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# Border Nation: The Reshaping of the Syrian-Turkish Borderlands

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## Summary

The Turkish-Syrian border is divided into separate areas of control—under the Syrian Democratic Forces in northeast Syria, Hay'at Tahrir al-Sham in Idlib, and Turkey in several cantons—which sustain contradictory political projects. Yet these border areas constitute a single political-security ecosystem, one connected to southern Turkey and regime-held Syria. As such, only a peace agreement that treats the border areas as an indivisible whole and delimits the major powers' zones of influence can lead to a stable long-term arrangement.

## Key Themes

- The war in Syria has led to the economic activation of areas along the Syrian-Turkish border. New border crossings were opened with Turkey, as were internal crossings connecting areas controlled by different actors.
- The border areas are heavily militarized and securitized. Tens of thousands of fighters blend in with millions of civilians. Efforts by Turkey to stabilize the economy by stimulating industry where it wields influence have had scant success, and the border areas remain dependent on trade.
- The locus of Syria's armed conflicts has shifted to an arc that extends west to east along the entire Turkish-Syrian border. A leading cause of conflict is Ankara's position that the Kurdistan Workers' Party (PKK), which it views as the power behind the Syrian Democratic Forces (SDF), poses a grave threat to Turkey's national security.

## Findings

- The border between Syria and Turkey has shaped bilateral relations since the beginning of the twentieth century. The exception was the first decade of the 2000s, when it receded in significance. Following the onset of the Syrian conflict in 2011, the border once again became the decisive factor in Syrian-Turkish relations.
- The war has shaped a new socioeconomic order in Syria's north. Several political projects and zones of influence have emerged—and sometimes fallen prey to political deals between the bigger powers.
- The war has reengineered Syrian society. Along the entire border with Turkey, residents displaced from across Syria live alongside the original inhabitants in densely populated areas. Demography and displacement in these areas have been main sources of contentiousness and any military activity risks more painful changes of that sort.
- The current status quo in Syria's north is untenable in the long run. Conflicting agendas are at play. Only if a comprehensive deal is reached, one that treats the border area as an indivisible whole and delimits the major powers' zones of influence, will a stable arrangement take shape.



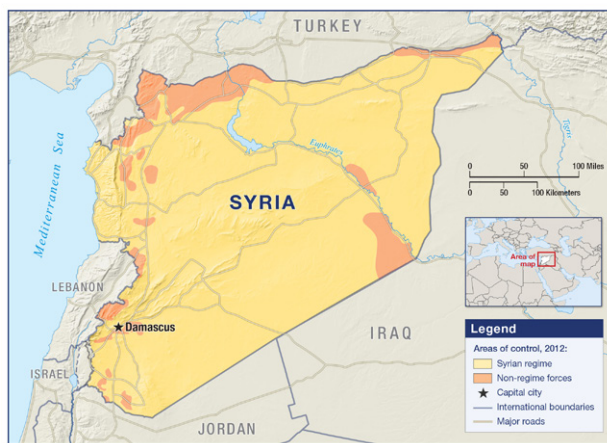


## Introduction

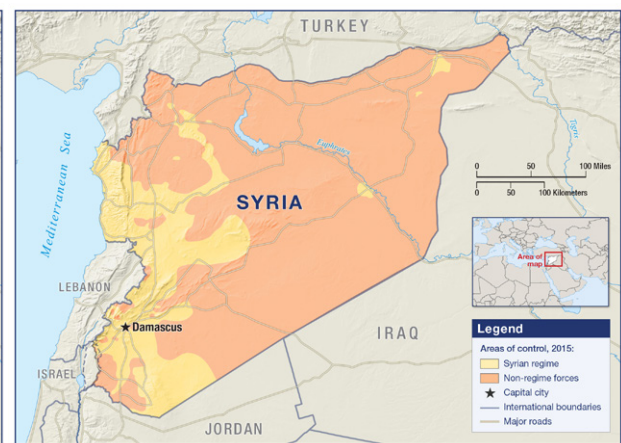
In the past decade, developments on the Syrian side of the border with Turkey have created a conflict-ridden political environment and complicated prospects for any kind of understanding between Ankara and Damascus. These developments include the Syrian uprising, massive demographic shifts, the rise of radical Islamist groups, the expansion of an affiliate of the Kurdistan Workers' Party along many parts of the border, repeated intervention by the Turkish military, and the establishment of a presence by both U.S. and Russian military forces. The war in Syria, which was and remains the primary engine for such developments (see map 1), has given rise to interlinked yet distinct socioeconomic and political patterns along the 911-kilometer-long border. Broadly speaking, the area is divided into three semiautonomous regions: the northeast, where a PKK-affiliate is in control; the center, where three cantons are subject to strong Turkish influence; and Idlib, in the northwest, ruled by a local Islamist group.

MAP 1  
**Evolution of Territorial Conflict in Syria 2012-2022**

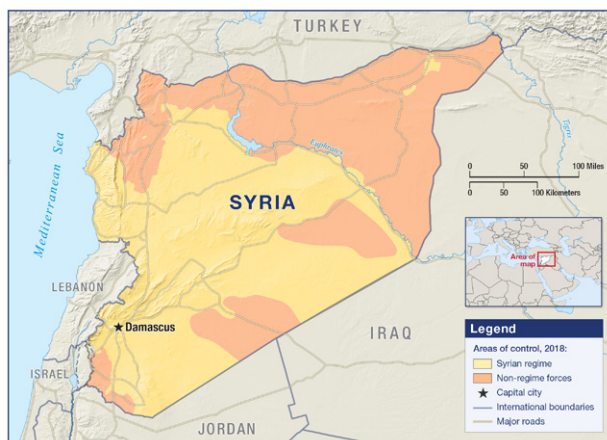
2012



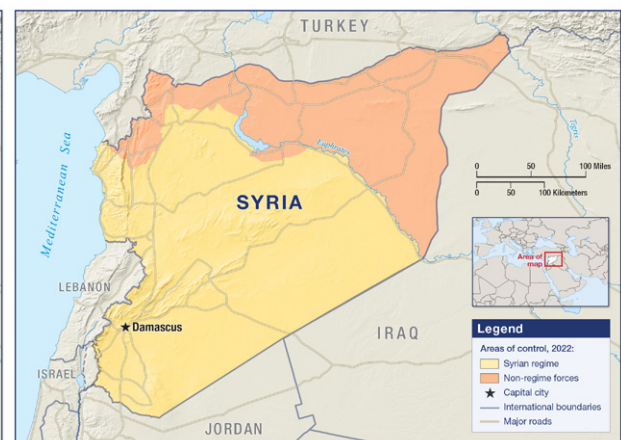
2015



2018



2022



These three regions affect, and are affected by, Turkey's border policies. Idlib and the three cantons under Turkey's sway, where half the population consists of internally displaced people (IDPs), are socially and economically connected to adjacent areas on the Turkish side of the border, such as Sanliurfa, Gaziantep, Kilis, and Reyhanli. Ankara has sought to stabilize the economy in Idlib and the three cantons, and to prevent major demographic shifts. The northeast, on the contrary, has its own distinct social and economic patterns, and is separated from Turkey by a hard border. Local dynamics reinforce these divisions. While Turkey has found ways to support or coexist with local political actors in the three cantons and even in Idlib, the specter of PKK-affiliated forces in the country's northeast continues to alarm Ankara.

