

# COST OF BUSINESS ASSESSMENT: DANA, IDLEB

January 2023 | Northwest Syria

SITUATION OVERVIEW

## CONTEXT & RATIONALE

Economic activity in Syria has halved since the beginning of the conflict in 2011 as a result of large losses of human capital, destroyed infrastructure, degraded basic services, and disrupted trade.<sup>1</sup> Compounding this, the Syrian economy has suffered from COVID-19, prolonged drought, rapid currency depreciation, high inflation, and the knock-on effects from the crises in Lebanon, Türkiye, and Ukraine. Such factors have contributed to pushing commodity and fuel prices up and greatly eroding the purchasing power of the population, one of the key drivers of humanitarian need.<sup>2</sup>

Insufficient income and lack of employment opportunities force households in Northwest Syria (NWS) to rely on negative coping strategies such as borrowing money, buying items on credit, sending children to work, and spending savings.<sup>3</sup> REACH Labour Market Assessments in NWS revealed that over two-thirds of respondents in both Dana and Idleb cities reported that the lack of job opportunities prevented them from finding employment, while more than half of respondents cited high competition for jobs as a key employment barrier. In addition, 38% of respondents in Dana and 14% of respondents in Idleb reported wanting to start their own business but lacking resources to do so.<sup>4</sup> In this context, members of the NWS Inter-Cluster Task Force for Business Support Programming (BSP TF) have prioritised implementation of livelihood interventions to help households meet immediate needs and support local businesses to be drivers of local economic activity and employment growth. This has involved, among other activities, the provision of cash grants to businesses, largely focusing on micro and small enterprises.

With the aim of expanding and better targeting such support to include a greater variety of business sizes and sectors, BSP TF partners identified the need for more information on the actual operating costs incurred by Micro, Small, and Medium enterprises (MSMEs) in NWS across different sectors, as well as the key challenges business owners face in maintaining or growing their businesses. As such, REACH, in partnership with the NWS BSP TF, conducted a pilot Cost of Business Assessment (CBA) in Dana urban area to assess the cost of expenditures for MSMEs and inform guidance for financial and other support to MSMEs.

Table 1: Number of assessed businesses in Dana by sector and size\*\*

Sector	Micro	Small	Medium	Total
Agricultural processing/food production	36	28	15	79
Services	33	37	19	89
Non-food industry/manufacturing	33	38	15	86
Commercial retail/trade	47	40	22	109
All	149	143	71	350*

## KEY MESSAGES

- Findings on overall business costs across the surveyed sizes and sectors indicate that **current MSME grant values may not be sufficient to adequately support businesses** in getting established or maintaining their operations (see pg. 6).
- Median yearly operating costs and start-up costs appear to vary significantly across sectors and sizes**, with agricultural processing/food production representing the sector with highest yearly costs (see pg. 6). This variation necessitates the practice of accounting for business sector when determining MSME grant values and other business support schemes.
- Based on analysis of proportional spending on different expenditure categories, the **high business costs documented through the CBA are likely a result of the high cost of inputs, salaries, and inventory**, which were the most common categories with the highest proportional costs across sectors and sizes. Business costs for inputs and inventory are highly impacted by the currency fluctuation and depreciation seen in NWS, where the **increased cost of inputs and inventory was the most commonly reported challenge to businesses maintaining their current sizes** (see pgs. 7-18, 28-29).
- Productive assets accounted for a large portion of most businesses' one-off expenditures across most assessed sizes and sectors** (see pgs. 7-18). This broadly supports the idea that expansion of grants that cover larger one-off costs for the necessary tools, machinery, and other assets which support business development and profitability would provide significant financial relief to local businesses.
- Beyond financial support, **access to new markets and support for marketing were other forms of support more commonly prioritised by businesses**. As findings also indicate the majority of businesses in Dana do not sell their goods or provide services in other communities of NWS, support in linking Dana businesses to supply chains in other areas could boost revenue and potentially allow for expansion (see pgs. 21, 26-27).
- The large majority (87%) of businesses across sectors reported interest in expansion**. While commercial retail/trade businesses were most commonly interested in expansion in terms of increasing their businesses' physical space, businesses in the other three sectors most commonly prioritised acquisition of necessary productive assets. Commercial retail/trade businesses were most common among the handful who reported they would seek to hire new staff for expansion. While very indicative, this may suggest that this sector would be a good targets for employment schemes in Dana (see pgs. 28-29).

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## METHODOLOGY OVERVIEW

The CBA is a pilot assessment that aimed to quantify the operational costs faced by MSMEs and the barriers they face in trying to maintain or expand their businesses. Through structured individual interviews held between 23 and 31 of January 2023, purposively selected owners of **350 businesses across four key sectors in Dana urban centre** were asked to estimate their businesses' expenditures on items and services across a variety of categories. In addition to information on respective businesses' operational costs, respondents were also asked about challenges to their business operations and any barriers that exist to business expansion.

For the purposes of this assessment, and based on the context in NWS, business sizes were defined as follows: **micro: 1-3 employees; small: 4-10 employees; medium: 11-50 employees.** The sectors included in the assessment were: agricultural processing/food production; services; non-food industry/manufacturing; and commercial retail/trade ([see definitions, pg. 30](#)). The types of businesses surveyed in the pilot reflects the joint decision of BSP TF members to target more micro and small-sized businesses as those are the business types more commonly targeted by BSP TF members' programming. It was decided in agreement with the BSP TF not to include farming or harvesting businesses given there is regularly updated information collected on the cost of agricultural inputs.<sup>5</sup>

## LIMITATIONS

1. The assessment relied on purposive sampling and therefore, the results must be regarded as indicative and not representative. The sample size also does not well-represent home-based businesses as they are harder to identify and include in assessments. As such, home-based businesses in Dana may have different expense and operational profiles than those outlined in this report.

2. Determining the type of sector for some businesses was challenging in some cases because of overlap in their activities. To address this issue, partners were consulted to consolidate the best approach for this disaggregation, and enumerators were given clear set of instructions, definitions, and examples to accurately determine the type of sector during data collection with final checks on appropriate classification completed during data processing. Nevertheless, thirteen surveyed businesses were counted under two sectors due to the dual nature of their work.

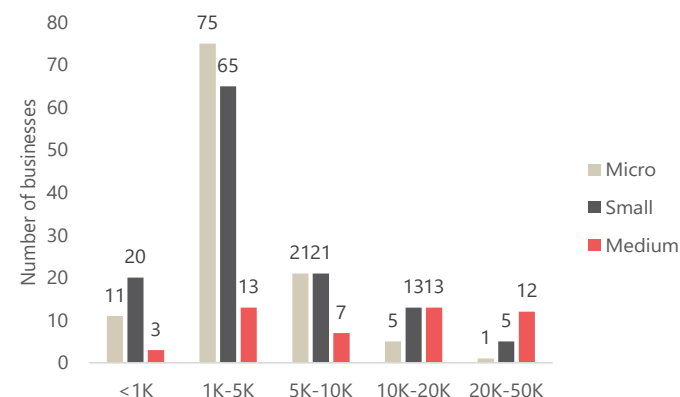
3. The respondents' estimations of recurring and one-off costs for their businesses vary in precision. After each interview, enumerators were asked to record, in their estimation, how precise they perceived the respondents' report of the business expenditures to be. "Precise" meant that respondents were able to refer to business records and get exact figures; "semi-precise" meant that respondents were able to think through expenditures systematically and arrive at informed estimates; and "imprecise" meant that respondents were only able to provide loose estimates, did not keep records, or were unsure about details. For more than half of surveys (58%), enumerators reported that they perceived the respondents' reports to be semi-precise, approximately a third reported the respondents' reports to be precise, and 8% to be imprecise.

4. In order to gauge the overhead costs required to start a business, respondents estimated how much it would cost in today's market to purchase the productive assets, equipment, and tools etc. that businesses currently have. In doing so the assessment attempted to provide a rough estimate of the value of such assets today, considering the market rate at which they were purchased would have changed dramatically over time. Respondents were asked to make this calculation themselves on the spot and therefore 'start-up' cost figures are less reliable indications of actual costs incurred.

5. Business owners may be more or less inclined to share their actual experiences, fearing that the information shared might be used by competitors, while others might adjust their responses based on the expected effect they anticipate it would have on humanitarian programming. This further underscores the indicativeness of the findings.

6. For this assessment, 'business size' was defined by number of employees, which is only one indication of size where others such as yearly revenue may also be an indicator. Overall, analysis suggests that the number of employees was generally a good indication of business size vis-à-vis yearly revenues (see Figure 1). However, there were some variation where businesses with a smaller number of employees reported larger annual revenues or businesses with a higher number of employees that reported lower revenues is seen. This may reflect the fact that different industries are more labour intensive than others and as such have different standard ratios of employees to revenues.

Figure 1: Yearly revenues in Dana in USD by business size



## February Earthquake Disclaimer

The data collection for the CBA took place shortly before the February 2023 earthquakes in Türkiye and Syria and it is possible that business costs may have changed due to the impact on markets and prices as a result. Data from [NWS CWG's Joint Market Monitoring Initiative \(JMMI\) March](#)<sup>6</sup> round shows a 6.6% increase in the cost of the SMEB since January in the Dana community. Further, the USD/TRY exchange rate increased by about 1% from January to March. Compared to monthly SMEB price and exchange rate changes seen across 2022, these increases do not seem irregular, suggesting the impact of the earthquakes on market prices, and thus potentially on business costs, was not significant.

## OVERVIEW OF SAMPLED BUSINESSES

Surveyed businesses in Dana were primarily located around the urban centre of Dana community. MSMEs from four key sectors of most interest to BSP TF members were included in the sample: Agricultural Processing and Food Production, services, non-food industry/manufacturing, and commercial retail/trade. These sectors were selected by BSP TF members based on their ability to encompass and provide information on a variety of more specific business types. Within each of these sectors, businesses of various sizes were included, the sample had a greater focus on micro and small businesses as those are the sizes more commonly targeted by BSP TF members.

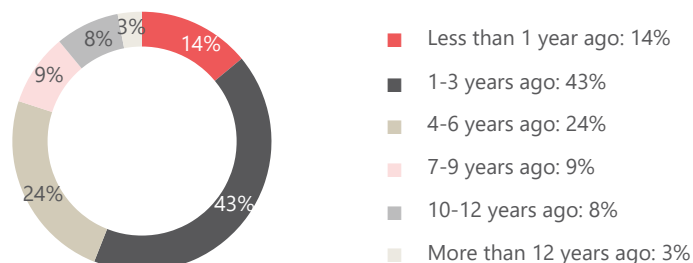
As visualised in Figure 2 below, the majority of sampled businesses (57%) were more newly-established, existing for 3 years or under, meaning they likely face higher risks in business continuity and may require more support to continue operating and build business resilience.

However, a significant amount of surveyed businesses (20%) had been established for a longer time, namely for seven or more years. Additionally and impressively, 9 businesses (3%) reported having been established over 12 years prior, meaning they had been operational before the start of the conflict in 2011 and demonstrating incredible resilience in continuing operations through the many shocks and stresses faced in those years.

**Table 1: Number of assessed businesses in Dana by sector and size\***

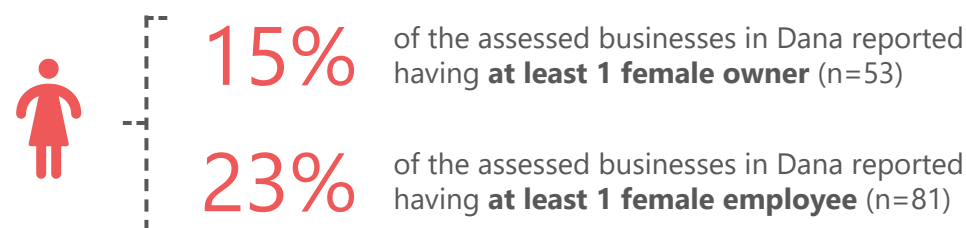
Sector	Micro	Small	Medium	Total
Agricultural processing/ food production	36	28	15	79
Services	33	37	19	89
Non-food industry/ manufacturing	33	38	15	86
Commercial retail/trade	47	40	22	109
All	149	143	71	350*

**Figure 2: Date of business establishment (by % of assessed businesses, as of January 2023)**

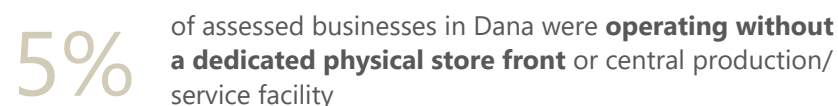


In order to understand the gender dynamics in business ownership and labour force participation, participants were asked about the gender composition of their business' owners and employees. Among surveyed business in Dana, almost a quarter of businesses reported having at least one female employee (23%) and 15% (over 50 businesses) reported having at least one female owner.

This indicates that the assessment had decent representation of women-owned businesses and businesses employing women, and suggests that women's participation in the labour market in Dana may be higher than averages for NWS as a whole.<sup>7</sup> However, the businesses that reported having at least one female staff were also generally those which were owned by women, underscoring that women-owned businesses tend to hire more women ([see further gender analysis on pg. 22](#)).



In terms of operational characteristics, the vast majority of businesses (95%) operated out of a dedicated physical office/store front or a central production/service facility. The remaining 5% of businesses operated through service requests on mobile phones, internet sites, or social media, highlighting that while most businesses still followed the traditional setting of operating out of physical facilities, some businesses taking a home-based approach to conduct their operations and connect with customers online. However, when considering the broader profiles of businesses surveyed for this assessment, home-based businesses are likely under-represented and require further study ([see limitations on pg. 3](#)).



Finally, in terms of businesses' financial operations and use of different currencies, 73% of the interviewed business owners were more comfortable reporting their expenditures in USD in this assessment. This indicates that businesses are more commonly operating in and paying for their expenditures in USD. This may be relevant for partners' considerations of which currency to provide transfers in, especially in relation to knowing if, for example, businesses would generally need to exchange grants given in USD into TRY in order to pay for their expenses.



## SECTION 1: BUSINESS EXPENSES

### INTRODUCTION: BUSINESS EXPENSE PROFILE (BEP)

Respondents were asked about recurring and one-off costs across 13 expenditure categories ([see categories and definitions, pg. 30](#)). Recurring costs were calculated as a monthly average over the last three months and one-off costs were taken from the past 12 months. Respondents were also asked whether they were able to estimate the total value of all the productive assets, tools, appliances etc. needed to establish the business and grow it to its current size to estimate business start-up costs (69% of respondents answered that they could).

