

SYRIA

The Economic Scene

Reports on the economic condition across Syria



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Syrian Economic Task Force

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Foreword

Economy is not only the stimulant of history, but it is also the foundation upon which all successful realistic strategic policies are built. Any national decision that ignores a main driver of the turbines of reality and history is a wrong one, and the maker of that decision will soon realize that success of any policy, or seeking a way out of a pivotal national predicament, is realized by not overlooking the living reality, especially the economic side of it. Hence, the economists bear, in the time of calamities and disasters, a mission whose impact is no less than that of the politicians, military, relief and medical personnel. The need for economic diagnosis is definitely a national need.

There is no doubt that the long nightmare that Syria experiences will come to an end one day, and we ask God Almighty to hasten the arrival of that historic day. But until that day comes, some party must undertake the task of describing the real Syrian economic condition of the Syrian districts and sub-districts without sugarcoating, in an objective and professional way. Therefore, Syrian Economic Task Force, with its patriotic economic experts, continues to address the economic vacancy, as was its habit since its writing of the Economic Discourse of the Syrian Revolution two months after its eruption, and consequently representing the Syrian side in all international conferences of the Group of Friends of the Syrian People seeking the reconstruction of Syria (Abu Dhabi, Berlin, Dubai, South Korea, ..).

Like it did before, when it provided the Syrian people and the decision makers with thirteen detailed economic reports on most sectors of the Syrian economy from a total, comprehensive and horizontal perspective, including the emergency plans for immediately after the crisis (first 6 months), medium-term plans (over 2 years), and long-term plans (over 5 years); today again, Syrian Economic Task Force is performing its national professional duty, and putting in the hands of decision makers what helps them make the decisions that will pull the Syrian people out of their historic predicament.

*Osama Kadi, PhD
President of Syrian Economic Task Force*

Word of Thanks

We cannot help, while we present the Syrian people with these studies, but thank one of the distinguished patriotic businessmen, and there are many, that is our brother and friend, Mr. Ayman Kassab Bashi, who spared no effort in supporting the Syrian issue, especially in its economic awareness side, through his support to the activities of Syrian Economic Task Force, believing in the importance of the realistic and futuristic prospective economic vision to the Syrian issue.

Research Methodology

In our research, we use the mechanisms of Microeconomics and Mesoeconomics exploring, through the research, the political and military situation and their direct effect on the city's economy or the factors that affect its local economy apart from the other districts or sub-districts that follow it administratively, since the effects of these factors differ from the other towns and cities according to the geographic and demographic location. In our research, we include the impacts of political and military factors and developments in Raqqah Governorate and Syria in general, and in each sector separately.

Furthermore, our research, we depend on field survey to detect price changes, economic situation of the population, and the effect of quarterly and agricultural seasons.

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Introduction

Al-Raqqah is the first liberated governorate capital in Syria, and is the only city that was entirely liberated from the Assad regime forces, by the efforts of the Free Syrian Army and the Islamic militant factions, which was in the end of winter 2013. However, now it is under the control of The Islamic State (also known as ISIL). We will study the economic status in the current situation and when Al-Raqqah is considered a capital or rather a stronghold for the ISIL before taking control of the Iraqi city of Mosul. We will address in our report a microeconomic analysis to Al-Raqqah city, and a mesoeconomic analysis to some of the economic sectors that constitute the economy of the Syrian society in general and Al-Raqqah in particular, as well as the factors affecting the economy. We will also explore in our research some of the political economy factors, urgent and long-term recommendations, and measures that can revive the economic life in the areas outside the Assad regime's control.



