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Ar-Raqqa

Localized Needs Assessment

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Ar-Raqqa overview

The city of Ar-Raqqa was selected for a localized needs assessment due to the extreme levels of damage it underwent during the Syrian conflict as well as the role it played, which make it an important regional center that requires concerted efforts to restore.

Much like other cities in Syrian Arab Republic, Ar-Raqqa's history goes back thousands of years. The city sits on the site of an ancient Greek city, Nicephorium, and a later Roman fortress and market town, Callinicus. The city was also the capital of the Abbasid caliphate at the turn of the 9th century.

Ar-Raqqa's traditional economy has largely been tied to the greater region and commercial connections with neighboring cities, including Aleppo to the west and Al-Hasakeh and Deir ez-Zor to the east and to the south. In recent years, its central location at the crossroads of four major regions has prompted growth of its role as a hub of trade and commerce.

Despite its relatively small size, Ar-Raqqa played a key role throughout the Syrian conflict. It was seized by the so-called Islamic State of Iraq and the Levant (ISIL) and was declared the capital of the so-called caliphate.

Conflict dynamics

Ar-Raqqa Governorate is home to so much agricultural land that the region was sometimes labelled the country's breadbasket. Politically and economically marginalized, Ar-Raqqa was one of the poorest governorates in the country and had the highest illiteracy rate, which fueled the youth-led demonstrations against the Government in 2011.¹

By early 2013, Armed Opposition Groups (AOGs) in Ar-Raqqa had grown in number and strength, with increasing recruits and foreign patronage. In March, Ahrar El Sham and Jabhat El Nusra launched a joint offensive and managed to expel the state security forces from Ar-Raqqa city.

Meanwhile, the so-called Islamic State of Iraq and the Levant (ISIL) had expanded across the eastern Syrian Arab Republic and became increasingly focused on Ar-Raqqa city. By the fall of 2013, ISIL succeeded in eliminating or absorbing AOGs and consolidated control over the city.²

In 2015, the Yekîneyên Parastina Gel (YPG) captured Kobani from ISIL, Kobani being close to Ar-raqqa given its proximity.

In June 2017, the Kurdish-led Syrian Democratic Forces (SDF) launched its long-anticipated offensive to seize Ar-Raqqa city from ISIL. After four months of intensive conflict, the SDF took control of the city in October 2017. The military campaign dealt a heavy blow to ISIL and to the city: over 1,600 civilians were killed and 11,000 buildings were destroyed. Of the nearly 230,000 people residing in the city in late 2016, fewer than 3,000 remained when hostilities ceased.³

The SDF's military victory over ISIL paved the way for the Syrian Democratic Council (SDC), the SDF's political wing, to assume political control over Ar-Raqqa City. Although many residents initially welcomed the Raqqa City Council (RCC) and the relative stability its security forces provided, residents interviewed have become disenchanted with its way of governing.⁴

Demining efforts and restoration of basic services were initially slow, delaying the return of much of the city's displaced population. Since then, many public assets have been rehabilitated by international relief actors and the RCC. However, the RCC often lacks the technical capacity required to administer services.

Systematic arrests of conscription evaders, ISIL sleeper cells and political dissidents (real or perceived) by the local security forces (Asayish) are an enduring source of discontent among residents.

Despite these issues, Ar-Raqqa city continues to be a popular destination for internally displaced persons (IDPs) fleeing conflict. It has attracted IDPs due to its relative stability, low cost of living, quality of public services and availability of employment opportunities compared to other cities in north-east Syrian Arab Republic.⁵

1. Ar-Raqqa economy overview

a. The toll of the conflict

Nearly all critical infrastructure required for a functional economy has been impacted. Damage was inflicted not only to roads, bridges and utilities, but also to the city's markets, storage facilities, grain silos, irrigation canals, manufacturing facilities, and the like. An estimated 55-60 per cent of the city's buildings were severely damaged or completely destroyed.

A vast amount of the region's agricultural infrastructure has also been damaged, including roads, irrigation canals and pumps, grain silos and processing facilities.

