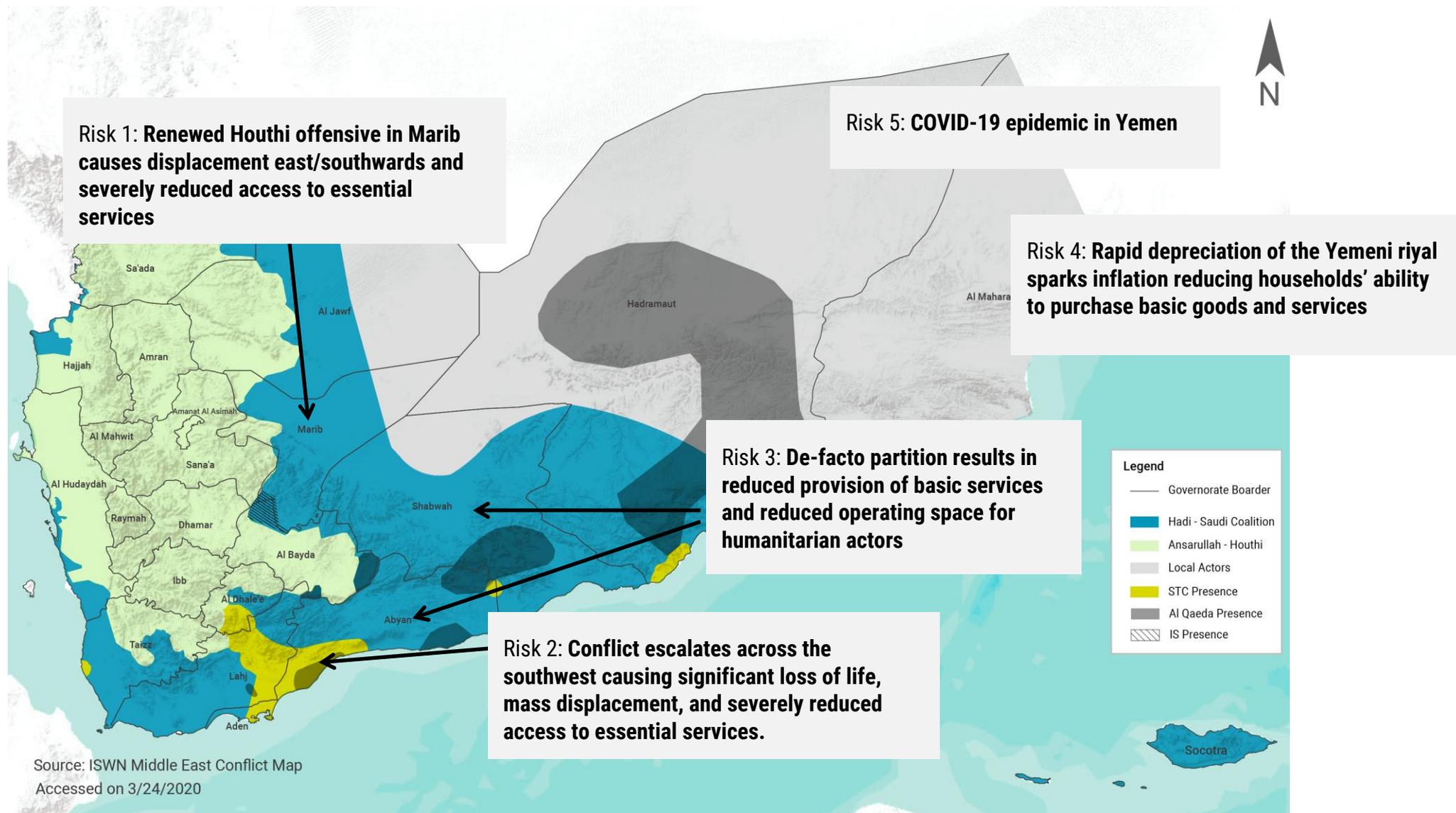


YEMEN

Outlook for April-September 2020



Risk 1: Renewed Houthi offensive in Marib causes displacement east/southwards and severely reduced access to essential services



The Houthis currently see themselves in a position of strength compared to the Government of Yemen (GoY). Control of Marib would nearly complete the Houthis control over northern Yemen. An intense conflict in Marib would cause casualties and displace over 500,000 people into the eastern and southern corners of Marib (immediately to Harib), potentially spilling into Bayhan and Shabwah. Food and water would emerge as priority needs and tensions with host communities would likely rise. The lack of water and sanitation would increase the risk of cholera and dengue outbreaks and other communicable diseases. Protection concerns would expectedly rise.

Risk 2: Conflict escalates across the southwest causing significant loss of life, mass displacement, and severely reduced access to essential services



If the GoY loses what legitimacy it still commands amongst the population in southern Yemen, and a public protests occurs, there is a risk that the STC will decide to take advantage of a weakened government to launch an offensive on Aden and other key locations in the south. The UAE may choose to strengthen its alliance with the STC through greater financial support and backing local militias. Around 300,000 people may displace while significant numbers would become trapped in conflict areas around Shabwah, Aden and/or Taiz. The conflict could result in casualties overwhelming hospitals that lack fuel for generators, supplies, and staff.

Risk 3: De-facto partition results in reduced provision of basic services and reduced operating space for humanitarian actors



Given that the Houthis have established a commanding hold over much of the north, and that there is little prospect of the GoY regaining outright control of Yemen, both sides may choose to focus their efforts on peace negotiations. Saudi Arabia could help to negotiate peace and recognise the Houthis' mandate to administer much of northern Yemen. This could result in a shifting focus towards post conflict governance structures. Protection issues could rise as the STC and Houthis seek reprisals against their adversaries. International humanitarian organisations face greater restrictions and aid activities reduce, with programs closing in the north.

Risk 4: Rapid depreciation of the Yemeni riyal sparks inflation, reducing households' ability to purchase basic goods and services



A potential lack or reduction of re-committed funds from Saudi Arabia can place downward pressure on the Yemeni riyal and result in its subsequent depreciation. Competition between the two central Banks of Yemen, through aggressive financial policies, worsens the financial situation by printing additional bank notes or issuing too many e-riyal. Should Yemen see a period of rapid inflation, the purchasing power of the majority of the Yemeni population will decrease significantly while food and fuel prices rise. This would result in increased levels of food insecurity, reduced access to essential services, and limited mobility.

Risk 5: COVID-19 epidemic in Yemen



COVID-19 virus may enter Yemen and spread rapidly across areas of high population density including Aden, Hadramawt, Sana'a and Marib. Hospitals will struggle to implement sufficient protective measures and within the first month of the first case being registered, many deaths may be recorded. The international community will likely be blamed (rightly or wrongly) and humanitarian operations face a backlash in local media and social media as community acceptance is significantly reduced.

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Introduction

Purpose

The Yemen Risk Overview is a risk identification report published every six months outlining the main emerging risks in Yemen that might affect the current humanitarian situation (6-month forecast). It aims to inform the humanitarian community of possible changes in context and humanitarian needs in Yemen, in order to facilitate contingency planning, risk management, and response. ACAPS regularly tracks these and other risks for Yemen and will publish monthly updates and one-off alerts as things change.