Economic Condition

1. Income Sources

We can classify the population's income sources as follows:

a. Income Sources in the Private Sector

- **Agriculture:** Agriculture in Al-Raqqah Governorate and City is mostly irrigated agriculture, and it extends along the banks of Euphrates and some areas where artificial valleys and canals from Euphrates flow in land reclamation projects. We cannot also forget some the areas where agriculture is rain-fed and have not been reached by irrigation projects.
- Income sources in the agricultural sector here are the price of crops that the land owners get, farmers working in these lands which are mostly partners in the profit as well, and daily workers. The daily worker's wage is SYP 500/day, but the farmer that supervises the land for a year will get a quarter of the crop for his work, he and his family, in the land, supervising irrigation and seeding, and being responsible for seasonal workers wage and anything that the agricultural season requires. The most important crops in Al-Raqqah and its surroundings are wheat, cotton with olive trees recently spreading.
- **Manufacture:** Manufacture is an important source of income to the owners of existing factories and workshops, as well as craftsmen and workers that work there. The workers' wages here are mostly weekly. This sector also includes construction workers, but the method of wage calculation in construction is different, it is usually daily or per commitment like farm workers. The daily-worker's wage ranges from SYP 800 to 1,000, while the weekly worker's wage ranges from SYP 3,000 to 10,000. There are major factories and industrial facilities in Al-Raqqah, but most of which were public-sector facilities that are currently non-operational, except those working in agricultural industries such as animal feed and dairy-products factories, oil and oil-related facilities, and irrigation supplies factories.
- **Trade:** Trade in Al-Raqqah City is a real support to those who stayed in the city from

shop owners and traders. It secures good income to shop owners and workers. The wages in trade shops are divided between weekly and monthly wages or commissions on sales. And so, wages in the trade sector range between SYP 5,000 – 30,000 a week.

- **Services:** Include:
 - Private water wells: Provides a source of income for its owners and the water transport workers.
 - Power Generators: A source of income for its owners, and it includes sales of Amperes and workers and technicians wages.
 - Communication networks: Secures an income for its owners, investors and workers in that sector, and includes sales of wireless internet service and the activities of telecom shops that depend mainly on internet since telecoms were cutoff for a long time in Al-Raqqah Governorate.
 - Fuel oil, firewood and gasoline sector.
 - Money and currency exchange sector.
 - Transportation sector, which includes transportation of passengers and shipping.

B. Income Sources in the Public Sector

- Salaries of government employees: Al-Raqqah Governorate is one of the highest governorates in the dependence of its people on the public job. It is noteworthy that it is the first liberated governorate in Syria and most of its employees still receive their salaries from the regime via certified accountants in Damascus. The percentage of government employees whose salaries are cut for security reasons are 15%. But salaries in general have been cut off after the ISIL preventing employees from travelling to the regime's areas, stopping education and preventing women from leaving the ISIL-controlled areas.
- Salaries of employees and workers of local entities and civil society organizations (municipal council – relief, medical or charity organizations – Islamic Legal body ... etc.) have become nonexistent after the Islamic State's control of Al-Raqqah, except for a few who have resumed working in the services circuits introduced by ISIL.
- Salaries of employees in entities that follow or receive salaries from the Syrian Interim Government, which have become nonexistent after the Islamic State's control of Al-Raqqah.
- Salaries or grants to units of FSA and militant factions, which have also become nonexistent after the control of the Islamic State's which gives \$300 to each of their members.
- Revenues of transportation vehicles including trucks, passengers and cars. The vehicle driver earns a portion of the income of the vehicle that ranges from 35-40%.
- Tangible subsidies from all sides. It secures about 15% of the population needs, or saves around 25% of their expenses. But it has become almost nonexistent apart from relief provided by ISIL-related entities.

2. Production Volumes

- a. **Agriculture:** The agricultural season this year is one of the worst in many years, especially to the most important crops which are wheat and cotton. As for wheat, there was a real drought not only in Al-Raqqah but all over Syria. As for the irrigated wheat, there are no accurate figures on its production this year due to the displacement of a large number of farmer after the ISIL control of Al-Raqqah in addition to secrecy with which the ISIL surrounds the production volumes of wheat. This is also the case for cotton. It is noted

that the wheat crop has become completely monopolized by ISIL, besides what the ISIL had seized from the Silos of Aleppo and moved to Al-Raqqah, Manbij and Maskanah while retreating from the western and northern countryside of Aleppo and before that.