Much like its physical impact, the city's human capital also suffered. Waves of immigration and displacement deprived the city of its labor force, including tradespeople, merchants, technicians, local leaders and service providers.

b. A roadmap of Ar-Raqqa's past and current economy

Ar-Raqqa's traditional economy has largely been tied to the greater region and commercial connections with neighboring cities, including Aleppo to the west and Al-Hasakeh and Deir ez-Zor to the east and to the south.

Agriculture plays the most dominant role in the city's economy. Generations have relied on a tradition of farming and livestock

husbandry for sustenance, income and economic security. Production was centered on primary crops including wheat, cotton and vegetables. In 2010, agriculture employed nearly 34 per cent of regional employment.⁶

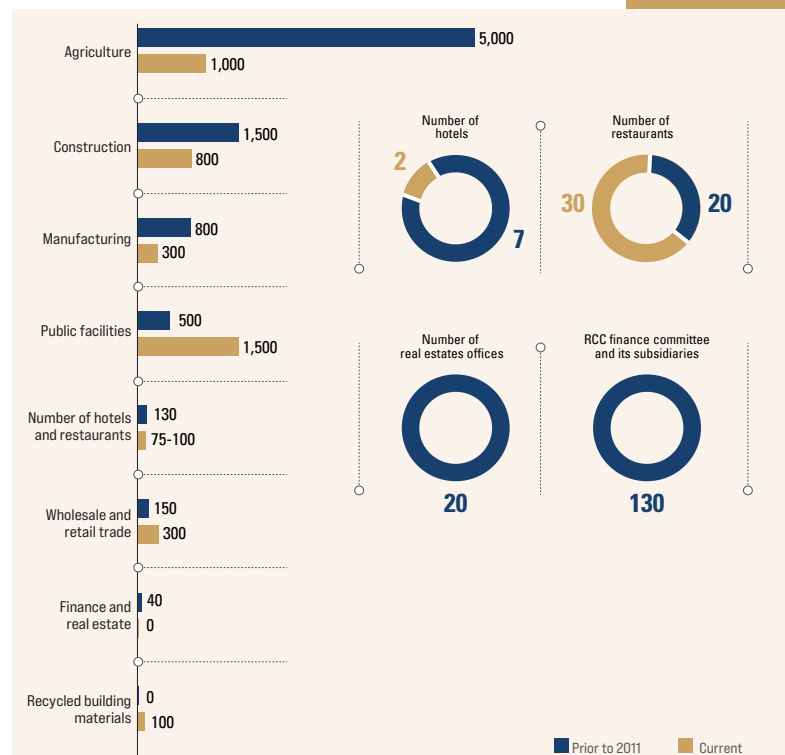
From 2010 to 2015, local and regional agricultural production contracted significantly, with a loss of 39,000 jobs, a 57 per cent contraction. By 2015, the number had shrunk to less than 30,000 jobs remaining in the sector. Despite this devastation, local experts estimate that 60-70 per cent of the city's economy still relies on agriculture.

Over 3,000 jobs in agri-processing existed in the city prior to the conflict, including employment at the city's sugar-beet factory, cotton gin and wheat mill. All of these facilities were damaged or destroyed during periods of heavy fighting.

Prior to the conflict, rural-to-urban migration into Ar-Raqqa city resulted in a period of increased population. The city's growth fueled an uptick in construction activities and employment. The sector's growth all but ceased during active years of conflict. Today, as the city's population swells with returning residents and IDPs, construction activities have resumed. The net demand for qualified workers has created employment for skilled workers, while reconstruction has also provided job opportunities to hundreds of day laborers.

Prior to 2013, there was high demand in the labour market for services and light industries such as security, engineering, medical, tailoring, ironwork, cleaning services and carpentry.

