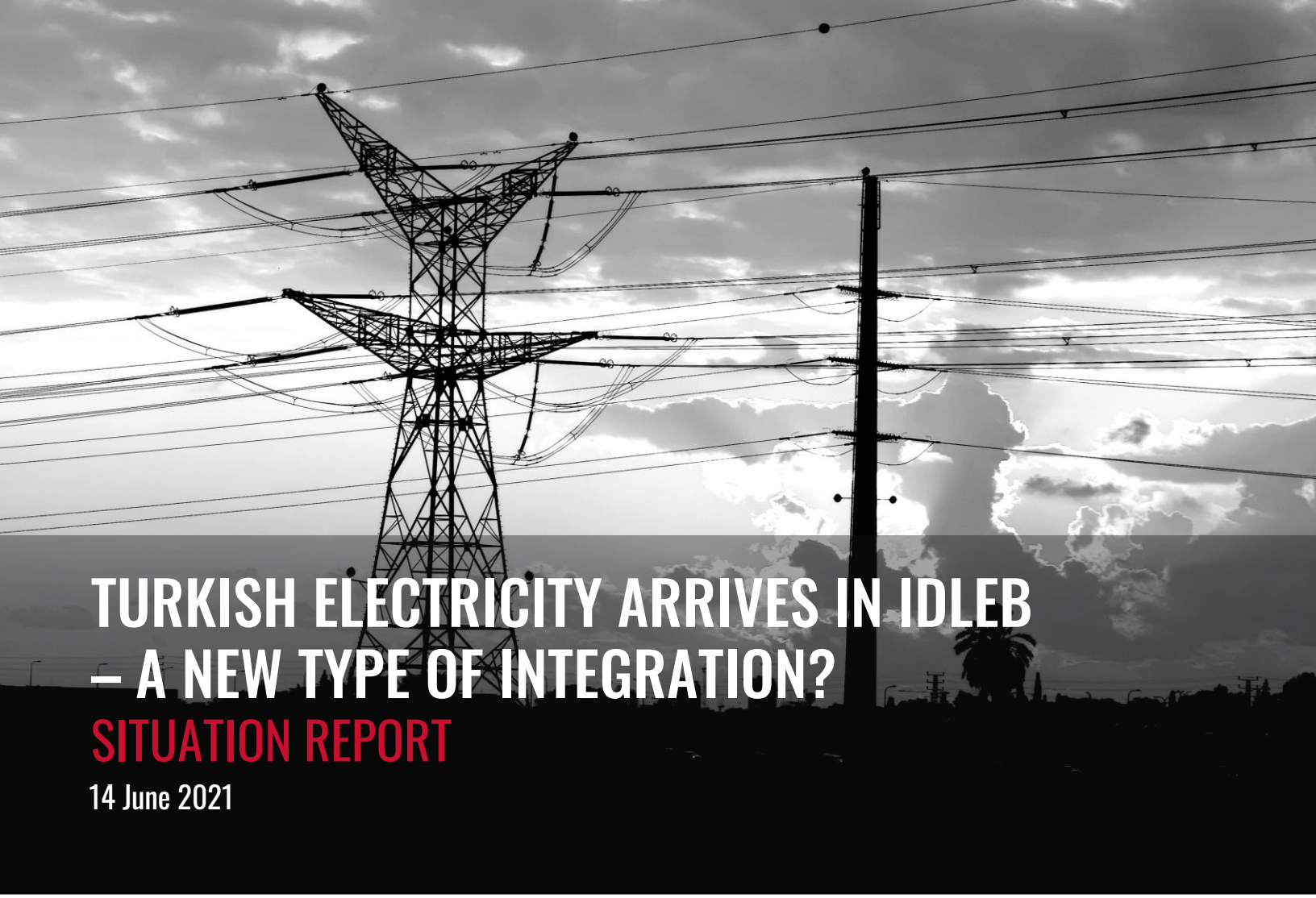


TURKISH ELECTRICITY ARRIVES IN IDLEB – A NEW TYPE OF INTEGRATION?

