg consumption for 49.5% of the respondents. For 31.8% of the total sample the consumption level dropped to less than half what it was in 2018. It should be noted here that the consumption question includes the respondent’s entire household; the actual number of people captured in our question may be around 3000, based on the assumption that the average household size of our respondents is five members.

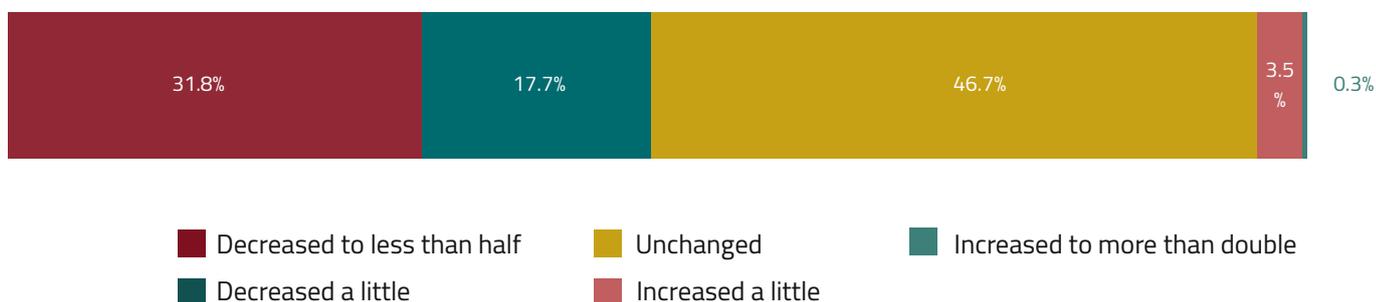


Figure 22 shows the distribution of respondents according to the variable of change in monthly egg consumption between 2018 and 2020

For chicken, the relationship between consumption and spending levels shows a greater decline in consumption between 2018 and 2020 than we saw in egg consumption. Broadening our lens to the total sample, the data shows a clear decline in chicken consumption between these two years, decreasing for 68.9% of respondents' households. For 35.2%, the consumption level dropped to less than half what it was in 2018.

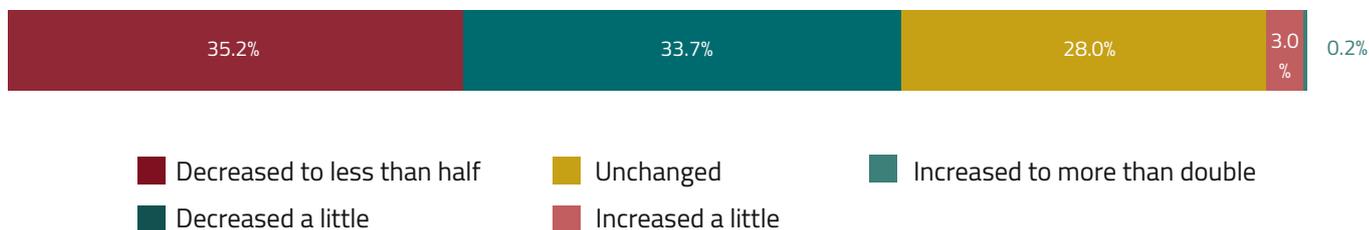


Figure 23 shows the distribution of respondents according to the variable of change in monthly chicken consumption between 2018 and 2020

Breaking down consumption level by spending categories (n=338), we notice a decrease in consumption among 76% of those who currently spend 200,000 SYP or less monthly; it drops to less than half among 51.2% of this spending group.

The percentage of decrease in chicken consumption in the next highest spending category (201,000–400,000 SYP monthly) was even more than in the previous category; chicken consumption decreased for 80.9% of those respondents spending 201,000–400,000 SYP monthly, and 2020 consumption dropped to less than half that of 2018 for 41.9% of them.

Respondents who spend 401,000–600,000 SYP monthly have fared a little better. While chicken consumption for this group did decrease for 68.6% of the respondents, only 29.4% decreased to less than half. The two highest spending groups decreased their 2020 chicken consumption as well, though far fewer to less than half that of 2018. But this does indicate that the increase in chicken prices between 2018 and 2020 greatly affected consumption at all spending levels within the population, albeit to varying degrees.