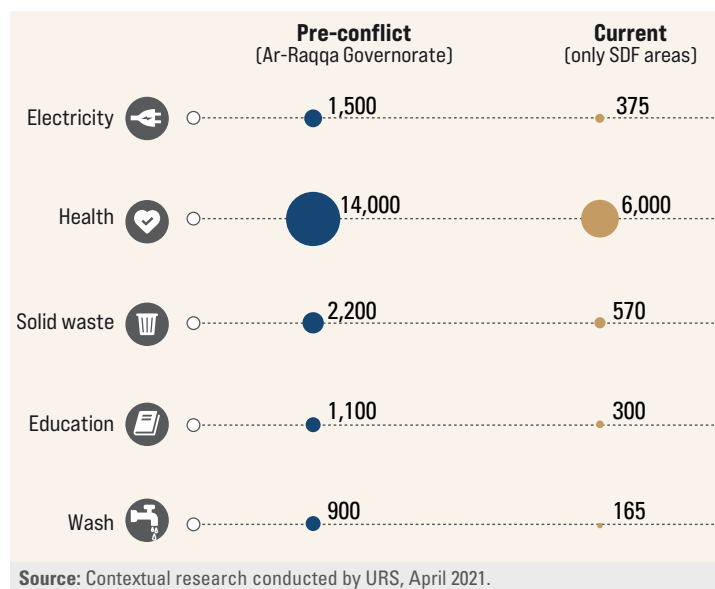
Figure 1. Change in city employment numbers, rough estimates by sector



Source: Contextual research conducted by URS, April 2021.

Note: Employment statistics are estimates based on multiple sources, including the RCC. A 30 per cent margin of error has been suggested. For Governorate-wide employment statistics, see Urban Analysis Network – Syria, 2019. Ar-Raqqa City Profile, May.

Figure 2. Numbers of employees in public services in Ar-Raqqa, by sector



Currently, Ar-Raqqa's sluggish economy is unable to generate sufficient jobs in the private sector. The public sector has grown to become the single largest employer in the city, with the RCC employing 15,000 residents in civil services, military and security institutions.

Separation from and loss of male spouses have resulted in approximately 30 per cent of families now being headed by women. The RCC has managed to provide more employment opportunities for Ar-Raqqa's women by integrating them into civil services, security and military forces.

Chronic unemployment plagues the city's youth, who face a variety of financial and social challenges. Failing education systems have also left them with limited opportunities for vocational training or higher education. Many have been forced into positions of caring for family members, which has delayed their studies or forced them away from certain job prospects.

c. Household economic vulnerability

With critically high unemployment, many of Ar-Raqqa's families struggle to manage their daily living expenses. The Survival Minimum Expenditure Basket is currently assessed at a cost of over 350,000 SYP per month, or around \$112. Within the past three years, nearly 70 per cent of households have reported to earning less than the equivalent of \$97 per month.⁷ Many families have also lost their main breadwinner to the conflict. According to a recent study, female unemployment has reached as high as 90 per cent despite the RCC's provision of opportunities.

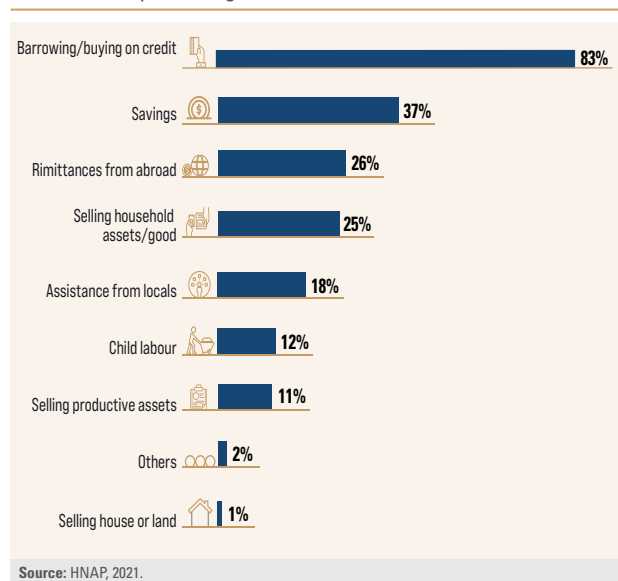
So how have people coped and survived?