SITUATION REPORT

14 June 2021

CONTENTS

KEY POINTS

- Electricity provision in Idleb and areas of western Aleppo has been extremely limited under the control of armed opposition groups, who took control of the area in 2015.
- In 2020 the Syrian Salvation Government (SSG) announced that Idleb would be supplied with electricity from Turkey by a private Turkish company, in coordination with the Public Electricity Corporation, following the development of infrastructure through the governorate.
- The initial phase of the project would supply the cities of Idleb, Harim, Salqin, Dana, and Sarmada with 200 megawatts of electricity, for 9 hours per day until systems are established, with the potential for 24 hours a day.
- Subscriptions start at 100 TRY, at 0.9 TRY per kilowatt for domestic use (previously 45 TRY for 3 hrs per day). Commercial subscriptions are slightly higher, with two additional levels of power depending on need.
- Despite the general positivity, there are concerns about affordability in Idleb, which has up to 80% of people living in poverty.
- Benefits to Turkey include growth in reach and regional power and the ability to monopolise economic opportunities in northern Syria: Benefits to the SSG include increased investment into infrastructure in the northwest, and a potential gain in popularity among its citizens.
- Access to reliable energy is a key development goal internationally, and gives citizens and businesses in northwest Syria the opportunity to modernize, potentially jump-starting the industrial sector and increasing productivity.
- Certain groups are expected to continue to use solar power; citizens living in poverty who are unable to afford subscription costs, IDPs in camps which have not been connected to the electricity infrastructure, and humanitarian organisations unable to work with the SSG or its affiliated companies.
- I/NGOs might worry of the expanding Turkish influence which requires registration in Turkey and pushes for greater collaboration with the Turkish authorities.

BACKGROUND

Following considerable infrastructural development throughout the governorate, households and businesses in Idleb now have access to reliable electricity for the first time in six years. In March 2020 it was announced that areas falling under the governance of the Syrian Salvation Government (SSG) would be supplied with electricity from Turkey. Since then, a private Turkish company, originally in partnership with the SSG-affiliated Public Electricity Corporation, has been fixing power lines and rehabilitating power stations, which are now ready to provide domestic and commercial energy to Idleb city and its surrounding areas.

Electricity provision in the northwest has been extremely limited under the control of armed opposition groups. Since 2015, and the Syrian government's loss of the governorate to armed opposition, there have been a number of military and administrative powers vying for control, while poverty and conflict has left minimal opportunity for infrastructural development.[1] The Syrian government, upon defeat, cut off electricity provision into Idleb,[2] leaving citizens to rely on sporadic provision from small-scale providers, and expensive (and rationed) generators. Citizens able to afford set-up costs have largely turned to solar power for domestic use, which is now common throughout the region.[3]

Turkey, which has de facto control over the neighboring governorates of Aleppo and border areas further east, has been slowly making inroads into the armed opposition territories of Idleb and western Aleppo. The Turkish military has contained the primary military force of Hay'at Tahrir al-Sham (HTS) and its political representation, the SSG,[4] while maintaining a ceasefire (5 March ceasefire, preceded by a demilitarized zone agreement[5]) with Russia, and by extension the Syrian government, to prevent further armed conflict.

The relative stability as a result of the continued ceasefire, and HTS' defeat of other armed groups challenging for power,[6] has meant Turkey and Turkish companies are able to step in, providing first services – allowing the Public Monetary Authority in the northwest to distribute Turkish lira when the Syrian pound was depreciating[7] – and now essential infrastructure. This confirms a number of slow-moving developments in the region; the further entrenchment of Turkish

[1] BBC News, Syria: Who's in control of Idlib? February 2020

[2] Syrian Observatory for Human Rights, Turkish private company accomplishes last stages of providing power supply to Idlib, 4 May 2021.

[3] NewYork Times, Syria's Surprising Solar Boom: Sunlight Powers the Night in Rebel Idlib, May 2021

[4] BBC News, Syria group Hayat Tahrir al-Sham and al-Qaeda legacy, May 2019

[5] Reuters, Turkey says agreed with Russia on details of Idlib ceasefire, March 2020

[6] MEI@75, HTS and al-Qaeda in Syria: Reconciling the irreconcilable, July 2020

[7] Syria HAT, The public monetary authority in northwest Syria, July 2020

power in northwest Syria; the continuing commitment by HTS and the SSG to gaining legitimacy, and; a lack of ability by the Syrian government to prevent these developments.