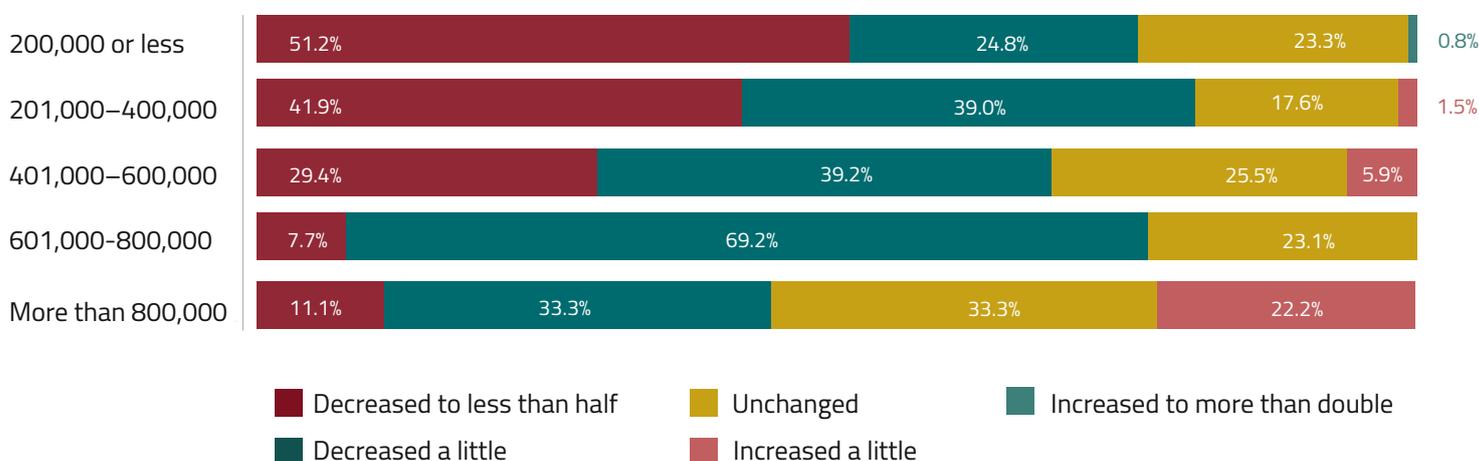


Figure 24 shows the distribution of respondents reporting monthly spending (n=338) according to the variables of average monthly spending and the change in monthly chicken consumption between 2018 and 2020

For red meat (lamb, beef, veal, mutton) consumption, we find that the largest decline was concentrated among the highest spending category (more than 800,000 SYP); their 2020 consumption dropped to less than half that of 2018 among 55.6% of respondents in this category. However, red meat consumption did not change for 84.5% of the lowest spenders.

This is easy to explain when we know that the average monthly red meat consumption of the lowest spending categories in 2018 was only 170 grams (about 6 ounces per month). In other words, the lowest-income groups did not eat a great deal of red meat in 2018 to begin with. But high prices and the cost-of-living rise in Damascus during the past two years have led to a decline in red meat consumption among those who were previously consuming more of it; namely, the highest spending categories.