- b. Manufacture:** There are a number of medium and large factories in Al-Raqqah City, but the most important industrial facilities are related to water resources. The private industrial sector in Al-Raqqah is relatively new and small. It includes factories to produce irrigation supplies and some sewing workshops. There are public sector factories, oil fields and new refineries.
- c. Trade:** Livestock, grain and animal product trade such as milk and wool are considered the most important in Al-Raqqah. In addition, car trade has flourished in Al-Raqqah before ISIL control, and has remained that way afterwards.
 - **Real-estate Trade:** the price per square meter of construction lands ranges between SYP 5,000 – 20,000, the price for square meter of ready-for-housing construction ranges from SYP 25,000 to 40,000, and the price for a residential apartment with an area of 100 square meters ranges between SYP 1,500,000 – 2,000,000.
 - **Food Trade:** Sales volume reaches \$3 million per day.
 - **Oil Trade:** A bazaar for oil was established in the Northeast of Al-Raqqah City on Al-Jazeera Road. Protection of oil and gas wells in Al-Raqqah governorate is coordinated between ISIL and the regime. For example, we mention the story of Tuwaynan gas field and factory.

Tuwaynan gas field and factory

- The contract was concluded with the Syrian regime and the work started on 20/1/2008. The main contractor of the project is Russian Stroy Trans Gas Company, and the consultant company for the contractor is WorleyParsons company. The implementation period was to be 20 months from commencement order date, and the value of the contract was EUR 160 million in addition to SYP 1 billion. The project was to be implemented on a turnkey basis (engineering studies, supplies, and initial installation and operation works).
- Factory Products:
 1. Clean Gas – 3 million cubic meters/day
 2. House Gas – 60 tons/day
 3. Condensates – 2000 barrels/day
- In the beginning of 2013, on 1/1/2013, Uwais al-Qarani Brigade began the battle for the control of Tuwaynan gas field which lies 80 km southwest of Al-Tabqah city, which ended with their control of the field. The brigade then signed a protection contract with HESCO company as the implementation subcontractor of the gas factory. The contract provided for the protection of the project, machines and staff in exchange for SYP 5 million per month.

Islamic State's control of the field

In the beginning of April this year, ISIL took control of the field and all the company properties in the area, and after consulting with a member of Uwais al-Qarani Brigade who have joined ISIL, an agreement was reached with the Syrian government to make a new contract, which provides for the following:

- ISIL is responsible for protecting the field and securing the arrival of crude to the regime's refineries.
- The regime is responsible for providing the maintenance and the engineers to manage the fields.
- Profits are divided into: 60% for the regime, and 40% for ISIL.

The regime has sent a number of maintenance workshops, the last of which was not too long ago. Abu Luqman, Wali of Al-Raqqah, is considered the main person in charge of the dealings of ISIL with the regime.

- d. Services:** Currently, there is no service production in Idlib because it is recently liberated, and services are almost nonexistent.
- **Transportation and Shipping:** There are a lot of shipping companies and a number of transportation companies, but they are currently on hold until the military operations around the city are stopped.

3. Estimation of income levels

The living standard of the people of Al-Raqqah and its residents is considered relatively average compared to the living standards of the Syrian people. Middle-class constitutes the majority of people of Armanaz.

It is difficult to estimate the average income per capita in Armanaz this year specially, because of the difficulty to calculate the total income and the change in the number of residents, and it ranges between \$3,500 – 5,500 this year, according to estimations and figures which we were able to obtain. That was done taking into consideration the absence of many services, and the decrease in value of some goods, and the decline in the value of the Syrian currency.

4. Basic commodities

All basic commodities are available in Al-Raqqah. But gas is considered one of the unavailable basic commodities these days.

5. Basic Services

- a. Power:** Al-Raqqah is mainly supplied by power from Tabqa Dam Power Station in Al-Tabqa City, and it is partially supplied by Al-Mansura Dam (Previously called Baath Dam) Power station. Electrical infrastructure was not affected by the bombing of the regime or the Coalition. It is noted that power is supplied for free in Al-Raqqah.

There are rationing hours for electricity in Al-Raqqah. Power is supplied only for six hours a day via the network.