In humanitarian terms, the provision of Turkish electricity into Idleb is largely a positive step. Direct impacts include the improvements to quality of life which come with electricity provision (including using time-saving appliances, and health improvements through having access to clean lighting), and economic development throughout the region is more likely with constant supply of clean energy.[8] However, costs of the electricity could be prohibitive for much of the populations, with up to 80% living in poverty.[9]

For the large number of IDPs living in camps, exclusion from official delivery plans means they are unlikely to benefit in the short term. For humanitarian actors, the situation is more complicated – most are unable to sign contracts with SSG-affiliated energy providers (which could include the current Syrian provider, Green Energy), while further Turkish integration in the long term could mean changes to registration rules and partnership requirements.

CURRENT SITUATION

Existing power supply

Generally people living in Idleb and western Aleppo under armed opposition depend on two sources of electricity; solar panels and private generators. Solar panels have become relied upon to provide consistent and cheap electricity at a domestic level; one solar panel costs on average $50, while the price of batteries ranges from $70 to $250, according to their size, quality and type.[10] Running costs are minimal (repair costs only), and unreliant on fluctuating fuel or energy prices, making them popular if initial set-up costs can be met.[11] Solar power provides adequate energy for basic household electrical items, (ie, TVs, lights, phone chargers, and smaller appliances), however for small businesses, batteries and numerous panels needed becomes expensive. Hospitals and medical centers which require large amounts of electricity also struggle with restrictions of the current energy supply.[12]

Currently, domestic private generators cost 45 TRY per month for only three hours a day.[13] The new Turkish supply by contrast costs 100 TRY initial subscription fee, 350 TRY up-front payment for meter installation and 0.9 TRY per

[8] World Bank, Energy Overview, [updated July 2020]

[9] Human Rights Watch, World Report 2021: Syria, February 2021

[10] Syrian Observatory for Human Rights, Turkish private company accomplishes last stages of providing power supply to Idlib, 4 May 2021

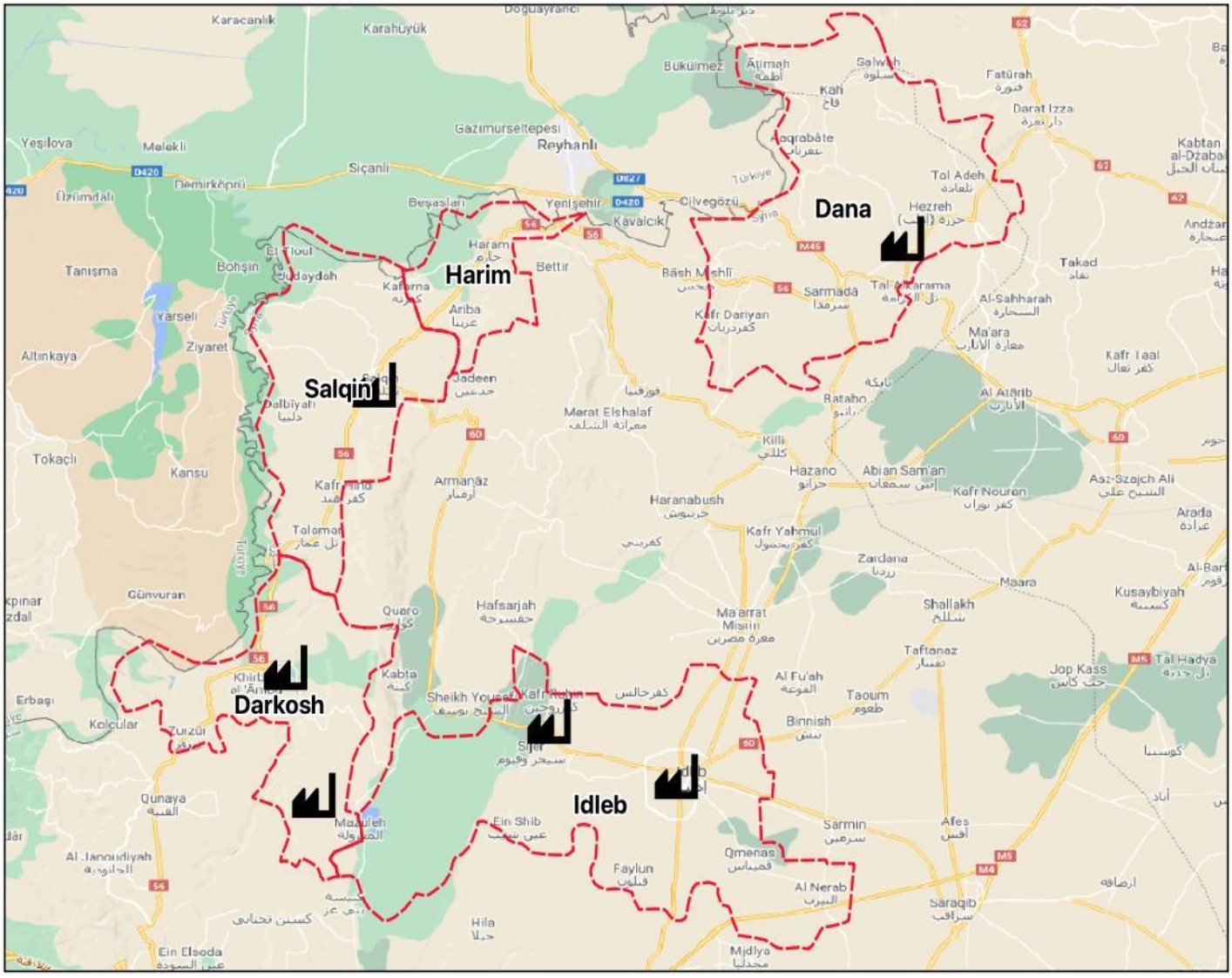
[11] New York Times, Syria's Surprising Solar Boom: Sunlight Powers the Night in Rebel Idlib, May 2021