In spite of their differences, the most significant of which are contradictory agendas on the part of local actors and their external backers, these three regions are linked to each other, and to regime-controlled Syria, through internal crossings. Such crossings facilitate the flow of goods and, to a lesser extent, people, meaning that economic dislocation and demographic displacement in one region, or in regime-controlled Syria, affect the other regions as well as southern Turkey. Indeed, the three border regions, regime-held Syria, and southern Turkey are akin to imbricated yet loose tiles—stepping on one inevitably dislodges the others.

The formation of the three border regions was part of the war-induced drastic reordering of the economic, political, and security landscape in northern Syria. This reordering makes it difficult to envisage a return to the situation as it was before 2011. This is not to say that the current situation is stable. The Syrian-Turkish border is no longer a divider between two countries, but rather a site of tension between various actors competing for influence along its length—and has emerged as one of the most heavily militarized areas in the Middle East. The dilemma is that even as this state-of-affairs is hardly optimal in the view of any of the key political and military actors, there is no way out of it that would suit all of them. As such, unilateral attempts by any side to redraw the map would cause simmering conflicts to explode.

## **The Syrian-Turkish Border: Shaper of Mutual Relations**

Since the establishment of the Turkish and Syrian republics in the first half of the twentieth century, the border separating them has served as a bone of contention. In fact, more than any other factor, the border has influenced bilateral relations. This is particularly true of the 1980s, when Syria extended support to the PKK. The only notable exception to the rule was the first decade of the 2000s, during the historic Turkish-Syrian rapprochement. The Syrian conflict, which broke out in 2011, transformed the border into a much-used crossing point for the entry into Turkey of refugees from Syria, and for the entry into Syria of money, weapons, foreign fighters, and even the Turkish army. In many ways, the two countries' relations were once again shaped by what was taking place on their border.

### **From a Troubled Beginning to a Cautious Rapprochement**

The line between Turkey and French-mandated Syria was first sketched by the Ankara Agreement of 1921, which terminated the state of war between France and Turkey.<sup>1</sup> Delimiting the border on the ground,

however, was a long process, one that greatly influenced Turkey's relations with Syria under the French Mandate and subsequently independent Syria. The most contentious issue concerned the border's eastern and western ends. In northeastern Syria, the delimitation of the frontier proved easy along the Baghdad railway, but there was disagreement concerning Syria's northeastern tip, or what became known as "duck's beak." In the northwest, the dispute concerned the Sanjak of Alexandretta, which the Turks call Hatay.

After negotiations and concessions on Turkey's part in 1929, Syria cemented its control over its northeastern areas, including the "duck's beak."<sup>2</sup> In Syria's northwest, however, matters went the other way. The Franco-Turkish agreement of May 29, 1937, gave autonomy to the Sanjak, which separated from Syria on November 29, 1937, following a controversial local referendum. In September 1938, the region's legislative assembly proclaimed the independence of the Republic of Hatay, the last step before it became part of Turkey in June 1939.<sup>3</sup>

Hatay remained a major point of contention between Turkey and Syria after the latter gained independence, while the border as a whole constituted a source of tension for the rest of the twentieth century. One of the main issues was smuggling. The importance of the issue is reflected in Turkey's decision to lay mines to thwart smugglers.<sup>4</sup> In 1960, Turkey fenced off and mined its border with Syria, and placed areas on the Turkish side under martial law. These measures put a dent in, but did not end, smuggling.<sup>5</sup> In 1981, it was estimated that smuggling had surpassed legal trade in monetary value.<sup>6</sup>

Smuggling continued as Syria and Turkey improved relations in the first decade of the 2000s. Gasoline stations began cropping up in Sarmada, near the Bab al-Hawa crossing. They were a lucrative business, so opening such an establishment required a strong connection (*wasta*) with high-ranking officials in Damascus.<sup>7</sup> Hundreds of vehicles, Turkish and Syrian, made daily crossings back and forth over the border. Oftentimes, they transported Syrian fuel, which was subsidized, along with goods such as tea and tobacco, from Syria to Turkey. The practice continued after the war broke out in Syria. Sarmada—like many other border cities—was a stop on the fuel's journey to Turkey's black market, where the price in 2012 was some four times higher than in Syria.<sup>8</sup>

Another border-related conflict was (and remains) that of water, particularly the waters of the Euphrates River, which originates in Turkey and flows through Syria and then Iraq. Turkey's construction of dams on the Euphrates River (as well as the Tigris River), a project that began in the 1960s, has long alarmed Damascus. The biggest of these projects is the multi-dam Southeastern Anatolia Project, known as GAP, which was launched in the late 1980s. GAP, some of whose dams are already operational, is expected to be completed in the mid-2020s, and will consist of twenty-two dams and nineteen hydraulic power plants, irrigating a total of 1.8 million hectares of land in the Euphrates-Tigris basin.<sup>9</sup> According to some estimates, the project will cut water flow to Syria by 50 percent. This would exacerbate a problem that the operational components of GAP have caused; in 1990, during Turkey's filling of the Ataturk Dam, Syria (and Iraq) suffered noticeably, as water flow was reduced at short notice from 500 cubic meters per second to a mere 165.<sup>10</sup> Syrian-Turkish relations were already fraught, but the implementation of parts of GAP in the 1990s added to the mutual tension and distrust.<sup>11</sup>

The biggest problem, however, was Syria's support for the PKK. A Kurdish militant group that launched an insurgency in southeastern Turkey in 1984, the PKK increasingly took to launching attacks from Syria, where its leader, Abdullah Öcalan, had been based between 1980 and 1998. On several occasions in the 1980s and

1990s, Turkey and Syria came close to resolving their disputes. In 1987, the two sides signed an agreement that tackled both the PKK and water issues, but its effect was short-lived.<sup>12</sup> Another such agreement was signed in 1992 that again did not yield results on the ground.<sup>13</sup>

Indeed, the dispute was not resolved until 1998. That year, Turkey and Syria were on the brink of war over Syria's harboring of the PKK. In October 1998, Turkey threatened to invade Syria, which relented and agreed to make concessions. The result was the Adana Agreement, which Turkey and Syria signed later that year. This led to a series of further agreements, the most recent of which was the "Joint Cooperation Agreement Against Terrorist Organizations," concluded in January 2011, just before the Syrian uprising.<sup>14</sup> One of the main outcomes of all these agreements was Syria's commitment to refrain from providing any type of support to any organization, especially the PKK and affiliates, that Turkey considered to be a terrorist organization.<sup>15</sup> According to Annex 2 (specifically, Article 5) of the Adana Agreement, Turkey had a "natural right to self-defense." Even more importantly, Annex 4 of the same agreement granted Turkey the right "to take all necessary security measures inside Syrian territory to a depth of 5 km."<sup>16</sup> Turkey has cited this provision to justify its intervention in Syria during the country's ongoing conflict.