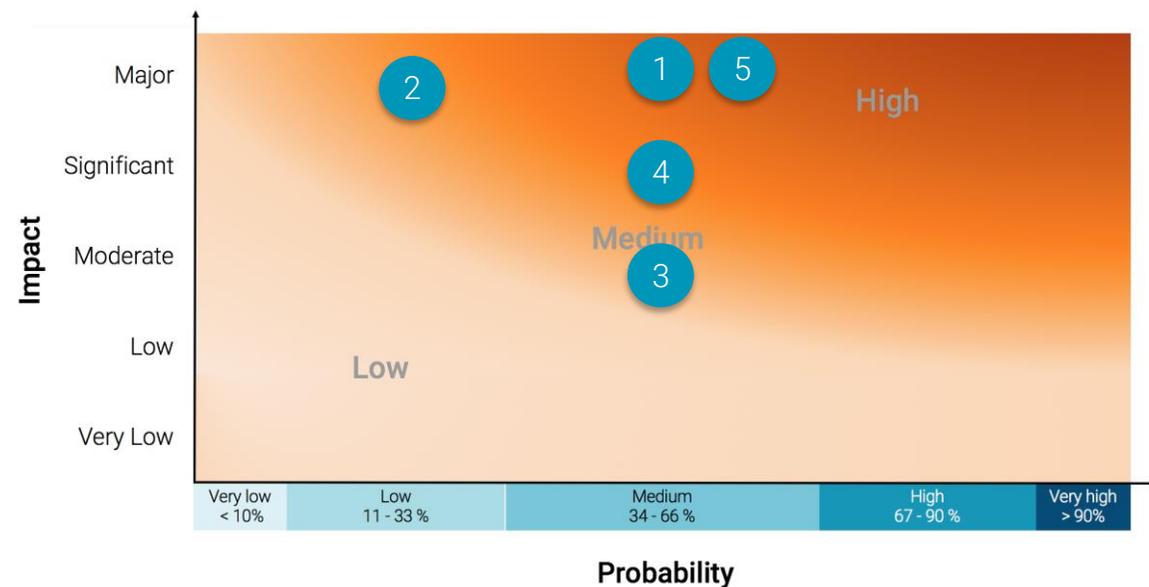
These risks were identified through joint analysis and key informant interviews with 31 experts from 14 humanitarian, economic, anthropology, development and conflict analysis organisations working on Yemen in March 2020, using the chain of plausibility approach.

ACAPS also published regular scenarios to help map out how the humanitarian situation in Yemen could change, for better or for worse. See ACAPS Yemen scenarios here.

Reliability

The report is based on primary data, joint analysis, and secondary data review conducted from January to March 2020. Yet, the context changes quickly in Yemen and there are gaps in information on vulnerable groups, coping strategies and response. More information on the methodology and limitations can be found at Annex A.

For additional information or to comment email: yahinfo@acaps.org



RISK 1**Renewed Houthi offensive in Marib causes displacement east/southwards and severely reduced access to essential services****Rationale**

The Houthis may launch an offensive against Marib city for a number of reasons: they currently see themselves in a position of strength compared to the Government of Yemen (GoY); control of Marib would nearly complete Houthi control over northern Yemen (with Shabwah and Al Jawf possibly the next objectives); control of Marib could cut off the coalition's access to al-Wadiyah on the Saudi border and Shabwah; control of Marib provides access to revenue through control of cooking gas routes from Marib, and to a lesser extent oil exports.

The Houthis' strength is derived from its control over the bulk of weapons and supplies from the pre-conflict national army, their strong internal cohesion built over 10 years of fighting the Sa'dah wars, and their strong ability to co-opt resources from local business. The GOY is heavily dependent on the Kingdom of Saudi Arabia (KSA) for financial and military support, yet KSA's determination to 'win' in Yemen appears to be waning. There is a growing possibility that KSA may decide to pursue an alternative track in the peace talks that involves acknowledging Houthi governance over part of Yemen. This is an incentive for the Houthis to take as much ground as possible prior to any peace agreement.

The Houthis' desire to expand territorial control, taking advantage of weakened GoY forces, will likely result in a determined and sustained assault on the city of Marib; a more enticing prize than Taiz where the frontline has been stagnant for many years. Marib is strategically important for the GoY as it is home to a significant proportion of the government's bureaucracy. It is the current stronghold of Islah, rivals of the Houthis.

Any success in Marib city would likely be followed by an attempt to control much of Marib governorate in order to place strategic gas reserves and oil fields under siege. Additionally, tax on businesses in Marib and land imports from KSA and Oman, investment from the local market, and potential oil exports would provide much needed revenue.

RISK LEVEL
MEDIUM

PROBABILITY**IMPACT**

An intense conflict in Marib would cause many casualties and displace over 500,000 people (of the current one to two million population of Marib city including 750,000 IDPs) into the eastern and southern corners of Marib (immediately to Harib), potentially spilling into Bayhan and Shabwah. Some IDPs may opt to move northwards towards Saudi coalition areas. Individuals based in Marib for business reasons would likely return to their home governorates, primarily Dhamar, Ibb, Hodeidah, and Amran.

Possible Indicators/Triggers:

- Cessation of or severe reduction in KSA funding to the GoY CBY
- Reduction in GoY military salary payments
- Riyadh agreement fails, diverting GOY military resources to the south
- Houthis receive additional military support (arms, munitions, etc.)
- Shifting tribal dynamics: Houthis receive support from local tribes or local tribes rise up against GoY
- Political or financial crisis inside Saudi Arabia leads to reduced attention and support to GoY
- Tribal negotiations take place in strategic areas surrounding Marib city
- Large drop in humanitarian funding increases financial pressure on one or more sides
- Lack of international diplomacy to drive the peace process and prevent further conflict

Impact

The displacement of more than 500,000 Yemenis from Marib city and surrounding districts eastwards towards the outskirts of Marib and, and south towards Bayhan and Shabwah would result in many staying with host families, with others (~40%) crowding into informal settlements with very limited facilities. The Aulaqi tribe (a large and influential south Yemeni tribe located in central/southern parts of Yemen) and smaller tribes in Bayhan (the Bal Ubayd, Banu Hilal, and Bal Harith tribes) are likely to reject any IDPs perceived as northerners from entering their region. These tribes have been heavily associated with the UAE/STC activity in the south and are wary of any attempt by “northerners” to take over limited resources.

Most of the IDPs fleeing Marib have been displaced multiple times, resulting in low resilience. Food and water would emerge as priority needs and tensions with host communities would likely rise. The lack of water and sanitation would increase the risk of cholera and dengue outbreaks and other communicable diseases. Protection risks, including child marriage, domestic violence and child recruitment, would likely increase in Marib, where up to a million people would be caught in the fighting, and in areas of displacement where many families would be forced to adopt negative coping strategies.

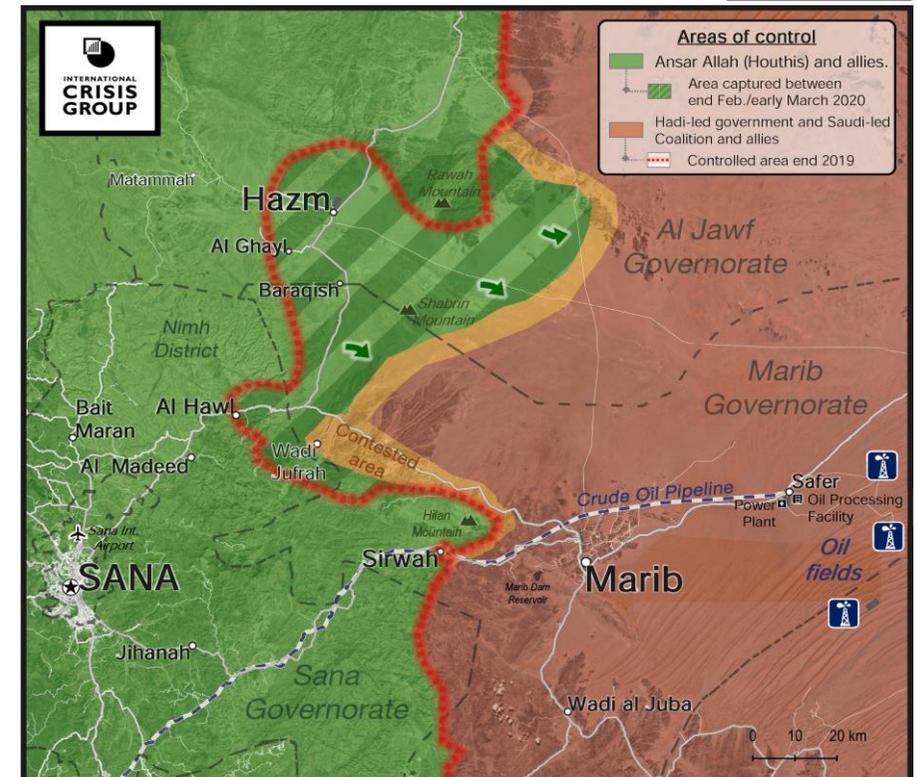
The humanitarian response, unable to meet growing needs, would be constrained by blocks on access, logistics, and security issues. People in Al Jawf would be particularly difficult to access. Those trapped in the conflict area would face severe protection issues and food/water shortages.