As for generators' electricity, the price (Ampere) is SYP 1,600/month activated for 8 hours a day.

- b. Water:** Water is originally pumped to Al-Raqqah from Tishrin (October) pumping station. It currently pumps water for 6 hours a day for a fixed bill of SYP 200/month. The price of a water tank is SYP 500, and the tank's capacity is 10 barrels (2 cubic meters)

- c. Telecommunications:** Syrian land and mobile communications in Al-Raqqah have been stopped for 2 years. People found an alternative in the internet. Land lines and Al-Raqqah phone division were restarted only for receiving calls. People pay a fixed bill of SYP 400 to ISIL for telecom services.

It is noted that an unmanned reconnaissance aircraft crashed into the main communications tower in Al-Raqqah City on the first day of the Coalition strikes against ISIL. Now, some wireless internet networks with a satellite or a Turkish origin are operating as an alternative to the lost communications and internet.

- d. Health:** There are several medical facilities currently operational in the city.
- Al-Raqqah National Hospital, and it performs most surgical operations such as bone surgery, etc.
 - Obstetrics Hospital.
 - Al-Mwasah Hospital.
 - Dar Al-Shifa' Hospital.
 - Al-Ahlia (Civil) Hospital.
 - Modern Medicine Hospital.

The remaining doctors and nursing staff in Al-Raqqah work 1 day/week or 24 hours/week in hospitals controlled by ISIL forces, and they are forced to work without pay unless the doctor or nurse swore allegiance to them, then he/she receives a wage from ISIL.

Those who are absent from the compulsory day in hospitals, are punished by closing down their private clinic or by imprisonment. These conditions have led to only a small number of doctors remaining there.

ISIL has established a faculty of medicine to replace missing medical services in Al-Raqqah.

Doctors who are originally Al-Raqqah residents perform surgical operations, each according to his/her specialization, in addition to medical aid, not to mention working in their private clinics.

6. Infrastructure

- Power grid: Completely sound, and it is periodically maintained by Muslims Services Body of the Islamic State.
- Water grid: Drinking water grid is existent and functioning.
- Sewage Network: Operational and intact.
- Roads Network: The roads in Al-Raqqah are open and in good condition, and did not suffer like roads in the rest of liberated cities from bombing and negligence. We noticed in our visits the cleanliness and wideness of roads, and the traffic police of the Islamic State organizing the busy traffic. There are no traffic violations except from members of the ISIL, especially the security members, which do apparent, deliberate and provocative violations.



7. Living Standard

The living standard of the people of Al-Raqqah after the revolution is considered good compared to the rest of the liberated cities, but it is still low with respect to the size of the city and the size of human resources in the city with the low number of people after the ISIL control of the city and the large resources available, and because of the lack of a local entity managing the huge resources to improve the living standard in Al-Raqqah in addition to the theft of ISIL to all strategic resources of Al-Raqqah such as oil, water resources, wheat and cotton.

The residential house rental in Al-Raqqah ranges from SYP 8,000 – 20,000, as for commercial shops, they range between SYP 5,000 – 40,000 depending on how close they are to the center of the market.

8. The impact of inflation on the population's life

The impact of inflation is evident in Al-Raqqah, for most of its people are employees, and the Syrian pound has lost most of its value against other currencies. This exhausts the citizen who receives his/her income in Syrian Pound. Money coming from outside the borders can hardly balance the scales or effectively help the economy mend the inflation crack, especially because most of the coming money is in the hands of ISIL who does not have any general developmental operational plans.