These respondents were asked to estimate the total value of these assets today in Turkish Lira (TRY) or USD. These figures for the business 'start-up' costs are therefore only rough estimates for initial overhead costs for establishing a business. The results have been assembled into 'business expense profiles' across assessed sectors and business sizes ([pgs. 7-18](#)). Total yearly operating costs for each business size in each sector are also summarised and presented in [Table 2 \(see pg. 6\)](#) providing an indication of the cost of running a business in Dana.



Photograph of an assessed business

### KEY FINDINGS: BUSINESS EXPENSES



- **Total business expenditures for recurring, one-off, total yearly, and start-up costs were higher than expected and varied greatly by sector and size.** The lowest median yearly operating cost was 7,590 USD for micro service businesses and the highest was 94,320 USD for medium agricultural processing/food production businesses ([see pg. 6](#)).
- As noted above, **businesses in the agricultural processing/food production sector reportedly also had the highest total yearly operating costs in comparison to all other sectors.** This is largely as a result of these businesses having high monthly recurring expenditures on inputs, which comprised, on average, more than 60% of their recurring expenditure, across all business sizes ([see pgs. 6, 7-9](#)).
- **One-off costs were highest for businesses in the commercial retail/trade sector due to high expenditure on inventory.** Similarly, for almost all businesses, irrespective of the business sector or type, **productive assets were consistently reported among top three one-off costs** ([see pgs. 7-18](#)).
- Among all surveyed micro businesses, **median start-up costs were observed to be highest for commercial retail/trade and agricultural processing/food production businesses**, at 3,510 and 2,100 USD respectively, and lowest for non-food manufacturing/industry and service businesses, at 1,850 and 1,000 USD ([see pg. 6](#)). These figures could support creation of guidance for minimum values of start-up grants in each sector.
- **The vast majority of businesses (94%) reported relying on the public network for their businesses' electricity consumption**, while only a small proportion of businesses reported private sources. **Electricity was generally found to make up the majority of businesses recurring utilities costs (54%)** where fluctuations in price and availability can have a significant impact on businesses operations ([see pg. 19](#)). As such, ensuring reliable and affordable electricity access for businesses, whether through financial or public service support is a key programmatic objective for livelihoods response partners.

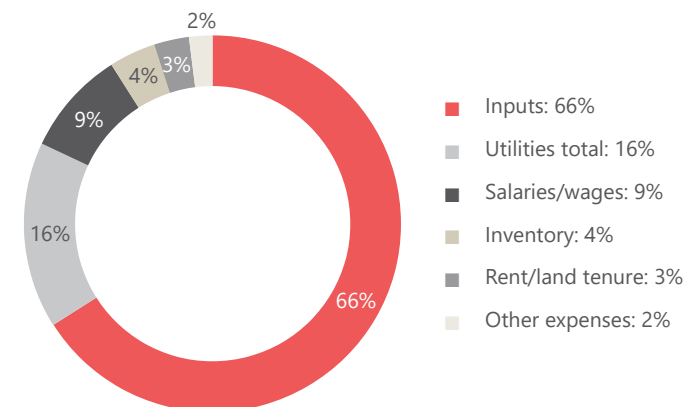
Table 2: Summary of business expense profiles, showing median operating costs (recurring, one-off, and total yearly) and median start-up costs\*

Business size per sector	Median recurring costs (monthly average from past three months)		Median one-off costs (incurred across the past 12 months)		Median total yearly operating costs (median recurring costs x12 + median one-off costs)		Median 'start-up' costs (total cost of productive assets in current market)	
	TRY	USD	TRY	USD	TRY	USD	TRY	USD
<b>Agricultural processing/food production</b>								
<b>Micro (n=36)</b>	44,420	2,370	13,530	720	542,630	29,000	46,790	2,500
<b>Small (n=28)</b>	88,620	4,740	43,050	2,300	1,113,860	59,520	70,180	3,750
<b>Medium (n=15)</b>	122,490	6,560	18,000	960	1,765,210	94,320	750,000	40,080
<b>Services</b>								
<b>Micro (n=33)</b>	11,170	600	6,320	340	142,020	7,590	18,720	1,000
<b>Small (n=37)</b>	40,700	2,170	19,230	1,030	560,700	29,960	93,660	5,010
<b>Medium (n=19)</b>	83,920	4,480	57,900	3,090	1,091,460	58,320	187,150	10,000
<b>Non-food industry/manufacturing</b>								
<b>Micro (n=33)</b>	21,260	1,135	13,100	700	269,500	14,400	34,620	1,850
<b>Small (n=38)</b>	43,200	2,310	41,080	2,200	611,610	32,680	56,150	3,000
<b>Medium (n=15)</b>	89,030	4,760	22,740	1,220	1,285,760	68,700	187,150	10,000
<b>Commercial retail/trade</b>								
<b>Micro (n=47)</b>	21,280	1,140	14,860	790	326,240	17,430	65,630	3,510
<b>Small (n=40)</b>	33,800	1,810	44,500	2,380	511,820	27,350	74,860	4,000
<b>Medium (n=22)</b>	72,990	3,900	132,880	7,100	1,042,200	55,670	262,190	14,010

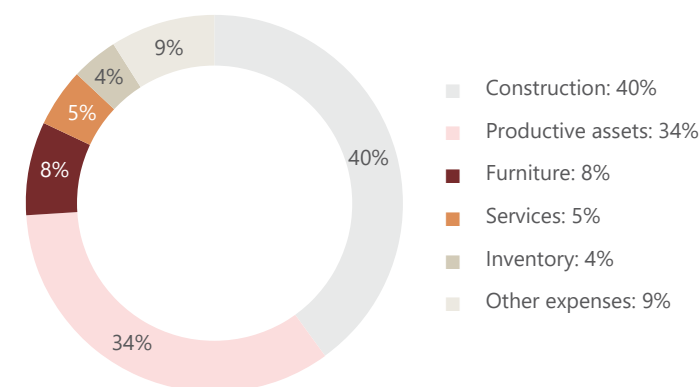
**BEP BREAKDOWN: Agricultural processing/food production, Micro enterprises (n=36)**

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	4,122	220	36	NA	NA	0
Rent / land tenure	1,900	102	27	1872	100	1
Construction	0	0	0	5615	300	3
One-off utilities (i.e. installation)	One-off cost only			1300	69	4
Electricity from public sources	749	40	36	Recurring costs only		
Electricity from private generator	187	10	1			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	200	11	35			
Fuel for heating or cooking	500	27	15			
Telecommunications	114	6	30			
Other utilities	0	0	0			
Inventory	9,358	500	21	15,000	801	1
Inputs	37,430	2,000	26	4679	250	1
Productive assets	515	28	2	9445	505	12
Furniture	NA	NA	0	2807	150	7
Office supplies	150	8	31	187	10	3
Services	375	20	7	1404	75	5
Transportation and travel	600	32	21	2807	150	1
Marketing and advertising	1,500	80	3	1404	75	9
Taxes, regulations, and documentation	130	7	22	NA	NA	0
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	542,630		36	29,000		36
Total cost of productive assets in current market	Median 'start-up' costs					
	46,790		15	2500		15

Recurring costs as a percentage of total recurring expenditure averages\*



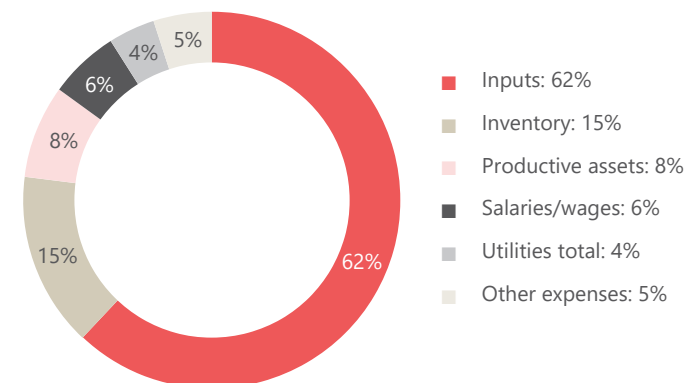
One-off costs as a percentage of total one-off expenditure averages\*



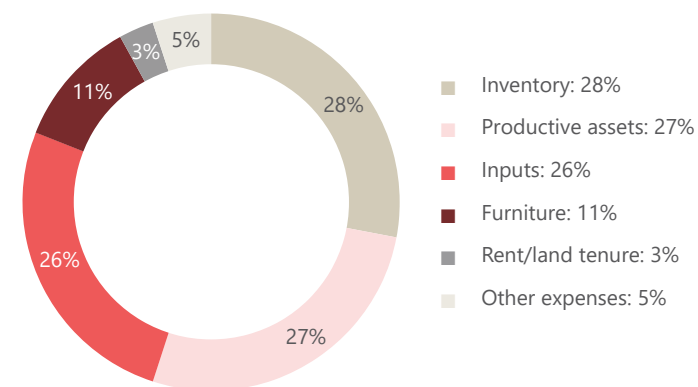
**BEP BREAKDOWN: Agricultural processing/food production, Small enterprises (n=28)**

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	3,509	188	28	4,752	254	2
Rent / land tenure	2,339	125	27	2,339	125	7
Construction	NA	NA	0	NA	NA	0
One-off utilities (i.e. installation)	One-off cost only			9,458	505	2
Electricity from public sources	1,123	60	27	Recurring costs only		
Electricity from private generator	618	33	4			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	500	27	27			
Fuel for heating or cooking	795	43	18			
Telecommunications	187	10	27			
Other utilities	NA	NA	0			
Inventory	18,715	1,000	20	18,715	1,000	9
Inputs	46,788	2,500	27	18,715	1,000	12
Productive assets	14,972	800	15	14,972	800	13
Furniture	3,743	200	12	5,307	284	10
Office supplies	187	10	25	287	15	2
Services	150	8	14	9,358	500	1
Transportation and travel	1,170	63	18	1,872	100	2
Marketing and advertising	1,872	100	1	561	30	1
Taxes, regulations, and documentation	187	10	12	1,811	97	2
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	1,113,861		28	59,517		28
Total cost of productive assets in current market	Median 'start-up' costs					
	70,182		28	3,750		28

Recurring costs as a percentage of total recurring expenditure averages\*



One-off costs as a percentage of total one-off expenditure averages\*

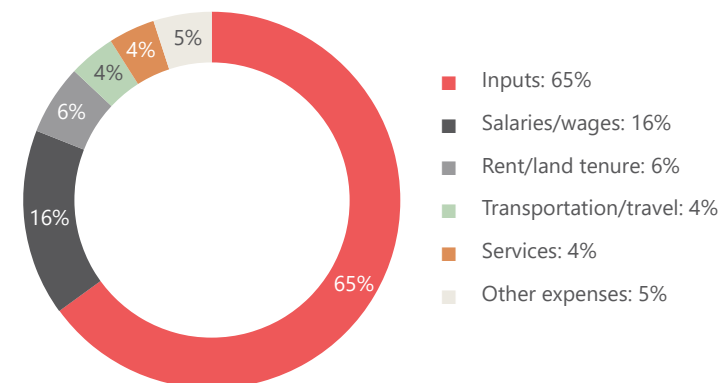




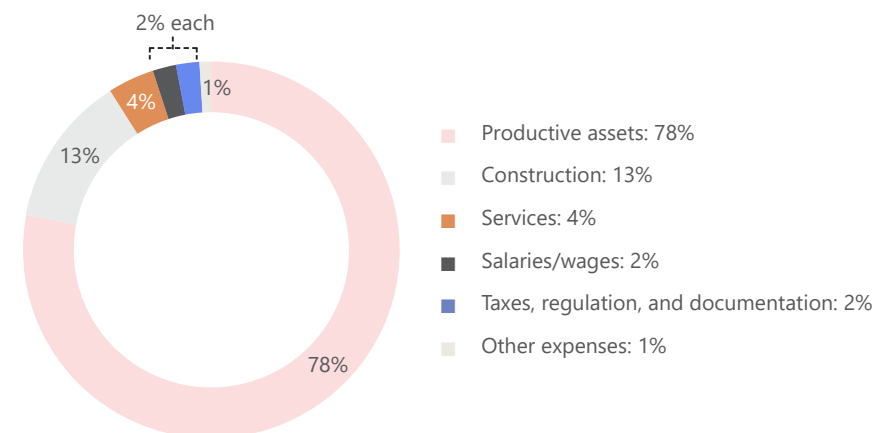
## BEP BREAKDOWN: Agricultural processing/food production, Medium enterprises (n=15)

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	39,187	2,094	15	3,773	202	4
Rent / land tenure	11,484	614	14	NA	NA	0
Construction	NA	NA	0	93,750	5,009	2
One-off utilities (i.e. installation)	One-off cost only			NA	NA	0
Electricity from public sources	1,312	70	8	Recurring costs only		
Electricity from private generator	2,640	141	3			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	1,875	100	15			
Fuel for heating or cooking	4,000	214	4			
Telecommunications	337	18	14			
Other utilities	NA	NA	0			
Inventory	1,975	106	2	NA	NA	0
Inputs	145,000	7,748	9	NA	NA	0
Productive assets	6,500	347	1	107,813	5,761	4
Furniture	NA	NA	0	5,469	292	2
Office supplies	500	27	15	NA	NA	0
Services	6,688	357	12	18,000	962	5
Transportation and travel	9,375	501	11	5,600	299	1
Marketing and advertising	3,750	200	1	500	27	1
Taxes, regulations, and documentation	NA	NA	0	15,000	801	2
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	1,765,207		15	94,320		15
Total cost of productive assets in current market	Median 'start-up' costs					
	750,000		15	40,075		15

Recurring costs as a percentage of total recurring expenditure averages\*



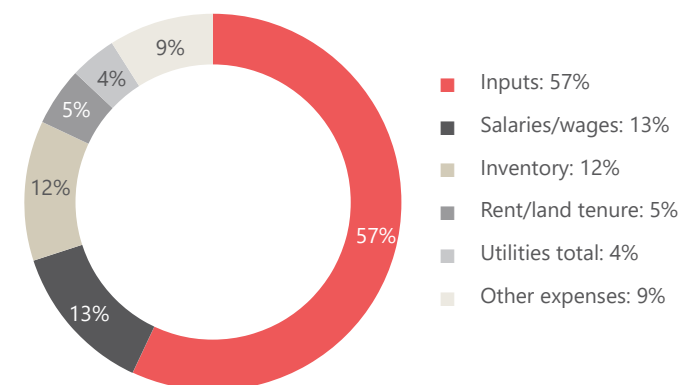
One-off costs as a percentage of total one-off expenditure averages\*