Any successful expansion east, resulting in Houthi control of the gas reserves and oil fields, would potentially enable the Houthis to be more self-sufficient with access to fuel and a skimming refinery while preventing the GoY expanding oil exportation. Tribal networks in the area will enable the Houthis to gain access to informal smuggling routes. It may also lead to two connected risks:

- An attempt by the Houthis to completely control Al Hodeidah port
- A renewed assault on Shabwah and possibly Taiz

Republic of Yemen Al Jawf-Sana-Marib

Estimated Areas of Control as of March 2020



Note: This map is for illustrative purposes only and does not imply endorsement by International Crisis Group. [Open sources; OSM; Esri; Twitter; Local media outlets]

Figure 1: Estimated Areas of Control March 2020 by International Crisis Group. <https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/yemen/b74-preventing-deadly-showdown-northern-yemen#map-13578-1>

RISK 2**Conflict escalates across the southwest causing significant loss of life, mass displacement, and severely reduced access to essential services****Rationale**

If the GoY loses what legitimacy it still has among the population in southern Yemen and public protests occur, there is a risk the STC will decide to take advantage of a weakened government to launch an offensive on Aden, and other key locations in the south. Events that could result in this include: inflation spiralling out of control; Saudi Arabia removing aid due to increased pressure from the unprecedented fall in oil prices or internal political changes; COVID-19 confusion; and widening division among the Saudi royal family which leads to withholding or ceasing financial support. This leaves the GoY unable to pay state salaries and continue to finance food and fuel imports.

Dissatisfied citizens would likely respond through a wave of public protests, possibly orchestrated by STC elements. The STC could capitalise on this by completely breaking the Riyadh agreement and attempting to take control of as much of the south as they can. Other groups would do likewise as splintering tribal alliances further destabilise the south. Conflict would restart across multiple frontlines as different actors seek to expand areas of control.

The UAE would likely strengthen its alliance with the STC through greater financial support and backing local militias. If the Houthis take over Marib city (Risk 1) and begin the advance south towards Shabwah, escalation of conflict would inflict significant displacement or hardship on the local population.

Possible Indicators/Triggers:

- Cessation of or severe reduction in KSA funding to GoY CBY
- Military mobilisation, reinforcements and weapons transfers
- Reduction in military salary payments by GoY CBY
- Escalation of conflict and/or offense in Al Dhale and Abyan
- Houthis bolster additional military support (arms, munitions, etc.)
- Inflation surges to YER1,000 to the USD

RISK LEVEL
MEDIUM

PROBABILITY**IMPACT**

- Public opinion becomes increasingly anti-GoY
- Mass anti-GoY protests
- STC influence increases (presence, checkpoints, or political positioning)
- AQAP elements become more active
- Tribal groups begin to make agreements or alliances with either party
- UAE position forces on the ground or exercise influence on its proxies to further undermine GoY
- One or more sides publicly withdraws from the Riyadh agreement

Impact

Around 300,000 people may displace while significant numbers would become trapped in conflict areas around Shabwah, Aden and/or Taiz. The conflict would result in many casualties rapidly overwhelming hospitals that lack fuel for generators, supplies, and staff. Conflict along main transport routes and the port of Aden would seriously disrupt the movement of fuel, food and water.

Any increase in prices would result in a lack of access to water and sanitation and hygiene would deteriorate in areas of displacement. Mass displacement caused by conflict would result in higher population density, which can exacerbate the spread of a disease due to sharing of WASH facilities such as latrines, community water points, and closer proximity to sick individuals in each household.

Mass deportation of north-Yemenis from Aden and elsewhere in the south toward northern governorates would increase humanitarian needs and tensions with host communities, especially in Ibb and Sana'a. Protection concerns would increase in the south including child recruitment and gender based violence. Households without income would resort to money lenders or loans, further increasing debt.

Humanitarian access would be severely restricted due to the ongoing conflict and multiple frontlines, requiring increased liaison with military actors.

RISK 3**De-facto partition results in reduced provision of basic services; reduced operating space for international humanitarian actors****Rationale**

Given that the Houthis have established a commanding hold over much of the north and there is little prospect of the GoY regaining outright control of Yemen, there exists the possibility both sides will enter peace negotiations. For this to happen, both sides need to believe that continuing the conflict will result in more losses than gains.

The GoY are heavily dependent on the KSA for both military aid, payment of army salaries, and financial aid. The KSA has not renewed its funding for 2020 and existing reserves are running out. The KSA is unlikely to want to continue to subsidise the GoY without some guarantee of peace, especially as falling oil prices have reduced their revenue. Negotiating peace in Yemen would also reflect well on the KSA internationally. Thus the KSA may signal they are prepared to make concessions to the Houthis, including recognition of the Houthis' mandate to administer much of northern Yemen, in order to broker peace.

While the Houthis are currently strong, particular events would make them more amenable to negotiating peace. These include the prospect of a settlement that would bring international recognition of their legitimacy to control north Yemen; a successful capture of Marib and its surrounds (giving them control of most of the north and a strong bargaining position); reduced access to arms and munitions; and perhaps the promise of a share of KSA funding for reconstruction.

If the Houthis fail to comply with US demands for greater transparency in the distribution of humanitarian funds, and the US or others suspend funds, this provides further incentive for the Houthis to agree to peace. In order to be self-sufficient, they would need to provide food and essential services to the populations under their control. The Houthis may refuse to make concessions and may even tighten restrictions as a pressure tactic. They could do this for ideological reasons, due to a belief they can leverage funding from other sources (such as the Saudis) or due to a strategic miscalculation about the resolve of the international community. The US and other international donors could then suspend or reduce funding. The resultant decrease in

RISK LEVEL
MEDIUM

PROBABILITY**IMPACT**

funding would force humanitarian organisations to further reduce operations in the north.

If the KSA side-lines the UN-led peace process and begins to broker a peace agreement involving the creation of two de-facto separate states, the different factions will jockey for power. The restoration of essential infrastructure including the banking system, taxation, distribution of oil revenue and control of imports would be slow and patchy, with little improvement to healthcare, water and sanitation provision. Access to food would likely be prioritised by both administrations.

The Houthis would likely seek to exert complete control over the areas they hold in the north, severely limiting humanitarian organisations, while the STC would seek to maximise their control and influence in the south.