Recent surveys reveal that the most common household coping strategy is borrowing money or buying on credit, while some residents have begun taking on additional jobs in the services sector and working in restaurants, shops, cafes and deliveries.

There has also been an increase in families taking their children out of school and seeking jobs for them. Meanwhile, remittances from relatives abroad have also become a main income stream for those unable to make ends meet on their own.

Individuals and families unable to find a stable or sufficient income have also become dependent on relief aid and charity organizations.

Figure 3. Coping strategies of households in Ar-Raqqa Governorate (percentage)



d. Agriculture and recovery

Agriculture still constitutes over 50 per cent of Ar-Raqqa's economy. Wheat and corn are still popular, and the disappearance of central planning has opened opportunities for many farmers and actors to switch to more profitable, higher-return agricultural products such as tomatoes, cucumbers, eggplants, potatoes, fruits, spices and olive trees.

Currently, the Syria Recovery Trust Fund (SRTF) appears to be the main entity supporting the agricultural sector.⁸ Its stabilization initiatives are largely focused on delivering agriculture inputs, such as seeds, fertilizers, pesticides, and polyethylene bags, and agricultural equipment, such as tractors, combine harvesters, plows, seeders, excavators, fertilizers and pesticide sprinklers.

The RCC's efforts have been largely focused on the rehabilitation of the irrigation system. This includes repairing the pumps, water and drainage channels. The RCC has also been supplying farmers with subsidized fuel and working to provide the network with energy, either by connecting it to the electric grid or providing it with fuel to power local generators.

Interviewed farmers do not appear to be satisfied with the support provided by the RCC, which they believe hinders the productivity of the sector. Notably, most of the recovery efforts targeting the agricultural sector do not seem to be provided by the RCC but rather by local and international NGOs and development bodies.

Local markets have been resilient to the conflict. Much of the city's heaviest damage occurred in Ar-Raqqa's old city, in its central neighborhoods and areas where markets have stood for decades. As the city's population began returning in earnest in 2018, so did its merchants and tradespeople. In lieu of concentrating in former central shopping districts, many re-establish themselves in areas of population return, often along the city's periphery.

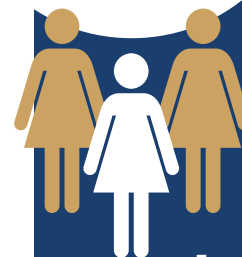
70%

of households have admitted to earning less than the equivalent of **\$97 per month** in the past three years.



female unemployment has reached as high as

90%



2. Enabling conditions for economic development

Despite its many challenges, the city has proven resilient in facilitating its own recovery. Its location as the regional centre supports residents and those living in the surrounding hinterland as a hub of connectivity.

a. Local governance

Challenges faced by the RCC to advance the city's recovery are difficult. A shortage of Government resources and technocratic capacity are accompanied by external political and security pressures, coupled with pressure to address internal needs and priorities.

Representation:

The RCC body continues to suffer from a lack of both adequate expertise and meaningful, accountable representation. Only 10 per cent of the RCC's legislative council members come from and directly represent Ar-Raqqa city.⁹ The majority of officials come from rural areas – many are tribal sheikhs – and are appointed based on their tribal affiliation. As much as one third of the legislative council's members are Kurdish, whereas the pre-conflict Kurdish population in the city was only 1-2 per cent.¹⁰

The process for appointments to the RCC has also been widely criticized by locals. Instead of holding elections, the RCC members are generally selected through a semi-consultation process. A lack of transparency also prevents locals from having access to key information about the activities and finances of governing institutions.

Poor inclusion of community also means that local technocrats and business figures are reluctant to contribute to the economic and urban recovery of the city.

Lack of financial resources and uncertainty about the future have further limited the RCC's governing capacity. Technocrats and skilled individuals generally refrain from joining the RCC due to the low salaries it provides.