[12] Omar, F.A., [Researchgate], (PDF) The effect of the Syrian crisis on electricity supply and the household life in North- West Syria, September 2020

[13] Al-Monitor, Turkey offers to supply electricity to Idlib, May 2021

kilowatt of use, however supply is available for 9 hours per day making it a more cost-effective option long-term. [14]

In the long term it is expected that most of the population will depend on Turkish electricity, as it expands throughout the countryside and into smaller cities and towns. Initially, 35,000 subscriptions are expected, to be set up in and around Idleb city in the first few months of the rollout.[15] For industrial users, the increase in daily hours of provision and both electrical strength and reliability is invaluable for productive and commercial growth.



Map 1: Rehabilitated power stations across Idleb (Source: Syria HAT)

[14] Most recent World Bank estimates for energy usage in fragile or conflict affected states is 468 KW per capita per year: [468/12*0.7=62 TRY per month]

[15] Twitter, Green Energy statement, May 2021

Turkish electricity arrives in Idleb

The provision of Turkish electricity into Idleb and western Aleppo was announced in March 2020 after an agreement of understanding was signed between a private Turkish electricity company and the SSG-affiliated Public Electricity Corporation. Since the announcement of the project, the Public Electricity Corporation has renovated power transmission lines and rehabilitated six high-voltage stations across Idleb, including the stations of Salqin, Abu Kasha, Kilani (known as Ain al-Zarqa station), Idleb 230, Kasih and Dana.

Provision to IDP camps and communities further south, close to Syrian government-held areas, has not been confirmed.

Subscription type	Price per kilowatt	Subscription fee	Price of Meter
Level 1	0.9 TRY	100 TRY	350 TRY
Level 2/100 amp	1 TRY	400 TRY	900 TRY
Level 3	1 TRY	N/A	200 USD

Table 1: Subscription models and prices, Green Energy electricity provision

A statement from the Public Electricity Corporation said at the time that the initial phase of the project would supply the cities of Idleb, Harim, Salqin, Dana, and Sarmada, close to the Turkish border, with 200 megawatts of electricity, which would serve domestic-level power to households at 0.9 TRY per kilowatt.[16] Households could expect to receive 9 hours per day (as opposed to the previous 3 hours) on subscribing to Green Energy.[17] Commercial and industrial properties would be able to subscribe to a higher level of power supply at 1 TRY per kilowatt.