Possible Indicators/Triggers:

Houthi independence increases:

- KSA or Houthis announce progress in peace talks
- Houthi authorities find alternative sources of income through control of oil fields or increased taxes on local industries
- Houthis receive direct funding from KSA

Peace negotiations encouraged as neither side senses victory

- Houthi military capacity weakens; and is insufficient to make additional territorial gains
- KSA increases its military support the GoY
- KSA increases pressure on the GoY to reach a negotiated settlement
- UAE decide to reengage in Yemen, increasing the capacity of the Saudi led coalition

- Oil prices fall (encouraging KSA to push a peace agreement)
- KSA reduce funding to GoY

International humanitarian access decreases as

- Donors cease funding projects in Houthi-controlled areas
- Houthi authorities further constrain humanitarian access by imposing additional movement restrictions, blocking assessments, controlling aid distribution
- Attacks on humanitarian organisations increase
- Messaging against INGOs or UN agencies increase
- The GoY increases pressure on donors to channel aid money through CBY – Aden (which leads to delays in approvals for programs in the south and possibly retaliation against humanitarian agencies in the north)

Impact

As conflict reduces and some of the displaced return home and restart livelihoods, commerce would gradually increase and most humanitarian aid programmes in the north would close – any remaining would be heavily controlled by the Houthi authorities. The Houthis would directly fund some of the essential services currently provided by humanitarians, but not necessarily to the same extent. While the overall food needs would diminish, some of the most vulnerable people (especially those not well-connected to the Houthi authorities) would likely remain in severe need. Access to potable water and adequate sanitation would decrease and the incidence of communicable disease would likely increase.

In the south, international humanitarian funding would continue although programming would be increasingly controlled by the local authorities and subject to increasing bureaucracy, compounded by the fragmentation of, and localised fighting between, southern groups. Access to potable water and adequate sanitation would reduce while incidences of communicable disease would likely increase.

Throughout the country, humanitarian assistance would be insufficient to meet the essential needs of the most vulnerable who are unable to access goods and services provided by state authorities. While conflict-related protection issues would reduce, other protection concerns would increase, including returnees' exposure to unexploded ordnance and explosive remnants of war, domestic violence, and shrinking opportunities for women's education and livelihoods. Deportations of northerners from the south, abductions/torture, and suppression of activists and journalists could also occur.

Increased Houthi control over the north and STC control over the south could result in both parties pursuing adversaries for retribution in their respective areas of control. Islah activists and youth actors would be particularly targeted through extra-judicial processes that may include the setting up of illegal detention centres. Displacement would possibly increase as vulnerable groups (considered adversaries) seek refuge away from the Houthis or STC.

Criminality would likely increase and housing, land, and property disputes would increase at the local level as people seek to reclaim property in the absence of a functioning local administration.

RISK 4**Rapid depreciation of the Yemeni riyal sparks inflation, reducing households' ability to purchase basic goods and services****Rationale**

The Yemen economy relies heavily on commercial imports for between 80 to 90% of its basic needs. With the reduction of crude oil exports and continued suspension of liquified natural gas (LNG) exports following the escalation of the conflict in 2015, the Government of Yemen (GoY) is dependent on a few sources of foreign currency (hugely reduced crude oil exports, Saudi support, aid funding, remittances) to facilitate the import of essential fuel and food commodities. In 2019, Saudi Arabia provided \$2.2 billion in funding for letters of credit to support the import of basic goods, to stabilise the Yemeni riyal and to pay public sector salaries. Saudi Arabia also provided additional funding for military salaries in mid-2019 and has been the largest aid donor through the UN humanitarian response plan and its own organisations, particularly the Saudi Fund for Development. Saudi financial support played a crucial role in stabilising the Yemeni riyal, with the local currency averaging between 500 to 600 YER to the USD in 2019, following the depreciation of the riyal to almost 900 YER in October 2018. Saudi Arabia has not yet renewed its funding commitment for 2020 and cash reserves are running out.

Steep reductions in Saudi funding to Yemen could trigger a sharp decrease in the value of the riyal, possibly reaching as low as 1,000 YER to the USD. This would be passed directly on to Yemenis, as the resulting depreciating of the riyal would further reduce citizen's purchasing power and make food and other basic commodities more expensive. Reductions in humanitarian aid or remittances could also trigger a drop in the value of the riyal (ACAPS 29/01/2020).

The Central Bank in Aden and Central Bank in Sana'a have also introduced competing policies that reduced the operating space for business and led to spikes in prices. The Houthis extended the ban on the use and circulation of newly printed Yemeni riyal banknotes (i.e. that the Central Bank in Aden issued after September 2016) in Houthi-controlled territories and promoted the use of the electronic currency, the e-riyal. If either party introduces new currency in an uncontrolled way – either by printing additional bank notes in the south or expanding the use of e-riyals in the north too quickly, noting how Yemen is a heavy cash economy with physical banknotes needed for essential everyday

RISK LEVEL
MEDIUM

PROBABILITY**IMPACT**

transactions – inflation could rise steeply. Competing GoY and Houthi import, distribution, and accompanying banking regulations could also further destabilise the riyal. The sharp drop in fuel prices could help reduce pressure on the riyal by reducing the amount of foreign currency that fuel importers need to borrow from the local market. However, reduced fuel prices alone are probably not enough to counteract the downward pressure on the riyal due to reduced external funding or a broader economic downturn. Moreover, the drop in global fuel prices will result in a reduction of crude oil export revenues for the GoY.

New restrictions that reduce Yemeni people's access to money (salaries or remittances), increase import costs or reduce labour or business revenue due to a country-wide recession would also weaken the riyal.

This risk is also linked to risk 1: renewed Houthi offensive in Marib and risk 5: COVID 19 outbreak. Both have the potential to push up prices by restricting trade and travel and reducing people's confidence in the riyal.

Restrictions in place to combat COVID-19 could result in a lack of economic activity and negatively impact Yemeni livelihoods. Yemen relies heavily on imports from China which may be impacted by the COVID-19 lockdown. Additionally, a downturn in the Saudi economy (as part of general global recession and its current oil price war with Russia) will directly impact Yemeni nationals in Saudi Arabia who may be forced to stop working for an extended period of time. In 2016, remittances from Saudi Arabia accounted for 61 percent of Yemen's total remittances. A significant reduction in economic activity globally will reduce the funds available to households that rely on remittances to buy their basic goods (World Bank 11/16/2017).

In 2014, 48% of the population fell below the poverty line, of whom 75% were rural and 25% urban. Following five years of conflict, the World Bank estimated between 71-78% of the Yemeni population (a minimum of 21 million people) had fallen below the poverty line at the end of 2019 (World Bank 30/03/2020). A sudden depreciation of the YER, and consequent inflation, will have a direct and negative impact on everyone around and below the poverty line.

This risk could materialise very quickly, if importers start panic buying foreign currency, or very slowly if the increased cost of doing business due to restrictions or an economic downturn are passed on to Yemenis over the coming six to twelve months.

Possible Indicators/Triggers:

- Continuation or escalation of competing economic policies between the Central Bank in Aden and the Central Bank in Sana'a, notably over regulation of banks and money exchange agencies or importation of key commodities such as fuel
- Depletion of GoY/Central Bank in Aden foreign currency reserves
- Cessation of or severe reduction in Saudi funding to GoY/Central Bank in Aden
- Oil revenues fall in Saudi Arabia as a result of a drop in global fuel prices
- Reduction in remittances due to reduced work activity among Yemeni migrant workers, the expulsion of Yemeni workers from Saudi, reduced demand for migrant workers in Saudi due to a drop in oil prices or a crackdown on *hawala* transfers
- Intensification of media campaigns that fuel economic rivalry
- GoY and Central Bank in Aden struggle to maintain same level of state salary payments
- Increase in cartel/currency speculation activities; ¹by political or economic actors in the absence of any countervailing policy options by economic authorities in the north or south
- Delays and interference that increases the cost of importing goods, especially fuel

Impact

A sudden depreciation of the Yemeni riyal or period of rapid inflation would lead to a significant decrease in purchasing power for the majority of Yemenis as food and fuel prices rise. This would result in increased levels of food insecurity, reduced access to essential services, and limited mobility. Fuel prices would also rise across Yemen with fuel importers and governing authorities seeking to mitigate the impact of YER depreciation.

