

*Lebanon
Jordan
Turkey
Iraq
Egypt*



COUNTRIES HOSTING SYRIAN REFUGEES

Solidarity and Burden-Sharing

Background papers
for the High Level Segment

PROVISIONAL RELEASE
SEPTEMBER 2013

Foreword

THE CONFLICT IN SYRIA has caused the worst humanitarian crisis in nearly two decades, and the entire region is buckling under its impact. The scale and pace of displacement within the country and the flight of refugees across borders have mirrored the patterns and rising intensity of the violence. An estimated 6.5 million – almost one-third of Syria's pre-conflict population – have been uprooted. There are an estimated 4.25 million persons internally displaced within the country.

Lebanon, Jordan, Turkey, Iraq and Egypt have been sheltering an unrelenting flood of Syrian refugees, saving lives and providing protection. They have been generous hosts to their neighbors, but all of them are stretched to their limits.

Together, these five countries now host more than 2.1 million registered Syrian refugees. This does not even include the hundreds of thousands more who have not come forward for registration, or Syrians who had already been living in these countries as economic migrants.

The impact of the refugee influx upon the societies, economies and communities of the host countries is immense. It further compounds already dire economic consequences created by the conflict: consequences including a loss of foreign investment, reduced trade flows and cross-border economic and commercial exchanges, as well as drastically diminished tourism revenues – not to mention the security risk of a war across the border. The pressure on local authorities and host communities is felt heavily in all areas of everyday life – from education and health to housing, water and electricity supply. Across the region, employment opportunities, salaries and price levels have been affected, leaving refugees and local families, alongside each other, struggling to make ends meet.

The country chapters in this background document provide examples of the impact that the situation in Syria and the refugee influx are having on the economies and societies of the refugee hosting countries.



UNHCR / S. HOPPER

This crisis passed a point beyond which only humanitarian assistance to displaced people is required. Its consequences pose fundamental, structural problems for the countries of the region, and international solidarity with refugee hosting states and communities is now a must. This has to include emergency development support – structural assistance – to the host countries, most importantly in health, education, housing, water and energy supply.

Some of the countries affected, who face enormous macro-economic challenges, may require direct budget support. Many local communities hosting Syrian refugees need massive longer-term development investment, as the challenges they face are only likely to grow in the future. Bilateral development programmes and international financial institutions should explore the possibility of making these countries priority partners.

International solidarity must also include burden-sharing in hosting the refugees, such as resettlement and other forms of providing protection to Syrians in third countries. Making available opportunities for family reunification is another key measure which I encourage States to consider.

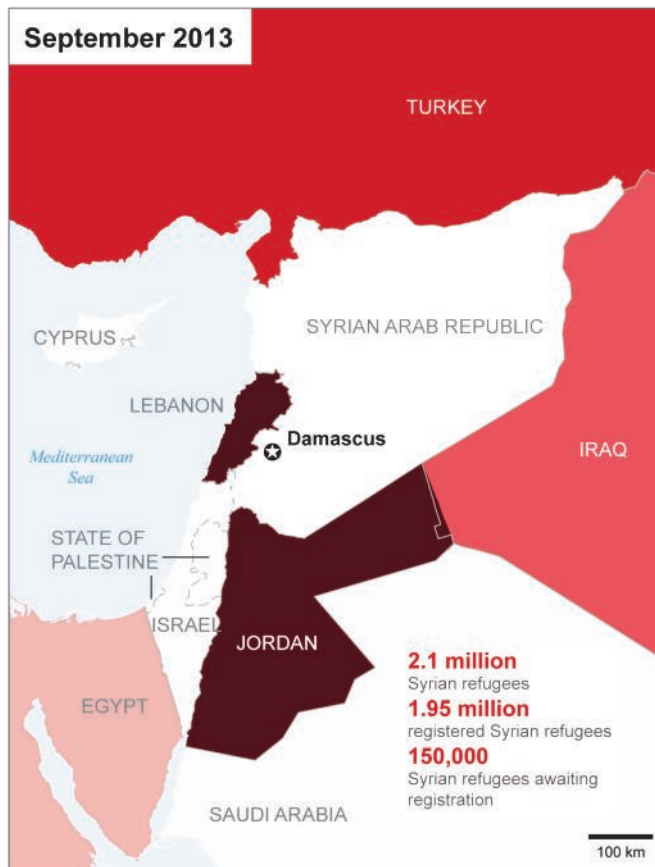
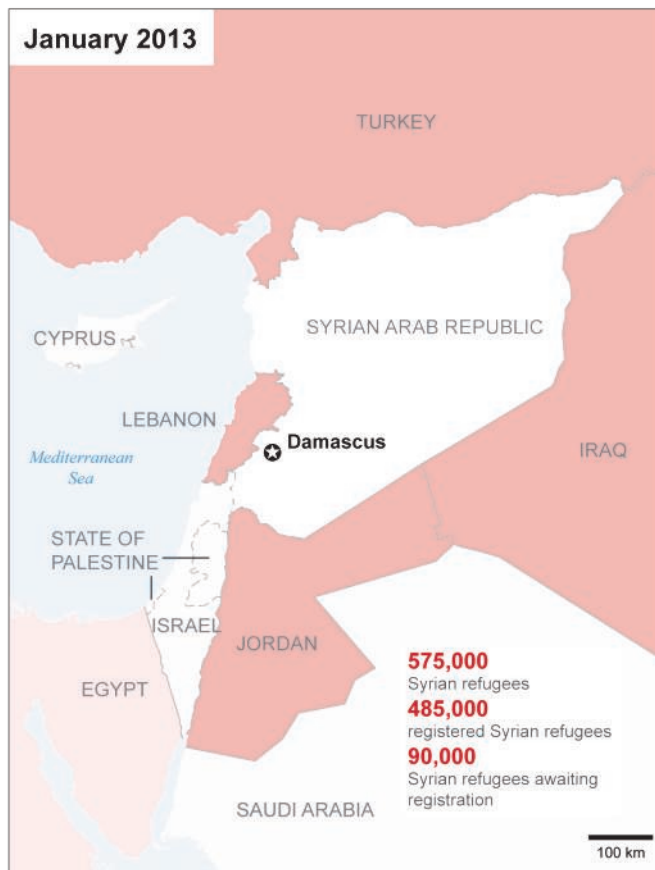
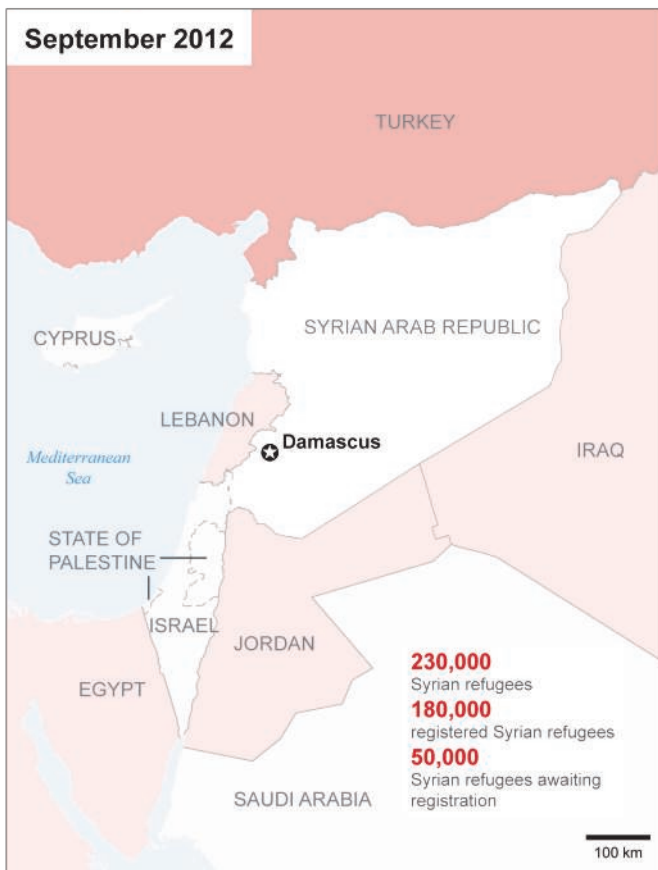
I call on all countries, particularly in Europe and the extended Middle East, to allow people fleeing Syria to access asylum at their borders and to enjoy a sufficient quality of protection. The burden of sheltering millions of Syrian refugees is far too heavy to be borne by only the neighboring countries. The international community must put in place more – and more robust – measures of sharing that burden.

This conflict has to stop, and I can only renew here my appeal for all of the parties, and those with the power to influence them, to come together and find a political solution. Only this will put an end to the suffering of Syrians and the gradual destabilization of neighboring countries.