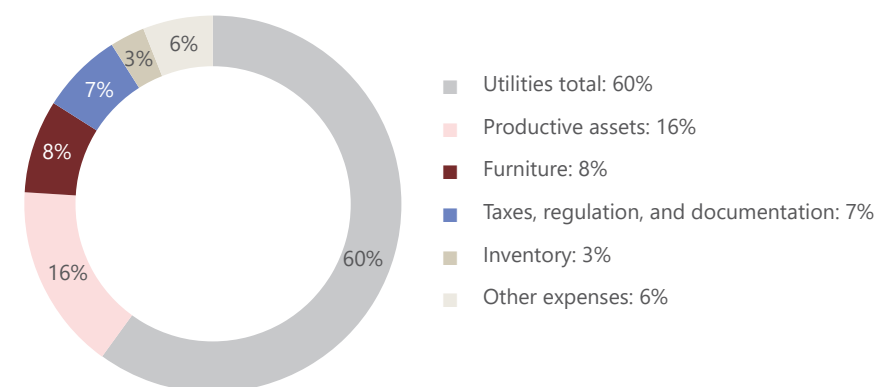
## BEP BREAKDOWN: Services, Micro enterprises(n=33)

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	1,872	100	33	NA	NA	0
Rent / land tenure	1,404	75	26	NA	NA	0
Construction	561	30	4	4,000	214	1
One-off utilities (i.e. installation)	One-off cost only			30,169	1,612	5
Electricity from public sources	600	32	33	Recurring costs only		
Electricity from private generator	94	5	3			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	112	6	33			
Fuel for heating or cooking	131	7	17			
Telecommunications	112	6	31			
Other utilities	NA	NA	0			
Inventory	3,743	200	19	7,500	401	1
Inputs	3,743	200	23	NA	NA	0
Productive assets	936	50	14	2,000	107	7
Furniture	1,872	100	11	1,404	75	10
Office supplies	187	10	33	NA	NA	0
Services	75	4	15	1,336	71	2
Transportation and travel	300	16	7	NA	NA	0
Marketing and advertising	936	50	3	1,436	77	4
Taxes, regulations, and documentation	125	7	15	18,715	1,000	1
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	142,020		33	7,589		33
Total cost of productive assets in current market	Median 'start-up' costs					
	18,715		24	1,000		24

Recurring costs as a percentage of total recurring expenditure averages\*



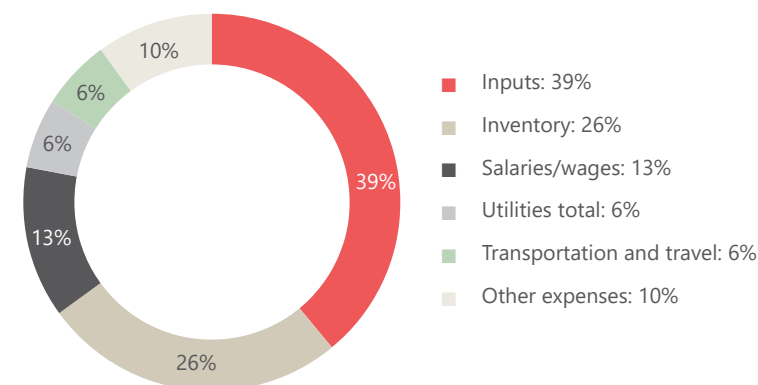
One-off costs as a percentage of total one-off expenditure averages\*



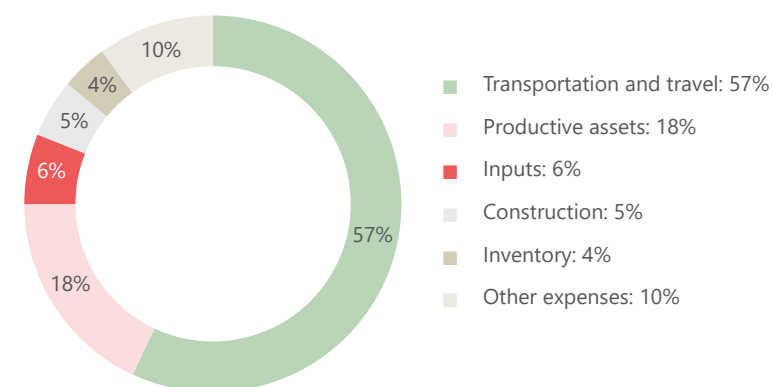
## BEP BREAKDOWN: Services, Small enterprises (n=37)

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	8,000	427	35	19,651	1,050	2
Rent / land tenure	2,800	150	29	2,339	125	3
Construction	1,918	103	2	3,743	200	12
One-off utilities (i.e. installation)	One-off cost only			1,872	100	9
Electricity from public sources	1,000	53	33	Recurring costs only		
Electricity from private generator	200	11	3			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	300	16	34			
Fuel for heating or cooking	655	35	25			
Telecommunications	187	10	34			
Other utilities	NA	NA	0			
Inventory	13,101	700	18	13,101	700	6
Inputs	10,293	550	28	28,073	1,500	6
Productive assets	1,404	75	13	7,486	400	20
Furniture	3,743	200	7	3,743	200	16
Office supplies	374	20	29	936	50	4
Services	175	9	19	1,123	60	3
Transportation and travel	936	50	15	14,598	780	4
Marketing and advertising	450	24	4	1,202	64	12
Taxes, regulations, and documentation	150	8	12	1,872	100	7
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	560,704		37	29,960		37
Total cost of productive assets in current market	Median 'start-up' costs					
	93,663		28	5,005		28

Recurring costs as a percentage of total recurring expenditure averages\*



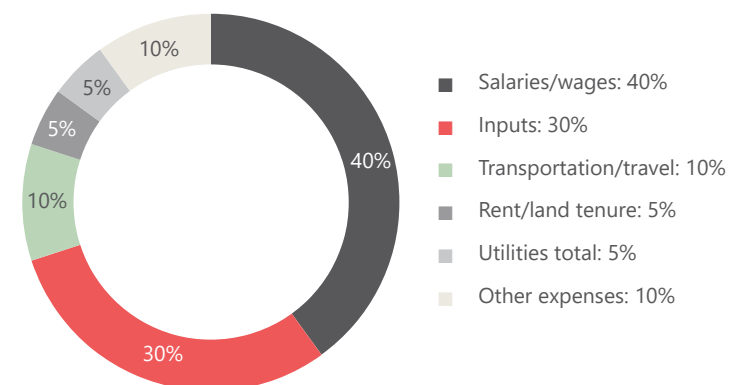
One-off costs as a percentage of total one-off expenditure averages\*



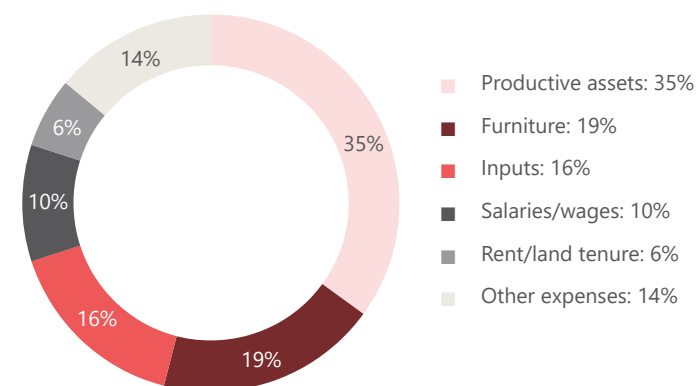
**BEP BREAKDOWN: Services, Medium enterprises (n=19)**

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	32,802	1,753	19	30,000	1,603	5
Rent / land tenure	9,366	500	14	37,430	2,000	3
Construction	1,872	100	3	14,036	750	4
One-off utilities (i.e. installation)	One-off cost only			1,095	59	6
Electricity from public sources	1,872	100	16	Recurring costs only		
Electricity from private generator	NA	NA	0			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	936	50	19			
Fuel for heating or cooking	3,513	188	6			
Telecommunications	374	20	19			
Other utilities	NA	NA	0			
Inventory	9,000	481	9	19,358	1,034	4
Inputs	11,229	600	14	93,715	5,007	4
Productive assets	1,702	91	6	24,330	1,300	8
Furniture	1,872	100	3	9,366	500	10
Office supplies	968	52	16	14,972	800	3
Services	936	50	15	2,807	150	3
Transportation and travel	1,872	100	15	11,229	600	7
Marketing and advertising	1,366	73	6	2,341	125	6
Taxes, regulations, and documentation	3,250	174	8	7,486	400	7
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	1,091,464		19	58,320		19
Total cost of productive assets in current market	Median 'start-up' costs					
	187,151		11	10,000		11

Recurring costs as a percentage of total recurring expenditure averages\*



One-off costs as a percentage of total one-off expenditure averages\*

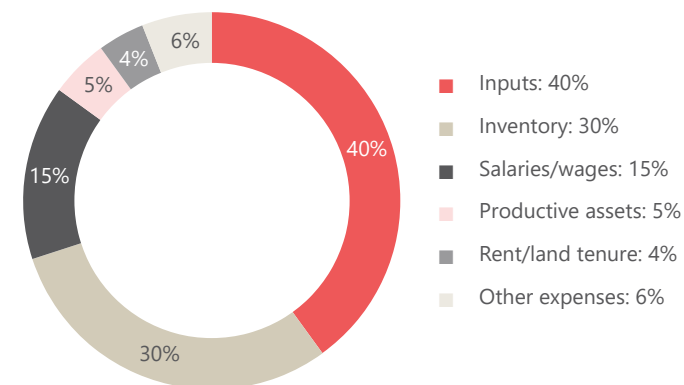




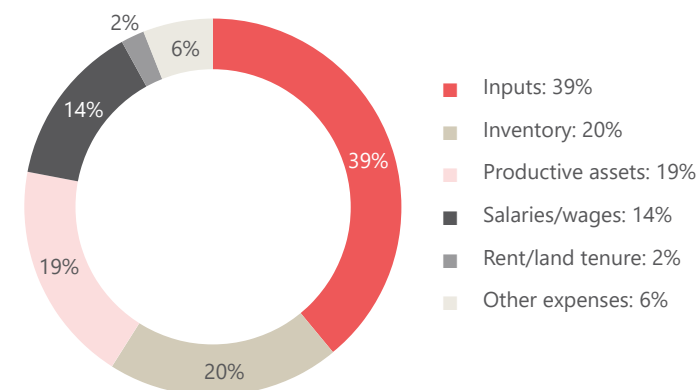
## BEP BREAKDOWN: Non-food industry/manufacturing, Micro enterprises (n=33)

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	4,679	250	33	4,211	225	5
Rent / land tenure	1,310	70	25	9,825	525	2
Construction	NA	NA	0	NA	NA	0
One-off utilities (i.e. installation)	One-off cost only			2,807	150	5
Electricity from public sources	608	33	32	Recurring costs only		
Electricity from private generator	NA	NA	0			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	150	8	29			
Fuel for heating or cooking	187	10	21			
Telecommunications	187	10	33			
Other utilities	NA	NA	0			
Inventory	7,486	400	19	18,715	1,000	6
Inputs	8,422	450	28	18,715	1,000	10
Productive assets	842	45	16	5,615	300	9
Furniture	2,807	150	2	3,275	175	6
Office supplies	103	6	26	187	10	5
Services	187	10	14	1,872	100	4
Transportation and travel	421	23	30	3,275	175	2
Marketing and advertising	NA	NA	0	936	50	3
Taxes, regulations, and documentation	112	6	5	1,872	100	1
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	269,497		33	14,400		33
Total cost of productive assets in current market	Median 'start-up' costs					
	34,623		24	1,850		24

Recurring costs as a percentage of total recurring expenditure averages\*



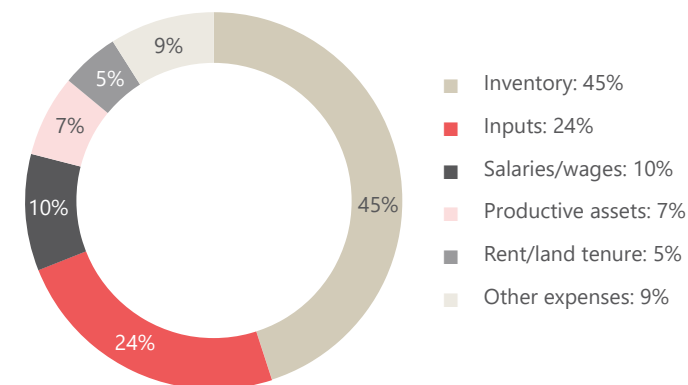
One-off costs as a percentage of total one-off expenditure averages\*



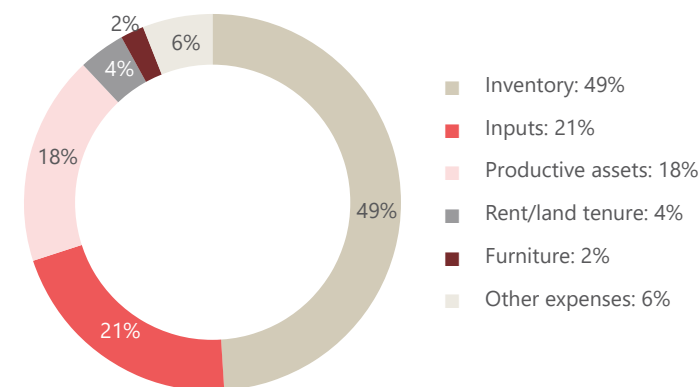
## BEP BREAKDOWN: Non-food industry/manufacturing, Small enterprises (n=38)