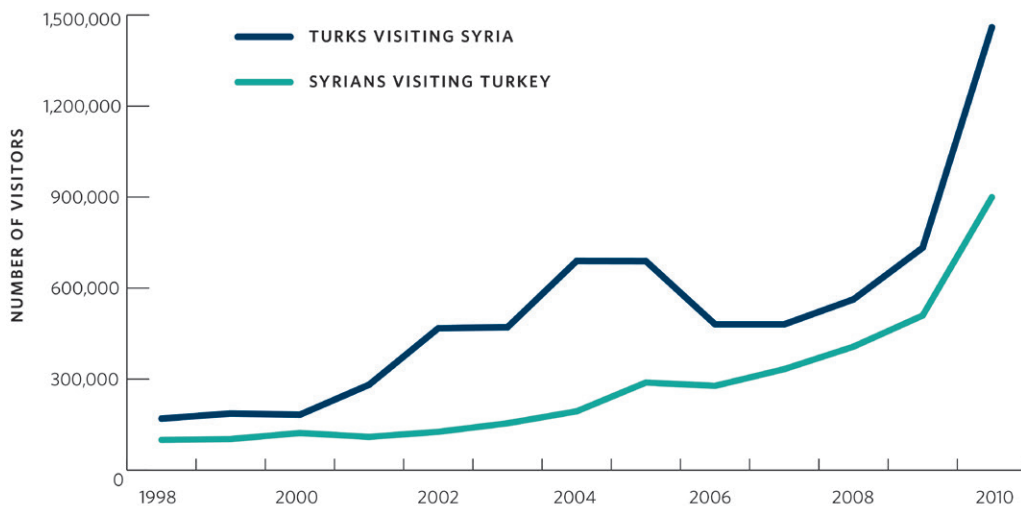
At the turn of the century, the Adana Agreement, Bashar al-Assad's inheritance of power in Syria, the ascent of the Justice and Development Party (AKP) in Turkey, and shifting regional and international dynamics all enabled the two neighbors to go beyond the border as the defining factor in their bilateral ties. Syria was facing a host of regional and international challenges, some of which were mutual with Turkey. The September 11 terrorist attacks and the U.S.-led invasion of Iraq worsened Syrian-U.S. relations, turning Ankara into a logical partner for Damascus. Meanwhile, the possibility that Kurdish autonomy in northern Iraq might become permanent brought the two neighbors even closer.<sup>17</sup> The failure of Syrian-Israeli talks as well as the weakening of the Arab axis (consisting of Syria, Saudi Arabia, and Egypt) provided additional reasons for Syrian-Turkish rapprochement.<sup>18</sup> Domestically, the strongest push for better relations with Syria came after Recep Tayyip Erdoğan's ascent to power in Turkey in 2003 and his administration's reorientation of foreign policy toward the Middle East under the slogan of "zero problems, maximum trade" with its neighbors.<sup>19</sup> From Syria's perspective, Turkey constituted a much-needed bridge to the global economy.<sup>20</sup>

In this context, the two sides took many practical steps that turned their enmity into amity. Syria supported Turkish military operations against the PKK in northern Iraq and inside Syria itself.<sup>21</sup> In return, Turkey increased water flow to Syria. Perhaps the most visible implications were on the socioeconomic front, as trade and cross-border mobility increased noticeably. Trade volume increased from \$600 million in 1998 to \$2.3 billion in 2010. The trade balance was tilted in favor of Turkey, with Turkish exports about three times larger than Syria's.

As relations improved, more Syrians and Turks visited each other's country. According to Syrian official data, the number of Turkish nationals who visited Syria increased from 170,000 in 1998 to 730,000 in 2009, which doubled to 1.45 million in 2010, as a visa liberalization regime entered into effect. According to Turkish official data, the number of Syrians entering Turkey also increased, though more gradually, going from about 100,000 in 1998 to 900,000 in 2010 (see figure 1).<sup>22</sup>

FIGURE 1

**Number of Turks and Syrians Visiting Each Other's Countries, 1998–2010**



Source: Annual newsletters published by the Turkish Ministry of Tourism, available at <https://yigm.ktb.gov.tr/TR-249709/yillik-bultenler.html>.

Moreover, economic relations went beyond trade and visits. In 2007, Turkey became the largest single foreign investor in Syria. That year, Turkish foreign direct investment doubled from the previous year, going from 2006 to 2007, when it reached \$146 million.<sup>23</sup> About 40 percent of businesses in Aleppo’s Sheikh Najjar industrial zone had Turkish partners, with Turkish funds accounting for \$650 million.<sup>24</sup>

**Contentious Frontier, Redux**

Shortly after the onset of the Syrian conflict, this unprecedented rapprochement reverted to bitter enmity. In the beginning, Turkey adopted a wait-and-see attitude and pursued diplomacy with the regime—as with then foreign minister Ahmet Davutoğlu’s visit to Damascus in August 2011. By November of the same year, however, Ankara was calling for Assad’s removal and openly extending support to his opponents.<sup>25</sup> As the conflict became more violent, and as refugees flowed into Turkey, Ankara became more vocal about the necessity of a humanitarian intervention. Turkey also boosted its support for Syria’s Muslim Brotherhood–dominated opposition—principally by allowing arms and rebel fighters to cross into Syria—which it saw as a possible alternative to Assad.<sup>26</sup> Ankara seemed to believe that Assad’s toppling was imminent, thanks in part to the arms and rebel fighters it was allowing to cross into Syria.

Yet it gradually became clear that the Syrian regime was much more resilient than most observers, including Turkey, had assumed. Ankara did not drop its interventionist discourse, but it did narrow its Syria policy.<sup>27</sup> Turkey’s priorities came to revolve around the border—in particular, brewing security and demographic

threats. In a sense, the Syrian uprising and Turkey's wrong bet on Assad's quick departure brought mutual relations back to the issue of the border.

