

CRISISINSIGHT

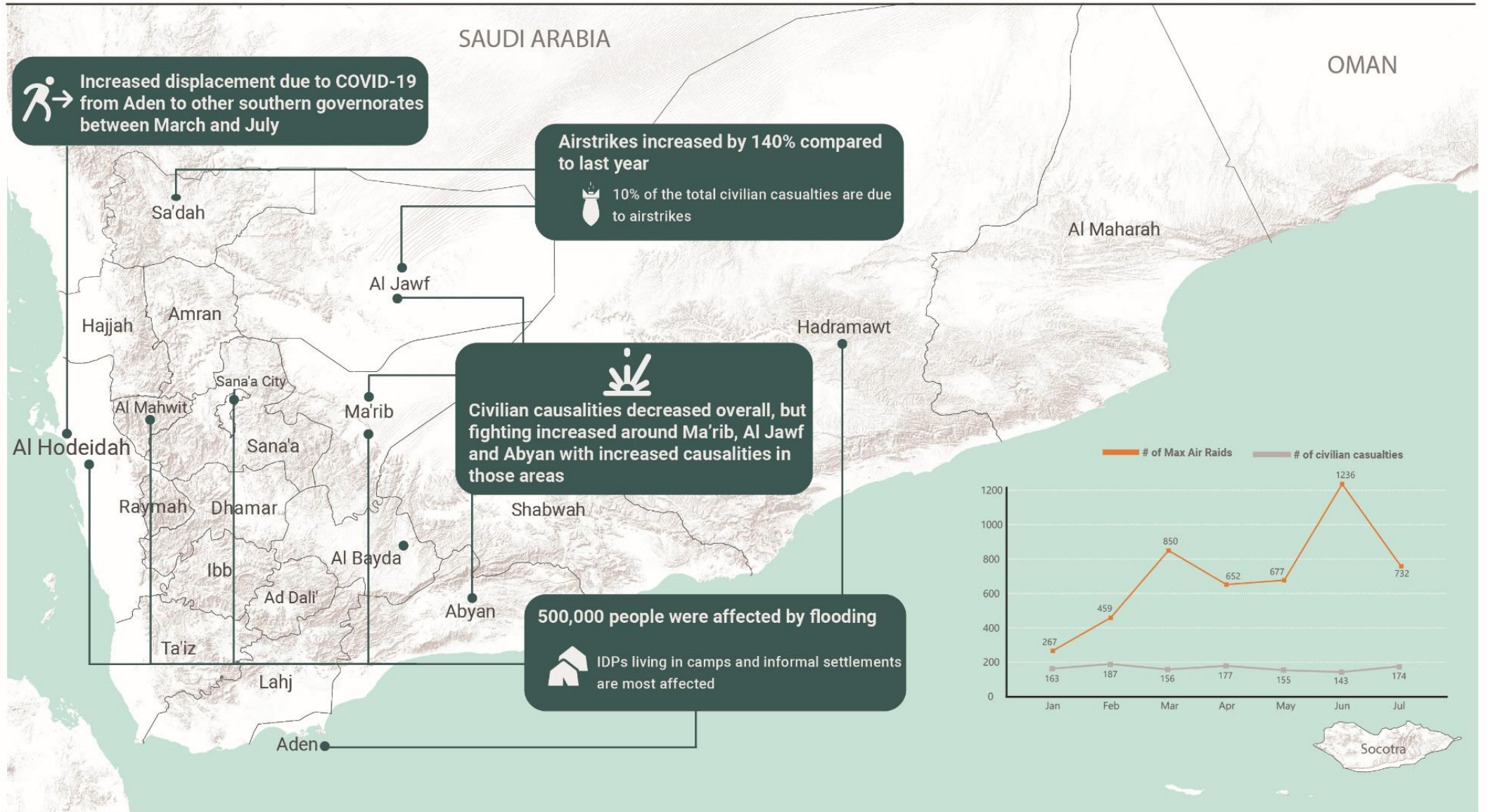
YEMEN CRISIS IMPACT OVERVIEW

JANUARY – AUGUST 2020





Humanitarian developments in Yemen between January-August 2020



Seven key issues to pay attention to

1. **Humanitarian needs have increased and become harder to address:** Some progress was made by humanitarian organisations in negotiating with authorities for programme approvals however, the overall operating environment is increasingly challenging. Constraints posed by conflict, bureaucratic impediments, COVID-19, shortages of funding, and the compounding of needs over time, are creating a situation where the humanitarian needs of people in Yemen are simultaneously greater than in previous years as well as harder to address.
2. **COVID-19 and flooding displaced more people than conflict from May to July 2020:** Conflict remains a key driver of displacement but 2020 has seen it joined by COVID-19, flooding and deteriorating public services. Some people are now choosing to move to remote areas further away from conflict and disease hot spots in major cities. These areas are less accessible for goods, services and support. Ma'rib, which already hosted the largest number of IDPs in Yemen, has been receiving large numbers of new IDPs from Al Jawf, northern Al Bayda and Nihm district in Sana'a governorate. The ongoing fighting in these governorates risks further displacement, increasing pressure on services and humanitarian operations. Many households have been displaced multiple times, often to a more precarious situation. This is stretching their ability to cope and to access key goods and services.
3. **Civilian casualties decreased, but fighting increased around Ma'rib, Al Jawf and Abyan:** There have been less civilian casualties as a result of conflict across Yemen compared to the same period in 2019. Conflict is now more concentrated around Ma'rib, Al Jawf, northern Al bayda, and Nihm district in Sana'a governorate, in the north. Conflict also continued along older frontlines in Al Hodeidah, Taiz and Ad Dali. Airstrikes have increased; doubling compared to the first half of 2019 as Houthi-Saudi relations became more strained.
4. **Deteriorating economic conditions continue to drive food insecurity and stretch coping mechanisms:** Economic conditions have been driving high levels of food insecurity throughout the conflict. Conditions worsened in 2020 due to converging negative macroeconomic trends: a drop in foreign currency inflows (specifically remittances), the continued depletion of the Saudi deposit, and the depreciation of the Yemeni Rial. There is a strong correlation between the value of the local currency, food prices, and the level of purchasing power in Yemen – all of which are trending in the wrong direction. Goods have remained readily available on the market throughout the conflict, but the issue of food security in Yemen is mostly tied to peoples' ability to purchase food which continues to decrease. Read more in our scenario report and Volatility of the Yemeni Riyal report.