Expenditure category (Definitions on pg. 30)	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	5,240	280	38	3,743	200	8
Rent / land tenure	2,807	150	34	56,145	3,000	5
Construction	374	20	1	2,807	150	2
One-off utilities (i.e. installation)	One-off cost only			11,229	600	9
Electricity from public sources	936	50	35	Recurring costs only		
Electricity from private generator	374	20	3			
Electricity via a community generator	1,123	60	1			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	281	15	31			
Fuel for heating or cooking	468	25	32			
Telecommunications	187	10	36			
Other utilities	NA	NA	0			
Inventory	28,073	1,500	27	93,575	5,000	17
Inputs	9,358	500	33	22,458	1,200	19
Productive assets	936	50	17	22,458	1,200	19
Furniture	2,807	150	12	3,275	175	18
Office supplies	187	10	26	1,872	100	11
Services	187	10	25	1,872	100	9
Transportation and travel	936	50	35	17,966	960	8
Marketing and advertising	187	10	4	1,825	98	8
Taxes, regulations, and documentation	374	20	5	1,965	105	2
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	611,609		38	32,680		38
Total cost of productive assets in current market	Median 'start-up' costs					
	56,145		30	3,000		30

Recurring costs as a percentage of total recurring expenditure averages\*



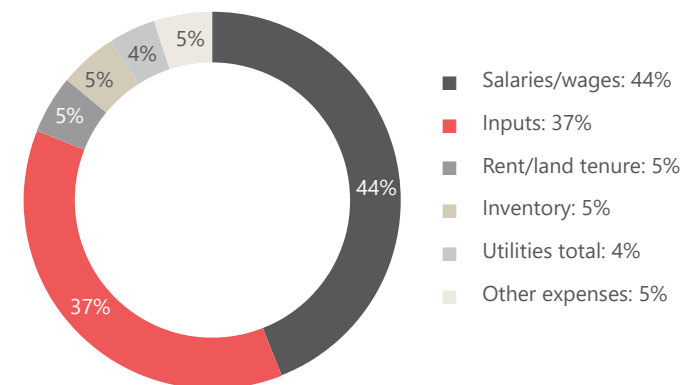
One-off costs as a percentage of total one-off expenditure averages\*



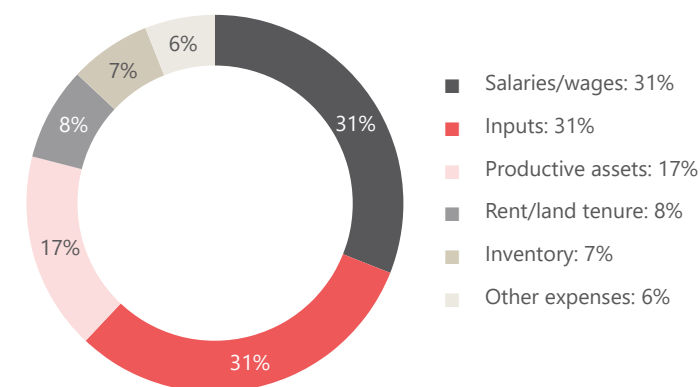
**BEP BREAKDOWN: Non-food industry/manufacturing, Medium enterprises (n=15)**

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	37,430	2,000	15	13,101	700	11
Rent / land tenure	4,679	250	13	112,291	6,000	1
Construction	NA	NA	0	NA	NA	0
One-off utilities (i.e. installation)	One-off cost only			3,088	165	2
Electricity from public sources	3,743	200	13	Recurring costs only		
Electricity from private generator	1,872	100	1			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	281	15	15			
Fuel for heating or cooking	187	10	10			
Telecommunications	187	10	15			
Other utilities	NA	NA	0			
Inventory	9,358	500	3	50,531	2,700	2
Inputs	23,394	1,250	12	42,109	2,250	4
Productive assets	2,339	125	12	9,358	500	11
Furniture	374	20	3	2,339	125	8
Office supplies	281	15	14	2,807	150	5
Services	112	6	8	2,948	158	2
Transportation and travel	936	50	6	NA	NA	0
Marketing and advertising	NA	NA	0	1,170	63	2
Taxes, regulations, and documentation	328	18	4	4,679	250	7
Other expenses (i.e. staff food and drink)	281	15	2	1,872	100	1
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	1,285,764		15	68,702		15
Total cost of productive assets in current market	Median 'start-up' costs					
	187,151		12	10,000		12

Recurring costs as a percentage of total recurring expenditure averages\*



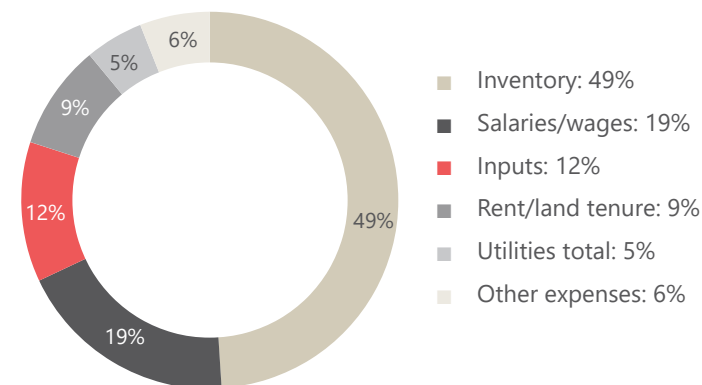
One-off costs as a percentage of total one-off expenditure averages\*



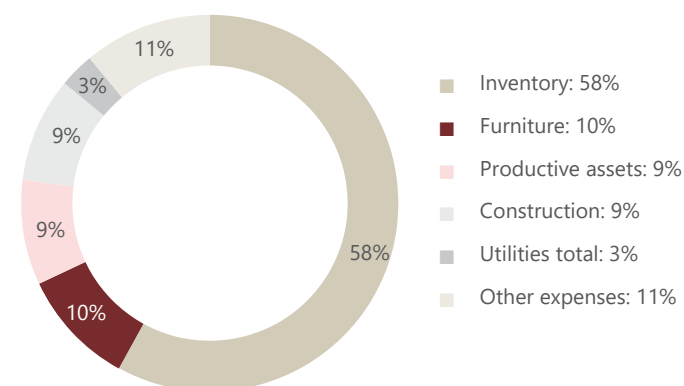
## BEP BREAKDOWN: Commercial retail/trade, Micro enterprises (n=47)

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	4,679	250	47	1,872	100	5
Rent / land tenure	2,950	158	40	936	50	1
Construction	936	50	1	2,654	142	18
One-off utilities (i.e. installation)	One-off cost only			842	45	18
Electricity from public sources	387	21	46	Recurring costs only		
Electricity from private generator	100	5	1			
Electricity via a community generator	100	5	1			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	112	6	41			
Fuel for heating or cooking	468	25	39			
Telecommunications	187	10	45			
Other utilities	100	5	1			
Inventory	13,101	700	41	28,073	1,500	25
Inputs	194	10	32	1,310	70	17
Productive assets	1,872	100	3	3,743	200	27
Furniture	1,216	65	4	1,872	100	34
Office supplies	106	6	38	374	20	7
Services	225	12	31	968	52	14
Transportation and travel	936	50	25	3,275	175	10
Marketing and advertising	2,200	118	1	1,404	75	29
Taxes, regulations, and documentation	161	9	10	936	50	20
Other expenses (i.e. staff food and drink)	NA	NA	0	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	326,241		47	17,432		47
Total cost of productive assets in current market	Median 'start-up' costs					
	65,625		27	3,507		27

Recurring costs as a percentage of total recurring expenditure averages\*



One-off costs as a percentage of total one-off expenditure averages\*

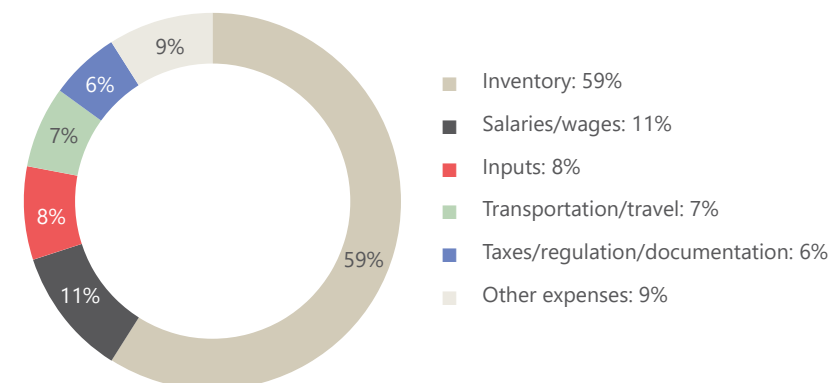




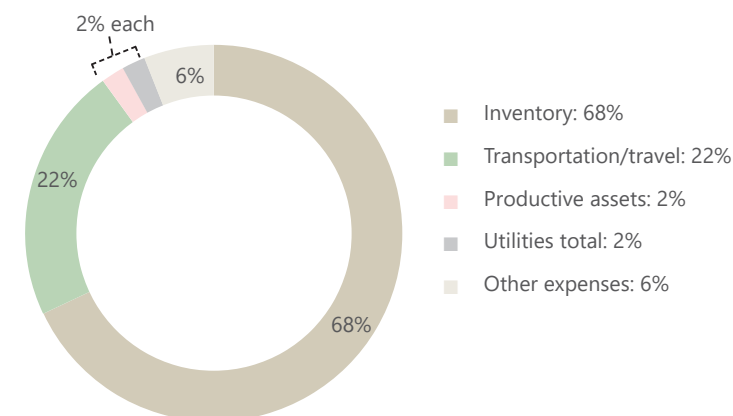
## BEP BREAKDOWN: Commercial retail/trade, Small enterprises (n=40)

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	5,147	275	40	2,000	107	15
Rent / land tenure	2,339	125	30	9,679	517	6
Construction	1,123	60	3	2,339	125	10
One-off utilities (i.e. installation)	One-off cost only			6,275	335	14
Electricity from public sources	655	35	39	Recurring costs only		
Electricity from private generator	187	10	3			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	112	6	39			
Fuel for heating or cooking	212	11	34			
Telecommunications	187	10	39			
Other utilities	NA	NA	0			
Inventory	28,073	1,500	27	112,291	6,000	17
Inputs	1,216	65	16	3,372	180	14
Productive assets	1,497	80	6	3,743	200	22
Furniture	2,807	150	9	1,872	100	26
Office supplies	187	10	25	936	50	20
Services	103	6	14	2,000	107	9
Transportation and travel	1,872	100	23	6,600	353	21
Marketing and advertising	1,872	100	3	2,105	113	12
Taxes, regulations, and documentation	328	18	18	2,872	153	16
Other expenses (i.e. staff food and drink)	187	10	1	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	511,820		40	27,348		40
Total cost of productive assets in current market	Median 'start-up' costs					
	74,860		25	4,000		25

Recurring costs as a percentage of total recurring expenditure averages\*



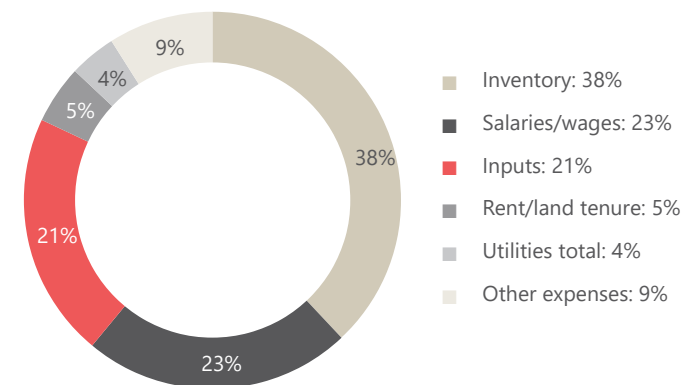
One-off costs as a percentage of total one-off expenditure averages\*



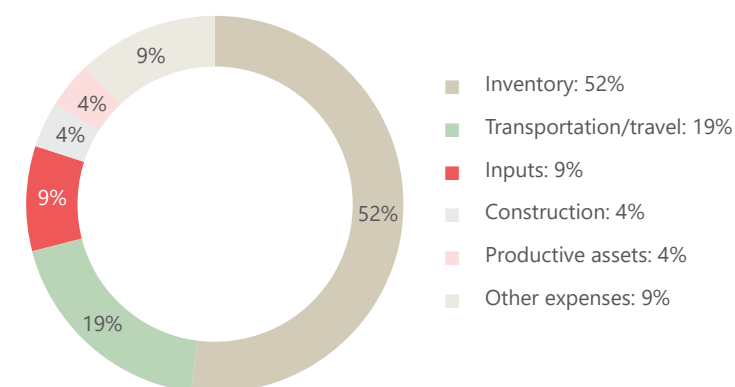
## BEP BREAKDOWN: Commercial retail/trade, Medium enterprises (n=22)

Expenditure category (Definitions on <a href="#">pg. 30</a> )	Median recurring costs		n*	Median one-off costs		n*
	TRY	USD		TRY	USD	
Salary / wages	25,265	1,350	22	12,170	650	8
Rent / land tenure	6,550	350	11	18,715	1,000	3
Construction	10,527	563	2	4,679	250	8
One-off utilities (i.e. installation)	One-off cost only			3,743	200	9
Electricity from public sources	1,872	100	22	Recurring costs only		
Electricity from private generator	1,710	91	4			
Electricity via a community generator	NA	NA	0			
Other electricity (i.e. bulbs and cables)	NA	NA	0			
Water	468	25	22			
Fuel for heating or cooking	468	25	19			
Telecommunications	467	25	22			
Other utilities	468	25	1			
Inventory	9,358	500	11	46,788	2,500	10
Inputs	4,849	259	12	37,430	2,000	7
Productive assets	1,263	68	6	14,972	800	11
Furniture	6,550	350	4	5,615	300	15
Office supplies	187	10	16	936	50	13
Services	1,872	100	15	2,807	150	11
Transportation and travel	2,807	150	18	37,430	2,000	14
Marketing and advertising	1,684	90	4	2,807	150	12
Taxes, regulations, and documentation	1,731	93	12	4,679	250	7
Other expenses (i.e. staff food and drink)	850	45	3	NA	NA	0
Median recurring costs x 12 + median one-off costs	Median total yearly operating costs					
	TRY			USD		
	1,042,196		22	55,688		22
Total cost of productive assets in current market	Median 'start-up' costs					
	262,186		10	14,009		10

Recurring costs as a percentage of total recurring expenditure averages\*



One-off costs as a percentage of total one-off expenditure averages\*



## ELECTRICITY SOURCE & EXPENDITURE ZOOM-IN

### Electricity sources used by businesses in Dana

As seen in Figure 3, the vast majority of the assessed businesses in Dana reported relying on the public network for their businesses' electricity needs (94%), while only a small proportion of businesses reported relying on private generators as a source of electricity for their activities (7%). Furthermore, very few businesses reported relying on community generators. These trends were similar across all business types as shown in Figure 4.