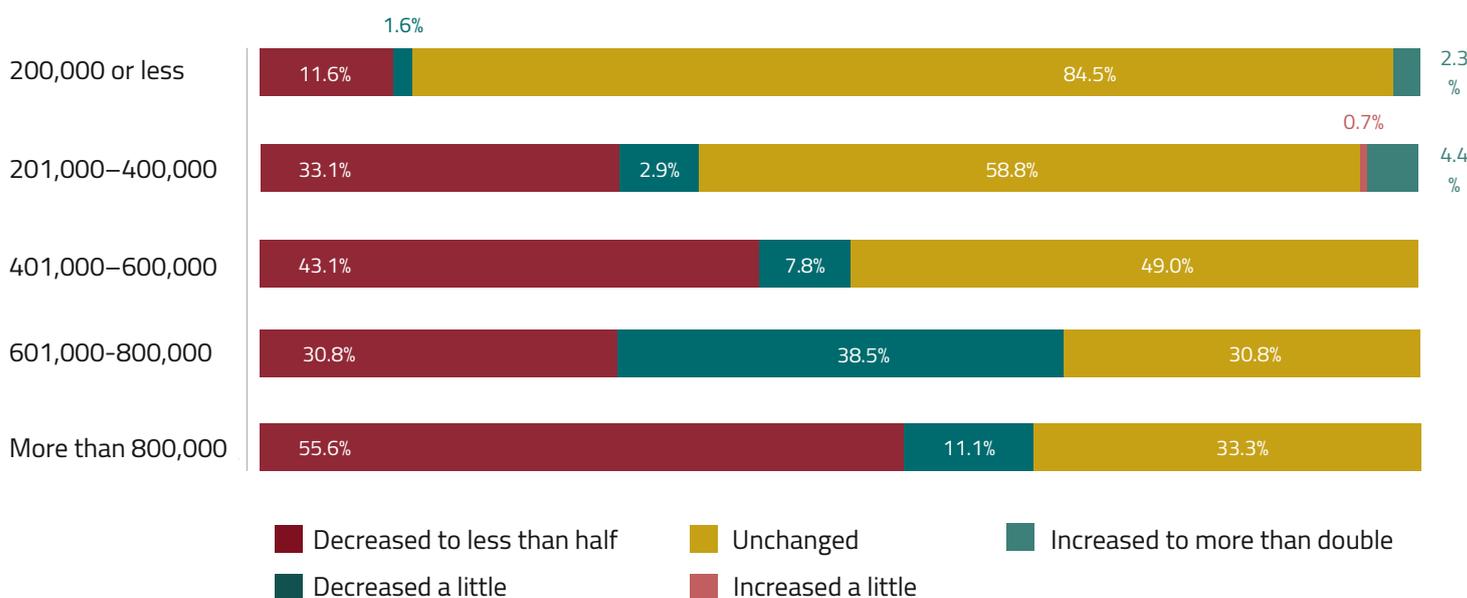


Figure 25 shows the distribution of respondents reporting monthly spending (n=338) according to the variables of average monthly spending and the change in monthly red meat consumption between 2018 and 2020

The conditions mentioned above affect the total sample rates of decline in consumption as well. The total sample data shows that consumption of red meat did not change for 65.5% of respondent households. But this is easily explained by the fact that very high percentages of the population were already deprived of red meat consumption, or were consuming far smaller amounts of it than they did before 2018.

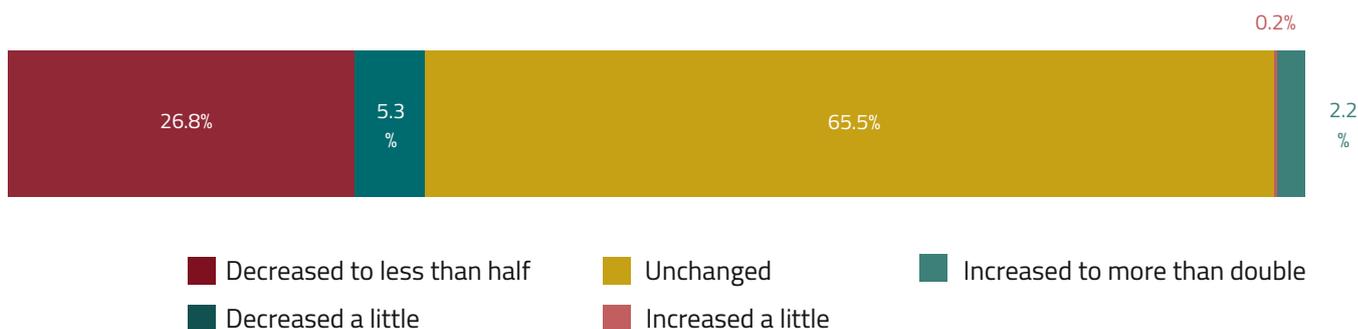


Figure 26 shows the distribution of respondents according to the variable of the change in monthly red meat consumption between 2018 and 2020

In analyzing the consumption of rice and bulgur, two basic ingredients in many daily Syrian dishes, we see that the consumption of these two foods was subjected to much less change for most spending categories. The highest percentages were for a “slight decrease” or “no change” in consumption. Among 17.1% of the lowest spending group there was actually a slight increase. It seems this was compensation for the lack of other foodstuffs, and because of the availability of government-subsidized quantities during the study period, according to accounts by local residents.