5. **Heavy rains and flash floods have had a greater impact than in previous years:** Flooding affected over 500,000 people between April and August, causing extensive damage to civilian infrastructure such as roads, bridges, electricity and water networks and displacing over 20,000 people. Flooding damaged food supplies at the household level and many shops and local markets reported stock losses. Floods caused drinking water and sewage to combine in some areas of Sana'a governorate potentially leading to the spread of water borne diseases. Fragile makeshift structures and IDP shelters were widely damaged. The most affected areas were Aden, Ma'rib, Sana'a city, Al Mahwit, Al Hodeidah and Hajjah.
6. **Protection concerns for migrants in Yemen have dramatically increased:** The number of migrants arriving in Yemen between March and August has decreased by 83% from 73,259 in 2019 to 11,780 in 2020. However, migrants are facing increasing protection risks as COVID-19 increases discriminatory attitudes, limits migrants' access to essential services and disrupts freedom of movement. Over 1,500 migrants were deported from the north to the south and stranded without access to essential services, near frontlines, exposed to exploitation by smugglers and facing increased risks of contracting COVID-19.
7. **Agreement to allow international inspections of the FSO SAFER oil tanker may help alleviate an environmental disaster, but this is yet to be implemented:** Since the war escalated in 2015 the SAFER oil tanker, which holds 1.1 million barrels of crude oil and is anchored in Al Hodeidah port, has fallen into disrepair. The vessel could explode or catch fire, which would lead to the closure of the port, reducing the availability of fuel and disrupting electricity, sanitation, health, and transportation services across Yemen. Increased mortality rates due to exposure to harmful pollutants and respiratory illness will create greater strain on already weak healthcare system. Estimate indicate 50% of fisheries will be severely affected, with 235,0000 people in the seafood industry put out of work for decades. The last six months saw a sharp increase in international focus on the SAFER oil tanker and the Houthis have agreed to an international inspection team. This is a positive sign however; a similar mission in August 2019 never received final approval to go ahead.

Outlook

The Southern Transitional Council (STC), the Internationally Recognised Government of Yemen (IRG) and Ansar Allah (more commonly known as the Houthis) continue to have different priorities, frustrating attempts to secure any meaningful end to the conflict. Negotiated agreements are very fragile, short-lived, and usually only reduce violence for a short period. With very limited progress made in the Riyadh agreement, conflict may spill into other governorates in the south including Aden, Shabwah, Lahj, and Hadramaut. Further civil unrest, in the form of rallies and demonstrations, is expected to continue as salaries and public services remain unreliable across the south.