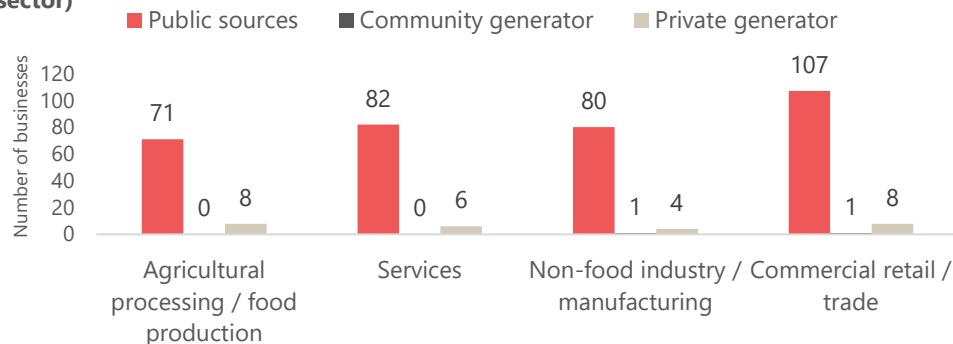
According to [REACH Humanitarian Situation Overview of Syria \(HSOS\)](#) May 2023 round,<sup>8</sup> on average, electricity is available in Dana community for more than 12 hours per day. However, while electricity is available, the cost of electricity from primary sources such as the network is noted to be a key barrier to access, limiting access to sufficient electricity within the community.<sup>9</sup> This suggests that overall expenses to sufficiently access electricity, especially in higher usage settings such as that for operating heavy machinery, could be a significant cost burden for businesses.

**Figure 3: Reported sources of electricity used (by % of surveyed businesses)\***



Further, following the earthquakes in February 2023, findings from REACH and NWS NGO Forum's Rapid Needs Assessment<sup>10</sup> indicate that electricity was accessible to most of Dana's population, despite reports of some damages to the electricity infrastructure. While there were no distinct trends among different sectors in terms of reported sources of electricity, findings suggest that in the absence of accessible and affordable secondary electricity sources, any shocks and unaddressed impacts on the public grid and infrastructure could have significant impact on Dana's business activities.

**Figure 4: Reported sources of electricity used (by number of surveyed businesses per sector)\***



### Electricity expenditure analysis

Electricity expenditures were overall correlated with business sizes, whereby larger businesses tended to report higher electricity costs (see Table 3). Notably, businesses in the non-food industry/manufacturing sector had the highest median expenditure for electricity, in line with expected trends as the sector relies more heavily on machinery and electrical equipment for processing/manufacturing of goods on a comparatively larger scale. While electricity costs make up only a small percent of overall recurring costs (2.3%), electricity makes up the majority of businesses total utilities costs (54%). As such, ensuring that reliable and low cost electricity is available for businesses to conduct their activities is a critical business support need and a key consideration for Early Recovery actors hoping to support economic recovery through improved access to basic services like electricity.

**54%** of the total median utilities expenditures are from electricity

**Table 3: Median electricity expenditures by source, sector, and business size**

Business Profile	Median expenditure on electricity from public sources		n*	Median expenditure on electricity from subscription to community generator		n*	Median expenditure on electricity from private generator		n*
	TRY	USD		TRY	USD		TRY	USD	
Agricultural processing/food production									
Micro	749	40	36	NA	NA	0	187	10	1
Small	1123	60	27	NA	NA	0	618	33	4
Medium	1312	70	8	NA	NA	0	2640	141	3
Services									
Micro	600	32	33	NA	NA	0	94	5	3
Small	1000	53	33	NA	NA	0	200	11	3
Medium	1872	100	16	NA	NA	0	NA	NA	0
Non-food industry/manufacturing									
Micro	608	33	32	NA	NA	0	NA	NA	0
Small	936	50	35	1123	60	1	374	20	3
Medium	3743	200	13	NA	NA	0	1872	100	1
Commercial retail/trade									
Micro	387	21	46	100	5	1	100	5	1
Small	655	35	39	NA	NA	0	187	10	3
Medium	1872	100	22	NA	NA	0	1710	91	4
Overall									
	918	49	328	611	33	2	300	16	23

## SECTION 2: BUSINESS OPERATIONS

### INTRODUCTION: OPERATIONS, CHALLENGES, AND NEEDS

The following section outlines key operational trends for businesses across assessed sectors in Dana community, identifying some of the challenges they face in maintaining their businesses and the barriers that prevent them from expansion.

While numerous types of businesses are operating in Dana, and some opportunities already exist for those looking to start a new business or expand their current activities, many challenges to running and expanding businesses are still present.<sup>16</sup> Some of these challenges exist as a result of decades of conflict, wider geopolitical issues, absence of stable economic conditions, unavailability of raw materials and inputs, limited import/export activities, irregular supply chain routes, climate-related impacts, and more.<sup>17</sup> However, financial, infrastructural, and staffing obstacles have also affected operations and expansion capacities of businesses across NWS. Understanding the overall challenges, key needs, and top priorities of businesses to mitigate and address such challenges could enable response actors to provide more effective and tailored livelihoods programming.



Photograph of an assessed business

### KEY FINDINGS: BUSINESS OPERATIONS

- **Businesses overwhelmingly prioritised financial support in the form of business grants when asked about their priority needs (87%).** This echoes findings that businesses' primary operational challenges and expansion barriers are related to lack of financial resources and highlights that a scale up of MSME programming would align with the reported needs and priorities of local businesses ([see pg. 21](#)).
- **While businesses in Dana are largely owned by and largely employ men, it appears that women's participation in the Dana labour market may be higher than female employment trends seen regionally.** Service sector businesses had the highest representation of both female owners and staff. Additionally, businesses with female owners tended to employ a higher percentage of female staff, likely due a general concentration of women in sectors that align with cultural norms ([see pg. 22](#)).
- **Nearly half of businesses reported a decrease in weekly customer numbers in comparison to the same time the previous year (46%), mostly attributed to decreased customer purchasing power** and indicating that lack of market demand for other reasons is not a significant factor. Non-food manufacturing and commercial retail/trade businesses most commonly reported decreases, presumably linked to household strategies of reducing non-food/non-essential expenditures to cope with insufficient income ([see pg. 25](#)).
- **Most businesses source inputs and inventory from wholesalers or retailers within NWS (over 90%),** with only a small percentage of primarily commercial retail/trade businesses sourcing from other countries such as Türkiye. Businesses did not often report sourcing directly from manufacturers. Regardless of supply source, businesses did not commonly report supply issues other than those related to high cost of the needed goods, indicating that supply chains were otherwise functional ([see pgs. 26-27](#)).
- While Dana is itself a market hub for surrounding communities, **only 13% of businesses reported selling/providing outside of Dana community,** highlighting that Dana businesses are not significantly linked into value chains in other areas of NWS. Notably, some businesses reporting linkages to A'zaz city markets, potentially linkages which could be strengthened by response partner support to increase access to new markets in line with businesses' reported priority needs ([see pgs. 27 and 21](#)).
- **Most businesses expressed interest in expansion (87%), with a lack of financial resources as the only barrier reported by a significant percentage.** Businesses commonly noted they would seek expansion in terms of physical space or in terms of acquiring new tools, machinery, and other assets. Among businesses that reporting already having a plan for expansion, median estimated expansion costs ranged from 2,000 to 6,000 USD, depending on sector ([see pgs. 28-29](#)).

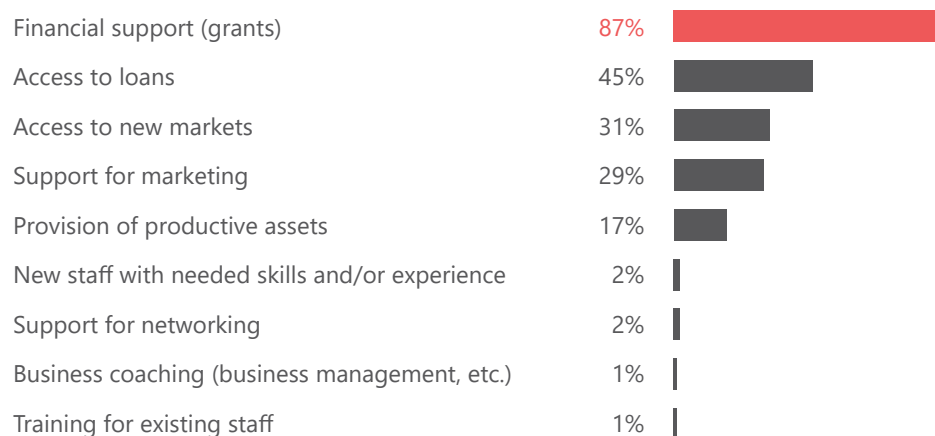


## PRIORITY NEEDS & CURRENT BUSINESS SUPPORT

When asked what types of support they were most in need of, businesses overwhelmingly reported the need for access to financial resources, largely in the form of business grants and to a lesser degree in the form of business loans. In light of severe economic decline, rising prices of goods, and lack of access to formal financial services, the desire for financial support is not surprising. This need is further underscored by the fact that the most commonly reported challenges to continued operations and business growth were related to the high price of inputs and inventory and lack of access to financial resources to afford key needs for expansion such as securing a larger operating space, buying needed tools/machinery, or hiring more staff (see pgs. 28-29). The need for financial resources was made more severe increased cost of inputs/inventory in the markets, impacting their normal operations and expenditures.

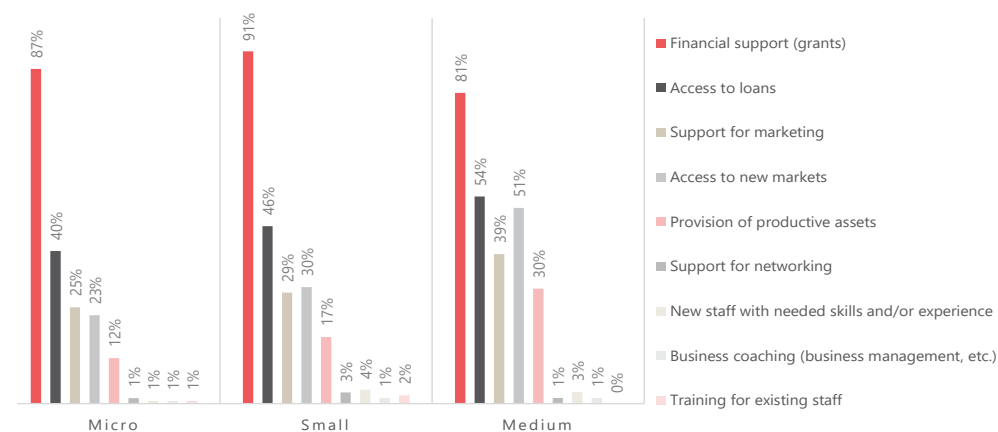
These findings highlight the importance of MSME grant support and underscore the necessity of a scale-up of financial support programs in order to meet the priority needs expressed by local businesses themselves.

**Figure 5: Most commonly reported priority needs (by % of surveyed businesses reporting option as a top 3 needs)\***



Businesses also noted that the need for support to access new markets and for marketing their products, highlighting that businesses perceive themselves being unable to tap into the wider customer base in the area and due to which sales and profit may be lower than possible. This could be a potential opportunity for response partners to support businesses by training and assisting them in marketing operations and provide support in building strategies for becoming integrated into new markets and existing supply chains in other areas of NWS. Some businesses also noted that support for acquiring productive assets would be their top priority, echoing the fact that almost half of businesses who expressed interest in expansion reported they would need additional assets to do so (see pg. 28)

**Figure 6: Most commonly reported priority needs by business size (by % of surveyed businesses reporting option as being among their top 3 needs)**

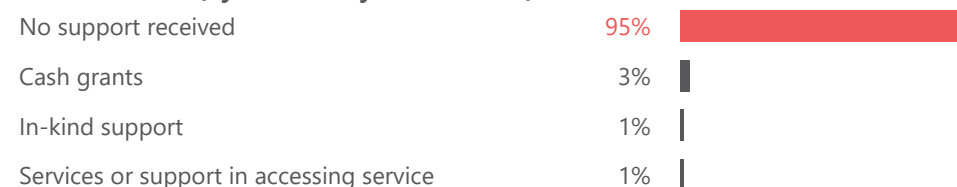


A small number of businesses, most commonly micro and small and in the services sector, also prioritised finding new staff with the needed skills/experience or training their existing staff on new skills. This suggests that employment support schemes such as job placement and vocational training would be helpful and best targeted towards these types of businesses. The skills that businesses outlined their current staff most needed were those related to knowledge of marketing, basic computer and IT skills, computer maintenance and management, and IT programming and coding.

In general, businesses across size categories prioritised needs similarly (see Figure 6). However, medium-sized businesses more commonly reported needing access to new markets, which is understandable given that their larger operations require a larger network of customers to maintain their sales for continuity and profitability.

Finally, the vast majority of the assessed businesses reported that they had not received any support in the past year (95%)\*, indicating that business support is still not readily accessible to most businesses, even as there is a growing recognition among response actors that business support programming is key to improving livelihoods and improving the humanitarian situation. While it is unlikely that response actors could support a majority of businesses in Dana, the results indicate that even a moderate expansion of their reach could support improved livelihood conditions.

**Figure 7: Business support assistance reportedly received in 12 months prior to data collection (by % of surveyed businesses)**



## BUSINESS STAFFING: EMPLOYEE TYPES AND GENDER, HIRING CHALLENGES

Potentially contradictory to expected trends around staff employment arrangements, CBA data shows that businesses across surveyed sectors (though not including agricultural production) employed mostly full-time staff rather than daily workers or part time employees (see Table 4). This was most notable for businesses in the non-food industry/manufacturing sector (77%) and agricultural processing/food production sector (70%) where it could be assumed daily-wage labourers would traditionally find employment in factory/industrial settings.