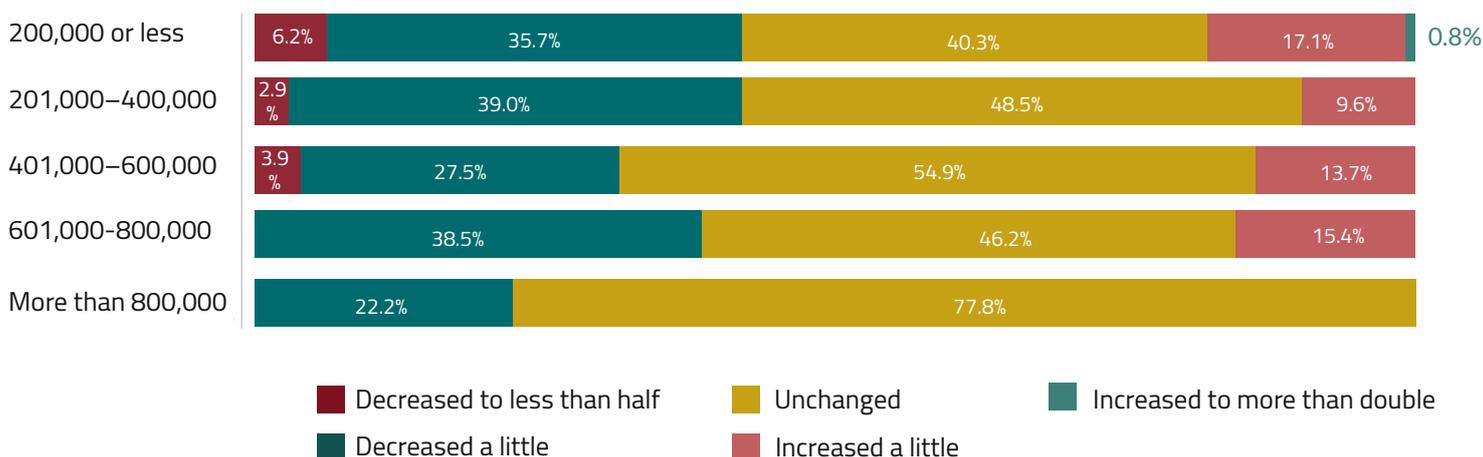


Figure 27 shows the distribution of respondents reporting monthly spending (n=338) according to the variables of average monthly spending and the change in monthly rice and bulgur consumption between 2018 and 2020

Expanding to the total sample, the data shows a similar trend to changes in rice and bulgur consumption; for only 3.5% of the total sample did consumption decrease, while consumption increased slightly for 11.3%.

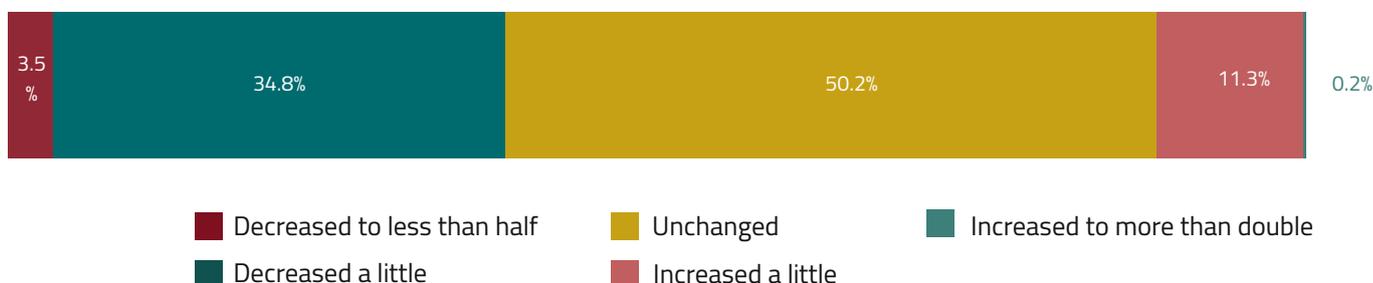


Figure 28 shows the distribution of respondents according to the change in monthly rice and bulgur consumption between 2018 and 2020