Accountability mechanisms:

Enabling independent and effective accountability mechanisms is important for Ar-Raqqa's recovery efforts. The court is unable to adequately hold the RCC and other governance bodies accountable given the scarcity of judges, prosecutors and other qualified professionals.

In October 2020, Self Administration of North and East Syria (SANES) established a public oversight body to investigate corruption and hold Government officials accountable, regardless of their rank. It is too early to tell whether progress has been made and how effective this institution will be in combating corruption.

Budgetary needs:

According to municipal officials, the budgetary needs of the municipality of Ar-Raqqa city are approximately 150 million SYP per month. Only 30 per cent of its monthly budget is provided by SANES and the remaining is covered by local taxes, fees and fines, which are often inadequate and leave a budgetary shortfall. As a result, administrative budgets have fluctuated unpredictably based on the market exchange rate and decreasing purchasing power. All of this has inhibited long-term planning.

b. Service delivery

The conflict in Ar-Raqqa caused the collapse of public-service systems such as health, education and solid waste management, as well as the destruction of vital water, sanitation, electricity and transportation infrastructure. In the two years since the conclusion of active conflict in the city, the RCC, together with humanitarian and stabilization actors, local civil society organizations (CSOs) and the private sector, have made strong gains in these service sectors.



Nevertheless, several persistent problems remain:

- Although primary care facilities are located in many rural communities outside of the city, their ability to deal with complex health conditions is limited. The city's hospitals are likewise ill-equipped. The per capita ratio of hospital beds is only 30-35 per cent of the international standard.
- The city's teachers are insufficiently qualified. Schools and other public facilities have been severely damaged. Lack of classrooms and adequate staffing has resulted in overcrowding in some schools, with up to 70 students per classroom. The SANES-mandated curriculum taught in schools is not recognized by the Syrian Ministry of Education or internationally. Due to concerns over curricula, many residents choose to send kids to official schools located up to 30 km outside the city. Thirty per cent of schools in the area require rehabilitation. Sources estimate that 3,000-4,000 students in the Ar-Raqqa Governorate are engaged in some form of child labour.
- The water sector is facing a shortage as not all water stations are rehabilitated or meet hygiene standards. Water is supplied alternately every other day for neighborhoods.
- Electricity services are challenged by strained generation capacity due to a number of intertwining factors and the incomplete rehabilitation of distribution networks. Public grid electricity has been restored in only 40 per cent of Ar-Raqqa's neighborhoods.
- Although much progress has been made with regard to debris removal, waste management remains

The per capita ratio of hospital beds is only

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under resourced and unable to respond to community needs. Ar-Raqqa's official landfill located in Kasra, 15 km outside of the city, is not operational. The only operational landfill is located in Karama, 30 km from the city. These problems are largely a result of extreme levels of damage, insufficient funds for rehabilitation, capacity shortfalls and corrupt practices.

The service projects carried out by the RCC contribute to economic development as they enhance the city's investment environment. Examples of such projects are extending and rehabilitating sewage networks, extending water networks, and removing dumpsites outside the city and burying them in a safe way. Some projects even provides job opportunities for civilians in Ar-Raqqa, which contributes to economic growth.

The depletion of public-sector capacity has led to the increasing reliance on the private sector to fill service delivery gaps. While more prevalent in cities controlled by the Syrian Government, these dynamics also exist in Ar-Raqqa.

c. Ar-Raqqa's housing

Housing is imperative to economic, social and civic development. In addition to providing basic shelter and security, the housing sector drives employment through the construction sector, which contributes to economic development at large.

Approximately 43 per cent of structures in the city are moderately damaged, 31 per cent severely damaged and the remaining 26 per cent

Figure 4. Extensive damage to Ar-Raqqa's residential infrastructure



Source: Amnesty International, available at <https://www.amnesty.org/en/latest/news/2018/06/syria-raqqa-in-ruins-and-civilians-devastated-after-us-led-war-of-annihilation/>.

destroyed. The shortage of adequate housing has severely strained the rental market. It can also take a long time for IDPs to secure a basic rental unit.