More than 23 million Yemenis falling below or just above the poverty line would adopt negative coping mechanisms such as skipping meals and increasing debt.

Any fuel price hikes would negatively impact hospitals, electricity generation, water pumping and sanitation services which rely on imported fuel to run. Increased logistical costs would strain humanitarian programme costs and reduce overall aid effectiveness.

Shortages of bank notes could also increase pressure for Yemeni households living in the north to use newly-printed banknotes issued by the Central Bank in Aden. This could expose people to reprisals from the Houthi authorities. Protection concerns, including negative coping mechanisms like child labour and families sending their children to fight would rise due to financial stress.

Any significant deterioration of living conditions would increase the risk of mass demonstrations that weaken loyalties to the GoY which, in turn, may lead to renewed conflict in the south (risk 2) as either the STC or Houthis seek to exploit this weakness. Casualties, displacement and economic collapse could ensue.

¹ Currency speculation activities involves buying, selling, and holding currencies in order to make a profit from favorable fluctuations in exchange rates (investorguide 2020).

RISK 5**COVID-19 Epidemic in Yemen****RISK LEVEL
MEDIUM****PROBABILITY****IMPACT****Rationale**

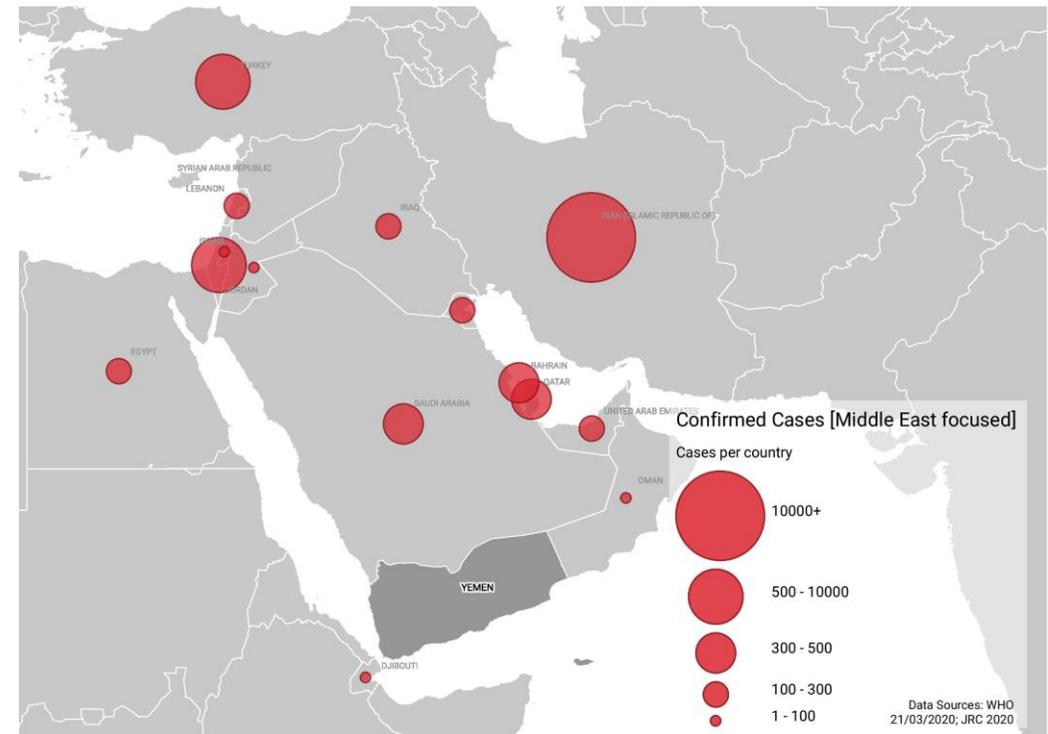
An outbreak of respiratory disease caused by a novel coronavirus (abbreviated COVID-19) (CDC 2020), was first detected in Wuhan, China in December 2019. Cases have been confirmed in over 100 countries. The virus quickly spread to neighbouring Asian countries, and then to countries in the Middle East and Europe and was declared a pandemic on 11 March 2020 (WHO 11/03/2020).

Despite precautions issued by Yemeni national authorities and WHO to minimise the risk of virus transmission, there is a high risk that COVID-19 will spread rapidly throughout Yemen. There may already be infected people in Yemen that have not been detected. It is also unclear if Yemen has the capacity to enforce border restrictions. Informal smuggling networks, migration, and displacement are likely to continue, even in the midst of a massive outbreak. Effective self-isolation of all infected persons is improbable, given that people are often unaware they have the virus for up to two weeks.

Yemen has limited facilities for testing. Currently only two sites (one in Sana'a, one in Aden) can carry out testing and they currently only have capacity to administer a few hundred tests. There is a high probability that in-country infections will occur.

Initially there will likely be no knowledge that Covid-19 is in Yemen due to the limited number of test kits and fear of reporting. The virus will likely spread to many others before cases are confirmed in country. Crisis-affected vulnerable populations will likely become infected within a short timeframe.

The virus will spread exponentially as in other countries, exacerbated by poor living conditions, the lack of personal protection equipment, high population density, poor hygiene practice, and a culture of gathering in groups such as mosques and markets which makes enforcement of containment measures such as social distancing challenging to enforce. The close proximity of dwellings, insufficient access to hygiene products and clean water, and lack of public awareness will also contribute to the spread of the virus, especially among vulnerable people groups in Yemen, IDP informal settlements, or crowded community dwellings with slum like dwellings (Muhamasheen).



An increase in rains during the monsoon season (April-August) could place further strain on the healthcare system as cases of cholera may increase across the country. Any decrease in income or purchasing power or availability of water would also create conditions conducive to the spread of the virus.

Possible Indicators/Triggers:

- Confirmed cases increase in Amman, Djibouti and surrounding countries
- Confirmed cases increase among humanitarian staff recently in Yemen
- Confirmed case(s) in Yemen
- Water prices in Yemen rise leading to decreased hygiene/handwashing
- Continued air travel into Yemen
- Social media discussion of the virus increases rapidly
- Anti-humanitarian media increases
- Northern and southern authorities implement ill prepared, poorly planned or contradictory preparedness measures
- New large-scale displacement from traditional international entry points into Yemen (Aden, Sana'a, Hadramawt, Abyan)

Impact

By the time COVID-19 is identified in Yemen, it will likely be spreading rapidly through the population. While a proportion of cases will be hospitalised, hospitals will struggle to implement sufficient protective measures in COVID-19 treatment wards. This may cause patients with other ailments to decide not to visit healthcare facilities for fear of contracting COVID-19.

Within a month of the first case being registered in Yemen, many deaths are likely to have been recorded and increasingly stringent movement restrictions will begin to be implemented. Nevertheless, the number of infections and deaths will continue to rise sharply, with death rates higher than the global average due to the underlying poor health conditions, lowered immunity among a malnourished population, and limited medical resilience in the general population.

Travel restrictions imposed by Yemen or its neighbours will further reduce Yemenis' access to health services in Jordan and other countries in the region. Patients with underlying health conditions in need of chemo, dialysis, or rehabilitation will struggle to gain proper care. Deaths from other chronic diseases (non COVID 19 related) will increase due to the overstretched health system, lack of personal protective equipment, and reluctance of the sick population to access healthcare facilities.