This highlights that most businesses are able to employ and retain full-time workers. This stability in staffing was further reflected in the responses of the 97% of business owners in Dana when they reported that they do not face significant challenges in securing the needed staff. However, almost all businesses still additionally relied on some proportion of employees which were either part-time employees or daily workers. Compared to other sectors, businesses in the services sector reported higher proportions of employees who were not full-time i.e. their staff were either part-time employees and/or day labourers (11% both).

**Table 4: Staff employment type breakdown (by % of total number of overall staff reported under each employment category per sector)**

	Owners	Full-time employees	Part-time employees	Day labourers
Agricultural processing/ food production	20%	70%	5%	6%
Services	17%	61%	11%	11%
Non-food industry/ manufacturing	20%	77%	1%	2%
Commercial retail/trade	25%	59%	12%	3%

**Interpretation example:** Out of the total number of staff reported by the 79 assessed businesses in the agricultural processing/food production sector, 20% of the total staff were owners, 70% were full-time employees, 5% were part-time employees, and 6% were daily labourers.

Female participation, both as owners and as staff, in businesses in Dana community was observed to be the highest in the services sector. Businesses in this sector mainly include, but are not limited to, beauty salon and parlours, sewing/tailoring/knitting, education, healthcare, hospitality, etc. Comparatively higher participation of women in this sector is in line with global trends where women more commonly participate in service-oriented businesses and lesser labour intensive jobs. Following the same trend, commercial retail/trade was another sector with higher female participation reported across all businesses.

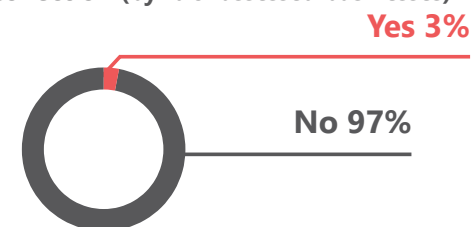
This gender analysis and breakdown of staff and business owners gives a good indication of cultural dimensions and gendered preferences in businesses in Dana, which could be a useful element in programs that aim to strengthen female employment in the labour market, support entrepreneurial initiatives among women and further female business ownership.

**Table 5: Staff gender breakdown (by % of total number of staff of all types and total number of owners reported per sector)**

	Overall (staff of all types)		Business owners	
	Male	Female	Male	Female
Agricultural processing/ food production	94%	6%	95%	5%
Services	72%	28%	76%	24%
Non-food industry/ manufacturing	97%	3%	100%	0%
Commercial retail/trade	87%	13%	87%	13%

**Interpretation example:** Out of the total number of staff of all types reported by the 89 assessed businesses in the service sector, 72% of the total staff were male and 28% were female. Out of the total number of business owners reported by the 89 assessed service businesses, 76% of owners were male and 24% of owners were female.

**Figure 8: Businesses that reported facing challenges securing staff in the 12 months prior to data collection (by % of assessed businesses)**



Compared to the findings from the December 2021 REACH Dana Labour Market Assessment,<sup>11</sup> which found that most assessed businesses faced hiring challenges, CBA findings point to a reduction of the supply-demand gap in Dana over the past year, with only 3% of businesses reporting challenges (see Figure 8). This is perhaps owed to better staff retention capacities of businesses and/or improved skill sets among the labour force. However, it is likely that the number of people seeking employment has increased as a result of economic pressures and increased unemployment, meaning that businesses have a larger labour pool to hire from. While the number of businesses reporting staffing challenges was limited, small non-food industry/manufacturing businesses was the only category where multiple businesses reported issues, suggesting that employment support efforts might be best targeted here.

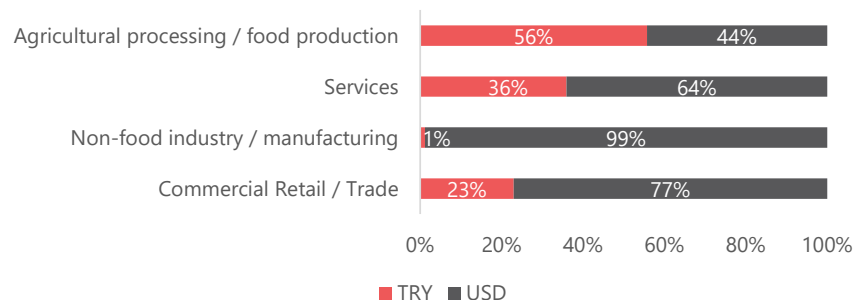
## CURRENCIES: EXPENDITURES & ACCEPTED PAYMENTS

### Currencies used for business expenditures

Available cash and markets data<sup>12</sup> evidences the fact that, due to inflation and exchange rate fluctuation, populations in NWS largely using currencies other than the Syrian pound (SYP), such as the Turkish lira (TRY) or US dollar (USD), whether for buying or selling goods. Similar findings were observed in Dana, where the majority of assessed businesses preferred reporting their business costs in USD as it is the currency they most commonly use. Among the different sectors, businesses in non-food industry/manufacturing and commercial retail/trade sectors most commonly preferred reporting in USD than any other currency. It is notable that these are the same sectors that reported conducting their businesses internationally such as importing stocks or inputs internationally from outside Syria ([see pg. 26](#)).

On the other hand, businesses in the agricultural processing/food production sector preferred using TRY to report their costs, highlighting that TRY is a more common expenditure currency in the sector. This may be related to the fact that 100% of businesses in this sector reported sourcing inputs and inventory from within NWS (see pg. 27) and may be more likely to source from retailers/wholesalers or producers that favour TRY.

**Figure 9: Businesses' preferred currency for reporting expenditures by sector (by % of assessed businesses in each sector)**

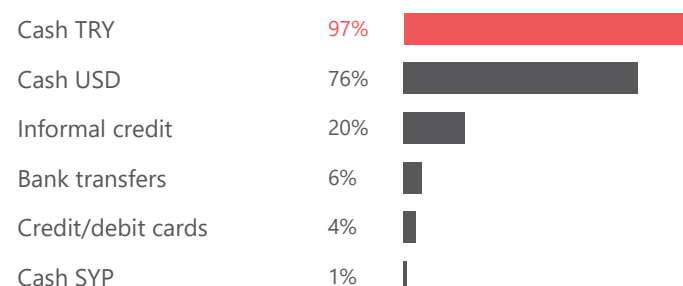


With the exception of non-food industry/manufacturing sector, businesses from all other sectors reported a mixed use of TRY and USD, with some businesses preferring one over the other in comparable proportions. This indicates that, operationally, programming actors need to take into consideration factors such as accessibility to exchange services, availability of currency denominations etc. in a community for businesses to be able to fully utilise the grant provided to them since they might need to exchange the grant value to their preferred currency of business. As such, exchange service providers may be important stakeholders in MSME grant programming and more detailed evaluation of these services in Dana should be undertaken for partners to be able to account for these factors.

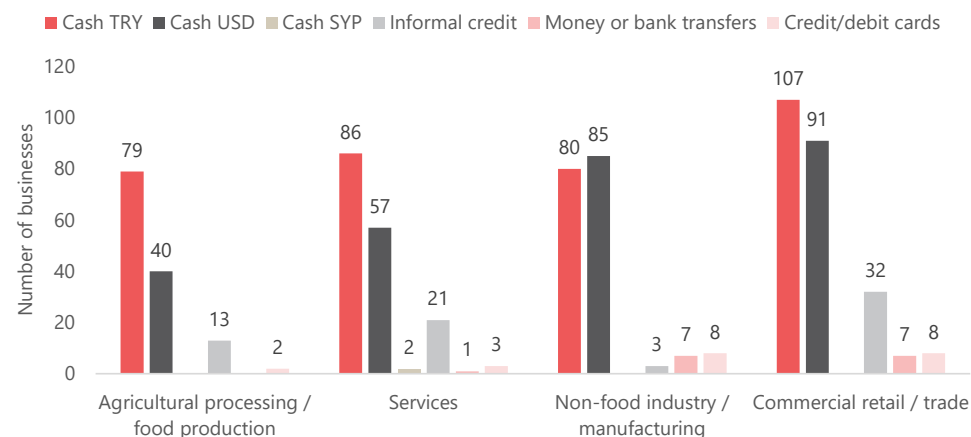
### Businesses' accepted payment modalities

In terms of payment modalities accepted by surveyed businesses in Dana, the vast majority reported mostly accepting cash in exchange for their products and services, as shown in Figure 10. TRY and USD were the most commonly reported cash currencies that businesses reported accepting. Owing to TRY also being the most commonly used currency by all populations in Idleb governorate, almost all businesses (97%) reported accepting TRY in comparison to 76% who accept USD. While no specific trends were observed between different sectors in terms of accepting payment in cash (TRY) from customers, 100% of businesses in the Agriculture Processing/Food Production sector reported accepting cash in TRY from customers (see Figure 11), in line with the businesses in this sector more often preferring to report their expenditures in TRY (see Figure 9).

**Figure 10: Payment modalities accepted from customers (by % of surveyed businesses)\***



**Figure 11: Payment modalities accepted from customers by sector (by number of assessed businesses)\***



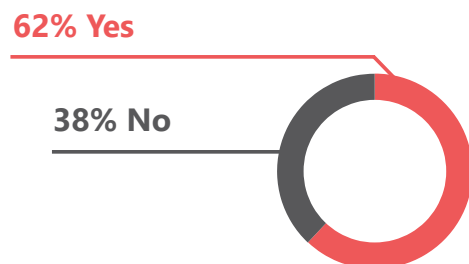
\* Respondents could select more than one option and therefore findings exceed 100% or exceed the total number of businesses assessed per sector.

## BUSINESS DONATIONS FOR COMMUNITY SUPPORT

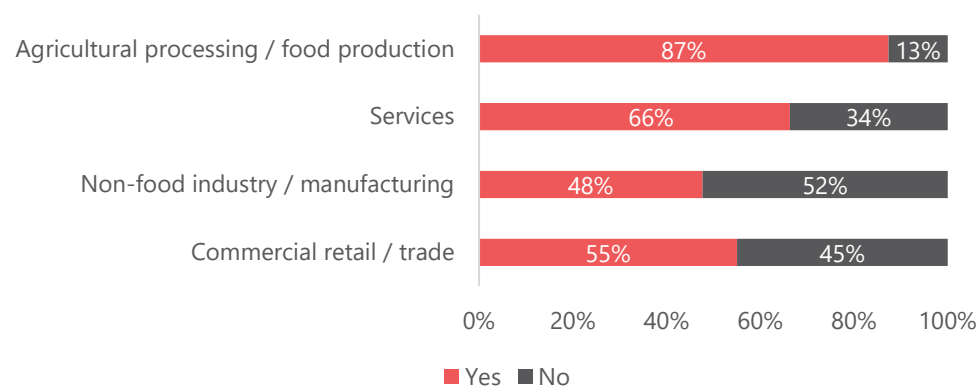
Despite the difficulties that businesses face overall in generating profits in spite of high business costs, more than 60% of assessed businesses in Dana reported donating products, services, or profits to community members in need (see Figure 12). This can be interpreted as reflecting socio-cultural practices, religious obligations of Zakat, and personal attitudes of social responsibility of business owners towards their fellow community members.

Compared to other sectors, agricultural processing/food production businesses most commonly reported making donations. This could in part be owing to the type of products these businesses produce (i.e. food items), which may be easier to donate or in higher demand due to high and ever-increasing food prices in NWS markets.<sup>13</sup> Notably this sector also has the highest yearly operational costs compared to other sectors, which underscores that while expenses and revenues of businesses likely play a role in making donation decisions, cultural and social norms are strong in encouraging businesses to support those in need in their community.

**Figure 12: Businesses that reported donating products, services, or profits to support community members in need (by % of surveyed businesses)**

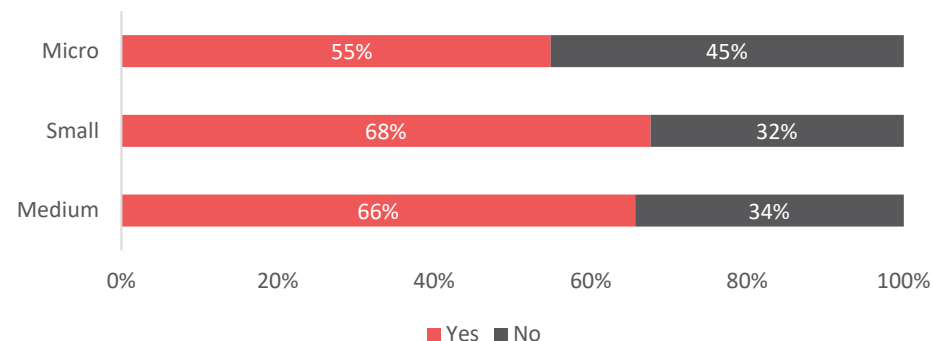


**Figure 13: Businesses that reported donating products, services, or profits to support community members in need (by % of surveyed businesses per sector)**



Further, businesses of all sizes reported contributing to donations to community members in need. However, in comparison to other business sizes, micro enterprises reported donations in slightly lower proportions, likely owing to their own small-scale production and revenue.

**Figure 14: Businesses that reported donating products, services, or profits to support community members in need (by % of surveyed businesses per size)**



Overall, support provided to local businesses, whether through externally supported initiatives, partnerships, or MSME grants can not only directly help owners and employees with increased income and job availability but also support broader access to local goods, produce, and services and potentially reduce needs. Availability of such communal support mechanisms are a key resilience capacity for local communities in the face of complex crisis. Overall, support from response actors could be a multiplying factor for local actors to work towards reduce the needs in their communities through charitable action.



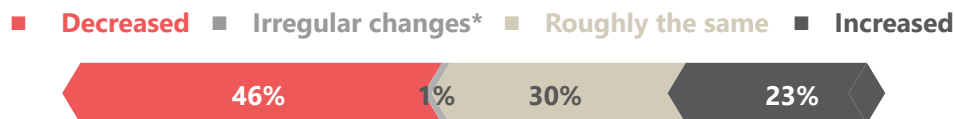
## BUSINESS DEMAND: CUSTOMER FLUCTUATION

Nearly half of assessed businesses reported a decrease in the number of customers their businesses received per week compared to the same time previous year, with non-food industry/manufacturing and commercial retail/trade businesses most commonly reporting a decrease (see Figures 15 and 16). Across all businesses, such decreases were overwhelmingly attributed to reduced customer incomes (84%) and increase in price of items (79%), both largely linked to continued TRY depreciation. These findings point to the likelihood that households first reduce spending on non-food/non-essential items when faced with insufficient income to meet needs. As such, it is possible that communities in Dana curbed their spending on the products from these sectors, in part explaining the reduction in their customers.