In response, housing rehabilitation has been prioritized by both private and humanitarian actors. Ar-Raqqa Municipality has been issuing approximately 3,000 building licenses annually for rehabilitation and reconstruction of damaged and destroyed properties and new construction. An estimated 10,000 housing units have been rehabilitated or reconstructed in the past three years. The total need, including those units that are now rehabilitated, is estimated to be 50,000 units.

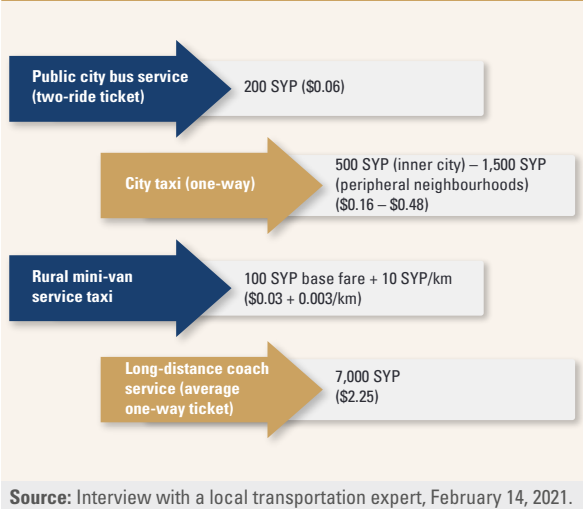
Private investment in the real-estate sector has also played a key role in responding to the acute need for housing in Ar-Raqqa city. Despite several stabilizing factors in the property and construction environment, the sector is unlikely to reach its full potential unless the limited access to essential construction materials is addressed. Lack of local production, constrained supply lines, illicit trade, and monopolization all contribute to rising costs of building materials.

d. Transportation and mobility

Ar-Raqqa's transport infrastructure was deeply affected by years of conflict-related damage. In the aftermath of the operation to oust ISIL, all primary roads were obstructed by debilitating amounts of rubble, and the city's four bridges were all destroyed. Such damage increases transportation time and costs, which is passed on to customers through higher prices.¹¹

In Ar-Raqqa city, public transportation services have improved markedly in the years since the end of ISIL control and have largely been restored by RCC and Ar-Raqqa Municipality to their pre-2011 operation scale.

Figure 5. Cost of public transportation in Ar-Raqqa, 2021



Restrictions on regional and international trade routes has had a major impact on the ability of Ar-Raqqa's economy to recover in the wake of conflict. The occasional closure of crossing points with the Syrian Government controlled territory also significantly limits Ar-Raqqa's access to other markets.

A decision taken by the the Syrian Government during March 2021 to stop trade destined for the north-eastern Syrian Arab