The most likely outcome is continued, lower level of conflict, similar to the first half of 2020 except for around Ma'rib, Al Jawf and Al Bayda. There is a moderate likelihood of a major increase in conflict with severe humanitarian consequences. If we see a large scale offensive on Ma'rib city, up to 500,000 people may be displaced and humanitarian access could all but cease as major highways into the governorate are cut off. Ma'rib already hosts over 800,000 IDPs. Fighting around oil wells in Ma'rib could spark an environmental disaster and further reduce Yemen's scarce export earnings. The number of Saudi-led coalition airstrikes is expected to continue to increase in the last three months of 2020 aggravated by repeated Houthi attacks on critical infrastructure in Saudi Arabia (ACAPS 30/08/2020).

Conflict, cyclones, flooding, deteriorating public services, economic necessity, and COVID-19 will drive additional displacement. Flooding has already been worse than in previous years, likely driven by more IDPs seeking shelter on marginal land and long term climate change. Seasonal rains continue until October and Yemen faces cyclone season in October and November. Five years of ongoing displacement have depleted people's savings and many struggle to find jobs. Economic desperation may force IDPs to return to, or stay in, unsafe areas. Others have already made choices to move to areas which are remote and sparsely populated, making it increasingly difficult for them to access goods and services and for humanitarian agencies to reach people in order to understand and respond to needs.

As the currency continues to deteriorate, household food access will likely be increasingly constrained by rising food prices. An increase of food insecurity in the coming three months is possible, especially in the northern part of the country where humanitarian assistance continues to be severely restricted.

With the increasing challenges around the operating environment and reduced funding, the response is expected to shrink further over the next six months. The programmes likely to be most impacted are those around reproductive health, water and sanitation as these are not as high a priority for the government as food, shelter and other primary

health care. The reduction of food rations due to bureaucratic impediments to areas in the north controlled by Houthis will increase the level of food insecurity unless resolved (ACAPS 31/08/2020).

Poverty can be expected to increase, driven by increased displacement, increasing cases of COVID-19, decreasing remittances, inflation and price rises. As a result, the number of people in need, already at 24 million, will continue to increase and the needs will deepen. Humanitarians will need to quickly build a more granular understanding of where the most serious pockets of need are in Yemen, and how to reach the most vulnerable. This will likely be in an environment of more constrained humanitarian assistance as humanitarian funding decreases.

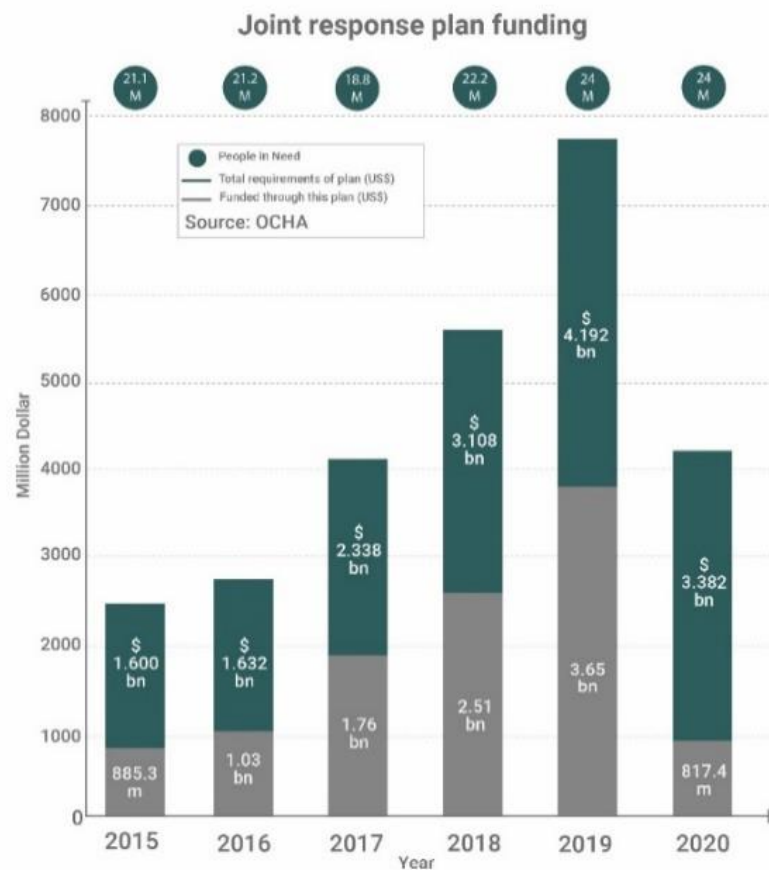
The following section provides more detailed analysis of three key trends

- **Increasing challenges addressing humanitarian needs**
- **Changes to displacement trends, and**
- **Changes in conflict dynamics**

Humanitarian needs have increased and become harder to address

The overall operating environment remains extremely challenging due to increased costs imposed by COVID 19, shortfalls of funding and decreased access due to bureaucratic impediments, insecurity and COVID-19 restrictions. All of these factors make humanitarian needs harder to address in a time where humanitarian needs continue to increase.