The security threat, which resulted from the collapse of central authority in Syria's north and the proliferation of armed groups, began manifesting itself toward the end of 2012, but came to the fore the next year. In February 2013, a car bomb went off at the Cilvegözü (Bab al-Hawa) border gate in the southern province of Hatay, killing fourteen people.<sup>28</sup> A few months later, a car bomb killed some fifty people in the Turkish border city of Reyhanli.<sup>29</sup> The increase in deadly security incidents forced Turkey to change its open border policy, tightening entry and exit requirements from 2015 onward.<sup>30</sup>

Another threat, one that included a security as well as a demographic element, also began to take shape in 2012. In July of that year, Syrian army and security forces withdrew from predominantly Kurdish areas in the northeast of the country, leaving the door open for the Democratic Union Party (PYD), an offshoot of Turkey's PKK, to fill the vacuum. As the PYD ousted civilian state officials in many of its strongholds and replaced them with its own, Turkey suddenly found itself neighboring an archenemy. Shortly thereafter, then prime minister Recep Tayyip Erdoğan threatened that his country had an "undisputed right" to intervene if the PKK were to set up military camps in Syria.<sup>31</sup>

One of the main turning points in terms of the changing dynamics between Ankara and Damascus was Russia's military intervention in Syria in September 2015. This not only diminished the Syrian opposition's hopes of ousting Assad, but enabled the latter to regain all opposition strongholds between 2016 and 2018, except those in the northeast and the northwest. Not long after Russia's intervention, Turkey became much more assertive in northern Syria, launching several military incursions along its border. The first operation, codenamed Euphrates Shield, started in August 2016 and ended in early 2017.

The offensive partly overlapped with Turkey's withdrawal of its support for rebels in Aleppo and a regime offensive that led to the capture of the city in December 2016. Essentially, it was a trade between Russia and Turkey.<sup>32</sup> In return for not interfering in Russia's mission to help the regime regain much of opposition-held Syria, Turkey was tacitly allowed to secure its borders by operating within Syrian territory. Turkish military forces entered Syria through the border town of Jarablus, linked up with Syria-based armed groups beholden to Turkey, and captured the city of Al-Bab, near Aleppo, from the Islamic State. Just as important as dislodging the Islamic State from Al-Bab and beyond was preventing the People's Defense Units (YPG), the PYD's armed wing, from forming, what Turkey called, "a terror corridor" on Turkey's doorstep by connecting Manbij and Afrin, two non-contiguous areas that it controlled.<sup>33</sup> The zone carved out by Turkey, which became known as the Euphrates Shield area, was administratively attached to the Turkish provinces of Gaziantep and Kilis, and subject to Turkish military oversight.

Afrin itself, controlled by the YPG, was next. Turkish forces and their Syrian proxies moved on Afrin in early 2018. After swiftly capturing the city, they turned it into a second canton under Turkey's sway. It should be noted that the Euphrates Shield canton and Afrin are adjacent to each other.<sup>34</sup>

Turkey's third military operation, which resulted in the carving out of a third canton under its sway, again targeted a largely Kurdish force, this time in the northeast of the country, where a YPG-led armed umbrella group, the Syrian Democratic Forces (SDF), was in control. Codenamed Peace Spring, Turkey and its Syrian

proxies launched the operation on October 9, 2019. Within ten days, they had pushed back the SDF and taken control of an area around 30 kilometers deep, extending from Tel Abyad to Ras al-Ayn.<sup>35</sup> The operation occurred three days after then-president Donald Trump's decision to withdraw U.S. troops from northern Syria,<sup>36</sup> and came to an end after separate agreements that Turkey reached with Russia and the United States.<sup>37</sup> In this way, the Peace Spring area became a third zone of Turkish influence, albeit one that was not contiguous with the Euphrates Shield and Afrin cantons.

Unlike the Euphrates Shield, Afrin, and Peace Spring areas, Idlib did not fall under Turkey's sway. The radical Islamist group Hay'at Tahrir al-Sham (HTS) is in firm control of the area, operating through its military security force and a civilian wing known as the Salvation Government. Yet Idlib's fate, too, hangs on Ankara's decisions. This is due largely to agreements between Russia, which exerts much influence in regime-held Syria, and Turkey, which borders Idlib to the west and holds sway over the Afrin canton abutting its north. In September 2017, the Astana troika—Russia, Iran, and Turkey—announced that Idlib was to become a deescalation zone. Shortly thereafter, Turkey started establishing observation points on the opposition's side of the frontline, thereby gaining a foothold in Idlib, while Russia and Iran did the same from the regime's side.<sup>38</sup> Although Idlib's frontiers have since changed several times to the advantage of the regime, owing to advances by the latter's forces, Turkish troops and observation posts are still in place. Because its forces are the main deterrent against a regime takeover, Turkey wields indirect influence over Idlib.

## Distinct Regions With an Interlinked Socioeconomic Order

HTS-controlled Idlib and the three cantons subject to strong Turkish influence—Euphrates Shield, Afrin, and Peace Spring—have distinct characteristics, yet are part of a single socioeconomic order. (Even the SDF-run northeast, which is socially distinct, remains economically linked to these areas.) The role of shifting demographics and population distribution was critical to the creation of this socioeconomic order. Demographic changes, the result of multiple waves of internal and external displacement after the uprising in 2011, have led to the concentration of a mass of Syrians in the country's northwest, particularly Idlib. Throughout the war, the northwest has constituted a relatively safe haven for those fleeing regime fire, given its proximity to an international border, easy access to shelter and humanitarian aid, and better economic opportunities.

As conflict became more violent at the end of 2012 and the beginning of 2013, the internally displaced population of the northwest increased. As of November 2021, it had reached about 4 million, of whom 2.7 million were IDPs.<sup>39</sup> Today, about one-third of IDPs live in some 600 camps near the border,<sup>40</sup> up from 65,000 IDPs in twenty-six camps in May 2013.<sup>41</sup> Northwest Syria became the prime destination for IDPs and by far the most affected by the IDP population movement. Humanitarian organizations have tracked the movement of some 10 million Syrians between January 2016 and December 2020, and point out that 70 percent of such movement occurred within Idlib and Aleppo governorates.<sup>42</sup> While most such movement was the result of displacement of locals from Idlib and Aleppo within their governorates, significant numbers of IDPs were displaced to the northwest from Hama, Deir Ezzor, and Rural Damascus Governorates.<sup>43</sup>

MAP 2

**Demographic Indicators in Northwest Syria and Southern Turkey**



The changed demographics are especially apparent in border areas. The Sarmada subdistrict of Harem in Idlib Governorate is located near the Bab al-Hawa crossing with Turkey, and grew from 15,000 before 2011 to 130,000 in 2020.<sup>44</sup> The population of Harem as a whole—which includes Sarmada, Bab al-Hawa, and other border towns—increased from an estimated 450,000 in 2011 to 1.1 million in 2019.<sup>45</sup> The same applies to Azaz near the Bab al-Salam crossing with Turkey, whose population of 30,000 before the war had increased tenfold as of the summer of 2020.<sup>46</sup>

In the meantime, the number of registered refugees in Turkey also increased. From a few tens of thousands in early 2012, the figure reached 150,000 by the end of 2012, almost quadrupled in January 2014, and had increased to 3.6 million by the beginning of 2018.<sup>47</sup> Currently, the total stands at around 3.7 million, just under 60 percent of whom live near the Syrian border, and 15 percent of whom reside in Istanbul.<sup>48</sup> As map 2 shows, out of the 12.6 million people who live in nine Turkish provinces on or near the Syrian border, 2,150,000 (or 17 percent) are Syrians. The percentage of Syrians in border provinces is 75 percent in Kilis, 26 percent in Hatay, and over 20 percent in the two most populous such provinces, Gaziantep and Sanliurfa.