43%
of structures in the city
are moderately damaged

31%
severely damaged

26%
destroyed



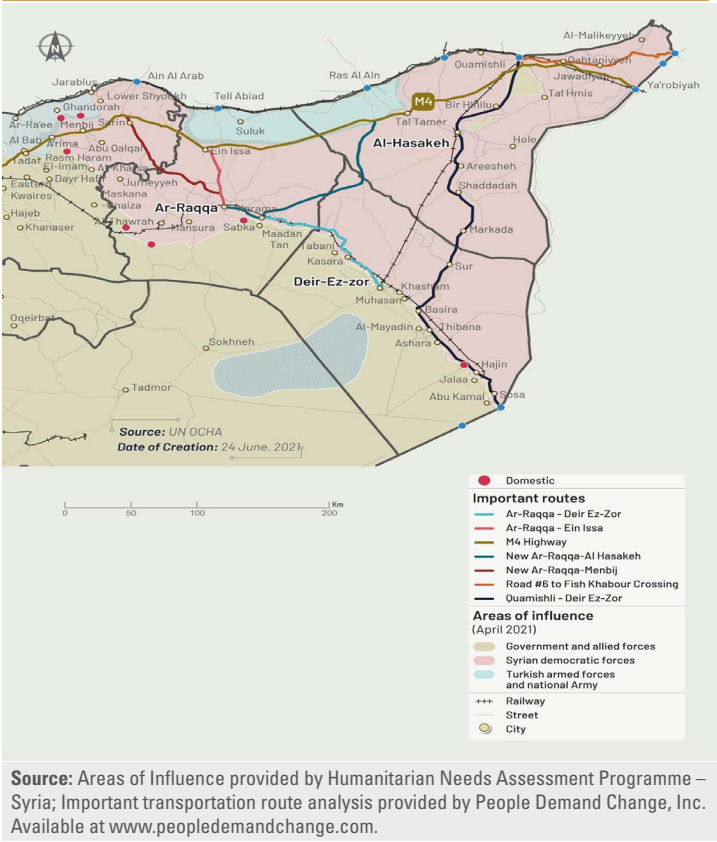
10,000

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Republic had a serious effect, reducing commercial shipments from Ar-Raqqa to Government areas from 35 trucks per day to five or less.

Map 2. Regional mobility assets and transportation routes in the north-eastern Syrian Arab Republic



Source: Areas of Influence provided by Humanitarian Needs Assessment Programme – Syria; Important transportation route analysis provided by People Demand Change, Inc. Available at www.peopledemandchange.com.

e. Financial services

In the north-eastern Syrian Arab Republic, *hawala* networks are partly regulated by SANES, which had a hand in the establishment of a number of prominent businesses and continues to support their operations. SANES has an interest in maintaining a level of control over the industry in order to ensure its so-called trustworthiness and track potential funding of terrorist operations. Regulation of the industry provides a valuable revenue stream, through licensing terms. Two tiers of *hawala* have emerged; one that is nominally controlled and endorsed and another that continues to work in the shadows. Part of a recently implemented round of stabilization funding by the United States is focused on strengthening these informal financial services and operations by supporting the development of legislation intended to formalize institutions and provide safeguards.

While in the long term it is important that formal financial services begin to return, more immediate solutions to the challenges faced by the city's residents should be considered, such as:

- Initiatives to introduce mobile wallet services.
- Programming around savings groups and financial literacy

f. Fuel

The high prices, poor quality and lacking availability of fuel, which is administered by the RCC Fuel Committee, have a direct impact upon Ar-Raqqa's economic development. Fuel is essential to business and industry, transportation, domestic electricity generation, and cooking and heating. Ar-Raqqa's fuel economy is controlled by the Kurdish Self-administration and the SDF. Despite SDF's control over the raw materials, most of the oil fields in the Syrian Arab Republic now fall within SDF-controlled territory.

Fuel Price variance between subsidized outlets and black-market supply

| Fuel Product Prices, January 2021 | | |
|-----------------------------------|------------------------------------|--|
| Product | Price through subsidized outlets | Price on open/black market |
| Diesel | 125 SYP (\$0.04)/litre | 500 SYP (\$0.16)/litre |
| Gasoline | 200 SYP (\$0.06)/litre | 700 SYP (\$0.23)/litre |
| LPG gas cylinder | 2,800 SYP (\$0.90)/filled cylinder | 1,500 SYP (\$0.48) standard price, but quantities vary |

Source: <https://www.syriahr.com/en/199713/>.

Although the RCC provides subsidized fuel to local businesses, the commodity is not supplied in quantities or qualities that fulfil local needs.

3. Threats to local economic development

Several threats and barriers to the equitable development of economic activity in Ar-Raqqa city have risen during the conflict. Others predate it.

g. Tribal tensions

Over the course of the conflict, opposing allegiances to various non-State actors have resulted in further social fragmentation. Many armed opposition groups – particularly brigades of the Free Syrian Army – emerged and recruited along tribal lines in the Ar-Raqqa Governorate. As largely foreign entities, ISIL and the SDF relied on tribal leaders to serve as bridges with local communities.