The price of food and other essential items are likely to rise as demand soars and the movement of goods becomes increasingly restricted at local levels. Low income households will have difficulties stocking up on goods for quarantine or self-isolation.

Importers will still be able to bring in goods, but with greater costs and challenges distributing them across the country. Markets, shops, and local businesses will close in an attempt to control the spread, negatively impacting the livelihoods of Yemenis in a struggling economy and increasing food insecurity (more than a third of households currently consume inadequate diets)(WFP Feb 2020). The government of Yemen and Houthis are likely to enforce contradictory measures further limiting movement between the north and south and attempting to enforce each side's control over the population and economy.

Anti-humanitarian propaganda increases as the international community is blamed for introducing the virus to Yemen (rightly or wrongly). Humanitarians face a backlash in local media and social media causing a reduction in community acceptance. Tight access restrictions are placed on humanitarian operations, either by the authorities or organisations themselves, further undermining the effectiveness of the response.

The outbreak is likely to spread in high density urban areas, specifically Aden, Hadramawt, and Sana'a, as well as in areas where displaced populations are still very fluid, such as Marib. This has the potential to lead to more hostility from host communities who perceive IDPs as "foreigners bringing disease to the community."

Update from the July - December 2019 Risk Analysis

On 31 July 2019, ACAPS identified five risks and one on watch risk. The on watch risk, **conflict between the Government of Yemen and the STC, materialised** in August 2019 and has been upgraded to full risk in this report (risk 2). The risk of a **reduction in humanitarian funding and SAFER oil terminal accident increased slightly over the past six months**. ACAPS will continue to monitor these risks. The risk of **Saudi airstrikes and Houthi rocket attacks, and a tribal uprising against the Houthis, decreased over the past six months** as Saudi Arabia and the Houthis stepped up talks and the Houthis consolidated their position vis a vis the GoY. The risk of conflict in Al Hodeidah remains at a similar level

Risk 1:

Breakdown in the peace process leads to escalation of conflict in Al Hodeidah exacerbating food insecurity and increasing the spread of cholera (Risk Level High in July 2019)

A major offensive in Al Hodeidah remains a risk, and the probability of a breakdown of the Stockholm agreement, signed in December 2018, remains moderate, as its stipulations remain largely unimplemented and its positive developments are fragile and reversible. Progress has been made. The UN established five observation points on the outskirts of Al Hodeidah city to monitor the ceasefire and slow progress has been made on prisoner exchanges. The agreement also reduced violence in Al Hodeidah. Civilian casualties reduced by 34% from 4,836 reported in 2018 to 3,217 civilian casualties in 2019. However, mediation in Taiz, a third and crucial piece of the agreement, has yet to be addressed

In January 2020, the UN Security Council unanimously adopted resolution 2505 renewing the mandate to support the Al Hodeidah agreement until 15 July 2020. Fragile gains were setback in March 2020, when a Houthi sniper shot a government observer at a ceasefire observation post prompting the GoY to suspend its participation in the UN-led Redeployment and Co-ordination Committee (CIMP 03/09/2020, UN 10/22/2019, OSESGY 12/1/2019, UN 01/13/2020, National 03/13/2020).

Risk 2:

Increased Houthi attacks on Saudi Arabia and retaliation by the Saudi-led coalition through airstrikes affect security of civilians and access (Risk level High in July 2019)

This risk remains, however it is downgraded to a medium risk level due to a decrease in airstrikes over 2019. In August 2019, the Houthis launched 10 drones at Shaybah oil field in south-eastern Saudi Arabia and on 14 September 2019 claimed an attack on the Saudi

Aramco facility at Abqaiq. However, UN investigations deemed the attack from Yemen unlikely, while the US, European Union and Saudi Arabia accused Iran of being behind the attack.

Positive strides towards de-escalation were taken on 20 September 2020 when a Houthi leader announced the halt of drone and ballistic missile into Saudi Arabia. After four months without missiles targeting Saudi Arabia, the Houthis announced they would renew attack on Aramco in response to an alleged escalation in airstrikes.

The civilian impact from airstrikes decreased in 2019 compared to the previous year. The number of casualties caused by airstrikes decreased by more than two thirds with 795 civilian casualties compared to 2,588 in 2018 (CIMP 2020, CT 12/12/2019, MEI 10/01/2019, Reuters 01/20/2020)

Risk 3:

Reduction in humanitarian funding and shrinking humanitarian space increases the scale of Yemeni households' unmet needs (Risk level High in July 2019)

A reduction in humanitarian funding and shrinking humanitarian space slightly increased over the past six months and remains a high level risk. The creation of the Supreme Council for the Management and Coordination of Humanitarian Affairs (SCMCHA), a Houthi body formed to oversee aid in November 2019 and its subsequent set of requirements created new access challenges for the humanitarian community. According to the UN, access constraints have hindered humanitarian aid for 6.7 million people across Yemen. The United States has also announced a suspension of further aid funding to the north of Yemen unless the Houthis increase the operating space for humanitarian actors. Some organisations have already announced a anticipatory reduction in programming due to the suspension (Reuters 26/3/2020, UN 16/1/2020).

Risk 4:

Oil spill of floating storage and offloading (FSO) vessel causes high environmental impact in the Red Sea and Yemen (Risk level Medium in July 2019)

The risk of an explosion or fire on the floating storage and offloading (FSO) terminal SAFER, slightly increased over the past six months and remains a medium level risk. The Houthis blocked a UN expert mission from conducting an assessment of the tanker in August 2019. The tanker is now entering its sixth year without maintenance. The risk of an accident will continue to steadily increase until the tanker is properly maintained. Depending on the season, an oil spill or fire could cause health impacts and lost income from fisheries and farming for up to 1.6 million people in Yemen and Saudi Arabia

Risk 5:

Tribal uprising against the Houthi forces leads to major escalation of conflict in the North, leading to casualties, displacement, and limited access (Risk level Medium in July 2019)

The risk of tribal uprisings against the Houthis decreased over the last six months and has been downgraded to low. A large-scale tribal defection against the Houthis is only likely if the highly pragmatic tribes surrounding Sana'a sense that the balance of power is shifting against the Houthis and a major Government of Yemen offensive is imminent. The Houthis consolidated their position in relation to the Government of Yemen over the past six months.

On Watch

In addition to the risk highlighted in this report, ACAPS Yemen Analysis Hub is monitoring the following risks over the next six-month period (April – September 2020).

A rise in civil unrest

In 2019 there were 371 protests and 36 riots recorded in Yemen, with the largest number of protests occurring in Taiz and Mahara. While protests have been largely peaceful, ACAPS is monitoring protests to better gauge any sense of rising dissatisfaction among the general population towards the Houthis and/or GoY that could result in a rise in civil unrest in 2020. The population will likely see a rise in civil unrest associated with the lack of access to basic service, employment opportunities and a lack of progress towards peace (ACLED 2020)

Communicable Disease epidemic: cholera, typhoid, dengue

Cholera, dengue, and typhoid are endemic to Yemen but are rapidly transmitted once the rains start in April. Further degradation of urban sanitation systems and medical systems combined with high concentrations of people living in poor conditions with poor hygiene practices all increase the spread of disease. Any event which results in increased displacement and/or reduced access to latrines, potable water, and handwashing facilities will increase the incidence of waterborne diseases.

Natural disaster (cyclone, floods, etc.) causes mass displacement, disabling the already weakened WASH infrastructure, furthering the spread of communicable disease such as cholera.