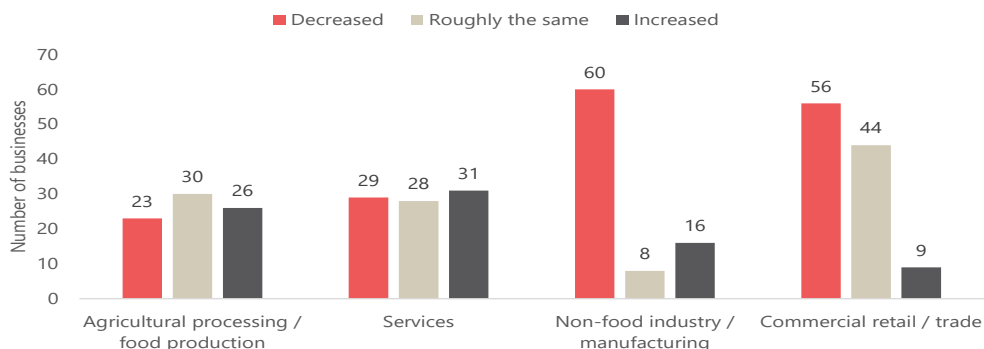
On the other hand, nearly a quarter of businesses reported an increase in the number of weekly customers in comparison to the previous year, most commonly reported by agricultural processing/food production and service sector businesses. More than 40% of these businesses attributed the increase in customers to greater availability of products and services than before, potentially indicating that for some businesses supply chains or productivity had improved since the previous year.

However, as shown in Figure 19, the majority of these businesses reported that the increase in customers was minimal (68%). Nonetheless, the 21%-40% or higher increase noted by the remaining businesses is a positive sign and suggests that room for business growth may be present.

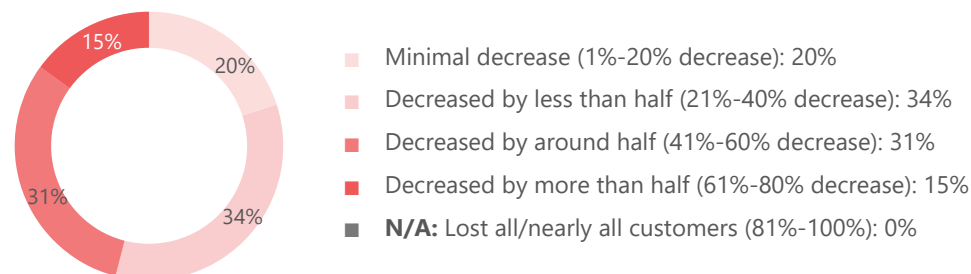
**Figure 15: Change in number of customers received per week compared to the same time the previous year (by % of surveyed businesses)**



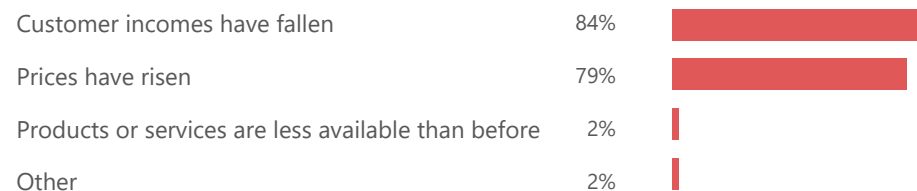
**Figure 16: Change in number of customers received per week compared to the same time the previous year by sector (by number of surveyed businesses)**



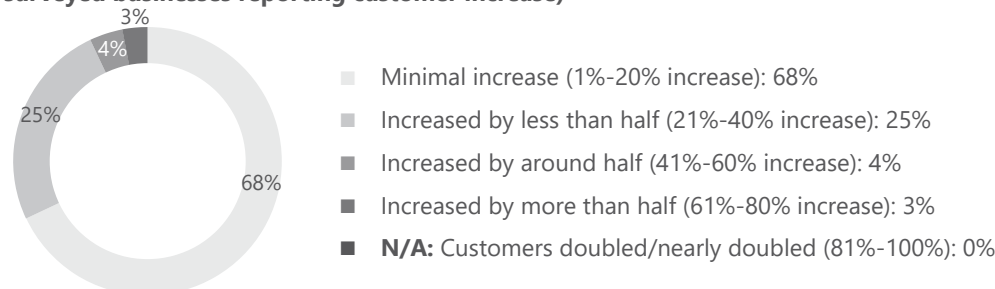
**Figure 17: Reported degree of decrease in customers received per week (by % of 162 surveyed businesses reporting customer decrease)**



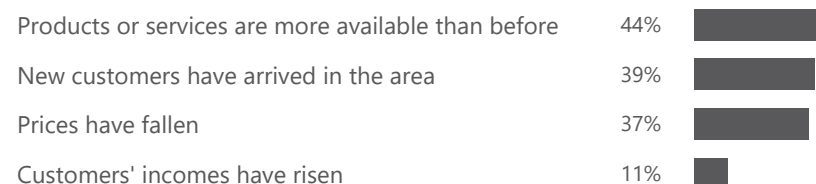
**Figure 18: Reported reasons for decrease in customers received per week (by % of 162 surveyed businesses reporting customer decrease)\***



**Figure 19: Reported degree of increase in customers received per week (by % of 79 surveyed businesses reporting customer increase)**



**Figure 20: Reported reasons for increase in customers received per week (by % of 79 surveyed businesses reporting customer increase)\***



## SUPPLY CHAIN: SUPPLY ROUTES, CHALLENGES, AND AREAS OF SALE ↻

### Supply routes for inputs and inventory

When business owners were asked where they purchased their inventory and inputs from, the large majority reported purchasing inventory (93%) and inputs (95%) from wholesalers or retailers within NWS (see figure 21). To a lesser extent, surveyed businesses reported securing these goods from wholesalers or retailers located in Türkiye, reported by 9% of businesses for inventory and 5% for inputs.

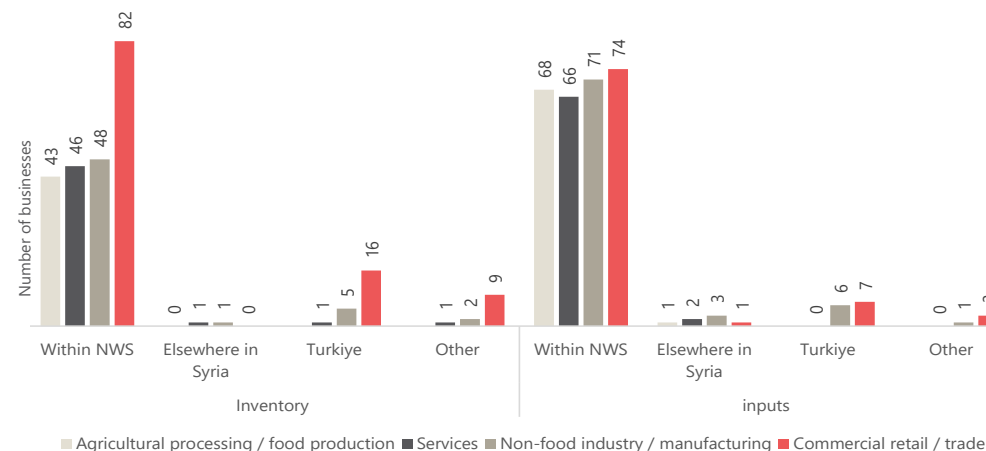
Looking at trends across sectors (see figure 22), surveyed businesses in the commercial retail/trade and non-food industry/manufacturing sectors reported sourcing goods from Türkiye more than businesses in other assessed sectors. These businesses' operations are more vulnerable to impacts of any disruption of cross-border trade and issues with import and transportation. A small number of businesses also reported sourcing inventory or inputs from countries other than Syria or Türkiye, most commonly from China and from India to a lesser extent.

In general, very few businesses purchase directly from manufacturers, meaning that the results of the assessment do not shed light on the origin of such goods and that further research with wholesalers would be required to understand business supply chain routes in NWS. However, the reliance on suppliers from within NWS underlines the importance of the region's market systems in supplying businesses with key items for their operations, regardless of the items' origins.

**Figure 21: Supply chain routes for purchase of inputs and inventory (by % of assessed businesses that have reported expenditures for purchasing inputs n=281 or inventory n=227)\***



**Figure 22: Supply chain routes for purchase of inputs and inventory by sector (by number of businesses per sector and supply route)\***

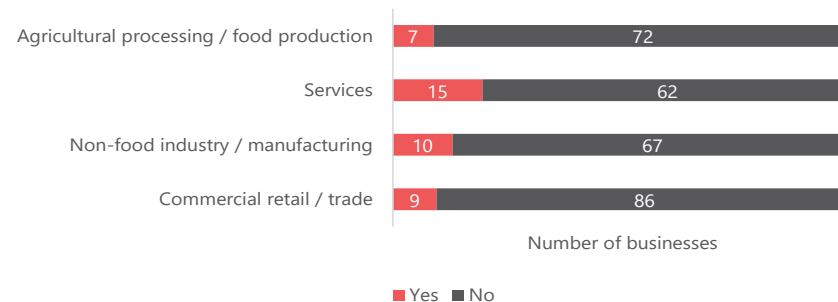


### Supply challenges: securing goods within NWS

The majority of businesses that reported securing inputs or inventory from a source within NWS reported that they did not face challenges in doing so. These responses were relatively consistent across all assessed sectors. However, surveyed businesses in the services sector reported facing slightly more challenges compared to other sectors. This is potentially linked to the types of enterprises from the services sector that participated in the assessment (hair/beauty salons, mechanics, tailors) and the financial and physical accessibility of the inputs and inventory they require.

Among the few businesses that did report facing challenges, most were related to pressures that impact the affordability of goods, rather than those relating to issues with supply chain functionality and availability.

**Figure 23: Number of businesses reporting challenges securing goods within NWS by sector (by number of 316 businesses reporting securing goods within NWS\*)**

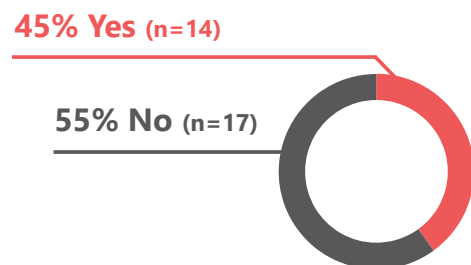


\* Respondents could select more than one option and therefore findings exceed 100%.

## Supply challenges: securing goods from Türkiye

On the other hand, nearly half of the businesses that reported securing goods from Türkiye reported that they faced challenges in doing so (45%). Reflective of issues generally faced in international or cross border trade, these businesses reported that the challenges were mostly related to high taxation and custom fees on foreign goods and transportation issues, particularly high cost of transportation and delays in delivery of goods.

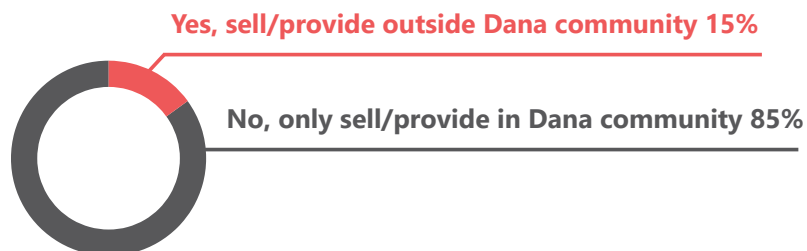
**Figure 24: Businesses that reported challenges securing goods from Türkiye (by % of the 31 surveyed businesses reporting sourcing inputs or inventory from Türkiye)**



## Primary areas of sale for businesses' goods and products/service provision

In order to understand how Dana businesses themselves fit into larger supply chains and may support availability of goods and services in other markets, businesses were asked about the locations in which they sell their products or provide their services. As shown in Figure 25, assessed businesses did not commonly report selling goods or providing services outside of Dana community (only 15% reported doing so), and only a handful (2%) reported that Dana community was not their primary area of sale or provision.

**Figure 25: Businesses that reported selling their goods/providing their services outside of Dana community (by % of assessed businesses)**



# 2%

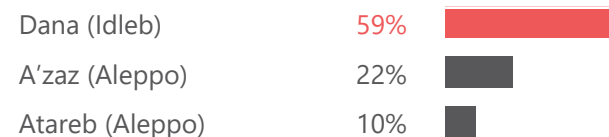
of all assessed businesses reported locations outside of Dana community as their *primary* area of sale/service provision.

Of those businesses that reported operating outside of Dana, there was no clear trend in terms of sectors or sizes that more commonly did so. Findings highlight that while Dana market itself is a market hub where people from surrounding areas come to buy goods,<sup>14</sup> and acknowledging that they may be indirectly linked by wholesalers/larger retailers who buy and resell their goods, Dana businesses do not appear to be deeply linked to market supply in other locations. However, businesses seem to recognise this and noted that they would like to receive support to expand into and access new markets ([see pg. 21](#)), indicating that the lack of linkages to other markets, rather than lack of potential, may be an issue.

Notably, the majority of businesses that reported selling their products or provide their services outside of the Dana community are medium-sized (52%), which could be expected given that larger operations may have more the capacity for wider market engagement and also require it for profitability. Where businesses did sell/provide outside of Dana community, the majority still did so in other communities within Dana sub-district, most commonly in Sarmada market. However a small number of businesses indicated sale/provision to A'zaz city, potentially pointing to an opportunity for increased supply chain linkages between the two urban centres.