In a similar fashion to rice and bulgur consumption, a steady tendency can be observed in the consumption of legumes and sugar. These items are considered food staples for the population in Syria. Their stability may not compensate for the decrease in consumption of other items—especially animal products—but it demonstrates the importance of these items for Damascus city consumers, which means fewer demand fluctuations with the change in prices (inelastic demand). Since the prices of these items remained at lower levels than other commodities, it allowed their continued consumption in quantities close to 2018 levels.

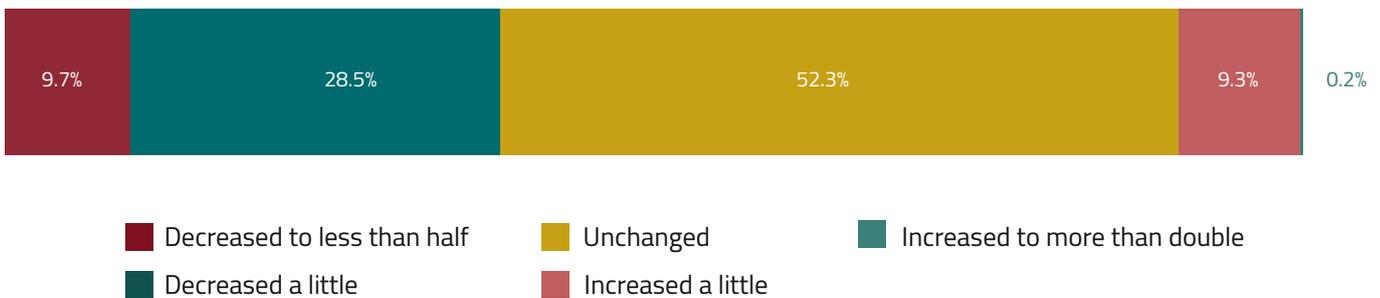


Figure 29 shows the distribution of respondents according to the variable of the change in monthly legume consumption between 2018 and 2020

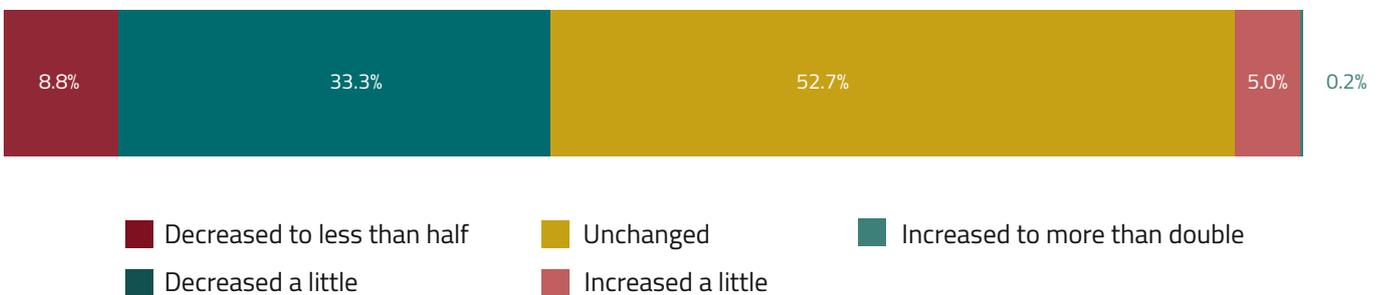


Figure 30 shows the distribution of respondents according to the variable of the change in monthly sugar consumption between 2018 and 2020

For clothing consumption, the data shows a decrease for just under half the study sample. It dropped by half or more for 34.3% of the total respondents between 2018 and 2020.

[Note: clothing consumption was measured annually rather than monthly]

We find those percentages similar in the spending categories. The decline was by half or more for 38.8% of respondents whose households spend 200,000 SYP or less per month, and for 40.5% of respondents who spend 201,000–400,000 SYP monthly.