A handwritten signature in black ink, which appears to read 'António Guterres'. The signature is written in a cursive style and is positioned above the printed name and title.

António Guterres
United Nations High Commissioner for Refugees

Influx of Refugees to Neighboring Countries since September 2012



The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Printing date: 23 Sep 2013 Sources: UNHCR, UNRWA, AFAD Feedback: mapping@unhcr.org

Syrian Refugees in Egypt, Iraq, Jordan, Lebanon and Turkey

(as of 23 September 2013)

2.1 million

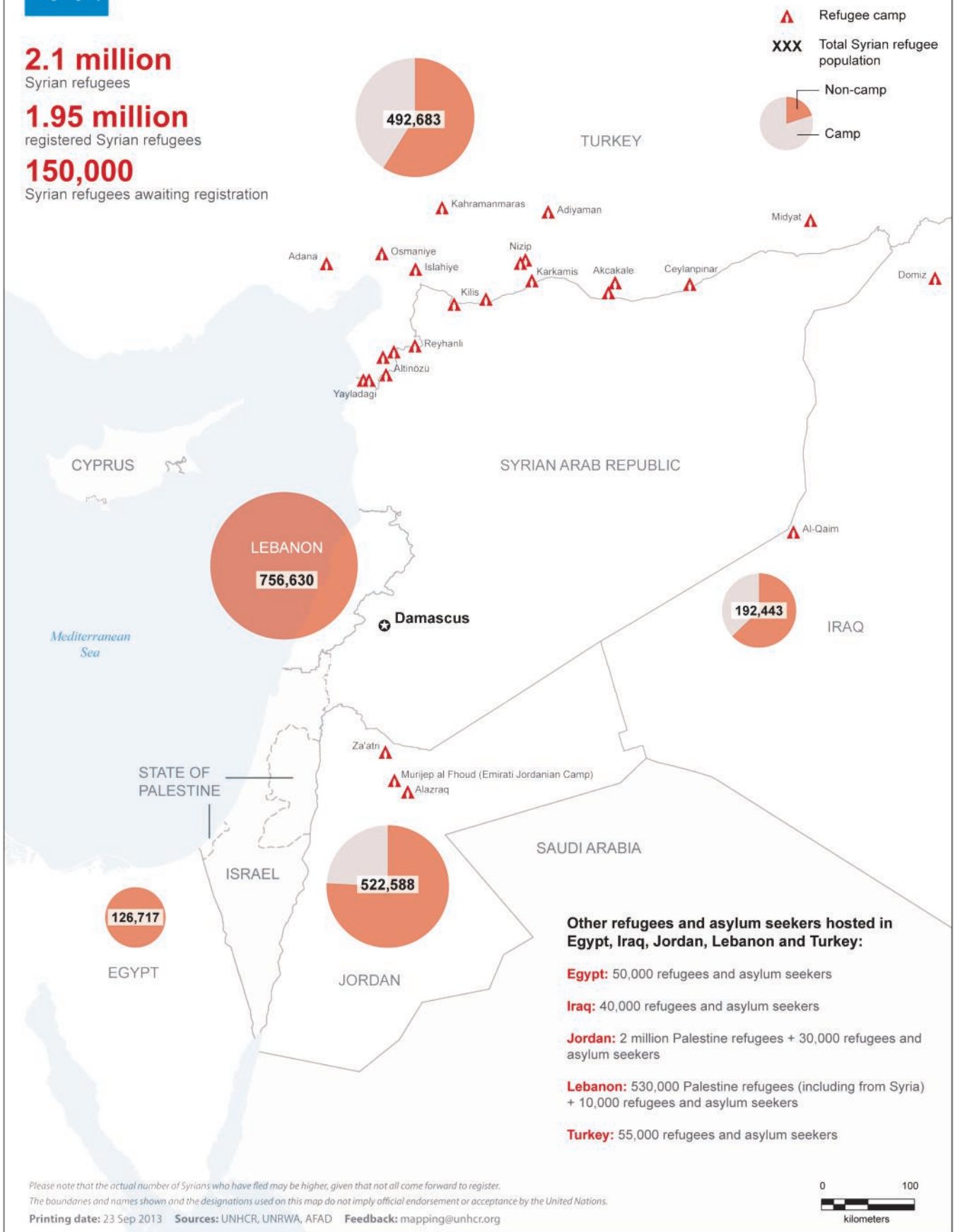
Syrian refugees

1.95 million

registered Syrian refugees

150,000

Syrian refugees awaiting registration



Lebanon

Introduction

Lebanon has suffered far-reaching consequences as a result of the conflict in the Syrian Arab Republic. The country's long-standing and deep-rooted historic, economic, and social links to its neighbour have rendered it particularly susceptible to the impact of the spreading violence. With over 1.2 million Syrian refugees anticipated to arrive in the country by the end of 2013 – over 60 per cent of the region's 2.1 million total - Lebanon's humanitarian solidarity has been exemplary.⁽¹⁾ Yet the growing cost of the Syrian conflict to Lebanon's economy and stability far exceeds the scope of relief assistance. The latest assessment by the World Bank estimates that the total cost of the crisis to Lebanon, through the end of 2014, will reach US\$ 7.5 billion; this includes neither the serious impact on employment, nor the demographic and political pressures exerted upon the country's stability. The unprecedented scale and complexity of the crisis require more comprehensive remedies to address the huge challenges it poses to Lebanon's economy and society.

Background and Context

As of early September 2013, over 914,000 persons had entered Lebanon from the Syrian Arab Republic, of whom more than 760,000 have been registered or are awaiting registration by UNHCR. This figure represents a 21 per cent increase in Lebanon's pre-conflict population, the largest proportionate increase experienced by any of the refugee-affected countries in the region. It includes 47,000 Palestinians formerly residing in the Syrian Arab Republic who were recently confirmed by UNRWA to be in Lebanon, as well as 42,000 returning Lebanese. The dramatic increase in population represents additional competition for jobs, places huge pressures on service delivery, and poses critical challenges to Lebanon's fragile political and sectarian balance.⁽²⁾

The Government of Lebanon's response to the immediate humanitarian requirements of the situation has been guided by the Office of the Prime Minister. The Ministry of Social Affairs (MoSA), appointed by the Government as coordinator for the humanitarian response to the Syrian crisis has established a response unit and dedicated 27 centres across the country to provide direct contact with host communities and refugees. As of 27 September,

some US\$ 529 million have been committed by donors to support humanitarian assistance programmes for refugees in Lebanon.⁽³⁾ These funds have supported a substantial operational response, including the registration of hundreds of thousands of refugees and the delivery of essential protection and material assistance (food, shelter, health, water and sanitation).

The refugee presence and composition

Initially modest, the level of refugee arrivals in Lebanon increased markedly during 2012-2013. By the end of 2011, only 5,000 refugees had been registered by UNHCR; one year later, the number of registered refugees surpassed 129,000. In 2013, monthly registration totals have risen even more sharply, averaging over 60,000 a month. As of late September, the number of refugees registered or awaiting registration has reached 764,000⁽⁴⁾, a figure approximating 18 per cent of the Lebanese population. Additional arrivals from the Syrian Arab Republic include Palestinian refugees (47,000), returning Lebanese migrants, and Syrians unwilling or unable to register with UNHCR.

1. *Draft Economic and Social Impact Assessment report, World Bank/United Nations, September 2013*

2. *Ibid*

3. *Funds not recorded against the official Regional Response Plan appeals are not included in this figure*

4. *UNHCR Lebanon registration data*



Families wait to register at the UNHCR registration center in Zahle, Lebanon.

The vast majority of Syrian refugees arriving in Lebanon originate from the central and western governorates of Homs, Aleppo, Hama, Idleb and rural Damascus. The remaining 20 per cent have come from Damascus itself, from Dara in the south, and from the north-eastern governorates of Hassakah, Arraqa and Deir-Az-Zour. Palestinian refugees formerly residing in the Syrian Arab Republic have come primarily from Damascus and surrounding rural areas.⁽⁵⁾

A particular feature of the Syrian refugee crisis in Lebanon is the absence of camps and the dispersal of the refugee population across 1,500 locations throughout the country. The majority – 65 per cent – have settled in the north and north-east (Bekaa) governorates, traditional destinations for Syrian migrant workers, notably in the agricultural sector. Growing numbers are now settling in Mount Lebanon, the south, and Beirut. Many refugees have been hosted by Lebanese families who shared their homes and resources. This pattern is attributable to proximity to the Syrian border, as well as to traditional cross-border ties and relations. The large number of locations also reflects the Government of Lebanon's opposition to the establishment of refugee camps.