In the first seven months of 2020 some progress was made compared to the corresponding period in 2019. Humanitarian agencies signed delayed sub agreements in both the north and the south. However, these were sub agreements that had been pending for some time and, by the end of June, over 95 NGO projects remain unimplemented due to pending approvals by authorities. These programmes are intended to benefit up to 5.6 million people (OCHA 24/08/2020, discussions with operational actors 7/09/2020).



Reduced capacities to cover humanitarian needs

Funding for the Humanitarian Response Plan (HRP) has reduced significantly compared to last year. This has already resulted in major programmes being suspended or downsized. As of 31 August, the Humanitarian response plan was only 24% funded (US \$811.5 million received of the US \$3.38 billion required to cover essential humanitarian activities between June and December 2020). Of the US \$1.35 billion pledged at the 2 June conference hosted virtually by Saudi Arabia only about half had been received by end of August (OCHA 28/08/2020).

Since April, many agencies have started down scaling or suspending their assistance due to the combination of deteriorating access and lack of funds. The US suspended aid funding to northern Yemen in March 2020 because of diversion of aid, restrictions imposed on humanitarian agencies by the authorities such as interference in the implementation of humanitarian activities, restriction of movement of organisations, delays in approving projects and restrictions in conducting needs assessments (OCHA 02/09/2020, NRC 20/08/2020, Foreignpolicy 20/08/2020).

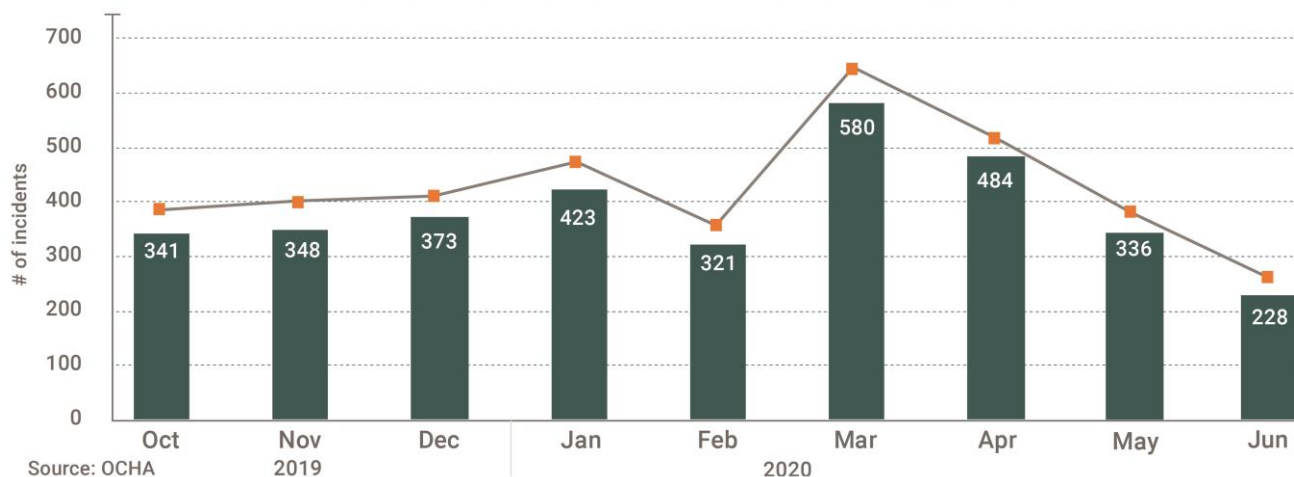
The lack of funding has also had an impact on health services, with many facilities closing or reducing the services they can offer due to an inability to cover operational costs and salaries. Health facilities that provide care for 1.8 million people have been closed, including 140 facilities that provide reproductive health care (OCHA 2/09/2020).