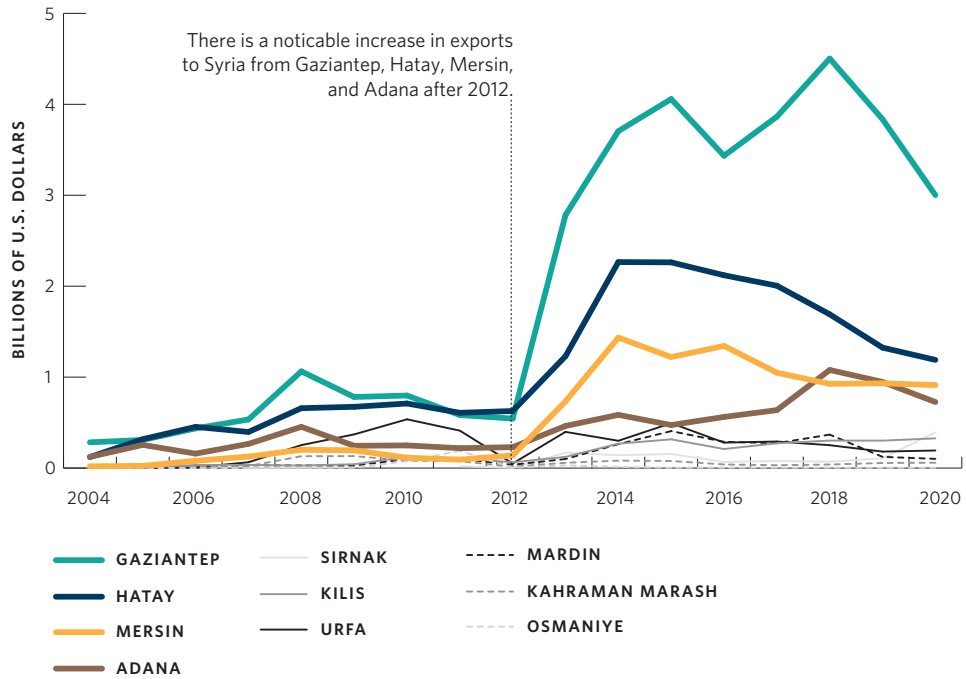
The Syrian war also led to Aleppo's decline as the center of business and industry in northern Syria, and the creation of new such centers. Aleppo used to host one of the most important industrial towns, Sheikh Najjar.<sup>49</sup> In 2010, on the eve of the war, 30 percent of all industrial establishments in the country were located in Sheikh Najjar,<sup>50</sup> and its local economy contributed 24 percent of Syria's gross domestic product.<sup>51</sup> As war consumed Aleppo, divided the city, and detached it from its rural hinterland, its centrality declined and a new, transnational socioeconomic order emerged. One of the defining characteristics of this new order was the formation of business communities and hubs along both sides of the Syrian-Turkish border, through which the new economy could breathe. Sarmada was the first and remains the most notable example of such a hub, though over the years border cities such as Azaz, Al-Rai, and Jarablus have also witnessed a significant rise in economic activities.<sup>52</sup>

The decline of Aleppo and the mass demographic shift into Turkey contributed to the formation of new business communities in Turkish cities as well, most notably Gaziantep. In the words of a local university professor, journalist, and director of a human rights organization, Gaziantep, like Aleppo, "was a center for trade and skilled people. So, when Syrians came, they had the skills needed in the Gaziantep economy."<sup>53</sup> Syrians became major players in the shoe and plastic industries, as well as in producing tricotage (a plain, warp-knitted fabric) in small textile workshops.<sup>54</sup> Other cities, too, tried to utilize Syrian capital. A Syrian businessman who owned a textile factory before 2011 in Sheikh Najjar said, "Turkish authorities encourage Syrians to invest. . . . We [Syrian businessmen] met many governors, [such as those of] Sanliurfa and Kilis. They all tried to encourage us to open factories in the industrial cities [in their governorate]."<sup>55</sup>

The displacement of a large chunk of the Syrian business community across the border essentially created a parallel supply chain within Turkey. According to a study conducted in Gaziantep in 2020, 96 percent of Syrians who participated in the survey reported having access to Syrian products. This indicated that Syrians in Gaziantep had "established their own commercial networks, especially in basic consumption items."<sup>56</sup> The phenomenon is noticeable on a small scale with the proliferation of small grocery stores (*baqqaliyyat*), which had ceased to be popular in Turkey and closed in large numbers.<sup>57</sup> On a larger scale, there is the transformation of the so-called Iranian Street, in the center of Gaziantep, from crumbling houses and unmaintained infrastructure into a bustling shopping area where both the storeowners and customers are largely Syrian.<sup>58</sup> In a discussion with a group of Syrian factory owners in Gaziantep's industrial city, all affirmed that their products were intended for Syrians in Turkey or abroad.<sup>59</sup> Indeed, the supply chain of Syrian products in Turkey extends beyond the country's borders. The demographic shift and the formation of Syrian business communities in Turkey has given rise to a regional economy between Turkey and northern Syria, as well as a transnational economy that connects northern Syria, via Turkey, with global markets.