Political divisions have also generated tensions between and within tribes, clans and families.

h. The Islamic State of Iraq and the Levant

During the period of ISIL's rule in Ar-Raqqa, the group's policies had a significant impact on women, from gender segregation to mobility restrictions to clothing requirements. ISIL was exceptionally successful at recruiting women through propaganda that proclaimed utopian ideals of religious duty and sisterhood. Most former ISIL wives have found themselves alone with children, without husbands or other family members for financial support.

Fears regarding ISIL's resurgence undermine investor confidence and deter returns. In recent months, individuals claiming to be ISIL have extorted traders and business owners for *zakat*.

i. Detentions

Detentions by the security forces are a major security concern for residents. They also significantly undermine economic and urban recovery efforts. The risk of detention has also deterred many from returning, particularly human-rights activists and legal professionals.

It has been reported that detentions entail a variety of problems, such as:

- Security forces rarely provide arrest warrants or inform detainees and their families of the reason for their arrest.
- Individuals are sometimes detained for months without trial.
- Individuals sometimes experience physical abuse during their detention.
- Detainees who are deemed innocent, sometimes months later, are released without receiving any type of compensation or public apology.

j. Criminal activity

In Ar-Raqqa city, one of the primary security concerns is the high level of criminal activity – such as proliferation of drugs, kidnapping for ransom and robberies. Residents are particularly alarmed by the increase in kidnappings of children. Amidst continued economic collapse, smuggling, robbery, kidnapping for ransom, and other illicit revenue-generating activities are likely to increase.



4. Recommendations

The following key recommendations have been developed following consultations with local stakeholders including community members, local authorities, NGO representatives and policymakers. The following proposed actions and considerations seek to address underlying challenges faced by city residents and the region's displaced people.



Developing comprehensive measures and plans, including policy proposals, is necessary to address environment challenges, such as land use, climate change, regional water scarcity and environmental degradation.



Promoting representation and transparency within the RCC and the municipality should be prioritized through standardizing administrative processes and the issuance of regular, audited and transparent public revenue and spending reports, in addition to refining appointment and election processes within local governance structures, empower decision-making at the local levels and strengthen the representation of women.



Enhancing the enforcement of regulations and accountability of actors in the private sector that provide public services and utilities is necessary to ensure adequate levels of service.



Encouraging the effective standardization of contracting with local market actors through reformed policies within SANES and RCC will help overcome preferential practices.



Prioritizing funding and rehabilitation efforts for key infrastructure will provide catalytic improvements that benefit the city's broader economy.



Addressing housing stock shortages is a livelihoods priority. Housing rehabilitation programming should be focused to benefit local property owners and the city's labour force.



Establishing a new industrial zone to accommodate light industrial and manufacturing activities could promote the skillsets of new residents and emerging industries.



Assessing the causes of regional water shortages and developing a comprehensive, regional strategy is needed to address regional water scarcity and concerns over water sourcing and utilization.



Improving commercial access with regional partners could be achieved by easing restrictions across the region, including cross-line trade with areas under the Syrian Government control.



Strengthening coordination among local authorities is necessary to promote equitable distribution of resources.



Initiating rehabilitation and construction programmes should be targeted at increasing the production and storage capacity of regional agricultural products.



Developing livelihoods programming needs to be strongly rooted in local market needs and include in-demand occupations that have clear linkages to existing value chains.



Rehabilitating equipment and technology in primary economic sectors is necessary to improve functionality.



Addressing the social concerns of marginalized populations, including women, youth, persons with disabilities, IDPs, and returnees, can be achieved through the development of inclusive livelihoods programmes.



Addressing gaps in regional Government subsidies and pricing regimen is needed for locally produced commodities.



Working closely with local associations (such as farming and livestock cooperatives) in agriculture recovery planning will help ensure that evolving local needs are identified and met.



Calibrating subsidies on imported goods and setting higher tariffs on imports could incentivize local manufacturers to produce substitute goods.



Supporting the expansion of locally acceptable cooperative economic models would help to foster community-driven economic activity.

Endnotes

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