In late October and early November 2019, two cyclones (Cyclone Kyarr and Maha) passed close to Yemen. While neither cyclone made landfall in Yemen, the region remains vulnerable to cyclones in 2020 (OCHA 11/01/2019, ACAPS 10/29/2019)

Locust invasion in Yemen

Desert locust can pose a serious threat to agricultural production in Yemen. In July 2019, FAO warned that widespread hopper band infestations and heavy rainfall can cause swarms to form, giving rise to new generations of breeding in August if weather conditions remain favourable to locust breeding. As of 24 March 2020, hopper bands continue forming on the southern coast near Aden and scattered adults have been sighted on the northern Red Sea coast. Heavy rains and flooding in Wadi Hadramawt can increase breeding. ACAPS will monitor this risk in 2020 (FAO 25/7/2019 and 24/3/2020).

Extreme water scarcity due to over extraction of existing water points in coastal cities contaminates drinking water

Any displacement into urban communities along the coastal line could result in over extraction of existing water points. This would result in a drawdown of existing wells in which wells begin pumping at an unsustainable rate, causing water levels to drop further. The over-extraction of wells causes a pull along coastal areas, further increasing saltwater intrusion and contaminating clean water sources. Communities' drinking water could become contaminated causing individuals drinking from contaminated wells to experience nausea, vomiting, and dehydration (consultation with operational actor on 15/3/2020).

Yemen consumes 3,900 million cubic meters (MCM) of water each year, which far exceeds the renewable resource from both surface water and groundwater of 2,500 MCM/yr. Overall, the water availability is only 80 m³ per capita per year which is well below the World Bank's water poverty level of 1,000 m³ per capita per year. Most of the water is withdrawn from groundwater – springs, wells, boreholes – and this has led to serious groundwater depletion as withdrawals far exceed annual groundwater recharge.

Cessation of international humanitarian response to Houthi controlled areas

Humanitarian agencies could withdraw from Houthi-controlled areas either for security or compliance reasons or due to pressure from the Houthis or donors. ACAPS continues to monitor this risk and potential impact with humanitarian actors.

Lack of reliable data and assessment leads to decrease in humanitarian funding

One of the main consequences of the restrictive access environment in Yemen is a lack of reliable data to provide an evidence base for humanitarian decision making. Authorities often block or delay assessments or limit the scope of questions organisations are allowed to ask. Lack of reliable information is increasingly raised as a concern by donors and decision makers and could delay or reduce funding available for the response in 2020.

Compounding factors

Disease outbreak

Waterborne diseases combined with displacement, reduced access to water and health services, and poor hygiene practice, significantly increase the probability of a major outbreak which authorities would struggle to contain under any of the risks outlined in this report (especially Risk 1 (major offensive), 3 (restrictions) and 4 (fragmentation)).

Cholera and acute watery diarrhoea (AWD) are ever-present in Yemen. An outbreak in 2017 saw more than 1.3 people infected and over 2,800 die. Over 400,000 AWD/suspected cholera cases were registered during the first half of 2019, more than during the whole of 2018. Diphtheria, measles and dengue fever are also endemic. A sharp decline in vaccination coverage of measles and rubella vaccination pose a substantial threat to people's health (UNICEF 2019, Hadramaut University 08/10/2018).

Natural disaster (cyclone, earthquake, volcanic eruption)

Yemen is prone to earthquakes, flash floods, floods (coastal storm surge and tsunami), landslides, rockslides, and volcanoes. The World Bank reports that at least one disaster strikes the country every year. In May 2018 Yemen was hit by cyclone 'Mekunu' sweeping through the island of Socotra, causing heavy floods and displacing over 60,000 people (World Bank 2010, UNICEF 05/2018).

Income loss: failed harvest

Agriculture in Yemen is subject to a number of threats (locust plagues, cyclones, droughts) while an oil spill in the Red Sea would severely shock the fishing industry. There are around 1.2 million landowners in Yemen, owning an average of 1.36 hectares. Domestic production satisfies a significant part of the population's food needs and helps reduce poverty in rural communities. A failed harvest would directly impact up to 7 million people and contribute to food shortages.

Reduction in funding

Yemen is currently the largest humanitarian appeal by the UN, with a request for USD 4.2 billion in 2019. It is comparatively well funded, with 85.7% (USD 3.5 billion) secured in 2019, against a global average of 48%. Donor fatigue, a new large-scale crisis in another part of the world, or major political changes among Yemen's major donors, such as leadership change in Saudi Arabia or UAE (largest and third-largest donors), or cuts to aid budgets in the US or UK (second- and fourth-largest donors) could reduce funding in the coming 18 months. Loss of donor confidence, or a major corruption scandal, could also see donor funds frozen or tightly earmarked to donor priorities. This could force a reduction in humanitarian operations, and potential backlash from local communities if not handled carefully (Financial Tracking System 1/04/2020).

Water – need for sustainable response options

The water availability in Yemen is 150 cubic metres (m³) per person per year (average of 1250m³ for Middles East). All surface water and groundwater resources are exploited beyond the level of recharge. The agriculture industry uses 93% of Yemen's potable water and does not actively encourage sustainable water saving techniques. Qat cultivation uses 40% of potable water. The water crisis could be mitigated by reducing qat production and promoting water reuse of treated wastewater for irrigation (Researchgate 2006).

In 2011, the rate of water consumption from the Sana'a Basin exceeded the rate of natural recharge by a factor of five. Much of the country's 68 billion cubic metres of annual rainwater is wasted due to mismanagement and inadequate dams. Swift adoption of more sustainable water management policies should be prioritised immediately, irrespective of the status of the conflict.

Iran-US relations

Escalating rhetoric between the US and Iran increases the risk that Yemen could be pulled into a broader regional conflict. This would particularly impact on Risk 1 (major offensive) and 2 (conflict escalates across southwest), as a broader conflict in the region could distract attention from events in Yemen and provide coverage for more violence.

Oil spill

An oil spill in the Red Sea, resulting from an attack on an oil tanker in the strategic Bab Al Mandab strait, or an explosion on the SAFER oil terminal could completely wipe out Yemen's Red Sea fishing industry for 25 years. Fishing currently employs 500,000 people who support 1.7 million dependants and brings in USD 60 million per year to Yemen's economy. An oil spill could also block access to Al Hodeidah port, doubling food prices and increasing fuel prices by 800% (LSE 12/2018).

Regulatory constraints

New sanctions, additional terrorist listings against the Houthis or other parties to the conflict, or further de-risking by the international banking sector will hamper humanitarian operations under any scenario. De-risking by the international community in 2010 cut off Yemeni banks from foreign exchange and introduced imbalances which continue to wreak havoc on prices in Yemen today. If the US lists the entire Houthi movement as a terrorist organisation (currently only its leaders are listed) or expands sanctions, humanitarian actors and traders will face additional challenges moving money and goods into Yemen.

Stakeholders

Houthis (Ansar Allah)

Emerged in Yemen as the opposition movement “Believing Youth Group” in the early 1990s protesting against social and economic marginalisation and Salafi encroachment on the Zaidi northern highlands. Between 2004 and 2010, the Houthis and the government fought six Sa’ada wars in northern Yemen. The Houthis participated in the Arab Spring in 2011 and the National Dialogue Conference, but kept hold of their weapons and built alliances, including with former President Saleh (until the breakdown in the relationship saw Saleh killed in December 2017). In September 2014, the Houthis seized Yemen’s capital Sana’a and swiftly expanded their control, almost capturing Aden in 2015. As of October 2019, the Houthis control the majority of northwest Yemen, including its capital Sana’a and 70% of the population (ECFR 01/07/2019).