As the number of Syrian refugees has grown, not only local absorption capacities, but also municipal and humanitarian response capacities, have come under increasing

strain. Accommodation within individual family households has proved inadequate and unsustainable. The majority of refugees have found temporary solutions by renting rooms and apartments. However, these options are not affordable for many families, such that a growing number are establishing themselves in informal settlements.

Future trends

Projecting current trends, the Government of Lebanon and UNHCR anticipate a total of 1 million Syrians in Lebanon by year-end, a figure that would represent 24 per cent of Lebanon's pre-crisis population. To that would be added an additional 47,000 Palestinian refugees from the Syrian Arab Republic and an estimated 49,000 returning Lebanese.⁽⁶⁾

For 2014, two scenarios have been envisaged: one in which the current level of conflict and its associated effects on displacement in Syria eases (low probability), and one in which it intensifies (high probability).⁽⁷⁾ Based on these scenarios, the total influx from the Syrian Arab Republic could reach between 1.56 million and 2.28 million refugees by the end of 2014. These estimates includes refugees registered or awaiting registration with UNHCR, those unwilling to register, returning Lebanese and Palestinian refugees from the Syrian Arab Republic.

5. *Ibid*

6. Draft Economic and Social Impact Assessment Report, *World Bank/United Nations, September 2013*

7. *A sudden and dramatic increase in the conflict would imply even higher numbers. It is assumed that such a situation be effectively addressed by a further expansion of emergency humanitarian assistance under a regional contingency plan.*

Economic and social impact of the conflict and the refugee crisis⁸⁾

The conflict in the Syrian Arab Republic shows no sign of abating. Even in the event of an end to the violence in the near-term, the recovery and reconstruction process will likely take many years. Moreover, international experience demonstrates that large scale displacement often results in protracted refugee situations. Some refugees may therefore remain in Lebanon for many years. The magnitude of their presence in Lebanon already has had a considerable impact on the economic and social welfare of local populations. What makes Lebanon's situation exceptional is the considerable macro-economic impact of the Syrian conflict, and the associated costs of absorbing such a proportionately large refugee population among local communities.

The recently concluded Economic and Social Impact Assessment (ESIA) study, undertaken by the World Bank and the United Nations at the request of the Government of Lebanon, projects the macro-economic and fiscal impact sustained since the onset of violence in 2011. It also projects detailed costs across key sectors caused by the increase in the country's population due to additional refugee arrivals anticipated by the end of 2014.

The macro-economic impact of the Syrian conflict upon Lebanon has been significant and negative. In summary terms, the ESIA estimated that over the 2012-2014 period, the conflict may cut real GDP growth of Lebanon by 2.9 percentage points each year, entailing large losses in terms of wages, profits, taxes or private consumption and investment. Accordingly, there would be a total loss of US\$ 7.5 billion in economic activity, a loss in government revenue of US\$ 1.6 billion, and an increase in government expenditure of US\$ 1.2 billion. The largest impact is expected to stem from the insecurity and uncertainty generated by the conflict, which negatively affects investor and consumer confidence and lowers economic activity.

Trade and tourism have traditionally contributed significantly to the Lebanese economy. The conflict in Syria caused sharp reductions in trade flows in the first half of 2013, affecting both bilateral trade and the sizeable portion of Lebanon's exports traditionally transiting through Syria. Tourist arrivals have steadily declined, due to concerns about spill-over effects of the conflict upon stability within Lebanon.

The shock of the conflict has put Lebanon's public finances under increasing pressure. As referenced above, revenue has declined due to lower economic activity whilst expenditure has grown sharply because of increased de-

mand on public services from the large refugee population. In combination, this is expected, cumulatively, to widen Lebanon's fiscal deficit by an estimated US\$ 2.7 billion over the period 2012-2014.

Unemployment has increased from 8.1 per cent in 2010 to 10.6 per cent in 2012, according to UN Economic and Social Commission for West Asia (ESCWA) July 2013 figures; moreover, the rate is expected to rise, as the supply of unskilled labour in the youth age group is likely to increase by 120 per cent, according to the ESIA.

Human and social development

The conflict and the refugee presence have materially affected livelihoods, poverty, and health conditions among the Lebanese population. The ESIA has estimated that by the end of 2014, an additional 170,000 Lebanese since 2011, will be pushed into poverty. An additional 230,000 - 320,000 persons, especially unskilled youth, are predicted to become unemployed by the end of 2014. Social service provision has been severely challenged by the arrival of the Syrian refugees, with health, education, and social safety nets all being affected.

Within the health sector, there has been a rise in communicable and other diseases and infections following the influx of refugees, spiking a surge in demand for health care services and revealing weaknesses in the health system, including inadequate capacity in primary health care, in numbers of sufficient health workers and shortages of medicines. Economically disadvantaged Lebanese have encountered problems in accessing health care services due to over-crowding in both public and private facilities and higher costs.

The registered Syrian refugee population includes 210,000 children of school age. This figure could swell to over 300,000 by the end of 2013, matching the number of Lebanese children in public schools within the country. This number could reach up to 500,000 by the end of 2014.. Since the beginning of the conflict, approximately 40,000 Syrian children have been permitted to enrol in Lebanese public schools. This figure is expected to rise, generating additional costs for the Ministry of Education and Higher Education in 2013-14. Notably, it does not include the 60 - 65 per cent of children who are not expected to enrol in formal education, who will incur additional costs for non-formal and out-of-school education.

The arrival of Syrian refugees has resulted in a major increase in the labour force in Lebanon, adding to a substantial

8. Data in this section is drawn from World Bank Lebanon Economic Monitor Spring 2013 and Draft Economic and Social Impact Assessment report, World Bank/United Nations, September 2013.

number of migrant workers already in the country. Short term effects include a decrease in wages and increase in high levels of unemployment among Lebanese in many of the poorest areas of the country. This situation may improve in the medium term as the refugee presence will likely increase overall demand. Yet, due to the decline in economic activity, there will be an oversize labour force in proportion to the available employment and job opportunities. The impact will be most strongly felt among lower skilled jobs and will most dramatically affect the young. It is anticipated that informal employment will grow substantially.

Prior to the Syrian conflict, the incidence of poverty in Lebanon was significant and regional disparities in living conditions were acute. Nearly 1 million Lebanese were estimated to be poor (living on less than US\$ 4 per day). Social protection was under-developed, and delivery was thought to be fragmented and poorly-targeted. The capacities of the Ministry of Social Affairs, notably the Social Development Centres at the level of municipalities, have been placed under additional pressure due to the reported 40 per cent increase in demand for health and social services from Syrian refugees. It is estimated that the refugee influx could push some 170,000 Lebanese into poverty.

In more than 133 locations, Syrian refugees already account for more than 30 per cent of the local population, predominantly in the north and north-east (Bekaa). There is a strong coincidence between large refugee populations and documented levels of poverty among Lebanese communities. The resultant overcrowding, exhaustion of basic services and competition for jobs has led to a deterioration of social cohesion and inter-communal relations. Counter-acting negative social and economic impacts at community level will require improving access to services and promoting livelihoods.

Concluding observations

The economic and social impact of the Syrian conflict and refugee crisis upon Lebanon has been huge. The effects have been far reaching, and they will be felt for many years to come, especially with no end to the violence in sight. To date, the generosity, solidarity and welcoming of refugees by the Government and people of Lebanon has been exemplary. In partnership with international and local humanitarian organizations, the Government has mounted an effective relief effort to address immediate challenges. Yet, there will be a continuing need for support to address pressing vulnerabilities and protection needs through 2014 and beyond.

From the assessment of the impact of the conflict and the refugee influx, it is evident that the enormous economic and social costs to Lebanon and its people cannot be addressed by conventional emergency relief measures. The stress and pressures are all too evident, and the need for remedies has become more urgent. The negative macro-economic and fiscal impact on growth and on government expenditure is expected to increase. Human and social development indicators and the rapidly growing demands on under-capacitated service delivery are of great concern. Pressures on critical infrastructure are rising. In sum, the essential stability of the country and social cohesion between the Lebanese and Syrian communities is increasingly coming under question; their protection requires an altogether more comprehensive response combining humanitarian and development approaches.

Lebanon's physical infrastructure has also been stressed by the refugee influx, especially at the local level, where poorly resourced municipalities have struggled to maintain services for water, sanitation and solid waste management. The additional demand for electricity and increased use of transport networks have added to the Government's maintenance and investment costs.