More programmes will be reduced or suspended by the end of September if additional funding is not received. This includes concerns that without additional funds, water and sanitation programmes could be reduced by 50 per cent in some locations and 400 more health facilities will be closed, cutting off 9 million people from medical care; and halting the treatment for over a quarter of a million severely malnourished children (OCHA 15/09/2020).

Deteriorating overall access

The reduction of funding takes place when humanitarian access is continuing to be challenged by bureaucratic impediments, conflict and new factors such as movement restrictions related to COVID 19. Authorities have curtailed movement in an effort to prevent the spread of COVID 19. This is impacting humanitarian organisations' ability to deliver programmes, meet community members and understand needs. In northern Yemen, restrictions mainly pertained to requests to limit inter-governorate movement and the movement of humanitarian personnel and goods from southern Yemen. Humanitarian organisations continue to face the denial of travel permits for the delivery of assistance and services. These restrictions affected both regular programmes and new programs designed to respond to COVID 19 (IOM 27 July 2020 , OCHA 2/07/2020).

Access incidents restricting humanitarian operations



From March, the movement of civilians, humanitarian personnel and cargo into the country has been disrupted by new regulations in Yemen and in the countries of embarkation as a result of COVID-19. Flight suspensions and the closure of international airports in Yemen and the region have disrupted the entry of humanitarian staff into Yemen. Two of Yemen's five international airports (Sayoun and Aden) have been opened to facilitate the return of Yemenis stranded abroad and humanitarian staff. In the south, visas and residency requests between March and June took longer than usual and authorities imposed additional bureaucratic processes. On 7 September, the Houthis closed Sana'a airport for humanitarian flights, which will disrupt the movement of humanitarian aid and personnel to the north of the country (IOM 22/08/2020, OCHA 2/07/2020, OSEGY 15/09/2020).

COVID-19 protocols have increased the cost of operations and the time they take to deliver. Humanitarian organisations need to replan activities to observe social distancing and provide PPE to staff. Some operational actors told us that food distribution or field visits which previously took three or four days to complete now take six to eight days, using more fuel and staff time (ACAPS discussion with operational actors 8/09/2020).

Organisations struggle to collect data from the ground. Many needs assessments and project monitoring have to be based mostly on remote data collection. This increases the risk that assessments will miss key locations and pockets of people in need. Some organisations are concerned that this will be perceived as a lack of evidence, and a breach of the principle of impartiality in a resource scarce environment. This could further compromise donor willingness to fund operations.

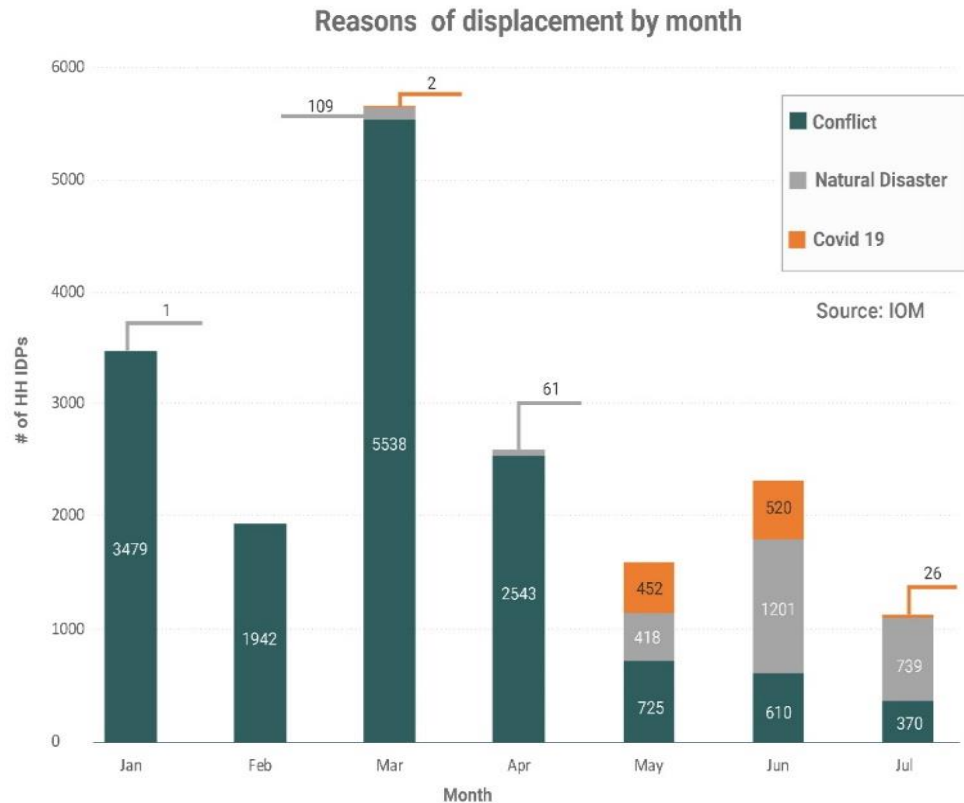
Fewer access incidents but no cause for complacency, a concentration in key hotspots