Internationally Recognised Government of Yemen (GoY)

During the Arab Spring in 2011, President Ali Abdullah Saleh was forced to step down, ending 33 years of rule. Abdu-Rabu Mansour Hadi became President in 2012. When Houthis seized the capital, Hadi resigned and fled to Saudi Arabia in January 2015. Saudi backing, including financial support, is key to the GoY’s survival. The Hadi government is the only government recognised by the international community. The GoY lost the southern capital, Aden, to STC forces in August 2019. The Riyadh agreement of 6 November 2019 appears to have put the GOY back in control, but implementation could be challenging.

Southern Transitional Council (STC)

Ostensibly an ally to the GoY under the Saudi led Coalition, the STC seized control of Aden on 10 August 2019 on a pro-southern separatist and anti-Islah agenda. Southern groups retain historic grievances against Islah dating back to the violent North-South reunification in 1994. The Southern Transitional Council was formed by politicians, tribal leaders, and military figures on 11 May 2017. It harks back to the Hiraq southern separatist movement of 2007. Other southern separatist groups sit outside the STC and view its rise to power with suspicion. STC is heavily backed by the United Arab Emirates. Armed groups aligned to the STC are the dominant force in many areas of the south, particularly Aden and Al Dhale’e. The Saudi led Riyadh agreement of 6 November 2019 granted STC a formal role in the government alongside the GOY, but implementation could be challenging (Sana’a Centre 6/11/2019).

Islah

Formed in 1990 from tribal, Muslim brotherhood and Salafi elements. General Ali Mohsen, the current Vice President and second most powerful man in Yemen behind Saleh for 33 years, is closely associated with Islah. The party has close ties to Saudi Arabia. It is widely mistrusted by the UAE but has cooperated with UAE forces at the tactical level, including

the 2018 offensive on Al Hodeidah. Southern groups have never forgiven Ali Mohsen and his Islahi allies for their role in the violent takeover of Aden in 1994. Islah is the major force in Marib and parts of Taiz.

General People’s Congress (GPC)

Saleh’s political party, the GPC functioned as a key patronage network and the main avenue for advancement for millions of Yemenis throughout Saleh’s 33 years of rule. Although it no longer plays a formal role in governing Yemen, the GPC retains a strong network across the country. The party is currently split between three groups with factions supporting President Hadi, others lining up behind former President Saleh’s son, Ahmed Ali, and a third faction still operating in Houthi controlled areas under Saleh Amin Abu Ras.

Al Qaeda & IS in Yemen

The Yemen based Al Qaeda in the Arabian Peninsula (AQAP), is considered one of Al Qaeda’s most effective branches. During Yemen’s Arab spring in 2011, AQAP seized parts of the southern governorates of Abyan and Al Bayda. An Emirati-backed military offensive in spring 2016 succeeded in forcing AQAP to give up control of most of these territories. Nevertheless, the group still has a presence in many areas of the country including Hadramaut and Shabwah. At the same time, the Islamic State has exploited the deteriorating security situation in Yemen to establish a foothold in the country, particularly in the south. AQAP and IS are increasingly fighting each other in Al Bayda governorate (ECFR 01/07/2019).

Saudi Arabia

With the Houthis poised to take Aden in March 2015, Saudi Arabia formed a coalition of nine Arab countries, armed and funded local forces, deployed Sudanese ground troops, imposed an air and naval blockade, and launched a ferocious air campaign which pushed back the Houthi offensive. Saudi budget support (USD 2.2 billion in the last 12 months) and extensive funding for the GOY military has played a crucial role in preventing the collapse of Yemen’s economy. Saudi is also a major aid donor, providing over USD 3 billion in aid since 2015, more than half of it to humanitarian appeals. The Saudi led coalition split in August 2019, with Saudi backed forces squaring off against the UAE backed STC in Aden. The Saudi led Riyadh peace process reunified these forces on 6 November 2019, but implementation could be difficult (FTS 6/11/2019, Sana’a Centre 6/11/2019).

UAE

The UAE has heavily supported southern separatist forces, particularly in strategic locations in the south such as Aden, Al Mukallah and Soqatra. UAE backed forces played a key role in pushing Al Qaeda out of Al Mukallah in late 2016 and the push towards Al Hodeidah in mid-2018. UAE’s backing of the STC takeover of Aden in August 2019 strained relations with Saudi. UAE announced it was withdrawing from Yemen in early 2019 but would continue to support ‘counter-terrorism’, signalling a likely ongoing role in

affairs in the south and centre of the country. The UAE is also a major donor, reporting over USD 4 billion in aid since 2015, though most of its contributions go through the UAE Red Crescent and Emirati NGOs (only 22% of UAE funding goes through the UN appeals) (FTS 6/11/2019).

Iran

Iran's support for the Houthis is often exaggerated, feeding into the broader narrative of an existential Shia-Sunni² power struggle for the region favoured by hardline elements on both sides. Iran played no significant role in the Houthis rise and early military successes. However, most commentators do see evidence of growing (but small scale) financial and technical support from Iran in recent years. Iran has also provided strong political support for the Houthis, signing agreements to establish regular air services (currently blocked by the Saudi air embargo) and formally recognising a Houthi ambassador to Tehran on 24 August 2019 (Middle East Institute 06/12/2018, Panel of Experts 01/2019).

US/UK

The US and its Western allies have led a long running covert drone programme targeting Al Qaeda and IS in central Yemen, prompting a backlash from local tribes over civilian casualties. The US heavily supplied the Yemeni armed forces to increase their counter-terrorism capacity throughout the 1990s and 2000s. Much of this equipment is now in Houthi hands. The US and its allies continue to provide political and logistical support to Saudi and UAE operations, despite domestic opposition. The US is the second largest donor to Yemen behind Saudi, providing USD 2.4 billion since 2015. UK is the fourth, (USD 1.16 billion since 2015). The US coordinates policy on Yemen with the UK, Saudi and UAE through the Quad (FTS 6/11/2019).

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² Zaidism, which the core of the Houthi movement follow, technically falls under the Shia branch of Islam. However, in practice it is ideologically closer to mainstream branches of Sunni Islam. Religion is not a major factor in the conflict, Zaidis and Sunni Shafa'is can be found on all sides.

Methodology

The objective of ACAPS risk analysis is to **enable humanitarian decision makers to understand potential future changes that would likely have humanitarian consequences.** This risk analysis is based on **ACAPS Risk Methodology Note** (read more about ACAPS risk methodology) using the chain of plausibility approach to risk analysis.

Risk analysis depends on a **solid understanding of the context** and on investigating the interaction of the variables that cause or resist change. It is a **process that should be repeated at regular intervals** and the change in risk recorded overtime.

Risk analysis is not an exact science, an event identified by one analyst as a hazard, might be identified by another as a trigger for a different event. This is of little consequence; the important issue is that the sequence of events and a hazard are identified.

Risk is a function of **Severity and Probability.** The Probability of a risk does not need to be high for it to be of concern.

ACAPS will provide updates of the risks every six months, in order to take into consideration the dynamism of the crisis developments that might change the chain of events and/or materialisation of the hazards identified. ACAPS will also conduct monthly internal monitoring of key risks and provide updates and alerts as risk evolve.

Limitations

- Population figures are estimates based on existing figures, and are used to give an indicative figure of people exposed to the risk and likely to be in need of additional humanitarian assistance if the risk occurs.
- Considering the complexity of the humanitarian crisis in Yemen and its regional dynamics, overall it is very challenging to establish how some of the identified triggers and risk that would develop.
- The lack of information on the population’s level of resilience and coping strategies made it particularly challenging to establish the impact of the risk.
- All figures provided for the impact of the risks are estimations based on previous similar events. As such, they have to be treated as mere indications that help understand the exposure of the population to the risk.
- While efforts were made to ensure that all information was up to date at the time of publishing, the rapidity with which the situation deteriorates means that significant changes are often observed from one week to another.

Annex A: Chain of plausibility approach to risk analysis