Assistance framework

Assistance to Lebanon has so far been mobilized primarily within the framework of successive UNHCR-led Regional Response Plans (RRPs). They have had the full support of the Government and relevant Ministries and have been coordinated by the Ministry of Social Affairs, in close cooperation with the international community. Immediate requirements of the Government of Lebanon have been included within the RRP framework. Planning has been organized through a range of sectoral working groups covering key concerns – food, water and sanitation, health, education, shelter, protection and livelihoods. At the local level, assistance has been delivered through local government departments, municipalities and non-government and community-based organizations.

The completed ESIA study for Lebanon provides the analytical baseline against which a more comprehensive development response must now be built. In collaboration with its international partners, the Government will lead the next phase to identify policy measures and priority investment programmes and projects to address critical needs in relevant sectors. It will need to decide upon how best to integrate development and humanitarian responses within one or separate - but complementary - frameworks in order to coordinate and oversee planning and implementation processes.



UNHCR / O. LABAN-MATTEI

Syrian civilians wait in a Jordanian military camp near the Syria/Jordan border after they crossed the border.

Jordan

Introduction

The events unfolding in the Syrian Arab Republic over the last two years have adversely affected stability in the region. Hardest hit have been the country's immediate neighbours. Since the beginning of the crisis in March 2011, Jordan has maintained an open border policy, and Syrians have, for the most part, found shelter in host communities. The influx of refugees into Jordan has reached a critical level, requiring a targeted response to address not only the humanitarian needs but also the longer-term consequences of the crisis.

As Syrians in urban areas are granted access to public services, including health, education, shelter, water and electricity, the pressure on scarce national resources and subsidized services has dramatically increased. The families and communities hosting vulnerable Syrian refugees face significant challenges, as does the Jordanian Government. Meeting these challenges will depend on increased support from the international community.

Syrian refugees in Jordan

The pace of refugee arrivals into Jordan has grown dramatically since 2012. By the end of 2011, only 5,000 refugees had been registered by UNHCR. Official statistics indicate that 62,000 refugees entered Jordan during the first quarter of 2012. In the same period in 2013, 206,000 refugees arrived. The number of Syrians seek-

ing refuge in Jordan is now estimated to be more than 600,000. More than 525,000 have been registered by UNHCR. This is more than one-quarter of all Syrians refugees registered abroad. Approximately 130,000 of the Syrian refugees in Jordan are in camps. The remainder are in urban areas.

As a result of the scale and speed of the influx, Syrian refugees now represent 10 per cent of the population of Jordan. Just over half are female. The largest proportion, about 56 per cent, come from Dar'a. The next leading places of origin are Homs (14.6 per cent) and the outskirts of Damascus (8.9 per cent). In Jordan, the main concentrations of refugees are in Amman (23.7 per cent), Irbid (21.1 per cent) and Mafraq (10.5 per cent). Absorption capacity in urban areas is rapidly being exhausted and in some areas may already have been exhausted. Unlike previous refugee influxes into Jordan, the majority of Syrians who have come to Jordan have limited education and limited resources. As a result, they have tended to settle in low-income areas, where services already were over-subscribed and work opportunities too few.

The early arrival of refugees from the Syrian Arab Republic primarily affected border areas and governorates in the north and north-west of the country, traditional destinations for Syrian migrant workers, notably in the agricultural sector. Pre-existing cross-border economic, commercial, and social ties between Jordanian and Syrian communities eased the initial reception of refugees. As the number of Syrian refugees grew, local absorption capacities and response capabilities of municipalities and humanitarian aid providers have come under increasing strain. In Mafraq, for example, the number of refugees already amount to almost 60 per cent of the pre-conflict population. Moreover, except for Amman, the refugees are aggregated in areas of the country where absolute poverty rates among Jordanians are among the highest in the country.

Economic and social impact of the conflict and the refugee crisis

The conflict in the Syrian Arab Republic shows no sign of abating. Even in the event of an end to the violence in the near-term, the recovery and reconstruction process will likely take many years. Moreover, international experience demonstrates that large scale displacement often results in protracted refugee situations. Some refugees may therefore remain in Jordan for many years. The scale of their presence in Jordan has already had a considerable impact on the economic and social welfare of local populations.

Jordan's economy is one of the smallest in the Middle East. The country has limited natural resources. It imports nearly all of its energy (96 per cent, consuming about 20 per cent of GDP), as well as large proportions of its water and grain. The economy depends heavily on expatriate worker remittances, tourism, and foreign direct investments and grants.

Over the past several years, Jordan has confronted multiple external shocks. High prices for imported oil and food, repeated interruptions of natural gas flow from Egypt, and sluggish foreign direct investment flows have combined with the growing unrest in the Syrian Arab Republic to produce a profoundly negative impact on the economy, including increased inflation and a sharp deterioration in its fiscal and external balances. Stimulating growth while simultaneously lowering the deficit has become Jordan's main economic challenge.

Recent economic assessments have observed that the Syrian conflict and its regional repercussions have had an impact on Jordan, particularly due to the increased fiscal costs incurred in key sectors following the arrival of refugees. With respect to the refugee presence, government finances and expenditure have come under increased pressure. The surge in population has exerted tremendous pressure upon the ability of local authorities to maintain service delivery, has resulted in over-crowded labour markets, and has generated considerable additional public expenditure. Since Syrian refugees in urban areas (who account for three-quarters of the refugee population) are granted access to public services (including health, education, water and electricity), there has been a greater demand for and use of public services by the refugees and increased consumption of subsidized commodities.

Over the last decade, the share of poor households in Jordan declined from 32 per cent to 14.9 per cent, a considerable progress which could be affected by the challenges triggered by the current crisis. The majority of poor households are to be found in the northern governorates hosting refugees. Part of the Government's efforts at social protection of lower income Jordanian families involves the provision of subsidized items such as bread, electricity, water and household gas. The provision of these subsidized items to Syrian refugees in the country constitutes a significant and unforeseen burden for the Jordanian Government. The estimated cost to date to the treasury for bread, electricity, water and gas is US\$ 183 million.

Approximately one-fifth of Syrian refugees in Jordan are of primary school age (*i.e.*, 5-11 years). Recent statistics indicate that 78,531 Syrian children are enrolled in schools in Jordan, implying that approximately 70,000 school-aged Syrian refugee children are not in school. Classroom space, especially in some of the northern Governorates, is constrained, requiring a two-shift system to be operated. The number of schools required to redress this gap is 120, at an estimated cost of USD\$ 135 million. Secondary school opportunities are even fewer and the costs even greater. Meeting the needs of the nearly 79,000 secondary school students in Jordan would require an additional USD\$ 81 million.



UNHCR / B. SOKOL

Trucks pulling “caravans” or pre-fabricated living structures drive down a newly-constructed tarmac road through the center of Za’atari refugee camp, Jordan.

In the health sector, data from the Ministry of Health indicates that there has been a rise in communicable and other diseases and infections consequent to the different vulnerabilities and morbidity patterns among the refugees. Available indicators show that there has been an accompanying surge in demand for health care from refugees at Ministry of Health facilities. The sector has therefore faced significant shortages in medicines due to the higher demand for drugs and vaccines, and considerable pressure is being placed on health personnel due to the need for health services.

The Ministry of Health estimates that the cost of providing health services will range between USD\$ 206 (for primary) and USD\$ 655 (for tertiary) per person. The total average cost per person per year will be about USD\$ 874. Based on established medical attention data (indicating about one-third of Syrian refugees require health services), the estimated cost to Jordan will be USD\$ 168 million. This does not include an estimated US\$ 84 million cost for expanding health facilities and USD\$ 58 million for purchasing medicines and vaccines.

As well as the impact on health and education, steep rises are reported in rental rates for accommodation due to the arrival of massive numbers of Syrian refugees in some areas. In Mafraq, for example, average rents have reportedly increased from 50 JOD/month to 150-200 JOD. Some Jordanians have reported that young people have been forced to delay marriages as they are unable to find affordable accommodation.

The Ministry of Labour has highlighted concerns over the increased number of job seekers in many of Jordan’s northern cities. The arrival of Syrian refugees has resulted in a major increase in the labour force, in addition to a substantial number of migrant workers already in the country. As many as 160,000 Syrian refugees may be working in Jordan, primarily in the construction, agriculture and services sectors. Since the Syrians are largely unable to secure jobs in public service or in the formal private sector, the impact is felt most acutely in the informal labour market. The immediate consequences of a large increase in additional, unskilled labour have been declining wages and increasing levels of unemployment (estimated at 15 per cent pre-conflict), especially among the low skilled and the young.

Providing water and wastewater services for an additional 600,000 people also poses challenges, particularly since the existing systems and infrastructure were in many places already stretched. The aquifers in the area of the camps are at risk if steps are not undertaken to avoid pollution. The water infrastructure in the northern governorates is not able to withstand the significant pressures resulting from the additional population.