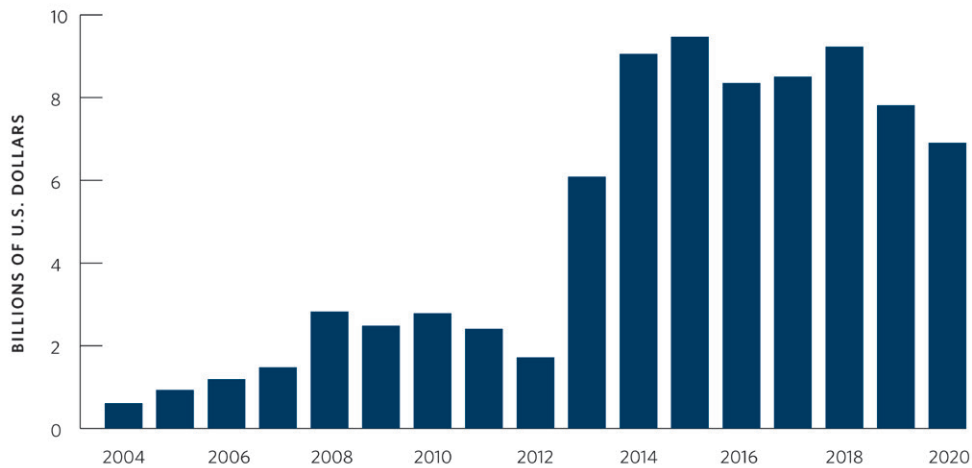
Opposition-held northern Syria (the three Turkish-backed cantons and Idlib) makes up an important market for Syrian produce coming from Turkey. Total exports from the nine Turkish provinces situated on or near the Syrian border to Syria stood at \$171 million in 2012, only to increase almost sixfold to \$950 million in 2015 (see figures 2 and 3), which is two-thirds of total Turkish exports to Syria.<sup>60</sup> It is difficult to determine what percentage of the products were made in Turkey-based Syrian factories, though the fact that the exponential increase in exports to Syria occurred after the massive Syrian influx would appear to indicate a nonnegligible Syrian role.

FIGURE 2  
**Turkish Exports to Syria, by Province**



Source: From foreign trade statistics provided by the Turkish Statistical Institute, available at <https://data.tuik.gov.tr/Kategori/GetKategori?p=dis-ticaret-104&dil=2>.

FIGURE 3  
**Exports to Syria from Turkish Border Provinces**



Source: From foreign trade statistics provided by the Turkish Statistical Institute, available at <https://data.tuik.gov.tr/Kategori/GetKategori?p=dis-ticaret-104&dil=2>.

The supply chain is not unidirectional: specific goods for which clearance has been obtained from the Turkish authorities make their way to Turkey, though the scale is much less than what enters Syria from Turkey.<sup>61</sup> A prime example of this is Syrian olive oil produced in Idlib and Afrin, and exported to Turkey or to third countries through Turkey. Before the war, olive oil was one of Syria's signature products and one of its top ten exports other than energy products (oil, gasoline, electricity, phosphate, and so on). In 2011, Syria produced 208,000 tons of olive oil, and exported 16,500 tons at a value of 3,289,245 million Syrian pounds (around \$70–\$75 million).<sup>62</sup> Most of this olive oil, particularly the best of it, was produced in northwestern Syria, especially Afrin.<sup>63</sup>

The current state of production is not clear, but according to local officials and traders, olive oil is one of the biggest products coming out of Syria's northwest.<sup>64</sup> It serves the local market but is also exported. One of the routes to outside markets is Turkey. One trader explained that there are licensed companies that, working with the Turkish government's consent, take local producers' olive oil, test it, and export it abroad on their behalf via Turkey.<sup>65</sup> The product, according to an oil trader, could be marked "Syrian made" or "Turkish made," depending on the rules of the importing country and the demands of the buyer.<sup>66</sup> A Turkish oil expert highlighted the problematic aspect of producing and exporting oil from Afrin as a Turkish product, given the fact that Afrin is in Syria and that a significant portion of its original, ethnically Kurdish population was displaced by Turkish-backed Syrian forces in January 2018.<sup>67</sup> Syrian producers in Turkey also maintained relations—or forged new ones—with overseas markets to which they used to export before 2011. A long-time tailor from Aleppo who now runs a small workshop in Gaziantep said, "Seventy percent of textiles produced by Syrians is for export to Iraq, Morocco, Russia, Saudi Arabia, etc. The rest is sold locally, mainly to Syrians."<sup>68</sup>

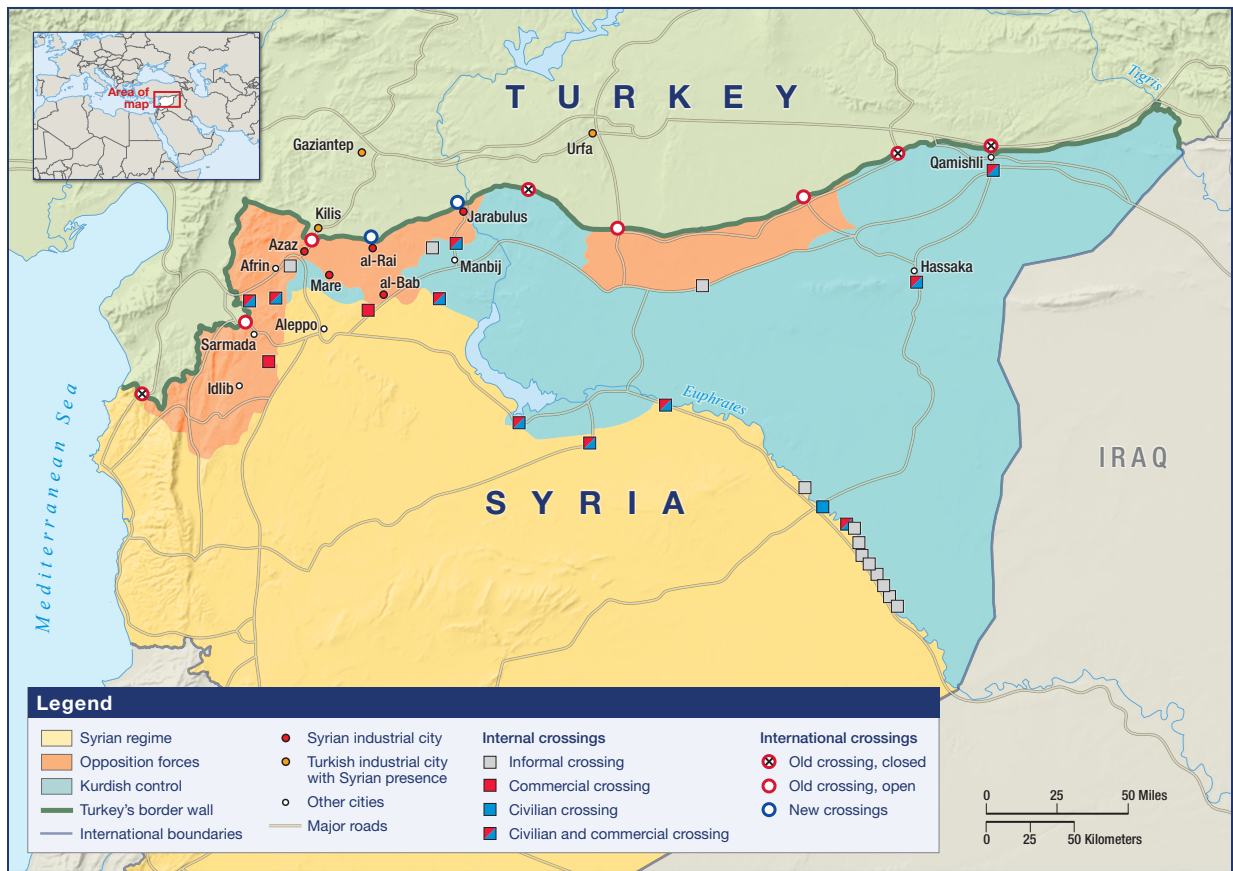
Turkey has utilized its growing influence in northern Syria to decelerate the refugee influx. After a period of lax border policies, in 2013 Ankara started to tighten border control. Between 2015 and 2018, while conflict became concentrated along Turkey's border, Ankara built the world's third-longest wall, after the Great Wall of China and that on the U.S.-Mexico border.<sup>69</sup> This drastic measure gave Turkey greater ability to monitor cross-border movements. As mentioned, Turkey also established a military presence inside Syria to keep its adversaries at bay, creating a frontier with the Syrian regime in Idlib, and one with the PYD/YPG and the SDF through the Euphrates Shield and Peace Spring areas. Preventing population movement into Turkey, and even toward Turkey's border with Syria, has been a top priority for Ankara.