Access incidents (as shown in the graph above) refer to interference in the implementation of humanitarian activities, including restriction of movement, violence against humanitarian personnel and military operations impeding humanitarian operations. The increasing trend of access incidents which began in 2019 continued into 2020 through to May. The reduction in reported access incidents in May and June can be attributed to the reduced field presence and movement of humanitarians in the country and should not be seen as an overall positive development (OCHA 7/09/2020, discussion with operational actors).

Over 1,628 access incidents were reported between March and June 2020 across 49 districts in 16 governorates. Al Jawf, Marib, Sana'a and Aden governorates reported the highest numbers of access incidents overall as well as increasing numbers of incidents between March and June (even when numbers dropped off in other areas).

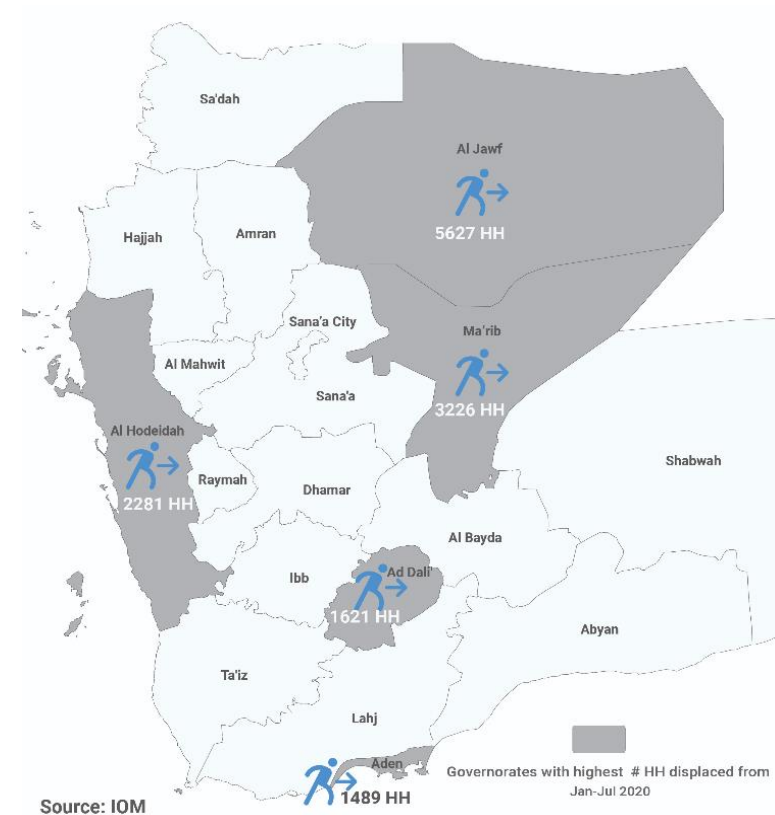
The increasing conflict in Marib, Sana'a governorates and Al Jawf is limiting access to these areas. The ongoing fighting and lack of safety assurances has led to the suspension, or re-location, of programmes, withdrawal of personnel in areas closest to the clashes, and blocked the movement of humanitarian cargo to Aden. The further concentration of conflict in key areas, and all of the concerns that go along with that – increased needs, less access to goods and services and an overall deepening of hardship conditions – could further increase needs and decrease humanitarian access in the coming six months (OCHA 2/07/2020, OCHA 24/06/2020).

COVID 19 and flooding displaced more people than conflict from May to July 2020



Conflict, natural hazards and COVID-19 displaced over 18,900 households (114,000 people) between January and July. The overall number of people displaced decreased by 62% compared to the corresponding period in 2019 from 300,000 people (54,600 households) in 2019 to 114,000 people (18,900 households) in 2020. However, displacement increased massively in Ma'rib and Al Jawf, offset by decreased displacement in Hajjah, Ta'iz and Sa'dah. This is linked to the increase of conflict in Ma'rib, Al Jawf governorates and Nihm district in Sana'a governorate and the decrease in conflict in Hajjah (DTM core data set).