Al Za’atari Camp currently shelters approximately 130,000 refugees. It is anticipated that Al-Azraq Camp may shelter approximately 55,000 refugees by the end of November 2013 and approximately 130,000 by May 2014, based on an average daily influx of 500 refugees. Wastewater from both camps needs to be managed through connection to wastewater treatment. Additionally, there are approximately 110,000 inhabitants (as many as

one-third of whom may be refugees) hosted in communities neighboring the camps. The cost of hauling wastewater from these neighboring communities to a designated wastewater treatment plant is very high, often resulting in environmentally damaging dumping occurring in isolated *wadis*.

Al Za'atari and Al Azraq Camps both lack nearby sewerage management sites. Sewerage from Al Za'atari is currently being hauled to Al Akaidar Waste Water Treatment Plant (WWTP) but Al Akaidar is already overloaded. If other solutions for wastewater treatment are not found, the newly planned Al Azraq camp will need its wastewater to be hauled to Al Akaidar or Ain Ghazal WWTPs. If Al Akaidar continues to be used, it will require significant rehabilitation and upgrading. Both WWTPs are reaching their full capacity or are not designed for the significantly more concentrated wastewater loads. The estimated cost of meeting the most pressing wastewater needs is USD\$ 40 million.

In terms of potable water, consumption by Syrian refugees has increased the pressure on existing water stations, including affecting the availability of water for citizens in Zarqa, Irbid, and Mafraq. There is an urgent need to finance and implement projects in the water sector in 2013, at an estimated total cost of USD\$ 160 million. This is in addition to the estimated recurrent costs of USD\$ 62 million.

Municipalities in Jordan provide a number of infrastructural and other services used by Syrian refugees. Pressures on the municipalities have grown as a result of the influx, particularly in Mafraq, Irbid, Ajloun, Zarqa, and Jerash governorates. The estimated cost to provide needed services (roads, lights, spraying against insects) is USD\$ 176 million, plus a further USD\$ 40 million for other areas.

A significant increase in electricity generation capacity is required to cover the additional demand from the Syrian refugee population. It is estimated that US\$ 110 million is required to construct a gas turbine with the adequate megawatt capacity in the north. More generally, the capital in-

vestment to meet additional demand is estimated at USD\$ 338 million. Furthermore, the cost of providing the whole site of Za'atari Camp with sufficient power supply is estimated at USD\$ 69 million.

Assistance framework

Assistance to Jordan has so far been mobilized primarily within the framework of successive UNHCR-led Regional Response Plans (RRPs). They have had the full support of the Government and different Ministries, coordinated by the Ministry of Planning and International Cooperation (MoPIC) in close cooperation with the international community. Some of the Government's immediate requirements have also been included within the RRP framework. Planning has been organized through a range of sectoral working groups covering key concerns, including food, water and sanitation, health, education, shelter and protection. At the local level, assistance has been delivered through local government departments, municipalities and non-government and community based organizations.

In collaboration with its international partners, the Government will lead the next phase to identify policy measures and priority investment programmes and projects to address critical needs in the different sectors. The recent establishment and endorsement of the Host Community Support Platform (HCSP), to be chaired by MoPIC with the participation of line Ministries (Labour, Municipality Affairs, Health, Education, Water and Irrigation) as well as the United Nations agencies and donors, is an important institutional development to bridge humanitarian and development efforts. The planned needs assessments under the aegis of the HCSP in many of the sectors outlined above will assist with the development of detailed investment proposals. They will need to feed into a resource mobilization mechanism addressing longer term requirements and a complementary arrangement with existing humanitarian operational and planning frameworks put in place.

Concluding observations

The dynamics of the influx of Syrian refugees into Jordan remain highly unpredictable, but the present signs indicate a deteriorating situation. Jordan's continuing ability to provide a minimum level of services to refugees and local communities without jeopardizing its broader economic and development objectives depends on future international solidarity. Both the Government of Jordan and international agencies and donors need to be prepared to provide the support required for a humanitarian crisis of this magnitude. A much greater mobilization and coordination of both humanitarian and development partners is required to assist host communities in coping with the impact of the influx of Syrian refugees. The US\$ 251 million expended by the Government of Jordan to host 300,000 Syrian refugees in 2012 is likely to rise to USD\$ 1.7 billion for the significantly increased number of refugees it is hosting in 2013. This figure does not include the cost of establishing and running the refugee camps.

Turkey

Introduction

Turkey has generously extended protection and assistance to Syrian refugees since the beginning of the conflict. From the first arrivals in late April 2011, the number of refugee arrivals began increasing significantly in June 2011; by October of that year, the Government declared that a temporary protection regime would take effect for all Syrians and Palestinians (from Syria) in Turkey.⁽¹⁾ The number of Syrians seeking protection in Turkey today has risen to more than 500,000.

The response to the Syrian refugee crisis has been led by the Prime Minister's Disaster and Emergency Management Presidency (AFAD), in collaboration with the Turkish Red Crescent Society and other national as well as international partners. Turkey has, to date, spent at least USD\$ 2 billion to protect and assist the refugees, and needs are growing, especially in urban and rural areas outside of the camps. Critical support is necessary, particularly financial assistance for the refugees, as well as for shelter, education and health.

The Refugee Presence and Composition

The majority of Syrian refugees are concentrated along the northern Syrian border in the southern Turkish provinces of Gaziantep (27 per cent), Sanliurfa (21 per cent), Hatay (15 per cent) and Kilis (11 per cent). Nearly 60 per cent are living in host communities with Turkish relatives or are residing independently in cities. The remainder – 200,000 refugees – are living in 21 camps, established across 10 provinces, where they receive shelter, food, health, education, security and other services. While the number of refugees living in camps has increased steadily, the non-camp population has risen exponentially over the past six months, from 41,000 registered refugees in March to over 284,000 registered as of September 2013. These figures do not include Syrians who have not yet sought registration. With thousands of non-camp refugees in the process of registration, the current number of Syrian refugees in Turkey is over 500,000 persons.

Of the registered refugees in camps, 54 per cent are children and 20 per cent are men between 18 and 59 years of age. While a comprehensive demographic profile is not yet available, current information indicates that the refugees represent all major religious and ethnic groupings in Syrian society.

Future trends

Any deterioration of the security situation inside the Syrian Arab Republic will result in Turkey receiving significant numbers of new refugees seeking protection and assistance. The Government is preparing for further influxes that could double the number of refugees – up to one mil-

lion – in the near future. It will not be possible to establish new camps to accommodate these numbers. The Government will continue to give food and accommodation support to new arrivals, but the scope of that support will increasingly depend on the generosity of the international community.

Another trend is the growing issue of onward migration of Syrians from Turkey. A number of Syrians who have been granted temporary protection in Turkey have moved onwards to other destinations, including the EU, by sea and road.

Economic and social impact of the conflict and the refugee crisis

Despite a steady rise in the number of camps established to accommodate them, only an estimated forty per cent of Syrian refugees in Turkey actually reside in camps. Finding ways to shelter and assist the 300,000 outside camps, and the communities in which they reside, is a major challenge.

Turkey has borne an estimated 95 per cent of the cost of responding to the refugee crisis. As of September 2013, the Turkish State has invested USD\$ 2 billion in direct support to the refugees. Of the USD\$ 372 million appealed for by Turkey in the UNHCR-led Regional Response Plan 5 (RRP5), only 26 per cent (US\$ 95 million) has been funded. If the trends identified in the RRP5 hold true, the number of Syrian refugees on its territory could double by early 2014,

¹ In light of the temporary protection regime, these refugees fleeing Syria do not need to access refugee status determination by UNHCR under its mandate.



UNHCR / B. SOKOL

A UNHCR staff member assists a young Syrian refugee with his classwork in Adiyaman Refugee Camp, Gaziantep Province.

posing a serious challenge to Turkey as a host country. While a willing and generous host, Turkey should not continue to bear so great a proportion of this burden.

The conflict in the Syrian Arab Republic has also negatively affected the Turkish economy and development projects. Turkey has been one of the main foreign investors in the Syrian Arab Republic, with approximately USD\$ 260 million invested in 2011. Many joint investments, including some water infrastructure projects, have been indefinitely postponed.