Economically, Turkey has sought to create a more stable and durable economic state of affairs in northern Syria through a number of measures. Because the humanitarian sector has become an integral part of northern Syria's economy, Turkey pressured Russia in the summer of 2021 to refrain from vetoing the United Nations Security Council's renewal of Bab al-Hawa's status as a crossing through which UN-authorized humanitarian aid is delivered. Ankara has also enhanced border management in the commercial sense.<sup>70</sup> In the Euphrates Shield area, for instance, it opened Al-Rai and Jarablus crossings, which facilitated commercial traffic by operating alongside the Bab al-Salam crossing. "Cars needed fifteen days to enter Syria [from Bab al-Salam]," said one trader. "After more crossings were opened, the time was reduced to 24–48 hours."<sup>71</sup> Additionally, in 2018, Turkish postal services as well as electricity and telecommunication providers appeared in those parts of Syria under Turkish influence.

One of the most telling examples of Turkey’s attempt to build a more stable economy in the north is its support for the creation of industrial zones, which, unlike trade, requires committed capital as well as a medium- to long-term commitment and stability. In the past few years, Ankara has announced several industrial zones—in Al-Bab, Al-Rai, Jarablus, and elsewhere (see map 3). The Turkish side has signaled its support for such initiatives through official visits, such as the one undertaken by its interior minister to Al-Rai in December 2021.<sup>72</sup> From Turkey’s perspective, economic stability in northern Syria would not only discourage outmigration, but could also encourage Syrians living in Turkey to return.

If the Syrian-Turkish border west of the Euphrates is an economic artery with bustling crossings, to the east of the river it is a hard border with no traffic. Ever since PYD-affiliated Kurdish militants (who would later form the nucleus of the SDF) took control of a swath of the northeastern border area in the summer of 2012, Turkey has kept this part of the border sealed and has shored up security. Thus, there has been much less cross-border activity, with most of it being informal. The northeast is not completely isolated, however. It is part of northern Syria’s border economy with Turkey through the internal crossings that connect the SDF-controlled area with the Turkish-backed Euphrates Shield canton, the most important example of which is the ‘Aun al-Dadat crossing. Moreover, the SDF-run region is well-connected to regime-held Syria, with about half a dozen official internal crossings and even more smuggling points.

MAP 3  
**Commercial Crossings and Selected Industrial Sites**



That some goods from international or Turkish markets end up in regime-controlled Syria via Bab al-Hawa in Idlib, crossings in the Euphrates Shield area, or SDF-controlled territory illustrates the interconnectivity of these separate regions. One longtime merchant explained that sometimes it is cheaper to import goods to regime-held areas via opposition-controlled areas than from the port of Tartous. Imports from Turkey arrive in Bab al-Hawa, cross into Sarmada at little cost, and then make their way to regime-held areas through internal crossings.<sup>73</sup> Although HTS closed its crossings with the regime in early 2020,<sup>74</sup> mutual trade did not stop. According to the same merchant, despite the higher cost and longer journey, goods from Turkey still made it to regime-held areas.<sup>75</sup> Perhaps more than any other factor, this phenomenon indicates that regions in northern Syria, regardless of who controls them, are interconnected economically and commercially.

## Growing Autonomy, Perennial Instability

Despite the Turkish-backed proliferation of industrial zones and the hype around the phenomenon in opposition circles, most of these projects remain unrealized, high-risk, or small-scale. Even when they become operational, industrial zones are more like a collection of small workshops than full-fledged factories. According to several businessmen, the most important production is that of olive oil, along with plastic, soap, and textiles.<sup>76</sup> In an interview, a senior official in the opposition government revealed that, realistically, such ventures seek to attract a maximum of \$100,000 in capital.<sup>77</sup> One reason for such modest investment is the risk-reward ratio. The clustering of industrial sites in one area makes them an easy target for airstrikes by Russia and the regime, as well as a tempting source of revenue for unruly armed groups.<sup>78</sup> Given these risks, producing locally is not necessarily always more profitable. As one trader put it:

<EXT>In these times of uncertainty, trade is the dominant way of doing business. Buy and sell. If your goods are destroyed or lost, it is manageable. But if the regime strikes your factory, it's gone. Also, importing is often cheaper than producing locally.<sup>79</sup> <EXT>

And it is not just the industrial sector. For example, Russia's ability to block UN-delivered supplies by using its veto power in the United Nations Security Council gives leverage to Moscow—and by extension the Syrian regime—over one of the main sectors of the local economy: humanitarian support.<sup>80</sup> In July 2021, the renewal of cross-border humanitarian aid, which in practice meant the continued flow of UN support to Syria via Bab al-Hawa, became a major issue of contention in the Security Council. The United States and its allies lobbied for its renewal, while Russia threatened to veto the resolution and end cross-border aid, unless its route to opposition areas passed through Damascus. In encroaching on aid distribution, Russia and the regime would have the ability to strike one of the pillars of the northwest's economy. Eventually, a compromise solution was reached between Russia and the United States, and resolution of the issue was postponed until July 2022.