9. Prices of food

Item	Unit	Price (SYP)
Bread	14 loaves	125
Sugar	1 kg	125
Powdered Milk - Nido	900 g	1800
Lamb	1 kg	1500
Whole Chicken	1 kg	250
Butter	100 g	400
Bulgur	1 kg	90
Ghee	1 kg	2500
Margarine	1 kg	300
Rice	1 kg	225- 260
Ground Lentil	1 kg	300
Flour	50 kg	4000
Tomato Past	1 kg	300
Tomato	1 kg	90-125
Apple	1 kg	100-140
Banana	1 kg	200
Potato	1 kg	100
Tahima	1 kg	600
Halva	1 kg	350
Egg	30	600-700

10. Prices of fuel, metals, and construction materials

Item	Unit	Price (SYP)
Diesel Fuel	1 L	80-85
Gasolin	1 L	350
Refined Gasolin	1 L	130
Fuel Oil	1 L	115
Propane (for ISIL members)	canister	800
Propane (for citizens)	1 L	4500
Crude Oil	Barrel	9000-11000
Gold (18k)	1 g	6750

Item	Unit	Price (SYP)
Gold (21k)	1 g	7800
Gold	ounce	US \$1289
Cement	50 kg	1200
Rebar steel	1 kg	125

11. Price evolution throughout 2014 and 2015, and its causes

The Prices have increased from the beginning of 2014 to now, 2015, by 10-20%. That is due to a number of factors:

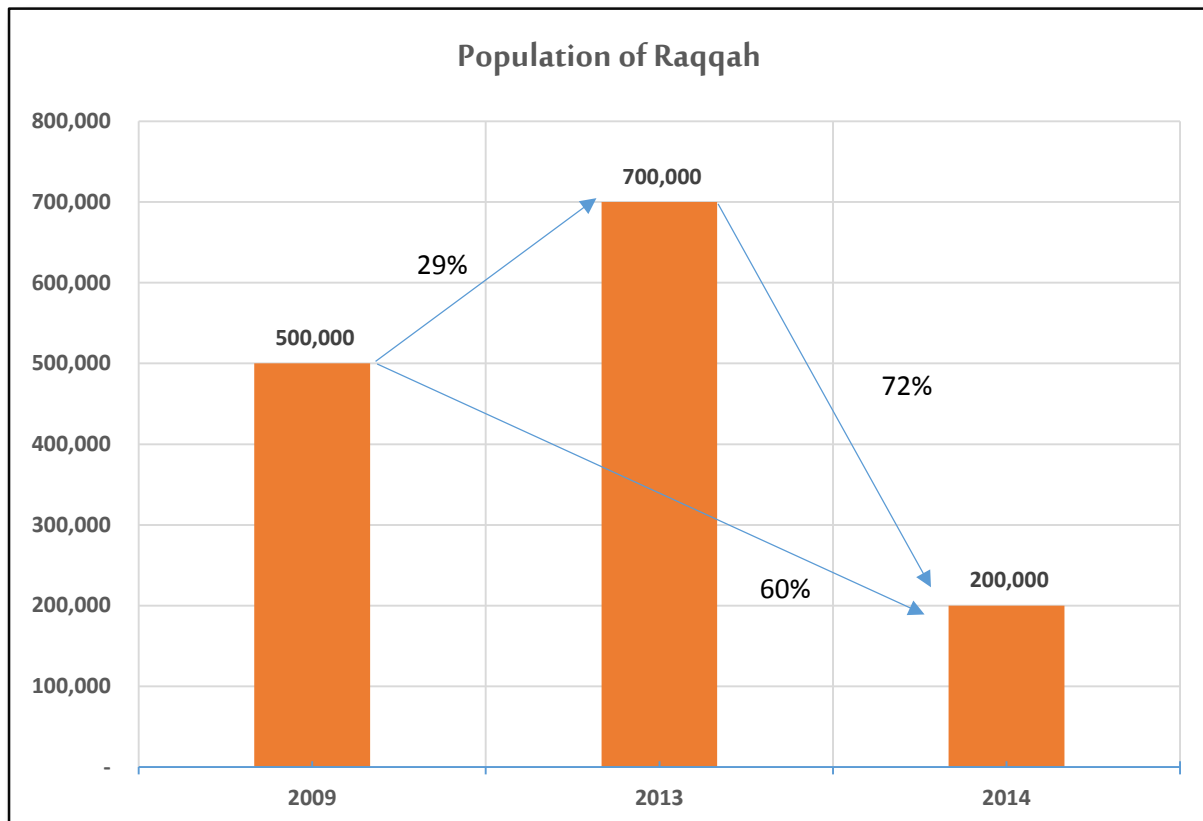
- Closing of Tell Abyad Border Crossing with Turkey after ISIL control of Tell Abyad City and Crossing led to disturbance of the economic situation in Al-Raqqah, and disconnecting of traders, students and people of Ayn al-Arab (Kobanî) from Al-Raqqah which have negatively affected the economy of Al-Raqqah City.
- Strikes of the International Coalition led to migration of some resources, which have stopped some kinds of trade and transportation for a while. This causes a turbulence in the prices then the market recovers.
- Shortage of the agricultural season (crops) this year, so prices increased in Al-Raqqah and all over Syria.
- Draining Al-Raqqah during the ISIL battles with Ahrar ash-Sham Movement in the beginning of 2014 before the ISIL gained control of the city. This have obstructed the economic life in the first month of 2014.
- Battles of ISIL in the 17th Division and Al-Tabaqa Airport against the regime have led to the instability of economic life in Al-Raqqah.
- Strikes of the Coalition against ISIL in the areas of oil wells have led to the increase of fuel prices by 15% with winter approaching and the high cost of heating fuel, which warns of an increase in all prices.