Likewise, the volume of trade has fallen precipitously, from USD\$ 2.5 billion (2010) and USD\$ 2.1 billion (2011) to only USD\$ 565.4 million last year. After the Free Trade Agreement between the Syrian Arab Republic and Turkey came into effect in January 2007, Turkey's exports to the Syrian Arab Republic increased significantly, reaching USD\$ 1.85 billion in 2010. Following the start of the conflict, Turkey's exports to the Syrian Arab Republic fell by 69 per cent, to USD\$ 498 million, in 2012. The volume has increased slightly since then. Meanwhile, imports from the Syrian Arab Republic to Turkey had been USD\$ 662 million (2010) and USD\$ 524 million (2011) and included products such as petroleum, cotton, fertilizers, cement, plastics and textiles. In 2012, these numbers fell to only USD\$ 67 million -- an 87 per cent decrease over the preceding year. In January to June of 2013, imports were estimated at USD\$ 51 million. More than one-third of the categories of imports (25 of 73) declined to zero.

Turkish transporters in the south-eastern parts of the country (especially Hatay and Gaziantep), who previously

traded in the Syrian Arab Republic and the surrounding region, have suffered greatly. Before the conflict, almost all of Turkey's TIR traffic to the Middle East and the Gulf passed through the Turkish-Syrian border. At present, no significant volume of traffic on these routes is possible.

The large number of Syrian refugees living outside camps in the border region has had a clear impact on the socio-economic situation of hosting communities. Some towns are now home to as many Syrians as Turks, while in others, Syrian refugees predominate. Kilis, a Turkish town near the border, has a health infrastructure designed for its pre-existing population of 89,000 persons. This local population is now sharing health services with an additional 75,000 Syrian refugees. Despite the fact that there is now almost one refugee for every citizen in this town and medical services are stretched to the maximum, relations between the two communities remain good, and many Turks continue to offer constant support to refugees in need.

The influx of refugees is reported to have triggered an increase in rental prices and a shortage of available housing. In order cover rent and other expenses, Syrians have sought employment, increasing competition in the local labor market.

Assistance to vulnerable refugees living outside the camps has largely been charity-based, although the Provincial Directorates of the governmental Social Solidarity and Assistance Fund (SSAF) have been undertaking social assessments and providing food and non-food assistance in some cities in south-east Turkey.

Human and Social Development

The 21 camps currently hosting refugees have 863 classrooms, enabling provision of education to 46,000 Syrian students. There are 1,923 Turkish teachers (including volunteers) and 1,546 voluntary Arabic-speaking teachers. The main courses are Arabic and Turkish, supplemented by courses in math, computer science, religion and social studies. Outside of the camps, 37 education centers reach 20,000 Syrian refugees, from kindergarten age through high school. Universities in Hatay, Gaziantep, Osmaniye, Kilis, Adana and Sanliurfa have enrolled Syrian students both formally and informally. The enrollment rate of refugee children living outside of camps is reported to be very low because of the language barrier and other social circumstances that prevent many Syrian children from attending Turkish schools.

In January 2013, AFAD issued a health circular informing governors in 11 provinces that it would cover hospital fees for primary and emergency health care of Syrian refugees. Both state hospitals and informal clinics that have been opened in the affected provinces are addressing the primary and emergency health care needs of refugees in the camps as well as those outside. AFAD reports that over USD\$ 600 million has been spent on medical assistance. Twenty field hospitals operate in the camps, with 74 doctors providing an average of 5,000 interventions per day, or more than 1.5 million interventions to date. Some 274,890 referrals to state hospitals have resulted in 27,874 surgeries and 5,959 hospital births.

The high proportion of refugees outside of camps and frequent referrals from within the camps pose a significant strain on the health infrastructure in south-east Turkey. The number of health personnel needed for the provision of quality health services is becoming insufficient, and the workload for individual staff has significantly increased.

Concluding Observations

Continuous pressure on the existing refugee camps in Turkey will remain a major challenge as more and more refugees arrive. The number of Syrians living outside of camps also increases day by day. Meeting all refugees' basic needs for food, shelter and health is essential; it is also critical for the preservation of security and public order. Under the coordination of AFAD, the General Directorate of Security is working to register Syrians in urban locations and in camps with the use of biometric ID. This registration will be important to facilitate delivery of assistance outside of the camps.

The resources and facilities of host communities are overstretched, especially in the areas of health and education. Finding appropriate ways to assist refugees in urban and other non-camp settings is an increasing focus. The RRP5 highlights the growing importance of urgent assistance to destitute refugees living outside of the camps. Support for the expansion of such efforts is a way for States to give practical meaning to the principle of international solidarity and responsibility-sharing, as is support for the incorporation of refugees into Turkey's development priorities, including employment and skills training, equitable access to public services, and more general sustainable development. In order to protect and assist the anticipated numbers of new arrivals, and to continue assisting refugees outside of the camps, Turkey needs significant and meaningful commitments of solidarity and burden sharing from the international community.

Many health personnel working are suffering from fatigue, leading to increased staff turnover. The Ministry of Health is exploring the use of Syrian health workers who have temporary protection in the rehabilitation centers to reduce the burden on Turkish health personnel. In addition, the nature of the injuries sustained by many Syrian refugees often requires long hospitalization and intensive care unit treatment. Additional health facilities, including rehabilitation centers, are critically required to complement those being run by local and international NGOs. More ambulances are also needed.

Living conditions in the makeshift camps on the Syrian side of the border are having a broader impact upon public health in Turkey. With a lack of access to clean water sources, adequate nutrition and hygiene, an increased incidence of infectious diseases has been observed.

The conflict has also prompted an increase in smuggling and trafficking activities, including the smuggling of Syrians without identification documents. Counterfeit US and Syrian currency seized in 2012-2013 is believed to have been printed by criminal organizations operating in the Syrian Arab Republic. Provinces on the Syrian border have experienced numerous security incidents involving drug traffickers and smugglers of goods including fuel. Measures to maintain security in the border region impose a growing financial burden upon the Government.

Assistance Framework

The response to the Syrian refugee crisis has been led by AFAD, together with national and international partners. The significant cost borne by AFAD and other state actors only includes funding spent directly on humanitarian assistance. Neither the losses experienced by the refugees or their hosts, nor the opportunity cost of funds being diverted from other uses, have been calculated. This should be considered in assessing the impact of the Syrian refugee crisis on Turkey.



Iraq

Introduction

Iraq is contending with a number of challenges: some one million internally displaced persons (IDPs), the arrival of tens of thousands of Iraqi returnees from the Syrian Arab Republic, as well as long-standing Iranian, Palestinian and Turkish refugee communities. Since the beginning of 2013, sectarian tensions have escalated and led to new internal displacement. The arrival of more than 220,000 Syrian refugees, predominantly in the Kurdistan region of Iraq, represents an additional burden and challenge for the Kurdistan Regional Government (KRG) and the Central Government of Iraq.

The number of new Syrian arrivals has tripled since December 2012. Since mid-August 2013, approximately 60,000 Syrians arrived after the Peshkapor and Sahela border crossings were re-opened, the vast majority of whom are ethnic Kurds.

The authorities and the local population have generously accepted Syrian refugees in the Kurdistan region. Their openness to the new arrivals -- partially attributable to shared language, ethnicity and history -- has been exemplary. Nevertheless, ensuring that the additional health, education and other needs of the refugees do not undermine regional and national development goals or upset delicate political and ethnic balances will require increased support from the international community.

Additionally, fatigue among the population due to additional burdens from hosting large numbers of refugees may prompt the Government to redirect refugees into camps rather than allowing them to reside in urban areas. Since early April 2013, the local authorities have suspended issuance of residency cards in Erbil and Sulaymaniyah, pending refugees' relocation to camps. The cards are essential for ensuring freedom of movement and promoting self-reliance for refugees.



UNHCR / G. GUBAIEVA

Hundreds of Syrian refugees cross into Iraq at the Peshkhabour border crossing in Dohuk Governorate on August 2013.

Syrian refugees in Iraq

By mid-September 2013, some 190,000 Syrian refugees were registered in Iraq, while another 30,000 awaited registration. The vast majority of the refugees have arrived in the last few months as violence in the Syrian Arab Republic has worsened. A significant increase in arrivals occurred in August 2013, as thousands of refugees crossing the Tigris River daily, at both the Peshkhabour and Sahela borders, into northern Iraq. Among recent arrivals are Syrians from Aleppo, Derik, Kobany, Hassakeh and Qamishlo. New arrivals cited the harsh living conditions in the Syrian Arab Republic, particularly the lack of essential services and attacks by armed groups, as some of the main reasons for their flight.

The majority of new arrivals since mid-August, some 61,000 refugees, are hosted in temporary locations in Erbil (Kawergosk camp, Baharka warehouse, Qushtapa and Basirma sites), Sulaymaniyah (Arbat temporary facility) and Duhok (Akra Castle, Badarash youth centre and football field and Qasrouk). Some 34,000 have opted to live outside camps, either in public buildings or with family or friends.