Crucially, it is not just Idlib, but all three border regions that suffer due to their geographic location and their dependence on external powers. They are often caught in between Russia, Turkey, and the Syrian regime. In exchange for Russia not opposing Turkey's Euphrates Shield operation, launched in August 2016, Turkey

withdrew its support from opposition forces in eastern Aleppo, thereby facilitating the regime and Russia's takeover of the area in November–December 2016.<sup>81</sup>

Much of the negotiating of direct relevance to the Syrian-Turkish borderlands concerns the two politico-territorial projects overseen by nonstate actors: HTS in Idlib and the SDF in the northeast. Turkey opposes the SDF, the Syrian regime opposes HTS, and Russia has little use for either. In 2017, in the context of the Astana trilateral meetings between Russia, Turkey, and Iran, an agreement was reached to include Idlib in the so-called de-escalation zones. This ultimately led to the division of the governorate between HTS and Turkish forces—on roughly one side of the M4 highway—and regime, Iranian, and Russian forces on the other side. Such a development gave Moscow and the regime leverage in the northwest, and enabled Ankara to do three things: deploy troops on the frontlines with the Syrian regime, prevent an influx of IDPs into Turkey, and exert some influence over HTS.

Kurdish-administered areas, such as those of the PYD/YPG and SDF, have fallen victim to similar machinations. When Turkey launched its offensive on Afrin in January 2018, it did so with the implicit approval of Russia and the Syrian regime. Russia, besides allowing Turkey to use Syria's airspace, which the Russians control, withdrew those of its forces stationed in Afrin before the offensive began.<sup>82</sup> For its part, the Syrian regime signaled its acquiescence by not mobilizing any of its forces to confront Turkey's military move. YPG officials talked of Russian betrayal and called publicly for Damascus to defend Syrian territory against Turkey.<sup>83</sup> According to some reports, Russia offered to stop the Turkish intervention if the YPG handed Afrin to the regime. The YPG refused.<sup>84</sup>

Afrin was not a one-off affair. In 2019, when Turkey launched Operation Peace Spring against the SDF, the Syrian regime did not intervene—despite requests by the YPG, which leads the SDF, to do just that—and Russia did so only after Turkey had carved out more territory within Syria, from Tel Abyad to Ras al-Ain, 30 kilometers deep.<sup>85</sup> More recently, in April 2021, Russian troops suddenly withdrew from Tel Rifaat (a small enclave north of Aleppo where Afrin's IDPs had congregated after the Turkish intervention in January 2018), exposing that area to Turkish attack. While there was no official explanation from Russia, it is likely that Moscow briefly withdrew its forces in order to pressure the YPG on a number of issues related to trade through internal crossings and the quantity of oil being supplied to the regime.<sup>86</sup>

All sides have pursued a form of demographic engineering. Under Kurdish forces and the Islamic State, several rounds of displacement occurred, adding to the long history of demography-based grievances in the northeast, particularly between Arabs and Kurds. Areas under Turkish-backed opposition forces also witnessed major demographic changes. When Turkish forces took Afrin in January 2018, a large segment of the city's mostly Kurdish population of 320,000 was displaced. According to the UN's Independent International Commission of Inquiry in August 2018, some 140,000 of Afrin's population were registered as IDPs in regime-held Tel Rifaat, Nablus, and Zahra.<sup>87</sup> Those who wound up in Tel Rifaat, which was under opposition control, displaced the local population.<sup>88</sup> Both displacement crises endure. In most of its subsequent reports, the commission has detailed various abuses and crimes committed against ethnic Kurds by Turkish-backed armed groups that were the de facto authorities in the area.<sup>89</sup> Meanwhile, there are reports of non-Kurdish IDPs who fled other parts of Syria having resettled in Afrin.<sup>90</sup>

The Syrian regime has behaved similarly. Once Damascus, with Russian air and Iranian-sponsored ground support, began to regain territory from the opposition in 2016, it repeatedly forced inhabitants to choose between living under its writ or evacuating to HTS-controlled Idlib. More than 200,000 Syrians from various parts of the country have since evacuated to Idlib. By helping turn the northwest into the ultimate destination for evicted Syrians, Damascus has rid itself of unwanted people and simultaneously used them to pressure refugee-weary Turkey, on whose doorstep they are now camped.

Despite statements such as that from the head of the SDF that the era of demographic bartering is over, this is more wishful thinking than reality.<sup>91</sup> Thus far, the only way for the major actors to come to an agreement has been at the expense of local groups such as the SDF and HTS. A deal between the Syrian regime and Russia on one side, and Turkey on the other, could well entail large-scale sacrifices by HTS and the SDF. This would almost certainly lead to major population displacement.

Syria has experienced such displacement in the past. During the formation and consolidation of the border between Kemalist Turkey and French-mandated Syria, a period which lasted about twenty years, a series of trades from its westernmost to its easternmost point took place. This had a disastrous impact on local demographics, at various times displacing Kurds, Arabs, Armenians, and Assyrians, mostly from Turkey to northern Syria. With the Syrian civil war stirring waters that had remained stagnant for eight decades, masses of ordinary people have suffered a similar fate, and the fear is that there is more to come.

This fear is warranted if current negotiating trends and trade-offs continue. This approach will not yield a lasting solution. Resolving the conflict in piecemeal fashion is impossible because, from the easternmost to the westernmost point of the border, it has given rise to a single political-security ecosystem. Only if a comprehensive or “package” deal is reached, one that treats the border area as an indivisible whole when it comes to the political-security dimension and delimits the major players’ zones of influence, will a stable arrangement take shape. It is sobering to note that a deal of this kind may itself cause population displacement, particularly if it entails the mutual sacrifice by the major actors of smaller ones, but at least it would mark the last such episode before the materialization of a long-term *modus vivendi*.

## Conclusion

What began as a conflict in Syria’s heartland between the regime and its opponents over political and territorial control has evolved into a conflict over the northern arc—Syria’s borderlands with Turkey. Demographics, economy, and security are all part of the border conflict, and they tie together the fate of the three border regions: Idlib, the Turkish-backed cantons, and the SDF-run area. In the years to come, this border conflict will define not only the fate of Syria as a political entity but also serve to outline a larger geostrategic framework. A likely scenario for the foreseeable future is that the border regions will remain a bargaining chip in the negotiating process between the major powers: the Syrian regime, Turkey, and Russia.

This negotiating process will not reach a conclusion anytime soon, in large part because Damascus has not accepted the new reality on its northern border and remains stubbornly committed to returning all three border regions to its fold, an approach that Ankara seems to view as both unrealistic and undesirable. Another complicating factor is that, since the withdrawal of U.S. forces from most of the territory east of the Euphrates in 2019, Russia has expanded its presence and is trying to secure a greater say in Syria's future. This has at times led to friction between Russia and Syria, particularly over where Russian influence ends and that of Iran begins.

Until these two issues are resolved, the negotiations will continue to start and stall. Moreover, the northern arc will remain a simmering source of conflict between the belligerent parties, with each trying to strengthen its position on the ground at the expense of the others. Meanwhile, the socioeconomic order that has emerged during the war in the three border regions will persist, but will also fail to achieve any sort of institutionalization as a system.

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