In an apparent takeover of responsibility, on 29 April, a private Syrian company called Green Energy emerged to announce that all electrical lines and electricity transmission centers in Idleb city and its countryside had been provided with 20–66 kilovolts of electricity, before officially announcing the provision of electricity to Idleb city on 5 May. Unconfirmed reports have also stated that the Green Energy company has maintained the electricity network toward Mastumeh, south of Idleb city as a step to deliver the power to Ariha city and later to other areas south of the M4 highway, near government-controlled areas.

Subscriptions and prices

Interested parties would need to subscribe to electricity provision in a Green Energy branch in

[16] Al-Monitor, Turkey offers to supply electricity to Idlib, May 2021

[17] Before the arrival of electricity from Green Energy Company, locals in Idleb city received electricity 3 hours per day through the private generator network established in the city. Locals pay an approximate of 45 TRY per month for 3 hours a day.

either Dana, Salqin or Idleb city, through registration with the following documents; ID (passport, official ID card or civil confirmation form), proof of residency (a rental contract or proof of ownership), or proof of power of attorney over the property.[18] Subscribers would then have a choice of three different types of electricity provision (as shown in Table 1), depending on their needs.

The first level is largely for domestic needs, while the following two levels are for commercial and industrial users (Level 3 supplying the highest current); once the one-off subscription fee and up-front meter installation costs have been paid, customers then pay as they go based on the amount of electricity consumed. Current rollout restricts energy to 9 hours per day, however this is projected to increase to 24 hours once subscriptions and infrastructure are established.

ANALYSIS AND FORECASTING

The provision of Turkish electricity to the opposition-controlled areas of Idleb and western Aleppo is generally a positive indicator for the region. Access to affordable and reliable energy is a key development goal internationally,[19] and gives citizens and businesses in northwest Syria the opportunity to modernize. Despite the general positivity, there are concerns about the cost (initial and ongoing) of the electricity. Poverty levels in Idleb are extremely high (over 80% according to 2021 estimates[20]), meaning any financial commitments are a strain on households. The cost of electrical meters, and initial subscription fees and usage remain unaffordable for many, while there is additional distrust in the SSG, who citizens worry will increase prices and taxes – worries which do not factor with the purchase of solar power.

Increased investment by Turkish companies is also an indicator of a stabilizing security situation: private companies' willingness to invest in services and infrastructure demonstrates confidence in a continuation of the status quo whereby the 5 March ceasefire holds. It remains to be seen whether the Turkish administration will be as active in the communities of Idleb and western Aleppo as it has in its territories further east: In northern Aleppo it has set up medical and educational centers, as well distributing the Turkish lira through its *Posta Telegraf Teşkilat* (PTT). Benefits to Turkey would be that it increases its sphere of influence in the region, while monopolizing economic opportunities for investment throughout northern Syria. If so, it would mean coordination with the SSG, and potential standing-down of HTS (which the US, UN and Turkey still categorizes as a terrorist organization). As discussed in a previous HAT

[18] Twitter, Green Energy statement May 2021

[19] World Bank, Access to Energy is at the Heart of Development, April 2018

[20] Human Rights Watch, World Report 2021: Syria, February 2021

report, we forecasted the likelihood of this happening as moderate; this would not mean a complete dissolution of HTS, rather a very clear emphasis on de-radicalization and rejection of extremism, while promoting the SSG as a moderate governing force to take over. [21]

In turn, with private companies improving services throughout areas of its control, the SSG hopes to increase its popularity and support – many anti-SSG demonstrations have protested poor service provision and living conditions.[22] Additionally for the SSG, the development of services and infrastructure only adds to its claims to legitimacy.[23] It is no secret that HTS commander in chief, Mohammed al-Jolani, is intent on overhauling the image of his group as terrorists – in a recent, well-publicized interview with an American journalist, Jolani maintained that HTS posed no threat to the US or Europe, rather it opposed the Syrian government only in its attempts to create a separate state.[24]

If Turkey aims to extend its influence and control into Idleb and western Aleppo in the same way as it has in its border territories, there are a number of additional factors which need to be accounted for. Despite attempts by Jolani to have its name removed from terrorist lists, HTS is still classified as such by the US, UN, Turkey, Russia and the Syrian government.[25] Turkey must tread carefully to uphold the 5 March ceasefire (in which it committed to removing terrorists from the northwest), and prevent a Russian-supported Syrian government offensive.[26] There have also been a number of attacks on Turkish soldiers in southern Idleb, protesting its military involvement in the area; although generally small in scale, they raise questions of Turkey's justification for patrolling territory so far from its border.[27] Finally, the geographical area of Idleb and western Aleppo is significantly larger than in the border territories. Stretching resources to secure and administer the area may prove uninviting to Turkey, who could prefer instead to allow private investment and collaboration for greater economic reward.