More than 95 per cent of Syrian refugees in Iraq are hosted in the Kurdistan Region in three governorates: Dohuk, Erbil and Suleimaniyeh. While 35 per cent of the

registered refugees stay in camps, approximately 65 per cent live outside camps in urban areas, many in precarious conditions including unfinished buildings and in public places. Until recently, the local host communities in the governorates of Dohuk, Erbil and Sulaymaniyah have been open to accepting refugees in urban areas, and no incidents of tensions or violence have been reported. Some 10 per cent of the Syrian refugees in Iraq are dispersed in other governorates, mainly in Anbar and Ninewa.

While the KRG has been generally supportive of Syrian refugees, it has acknowledged that the influx of refugees has imposed a substantial burden upon available resources and delivery of services. The authorities have been compelled to continuously expand and establish new sites/camps, with the current population of displaced Syrian in the region now exceeding 220,000 persons. In order to cope with the growing numbers, the KRG, together with UNHCR and other humanitarian actors, is constructing several new camps in Dohuk and Erbil governorates.

Nearly 60 per cent of refugees are male. Among them, the largest cohort is men between the ages of 18 and 59 who have reportedly fled the fighting (37.2 per cent). A quarter of all of the arrivals are of primary or secondary school age.



UNHCR / S. BALDWIN

Syrian refugee Aya, 8-years-old, helps her older sister Houdoud prepare the Iftar meal in their family home in an informal settlement in Dalhamiyed in the Bekaa Valley.

Projecting current trends, UNHCR and other humanitarian actors expect that the number of Syrian nationals seeking safety and humanitarian assistance in Iraq will continue to increase significantly, potentially reaching 350,000 by end of 2013. This projection takes into account many variables in the region and inside the Syrian Arab Republic itself, including neighbouring countries' decisions on border management and the measures they adopt for the maintenance and welfare of the refugee populations on their territory.

Economic and social impact of the conflict and the refugee crisis

The security and socio-economic impact of the arrival of large number of refugees from the Syrian Arab Republic has necessitated immediate action to provide shelter, assistance and protection to the refugees. The central and regional Governments are working to do so in compliance

with international standards and in consideration of limited available resources in a country which already has more than one million people displaced within its own borders.

The Syrian crisis has had serious security, economic and social impact on countries in the region. It has directly and negatively affected the flow of transit goods between countries of the region, including land transport routes across Syria between Lebanon, Jordan and Iraq, which in the past has represented an import economic sector. Iraq has lost an important artery and link to the Mediterranean Sea.

Despite political and sectarian challenges, Iraq has made progress towards macroeconomic stability. As the World Bank notes, it has achieved single-digit inflation, improved fiscal and current account balances, established a downward trajectory for its debt to gross domestic product ratio, and resumed economic growth. These factors alone, however, are not sufficient to ensure continued prosperity. A lack of economic diversification makes Iraq's economic growth vulnerable to oil price and volume shocks. Therefore, economic diversification and promo-

tion of income-generating opportunities for a majority of the Iraqi population remain major challenges for the Iraqi Government.

As reflected in its development strategy,⁽¹⁾ the Kurdistan Regional Government faces many of the same challenges. Already with a lower unemployment rate than elsewhere in Iraq and the region, it seeks to develop a more diversified economy led by the private sector, with particular attention to the needs of youth, as a majority of the population is under the age of 20 years old.

The KRG is also seeking to ensure health and social services to meet the needs of the population. Physical infrastructure is a priority, notably: improving access to clean drinking water, which is a key challenge for the region especially in rural areas; and connecting households to the public sewerage network, as only 10 per cent of households are currently connected. Improving land-use regulations, reforming land titling and ownership, and encouraging the development of mixed-income neighborhoods are also key development initiatives.

Currently, Iraq suffers from multiple deficits in public services including electricity, water, accommodation and public health. The sudden arrival of nearly one-quarter of a million Syrian refugees has further negatively affected the situation. The influx also caused increased prices of domestic basic commodities.

Employment and competition for labor is also a major challenge for local authorities. Development projects in the communities requiring cheap labor have attracted strong interest from Syrian refugees, who are competing with unskilled Iraqi workers for employment. Preliminary reports from assessments indicate that 80 per cent of refugee households have someone employed in the informal sec-

1. *Ministry of Planning, Kurdistan Region of Iraq 2020: A Vision for the Future, 5 Oct 2012*

tor. One clear consequence is a reduction in wages due to increased competition and labor supply.

A number of Syrians are renting accommodation in Iraq; due to the increased demand for housing in some areas, rental costs have soared for refugees and the host population alike. Dohuk has been particularly affected. There is also an increase in the prevalence of overcrowding within houses, as host families struggle to accommodate refugee families. Strains on municipal and social services, including water and electricity supplies, are increasing as already limited services must accommodate the refugee population.

Health facilities have been overstretched and there has been increased pressure on a fragile health system, as refugees receive free access to health services. Some chronic diseases are reported to be prevalent among the Syrians, treatment of which can be costly due to requirements for medications and procedures such as dialysis and heart surgery. More skilled health workers, medical supplies and healthcare facilities are needed to meet the increased demand.

The influx of Syrian refugee children has also led to overcrowded classrooms in local schools. Additionally, there are a limited number of schools with Arabic-language study. The absorption capacity of the few Arabic-language schools has been over-stretched, leading to more than 50 students per class rather than the usual 20 to 25.

In August 2013, a joint assessment of Syrian refugee children and of school capacity in Erbil was conducted by UNHCR, UNICEF and UNESCO. Additional assessments are being conducted in the other governorates. Preliminary findings show that only 768 of the 8,968 primary school-aged Syrian refugees were enrolled in one of the nine available Arabic primary schools, while 239 of 4,697 high school-aged Syrian refugees were enrolled in one of the four available high schools.

Concluding observations

While the economic implications of the refugees' arrival in the Kurdistan region are significant, the regional and central Governments are eager to ensure that the refugee presence does not negatively affect the progress that the region and the country have made towards peace, security and development. Assistance to refugees thus needs to be addressed comprehensively, taking into account needs of the host population and the broader security, social and economic impact.

International solidarity and support is critical. In addition to the immediate humanitarian assistance requirements, the additional needs generated by the refugee presence must be incorporated into regional and national development plans.

When the KRG's development strategy was articulated, it did not foresee the influx of Syrian refugees. Iraq's ability to continue hosting refugees and to support communities, including the Iraqi IDPs and returnees, without undermining its progress towards peace, security and development, depends on future international solidarity and burden-sharing.

Egypt

Introduction

Egypt has an important history of close ties and shared influences with the Syrian Arab Republic, and it traditionally has opened its doors to Syrians. Even prior to the conflict, there was an established and sizeable Syrian community residing in Egypt. At the beginning of the crisis, the first wave of Syrians fleeing to Egypt in 2011 was primarily composed of persons with family ties, business connections or personal networks in Egypt. These first arrivals generally relied on personal savings, found work or opened businesses, and they maintained a moderate degree of self-reliance.

Refugee arrivals in Egypt from the Syrian Arab Republic have risen dramatically in 2013. As of mid-September, 124,373 Syrian refugees were either registered (105,153) or awaiting registration (19,220). This is twice the number registered only four months before, and it significantly exceeds the projection in the Regional Response Plan⁽¹⁾ that 100,000 people would seek refuge in Egypt by the end of 2013. Many of the new arrivals first resided in another country in the region and relocated to Egypt due to the lower cost of living and the lack of visa requirements prior to July 2013.

According to the Government of Egypt, the number of registered refugees may significantly understate the scale of the influx. It estimates that the actual number of Syrian refugees in Egypt may be as high as 300,000, since many of those arriving opt not to register. This is often possible because of their personal networks and resources, their familiarity with the language and culture of Egypt, and the country's receptivity to their arrival.

Syrian refugees in Egypt

Most Syrian refugees in Egypt are scattered in urban neighbourhoods, sharing and renting whatever accommodation they can afford. The highest concentration of Syrians registered with UNHCR live in Greater Cairo (55,177), with 32,366 residing in 6th October City, Alexandria (19,585) and Damietta (9,056).

Of the 103,015 Syrians registered with UNHCR as of 14 September, 50,762 are female and 52,253 are male; 46,377 are below the age of 18, and 4,248 are 60 years of age and above. Some 35,509 are from Damascus, 32,929 from rural Damascus, 15,093 from Homs, 7,440 from Aleppo, and 12,044 from other cities in the Syrian Arab Republic. Among professions, some 25,554 Syrians are registered as students; 19,234 as housekeepers, including housewives; 4,140 as merchants; 2,445 as labours; 1,445

as tailors; 1,154 as taxi drivers; 965 as carpenters; 820 as cooks; 767 as general managers or small business owners; and 698 as salespersons.