The number of people displaced in 2020 may be higher than the recorded figures indicate – it has been a difficult period to measure displacement due to movement restrictions in the north. Anecdotal evidence suggests many of those displaced by floods are staying with host communities and relatives, while others have fled to more remote, desert areas that are harder for humanitarians to access.



Conflict remains by far the main driver of displacement in Yemen, accounting for over 81% of the total displacement between January and July 2020. Over 15,000 households (92,000 individuals) fled due to increased or ongoing conflict, including in Al Jawf (34,000 individuals), Ma'rib (18,000), Al Hodeidah (10,000) and Ad Dali' (9,000). Many of the people displaced from Ma'rib and Al Jawf moved within their governorate or to the neighbouring governorate. Significant displacement continues within and from areas witnessing continuing high levels of conflict, such as Ma'rib, resulting in greater concentrations of IDPs. This led to pressure on services, which fuelled tensions between and within households and communities. Furthermore, some people are choosing to displace to more remote areas making it harder for humanitarians to reach them (ACAPS June 2020).

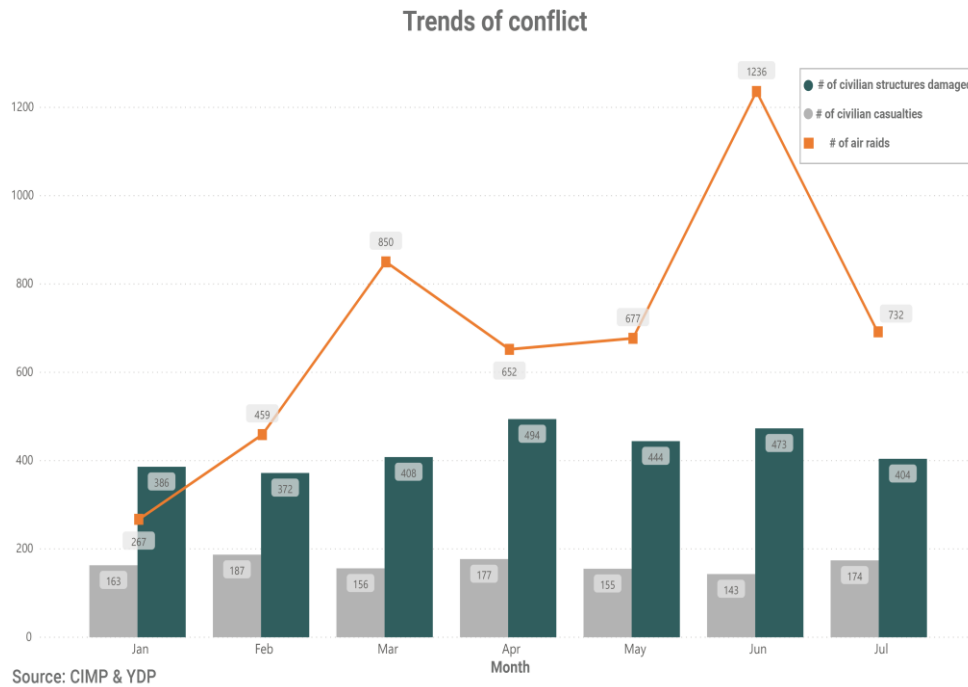
COVID-19 and flooding were the main reason for displacement between May and July: COVID-19 emerged as a new driver of displacement in the south between March and July and peaked in May and June. Over 1,600 households (9,500 individuals) were displaced

from Aden and surrounding areas in Lahj by COVID 19 between March and July 2020. There is a high risk that COVID 19 cases could increase, driving further displacement. COVID 19 cases are decreasing in Yemen, from a peak of 835 in June to 230 in August. However, we are concerned there could be a second wave in the future (OCHA 9/09/2020, OCHA 12/07/2020).

Displacement due to natural hazards such as flooding is an annual occurrence. In 2020 flooding affected over 83,300 households (500,000 people) across Yemen between April and August. An estimated 20,000 people (3,300 households) were displaced due to flooding with most displacement reported in Al Hodeidah, Aden, Al Maharah, Shabwah and Hadramaut. Most of the affected people are IDPs living in displacement sites in Ma'rib, Lahj, Aden, Ad Dali, Ibb, Al Hodeidah, Hajjah and Hadramaut. The risk of COVID19 transmission potentially increases with the floods as many IDPs and host communities lost shelters, houses, livestock and livelihoods, which makes social distancing and hygiene measures harder to observe (OCHA 28/08/2020).