HUMANITARIAN IMPACT

Citizens of Idleb and western Aleppo stand to benefit significantly from increased electricity provision. Lower costs for increased provision will mean both households and businesses will benefit from a clean, reliable energy supply, and

[21] See '*Scenario 2: The deradicalization of Hay'at Tahrir al-Sham and the survival of the SSG.*' In Syria HAT, Changing dynamics in northwest Syria, June 2020

[22] Civilian protests against the SSG and HTS leader Jolani have consistently occurred in Idleb governorate. For example, in March 2019 and June 2020, protestors took the street to demonstrate the lack of service provision and poor living conditions, despite the high taxation on many services such as water, electricity, and garbage collection.

[23] Financial Times Syrian jihadi overhauls image in effort to hang on to power, Feb 2021

[24] Frontline, Syrian Militant and Former Al Qaeda Leader Seeks Wider Acceptance in First Interview With U.S. Journalist, April 2021

[25] Chatham House, Can Turkey Win Over HTS?, October 2019

[26] Arab Center Washington DC, Complications for Turkey in Idlib, March 2020

[27] Al-Monitor, Little-known groups target Turkish military presence in Syria, May 2021

the economic benefits this brings. Notably however, IDP camps have not been included in the rollout, and so will remain dependent on current infrastructure unless negotiations take place between Green Energy and camp administrators and humanitarian organisations. There are over 400,000 IDPs living in camps throughout Idleb and western Aleppo, with water, sanitation, hygiene, health and education provision of higher priority than electricity. Communities in southern Idleb near government-held areas will also not be reached initially.

Indirectly, it is expected that a permanent and stable power source motivates the industrial sector and increases economic productivity in Idleb and western Aleppo. Most recently, the SSG's ministry of industry had completed a plan for a new industrial city with a budget of $3.5 million in Bab Al-Hawa, near the Turkish border. These projects, although still in their infancy, show a commitment towards development in which modern energy provision is key.

For some humanitarian organisations, benefits could be limited. Many I/NGOs are unable to have contracts with the SSG (due to its affiliation with HTS and restrictions on donor funding), and so could have difficulties subscribing to Green Energy (whose affiliation to the SSG is as yet unconfirmed) for its electricity provision. It is likely that most will continue to invest in solar energy (as is already the trend for the most part), in order to avoid financial transactions with a potentially SSG-affiliated company.

Additionally, I/NGOs might worry of the expanding Turkish influence in the long term. As observed in communities falling under the control of the Turkish-affiliated Syrian Interim Government in northern Aleppo, local humanitarian organizations, INGOs, and other NGOs will be required to register with Turkish authorities. This will mean cross-border programming administered by I/NGOs not registered in Turkey could become complicated, and humanitarian operations throughout the area will be increasingly subject to regulations imposed by Turkey. This is also likely to imply the reduction of individual I/NGO funding for local humanitarian organizations, and the application of pressure on local governance bodies and local humanitarian organizations to increase coordination with Turkish humanitarian and development agencies such as the Disaster and Emergency Management Presidency (AFAD) and Humanitarian Relief Foundation (IHH).

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The Humanitarian Access Team (HAT) was established in Beirut in March 2015 in response to the collective challenges facing the remote humanitarian response in Syria. Successful humanitarian and development interventions require a nuanced and objective understanding of the human ecosystems in which these interventions occur. To this end, the HAT's most important function is to collect, triangulate, synthesize, analyze and operationalize disparate data and information. Since 2015, HAT analysis has provided a forward-looking template for international interventions in Syria, and facilitated an increasingly nimble, adaptive, integrated, and ultimately impactful international response to the Syrian conflict

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