The Social and Demographic Condition

According to 2010 census, the population of Al-Raqqah reached around 500,000, and around 200,000 have arrived from the rest of the Syrian cities in the beginning of the revolution in 2011 and 2012. After liberation in 2013, Al-Raqqah became the destination of many Syrian families from hot governorates such as Deir ez-Zor, Aleppo and Homos, so the population reached around 700,000. However, the control of ISIL which was preceded by bombing of the regime and succeeded by bombing of the International Coalition o Al-Raqqah City, the stronghold of ISIL in Syria, all that have led to the displacement of most of Al-Raqqah population. There are estimates that Al-Raqqah currently contain only 200,000 citizen.

Thus, we can say that there is population displacement of 70%, for Al-Raqqah became ago of population after the crimes of ISIL and its control of Al-Raqqah, when it started to show the population and people of Al-Raqqah all kinds of harassment.



1. Demographic Age Groups

There is no accurate statistics about the age groups of the population, because of the total absence of the body or institution of specialized statistics, and as a result of displacement conditions and lack of registration of births and deaths. However, stats elicited from some credible relief organizations reveal that the active age group (age 15 to 60), which is the productive or under arms group in wars communities, has declined. This is because of the displacement, and the migration for work or for political and humanitarian asylum, especially to the EU countries.

- Under the age of 15 years: currently 55-65%.
- Age of 15-60 years old currently 25-30%, this is the active or working group, which is used to be more than 35% of the population before the revolution.
- Over the age of 60 years: 10-15%.

2. Education

- ISIL has closed all schools for almost a month, then reopened them but in its own way, in the middle of January 2015, where:
 - They replaced the curriculum with another, and the name of "Education Department" became "Diwan of Education"
 - 12 schools for boys and 12 schools for girls were introduced.
 - Teachers willing to continue teaching were subjected to a Sharia course, and whoever does not attend that course is not eligible to teach in schools.
- Salaries of teachers are from the Assad's regime, ISIL does not pay any wages unless the teacher is a member of ISIL.
- Private tuition in homes or offices is forbidden, and violators are subjected to the harshest punishment such as flogging and imprisonment.
- ISIL has introduced a faculty of medicine in Al-Raqqah, the duration of study in which is 3 years.
- ISIL has abolished old curriculum, and prevented the teaching of some subjects such as history and philosophy.
- It has also renamed schools after ISIL-related names, such as "Abu Musab al-Zarqawi"



Administrative Condition

It is known that Al-Raqqa is a governorate capital, it is administratively followed by the areas of: Al-Tabaqa- Tell Abyad – Al-Raqqa Subdivison. But now, under ISIL control, it is called “Wilayah Al-Raqqa”. All locally-formed administrative structures before and during the revolution were abolished and replaced by new bodies that follow ISIL. An area is called “Emirate” and a governorate is called “Wilayah”; the municipal council was replaced with “Muslim Services Body”, which is now providing services. The municipal councils that remain under ISIL control follow the services body, and it carries out cleaning, power maintenance, water, telecom, and bakery services. In addition, ISIL has founded:

1. Traffic and Driving Accident Police.
2. Consumer Protection Agency.
3. Hisbah (Accountability) Agency, which is an executive power that monitors violations in the street such as women’s dress, it has a special women force to deal with women, and combating smoking and selling of smoke. And this agency provokes the remaining population of Al-Raqqa to the highest degrees.
4. Zakat Collection.
5. Media Office.
6. Affiliation Office.
7. Mujahedeen (Fighters) Affairs Office.

1. Courts

ISIL Sharia Courts are prevalent, and they are divided into specialized courts:

- Hisbah Court, which is a court concerned with violations and their punishments.
- Zakat Court
- Personal Affairs
- Islamic Police, which is a judicial police and executive authority to implement Hudud and punishments.
- State Security, which is a secret intelligence agency, all its members are masked, whether investigators or executives.



2. ISIL's Formations

As for the ISIL formations, they all lie within ISIL, but some formations belong to the countries that they came from, such as the Uzbek battalions and Umar Al-Shisahni (The Chechen) Brigade (The military commander of ISIL).

The majority of ISIL members of police and fighters are strangers to Al-Raqqah City, and most of them are from outside of Syria.

Islamic State took control of Al-Raqqah City in the beginning of 2014 after fierce battles with Ahrar ash-Sham Movement, Tawhid Brigade, factions of the Islamic Front and the Free Syrian Army. It has spilt the blood of many of Ahrar ash-Sham fighters inside Al-Raqqah in particular and on the edges of the 17th division. More than 100 fighters of Ahrar ash-Sham were killed treacherously from behind while stationed on the 17th division. It has swept through Al-Raqqah and extended its control over it and the surrounding cities such as Al-Tabaqa and others. This has led to the fallback or surrender of most members of FSA and the militant factions. ISIL has insisted on Istitabah (Asking for repentance) of all who carried arms during the Syrian revolution and hand over their weapons, which prompted many activists and revolutionaries to either migrate or give up arms and sit in their houses.

In addition to the governor's palace or the governmental complex, which is the headquarters of the Wali and the most important leaders of ISIL and has been targeted by The Coalition airstrikes more than once, The palace of Justice has been turned into a security and criminal prison.

Islamic state has imposed a certain type of Hijab, but Niqab upon the women of Al-Raqqah and the areas under its control. It has also imposed taxes upon Muslims and Jizya upon the remaining Christians in Al-Raqqah.

In addition, ISIL has imposed certain appearances on men; such as allowing the beard (to grow), prohibiting barbers' to perform certain types of haircutting, and preventing smoking and selling of smoke.



Conclusion and Recommendations

1. Seeking to economically reconnect Al-Raqqah City with the liberated Aleppo Governorate and preserving the resources of Al-Raqqah to support the Syrian economy once again.
2. Attempting to reclaim the Syrian water and power resources that ISIL is controlling.
3. Reclaiming oil wells in Al-Raqqah governorate which constitute an important income source to the Liberated Syria.
4. Mitigating the effects of bombing whether by the regime or the International Coalition.
5. Solving the gas problem urgently and fixing its price, after the prices have reached insane levels, and establishing gas mobilization companies in the future to be enough for the market, and so that these predicaments are not repeated.
6. Improving the infrastructure, and activating the role of professional syndicates, such as Liberated Engineers, Teachers, Doctors, and economists.
7. Working to establish investment projects to enhance the industry in Al-Raqqah and employ people in developmental projects.
8. Being civilly and militarily prepared to accommodate the outcomes of a sudden and expected collapse of ISIL after the strikes of the Coalition and the ISIL defeat in Ayn al-Arab.
9. Filling the void that could be caused by the collapse of ISIL, if it actually happened, or if it retreated from Al-Raqqah, with pre-prepared economic plans to restore the Syrian oil wealth to the liberated Syria.