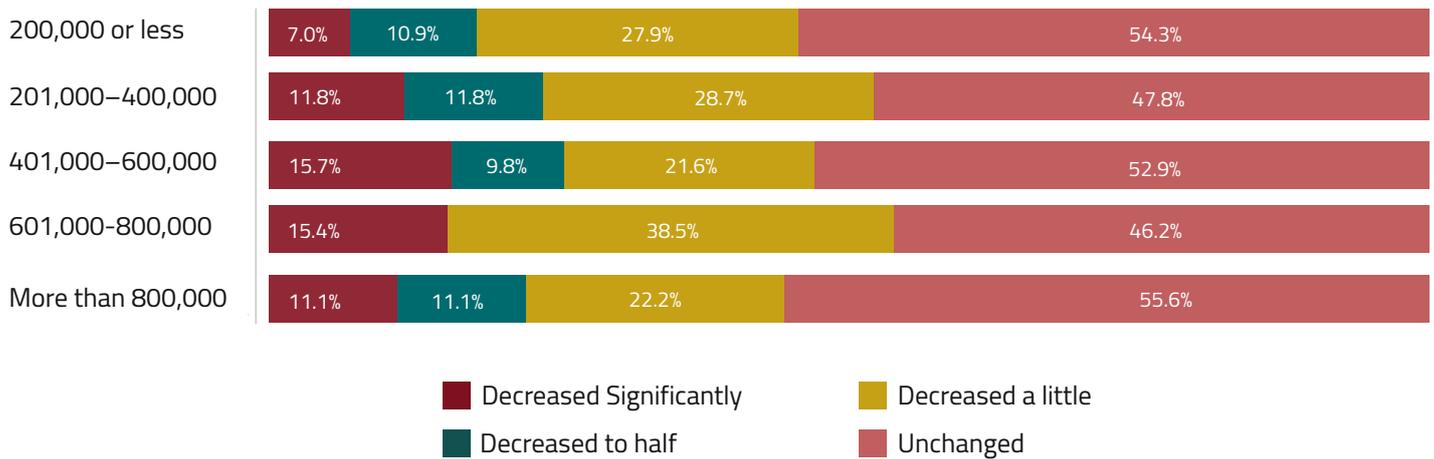


Figure 31 shows the distribution of respondents reporting monthly spending (n=338) according to the variables of monthly spending average and the change in average annual clothing purchases between 2018 and 2020

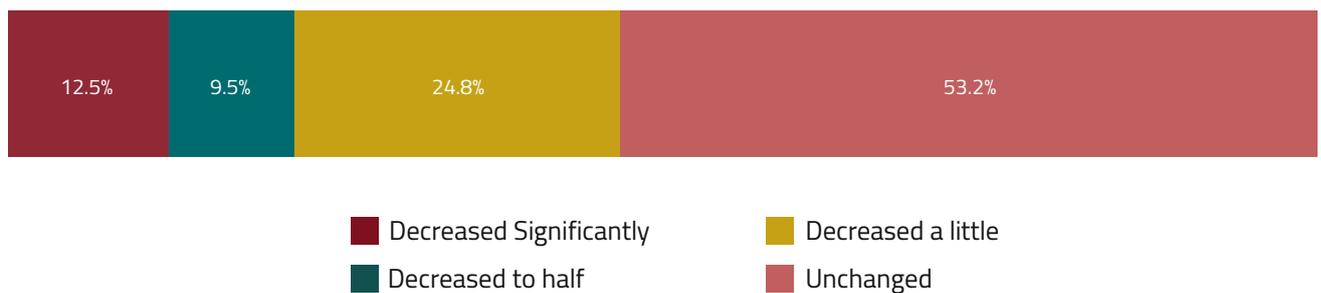


Figure 32 shows the distribution of respondents according to the variable of the change in annual clothes purchases between 2018 and 2020

Diesel is the main household heating fuel in Syria; 48.4% of respondents listed their monthly need for diesel during the winter season as 200–400 liters, while 45.2% said that their households need more than 400 liters.

Only 10% of respondents expected to secure more than half of their diesel needs for the winter of 2020–2021; 35% said they could secure a quarter or less of their needs, and 29.5% said they were unable to meet any of their diesel needs during that winter season.