Impact of the refugee crisis

In the last two years, the Egyptian economy has experienced a significant downturn. The gross domestic product (GDP) growth rate has fallen from a level of 5.1 per cent (prior to the revolution) to around 2.2 per cent (at the time of reporting). Events in mid-2013 have prompted further downward revision of the growth forecast.⁽²⁾ The country has a high fiscal deficit and gross public debt (domestic and external), which rose to nearly 100 per cent of GDP at the end of June 2013. Egypt's foreign reserves have also fallen since 2011.

The economy is highly dependent on fuel and food imports, which the Government traditionally has subsidised at the rate of approximately US\$ 1.8 billion annually. Prior to their interruption by recent events, negotiations with the In-

1. Release in June 2013

2. Current estimate is 2.2 per cent according to the World Bank.

ternational Monetary Fund on a loan agreement had focused on reforming of tax collection and phasing out subsidies. These adjustments were seen as critical to redressing low growth rates, falling employment levels and rising costs.

Egypt is a large and populous country of over 80 million people. The unemployment rate reached 13 per cent in June 2013. UNDP estimates that Egypt would need an annual growth rate of 6-8 per cent and 650,000 new jobs each year to accommodate the demands of new jobseekers entering the market. Absorption of the estimated 300,000 Syrian refugees -- a large portion of whom are of working age -- has put pressure on urban centres and led to some tension between the communities.

The influx of Syrians has had noticeable impact on the education, health and food sectors. According to UNDP, more than one in four Egyptians is estimated to live below the international poverty line of two dollars per day. Regional economic disparities exist along the urban-rural divide. These concerns are especially acute in Upper Egypt, which is home to 36 per cent of the population, and where a significant number of Syrian refugees have settled. There has also been increased pressure on the government's administrative responsibilities, including immigra-

tion and civil registry. At local level, there has been increased strain on public transportation, food resources, waste management, sanitation, and the maintenance of communal areas.

In areas of high concentration of Syrian refugees, rental prices have increased. In 6th of October City in greater Cairo, the pre-influx average cost of a family flat has increased from 600 Egyptian Pounds (EGP) per month to nearly 1000 EGP. This affects lower and middle class Egyptian families as well as Syrian refugees. Costs have also increased in coastal areas and cities, such as Alexandria, due to the increased demand.

In announcing that Syrians will have the same access to education as Egyptian children for the 2013-2014 school year, the Ministry of Education has highlighted the historic ties between the Egyptian and Syrian peoples and the Government's commitment to assist Syrian refugee students in achieving their full potential. During the 2012-2013 school year, 7,825 Syrian students were enrolled in public schools. With the beginning of the school year in September, 13,000 of the 26,000 school-age Syrian children (age 6-17) in Egypt are enrolled in public schools; 5,000 in private schools; 3,200 in community schools; while 4,800 Syrian children are estimated to be out of

A man holds his child as hundreds of Syrian refugees register for protection and other social services at UNHCR offices in the Zamalek neighbourhood in Cairo.



UNHCR / S. BALDWIN



UNHCR / S. BALDWIN

Hundreds of Syrian refugees register for protection and other social services at UNHCR offices in the Zamalek neighborhood in Cairo.

school. The number of Syrian students enrolling has stretched the capabilities of the of the local education departments. In areas of high Syrian concentration there is a ratio 40-50 students to every teacher.

The Government of Egypt presently devotes 11.9 per cent of total expenditures (3.8 per cent of GDP) to education. As a result of a Presidential decree exempting Syrian students from university fees and stipulating that Syrian students have equal access to education, the Egyptian Ministry of Higher Education has estimated the costs incurred as a result of the enrolment of Syrian refugees in Egyptian Universities and other higher academic institutions for the academic year 2012/2013 to be approximately US\$ 10 million. The Ministry estimates that the total costs incurred for the academic year 2013/2014 will be similar.

The Egyptian Ministry of Education, UNHCR and UNICEF have been conducting joint needs assessments of public schools with the highest numbers of Syrian refugees in Alexandria, Cairo, Damietta, Giza and Qualubia,

to identify needed assistance the schools require to enhance their capacity to facilitate easier access to education for Syrian refugee students. Challenges include overcrowded classrooms due to an insufficient numbers of teachers and classroom space. There are also not enough desks, blackboards, lab equipment and computers to accommodate the added pupils. The assessment has also noted the following needs: for space to be made available through rehabilitation, refurbishment and construction of additional classrooms for 15-20 schools; for 240 teacher training sessions for 800 teachers; and for enhancement of school governance to establish school boards and Parent Teacher Associations.

Very early in the crisis, the Government of Egypt issued a decree enabling Syrian nationals to receive equal access to health services as Egyptian nationals. The number of Syrian refugees has accordingly increased the demand on the national health system, including stock for vaccination campaigns and control of communicable diseases, secondary and tertiary services, and emergency services.

The World Health Organization 2012 Demographic, Social and Health indicators for Eastern Mediterranean Countries reported that the Government of Egypt's contribution to total health expenditures is 37 per cent of the cost of the governmental health services. However, out-of-pocket expenditures represent 61 per cent of total health expenditures.

The UNHCR has contracted some local and international NGOs to provide a package of primary and specialized health services to Syrian refugees. However, their needs have placed a particular strain on the Government's stocks for routine vaccination and vaccination campaigns. Vaccinations are available for all Syrians in Egypt, and there is a need for support of immunizations for polio and measles, as well as the triple vaccine for measles, rubella and mumps. Especially in areas with the highest numbers of Syrians refugees, strengthening the capacity of the health system through training for service providers in primary, specialized and emergency care services is needed. There is also a need for diagnostic and therapeutic equipment and medical supplies.

Food insecurity in Egypt remains an issue of household purchasing power, making households vulnerable to high and rising food prices while incomes remain stable. The average Egyptian family allocates 40 per cent of its expenditure to food; and this rises to over 60 per cent for the

poorest households. *The Egyptian Food Observatory*, a joint Government and WFP food security monitoring report from June 2013, shows that poor households faced various shocks which have affected their purchasing power in the past year. The main shock was rising food prices, compounded by rising unemployment or static incomes. The Government has maintained different social safety net schemes for food and nutrition security, including subsidizing the cost of bread and other staples. Notwithstanding present economic difficulties, key staples such as wheat have remained available in the markets.

A portion of the Syrian refugee community in Egypt has been particularly susceptible to food insecurity due to difficulties in maintaining self-reliance. Following a joint assessment carried out by UNHCR, WFP and UNICEF in November 2012, there was general agreement to apply geographic targeting to ensure that food assistance reaches the most vulnerable refugees in poorer neighbourhoods. Obour, 6th October in Greater Cairo, Alexandria and Damietta were identified as key concentration areas for vulnerable refugees, now are being prioritized for interventions. WFP reached 45,543 beneficiaries in August, which was 90 per cent of the target. WFP is planning to assist 60,000 Syrian refugees in September and October and 70,000 per month in November and December.

Concluding observations

The 124,373 Syrian refugees officially registered or awaiting registration in Egypt already significantly outnumber the 100,000 refugees originally projected to reside in the country by the end of 2013. The scale and pace of arrivals has been staggering. The Government estimate stands at around 300,000. To their continuing credit, the Government and people of Egypt have responded to the refugees with remarkable generosity. The difficulties facing refugees in terms of housing, food security, employment, health and education are a function of the limited public resources in country experiencing massive challenges of its own.

The response on behalf of Syrian refugees in Egypt must be tailored to reality in which they live – outside of camps and largely in urban areas. This is reflected in initiatives such as the food voucher program, which is being expanded. Similarly well-conceived programs, which avoid the creation of parallel delivery mechanisms and reinforce relationships with municipal, regional and national actors, need to be emphasized.

In many cases, the steps that need to be taken to meet both humanitarian and longer-term needs of refugees are already clear, and await sufficient support. The dramatically increased pace of arrivals has shown that the projected needs were significantly underestimated.

Fundamental to the Egyptian identity are the values of hospitality and charity, particularly for those in the greatest need of protection and support. This has been a challenging time for all countries in the region. Egypt has faced some particularly difficult challenges over the last several months. Hosting a rapidly increasing refugee population has placed significant additional pressure on Egyptian infrastructure, particularly with respect to food security, education and health services. While Egypt remains committed to providing Syrian refugees with access to education, health care and food security on the same footing as Egyptians, this will require substantially increased support from the international community.



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