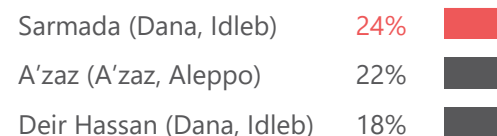
**Figure 26: Most common sub-districts of locations outside of Dana community where businesses reportedly sell their goods/provide services (by % and number of 53 assessed businesses also selling goods/providing services in other locations)**

### Sub-district (Governorate)



**Figure 27: Most common communities outside of Dana community where businesses reportedly sell their goods/provide services (by % and number of 53 assessed businesses also selling goods/providing services in other locations)**

### Community (Sub-district, Governorate)



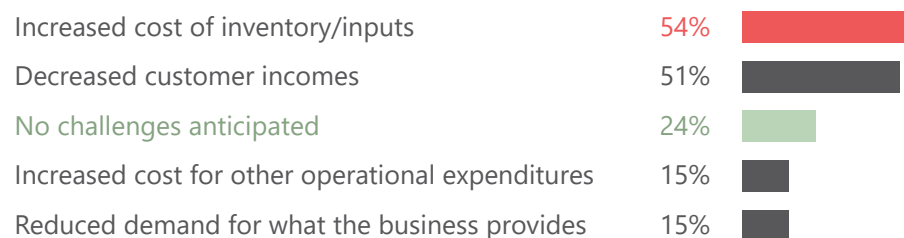
## BUSINESS CONTINUITY AND EXPANSION

### Business continuity challenges

To understand how businesses perceived what conditions for conducting their activities in Dana in the future would be like, business owners were asked what challenge they anticipated in maintaining their businesses at the current size or profitability in the coming six months. While nearly quarter of businesses reported that they did not anticipate any challenges, a majority of businesses anticipated challenges related to increase in costs associated with running businesses, and diminished consumer purchasing power (see figure 28).

While businesses did not generally report that they were currently facing major challenges in procuring inputs and inventory, irrespective of the supply chain routes (see pgs. 27-28), future shocks such as further TRY depreciation and corresponding price inflation would likely negatively affect overall costs of required inputs and inventory, both already cited as major expenditure categories by businesses (see pgs. 7-18). Echoing this, businesses noted that increased costs of inventory and inputs and of other operational expenditures could pose as challenges to maintaining their business (54% and 15% respectively).

**Figure 28: Anticipated challenges to maintaining business at current size and/or profitability in the 6 months following data collection (by % of assessed businesses)\***



NWS CWG JMMI data from July to December 2022<sup>15</sup> shows consistent increase in the price of essential items in NWS markets. Adding to this, due to lack of sufficient employment opportunities, high competition for available jobs, and the generally low salaries available, household income and purchasing powers has decreased and consumers have less disposable income. This has direct implications on businesses since in the absence of sufficient sales and demand for their products and services, their overall revenues and profitability could be severely impacted.

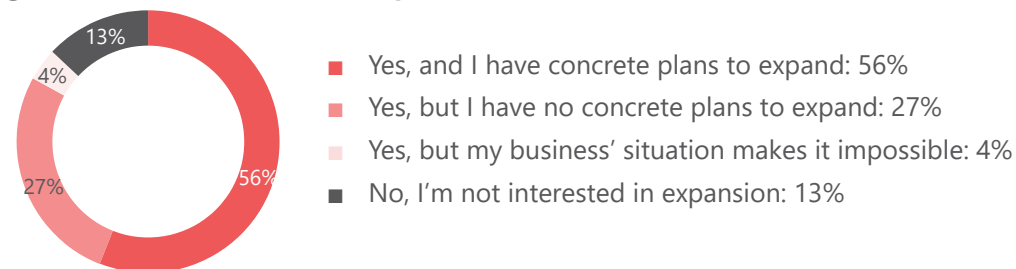
This likely scenario is reflected in CBA findings by the 51% of businesses that reported that a decrease in income-levels of customers, and therefore a resulting decrease in demand, could be a challenge for them in maintaining their businesses in the next six months. However, businesses did not commonly anticipate that demand for what they provide would decrease in coming months for other reasons.

### Business expansion: interest, cost, and challenges

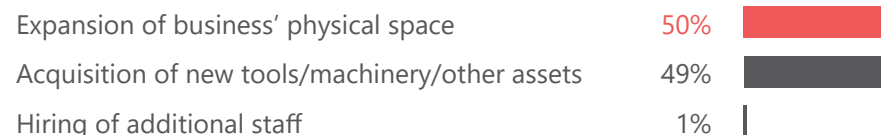
Overall findings show a very strong interest in business expansion among Dana businesses; more than half of surveyed businesses reported that they already had concrete plans to expand and more than a quarter reported that they were interested in expanding but had no set plan to do so. When asked in which terms they would be most interested to expand, half of the interested businesses prioritised expansion of physical space for their business. Of the 17 businesses operating without a physical store front or central facility, 16 were interested in expansion and 8 prioritized expansion of physical space, indicating that support for securing store fronts or production spaces would be welcome.

Echoing earlier findings that tools and productive assets are priority resources elements for almost all business sectors, nearly half of the businesses who expressed interest in expansion noted that they were interested in acquiring new tools, machinery and other assets to support expansion. Only 4 assessed businesses (1%) reported that they would hire additional employees as part of business expansion; these were 2 micro and 1 medium commercial retail/trade businesses and 1 medium agricultural processing/food production businesses. While only reported by a handful of businesses, this indicates that commercial retail/trade in particular may be a good target for employment/employability schemes in Dana.

**Figure 29: Interest in business expansion (by % of assessed businesses)**



**Figure 30: Type of expansion most desired (by % of 305 assessed businesses who expressed interest in expansion)\***

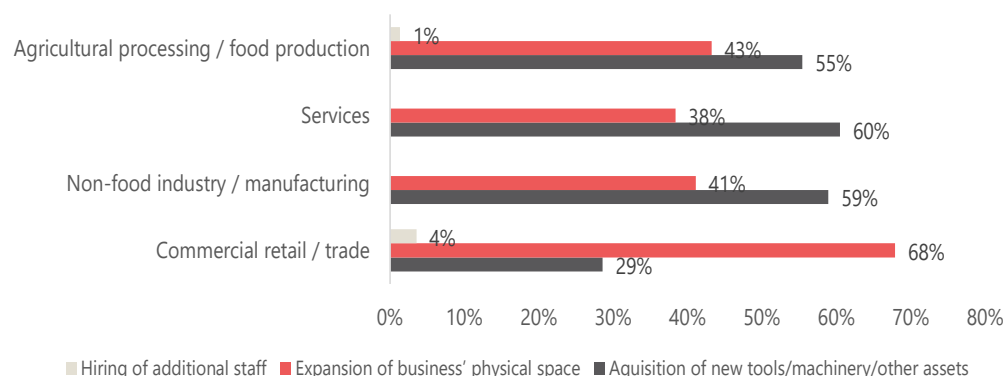


\* Respondents could select more than one option and therefore findings exceed 100%.

Overall, trends were relatively consistent across all sectors in terms of interest in business expansion. A vast majority of businesses in the agricultural processing/food production sector (94%), services sector (94%) and non-food industry/manufacturing sector (83%) reported that they were interested in business expansion, primarily through acquisition of new tools, machinery, and other assets (see figure 31).

On the other hand, 68% of businesses in the commercial retail/trade sector reported that they were interested in expanding their business through expansion of businesses' physical space (see Figure 31), likely due to need for more storage space for increased inventory and/or requirement of a bigger store front to conduct retail activities.

**Figure 31: Type of expansion most desired by sector (by % of 305 assessed businesses who expressed interest in expansion)\***



As noted previously, out of those businesses that expressed an interest in expansion, 56% of businesses reportedly had concrete plans for expansion. These businesses were asked to provide an estimate of the cost of planned expansion, irrespective of type and scope, in order to understand the typical overall costs associated with business expansion in each sector, also understanding that costs may vary based on the size of businesses and the type and scope of planned expansion.

As displayed in Table 6, median expansion costs across sectors range from 2,000 USD to 6,000 USD, with service sector businesses representing the low end and non-food industry/manufacturing at the high end. These expansion cost estimations provide critical information and insights into what businesses require for future continuity and expansion, and could potentially inform decisions around MSME grant support values specifically for business growth in Dana. However, a more detailed breakdown of cost in relation to the specific desired expansion activities would provide response actors a better indication for setting guidance around such values.

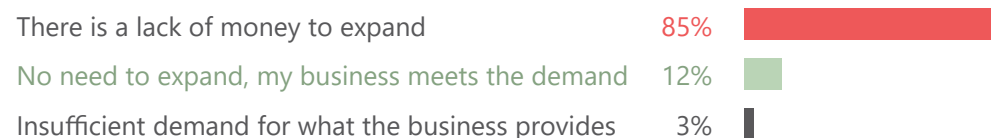
**Table 6: Median estimated cost of planned expansion by sector (of 197 assessed businesses who reported having a concrete plan for expansion)**

Sector	TRY	USD
Agricultural processing/food production	60,000	3,206
Services	37,430	2,000
Non-food industry/manufacturing	112,291	6,000
Commercial retail/trade	75,000	4,007

Among the challenges that businesses felt could potentially deter or prevent expansion, a large majority highlighted a lack of financial resources as the main barrier. This is in line with the reported businesses priority needs where surveyed businesses reported that financial support was the top priority support need for their activities ([see pg. 21](#)).

In the absence of formal financial institutions and channels for businesses to access loans, MSME grant support can not only help businesses to maintain their operations but also support businesses to expand. Such expansions could contribute to improving the overall economic conditions in the area but additionally, also create more jobs for populations, therefore improving employment and livelihoods opportunities for all.

**Figure 32: Reported challenges that could deter or challenge businesses from expanding (by % of assessed businesses)\***





## KEY DEFINITIONS

Sectors		Furniture	Expenditures on items such as tables, chairs, desks, shelving, mirrors, display stands, that are used to make a space suitable for a business's operations. This does not include productive assets that a business requires in order to perform work and generate profit (see productive assets, tools appliances).
<b>Agricultural processing/food production</b>	Agricultural processing businesses take raw agricultural outputs like wheat or livestock and change them into consumer products. Food production businesses are similar but are focused on the production of ready-made food products through adding additional inputs. This sector did not include farming or harvesting due to existing information available on the cost of inputs for such businesses in North Syria.	<b>Inputs</b>	Expenditures on items, ingredients, raw materials, packaging, etc. that are intended for use in a business's production or provision of services, but not for direct sale to customers.
<b>Commercial retail/trade</b>	Retail businesses are those that sell products directly to consumers. This category also includes wholesalers, distributors, and importers who sell products to businesses and are involved in the process of getting products to their end destination.	<b>Inventory</b>	Expenditures on items that are intended for direct sale to customers.
<b>Non-food industry/manufacturing</b>	Businesses that aid other businesses in manufacturing, shipping or producing their products. Products and services of this sector go to other businesses, not directly to consumers.	<b>Marketing and advertising</b>	Expenditures on signboards, advertisements, flyers, communication campaigns, and other items or services designed to raise awareness of a business's work among potential customers.
<b>Services</b>	Provision of services as opposed to goods or product production, for example transportation, training, consulting, health care, financial services.	<b>Office supplies</b>	Expenditures on items that are intended to support the smooth functioning of a business, but are themselves not directly related to its work (pens, paper, cleaning supplies).
Assessment terminology		<b>Productive assets, tools, appliances</b>	Expenditures on items directly connected with a business's main line of work and its efforts to generate profit (farming equipment, machinery, stoves, refrigerators, computers)
<b>Micro, small, medium enterprises (MSMEs)</b>	Local definitions of MSMEs vary from country to country. Based on the context in north Syria and for the purposes of this assessment they were defined as follows based on the number of employees they report (including owners) – micro: 1-3 employees; small 4-10 employees; medium: 11-50 employees.	<b>Rent and land tenure</b>	Payments made to a land-owner, building owner, or similar actor in order to secure a business's right to occupy its land and/or facilities. This does not include the cost of constructing new buildings or of maintaining existing ones.
<b>Start-up costs</b>	The total value of all the productive assets, tools, appliances etc. needed to establish the business and grow it to its current size.	<b>Salaries and wages</b>	Payments made to a business's employees to compensate them for their labour, no matter how often these payments are made (daily, weekly, monthly, seasonally, on commission). This includes the owner's salary.
<b>Recurring costs</b>	Costs incurred on a recurring basis. For this assessment these were taken as a monthly average from the past three months	<b>Services</b>	Payments made to external providers for services required to enable a business to function (software licenses, insurance, legal services) or to keep a business facility running smoothly (cleaning, maintenance, repairs).
<b>One-off costs</b>	One time expenditures. For this assessment these were those incurred in the past 12 months.	<b>Taxes, regulation, documentation</b>	Payments made to governments, local authorities, trade unions, etc. to ensure that a business is legally compliant and has all the permits and other documentation necessary for it to operate.
Expenditure categories		<b>Transportation and travel</b>	Expenditures incurred in the process of moving products, inventory, assets, or employees from one place to another as part of a business's operations (for example, bringing goods to a marketplace, arranging shipments of inventory or inputs, delivering products to customers).
<b>Construction</b>	Expenditures incurred in the process of constructing new facilities or expanding existing facilities for a business, including the cost of labour and construction materials.	<b>Utilities</b>	Payments made to external providers to secure a business's access to electricity, water, fuel, phone services, internet services, trash collection, and other basic services that help a business to function and to keep its facilities comfortable for employees.

## ENDNOTES

- 1 REACH (2023). [Humanitarian Situation Overview of Syria \(HSOS\)](#).
- 2 REACH (2021). [Labour Market Assessment in Northern Syria](#).
- 3 REACH (2023). [Humanitarian Situation Overview of Syria \(HSOS\)](#).
- 4 REACH (2022). [Labour Market Assessment in Northern Syria](#).
- 5 FAO (2022). [Agriculture Input and Commodity Price Bulletin](#).
- 6 CWG and REACH (2023). [JMMI dashboard](#).
- 7 HNAP (2022). North-West Syria Livelihoods Situation Analysis.
- 8 REACH (2023). [Humanitarian Situation Overview of Syria \(HSOS\)](#).
- 9 Ibid.
- 10 REACH and NWS NGO Forum (2023). [Earthquake Rapid Needs Assessment](#).
- 11 REACH (2021). [Labour Market Assessment in Northern Syria](#).
- 12 REACH (July 2021). [Cash Feasibility Snapshot](#), CWG and REACH (2023). [JMMI dashboard](#) and [JMMI Situation Overviews](#).
- 13 CWG and REACH (2023). [JMMI dashboard and JMMI Situation Overviews](#).
- 14 REACH (2022). NWS Market Network Analysis. REACH (2023). [Humanitarian Situation Overview of Syria \(HSOS\)](#).
- 15 CWG and REACH (2023). [JMMI dashboard](#).
- 16 REACH (2021). [Labour Market Assessment in Northern Syria](#).
- 17 Ibid.

## ABOUT REACH

REACH Initiative facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications Programme (UNITAR-UNOSAT).

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