The shortage of diesel poses a great challenge to the population. The use of unhealthy alternatives, such as charcoal or the burning of plastic waste, has serious health effects. In addition, the use of unsafe diesel alternatives in unprepared heaters may cause fires and other serious life and wellbeing threats.



Figure 33 shows the distribution of respondents according to monthly household diesel fuel needs for the 2020–2021 winter season

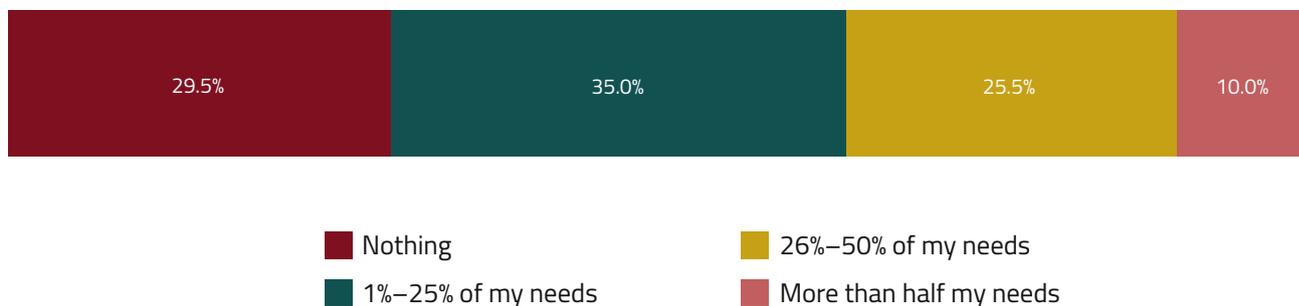


Figure 34 shows the distribution of respondents according to how much of their diesel needs they expect to secure for the 2020–2021 winter season

Diesel fuel was the first commodity to be subsidized using the smart card method (where holders are authorized to buy a certain amount of a certain commodity at a reduced price during the year). The Syrian regime government has set a limit of 400 liters at the subsidized price, which in 2020 was 180 SYP per liter.

However, our data shows that 20% of respondents do not have this card in the first place. This percentage includes Syrian Palestinians¹⁶ who did not receive this card at all. Most respondents indicated that the smart card has no significant positive impact on securing their basic needs; 39.7% expressed a moderate positive impact of the card. But we found it interesting that 39.3% said it actually has an adverse impact on their ability to secure basic needs. We believe this is a result of the association between limited availability of subsidized goods and the recent increase in smart card use being interpreted causally by the respondents, although the two factors may be independent of each other.



Figure 35 shows the distribution of respondents according to the impact of the smart card on their ability to secure their basic needs

In conclusion, given that in 2018 economic conditions were already deteriorating to the point that Syrians were reducing their consumption of numerous items, any further decrease in consumption will be mostly at the expense of the basic needs of the household. The significant decrease in animal protein consumption in particular portends potential damage to the production sector. The sizeable decrease in demand while production costs remain high will cause more producers to go out of business. This in turn will lead to further decrease in the productive capacity of the livestock husbandry sector—very important to Syria’s rural areas—and a decline in job opportunities in the same.

The Minister of Agriculture, Hassan Qatna, stated in an interview with Russian media outlet Sputnik that Syria had lost 50% of its livestock, a number that confirms the depth of the crisis facing the livestock husbandry sector in the country.¹⁷

Likewise, the significant decline in the consumption of clothes threatens the textiles sector, which is vital in Damascus city. As with the animal protein crisis, the inability to adapt to reduced demand against fixed costs, which in turn triggers an inability to reduce prices, means that this sector will also receive a major blow, leading to massive job losses. This will put Damascus and its residents into an ever-downward-spiraling cycle of hardship unless other economic factors change.

16- "Atfal Filistinyi Sourya la Yahsoloun ala Mukhassasatihim Abr Al-Bitaka Al-Dhakiyya [Children of Syrian Palestinians do not receive their benefits of the smart card],"

Enab Baladi, February 28, 2021, accessed on March 15 2021, [URL](#).

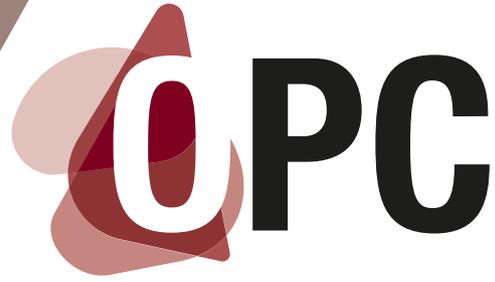
17- Interview by Russian Sputnik with the Minister of Agriculture in the government of the Syrian regime. You can read the full text of the interview at this [link](#).

Conclusion

- Syria's regime-controlled areas witnessed several economic crises in late 2019 and 2020: the spread of COVID-19, the acceleration of Western economic sanctions, the financial and security crisis in Lebanon, and the increase in internal conflicts among the inner circle of the regime. The combination of these factors led to deteriorating economic conditions for the population. This study assesses the economic situation and how it changed in the capital city of Damascus.
- Waves of Syrian refugees leaving the country has led to the loss of large numbers of those 18–45, prime workforce age, which has resulted in longer working hours for those in that age group who have remained in Syria.
- The average work week in Damascus is one of the highest in the world. Although the average working hours for men were higher than those for women, the rate for women remains higher than global averages.
- Although nearly half of respondents described their living standard as "average," a large number reported living on amounts below the global poverty line.
- The conditions of war have also led to an increase in the percentage of those unable to work due to health reasons, which reached 13.8% among the respondents of working age.
- The percentage of employed individuals in the Rukn al-Din and Al-Zahirah neighborhoods is greater than that of Nahr Aisha, one of the poorest neighborhoods of Damascus, increasing the economic burden on those living there. As a result, the residents of Nahr Aisha showed a greater dependence on aid.
- Remittances from friends and relatives outside Syria constitute one of the main sources of household income for 25.8% of respondents.
- In-kind and cash assistance provided by relief organizations is one of the main sources of household income for 41.8% of respondents.
- Sizeable reliance on charitable aid does not exclude any neighborhood. The percentage of those relying on aid in Rukn al-Din neighborhood, the highest level of income in the study, reached as high as 37%.
- Decreases in consumption mainly affect the lowest spending group, except for rice and bulgur, which have maintained a relatively stable rate. This is likely a result of government subsidies for these two commodities, among the main components of every kitchen in the city.
- For the 2020–2021 winter season, 29.5% of respondents said they don't believe they will be able to secure any of their needs for diesel fuel, the main heating fuel in Damascus.
- In addition to its health effects, the decrease in animal protein consumption shown in the study may cause long-term economic damage to livestock keepers, which would in turn cause an increase in the unemployment rate.

Recommendations

- We recommend that international actors concerned with the Syrian issue be transparent about providing aid to the population in regime-controlled areas, prepare to increase that aid, and refine implementation mechanisms to reach additional beneficiaries for whose livelihoods this aid is essential.
- Aid provided by Syrian refugees and expatriates abroad is considered a basic source of income for a quarter of the population in Damascus, a percentage that is likely higher in other regions of Syria. Therefore, we recommend that those countries hosting Syrians ease their restrictions on individual remittances, especially for small sums, which are needed to sustain many households in-country.
- Aid programs for the population must include the provision of job opportunities, not merely the rehabilitation of individuals for work. This can be done by sponsoring productive projects that are able to absorb a greater percentage of workers.
- Aid should be provided to farmers and livestock keepers, especially small businesses in this field, to permit them to lower their prices. This is specifically important for animal products; the ability to lower prices will result in increased consumption (demand), which will in turn allow the producers to keep producing (and employing) and secure the needs of many households.
- Over the course of a decade of conflict, the country's economic and living situation has continued to deteriorate at varying speeds. At each peak of a crisis, there are expectations that this might push the regime to make political concessions, but this has never happened. As such, there is little optimism that the current peak will be any different. However, this crisis is certainly the most intense since the beginning of the conflict; discontent has reached those inner circles most loyal to the regime. It may now be an appropriate opportunity for more political pressure on the regime and its allies to proceed with the political process.



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