IDPs living in informal settlements face increasing protection issues. Many report increasing threats of eviction and increased violence due to tensions with host communities, particularly in Lahj, Aden, Shabwah and Ibb. Many households have now been displaced multiple times, exhausting coping mechanisms and forcing increasing numbers of people to resort to negative and risky coping mechanisms for survival. Operational actors on the ground report growing anxiety among internally displaced people due to the lack of livelihood opportunities and COVID 19 (Discussions with operational actors).

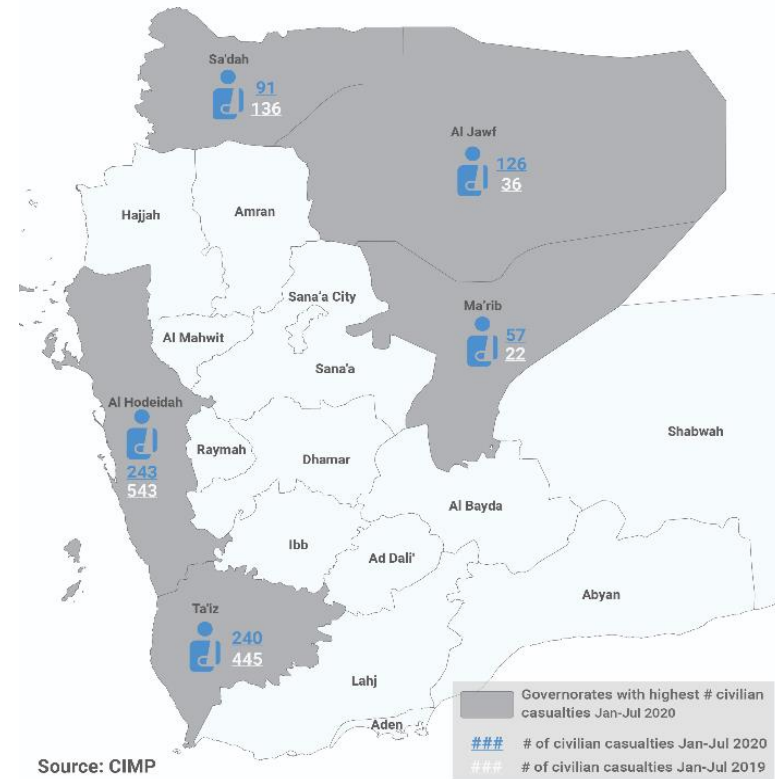
Civilian casualties decreased, but fighting intensified around Ma'rib, Al Jawf and Abyan



The overall number of civilian casualties decreased across the country compared to Jan–July 2019, however this should be interpreted with caution as it increased in the governorates with intense frontlines: Ma’rib (by 25%), Al Jawf (by 60%) and Abyan (by 29%). In Ma’rib and Al Jawf conflict escalated between the Houthis and IRG supported by the Saudi-led coalition in mid-January, opening seven new frontlines. The number of airstrikes doubled compared to 2019. In the south conflict renewed in late April between IRG and STC after five months of calm.

Despite a sharp reduction in civilian casualties from airstrikes, Al Hodeidah remains the most dangerous governorate for civilians. It has continually recorded the highest number of civilian casualties since 2018. Almost 21% of all civilian casualties between Jan and July 2020 were in Al Hodeidah. Despite the decrease in civilian casualties brought about by the Stockholm agreement, daily fighting is reported and it remains the governorate with the highest number of civilian casualties as a result of shelling and armed violence.

Mass casualty events from shelling and airstrikes continued to impact public and civilian infrastructure, particularly houses and health services, though at a lower level than 2019.



A shelling attack in April hit the women’s central prison in Al Jibali area in Al-Mudhaffar district, Taizz, resulting in 33 civilian casualties. An airstrike in February was responsible for 40 civilian casualties in Al Hayjah area in Al Maslub district of Al Jawf (CIMP 15/07/2020).

The Saudi-Houthi negotiations, announced in September 2019 following a Houthi decision to suspend missile attacks on Saudi territory and the Saudi response that they would reduce airstrikes, was credited in helping to reduce both the number of airstrikes in Yemen and missile attacks on Saudi Arabia in the last quarter of 2019. However, in January 2020, the Houthis resumed cross border missile attacks and Saudi Arabia launched major air offensives from March 2020 largely focussed on Ma’rib, Al Jawf and Sana’a.

The number of airstrikes escalated in March and is now double the number for the same period last year. Most airstrikes are recorded around Marib, Sa’ada, Al Jawf, Hajjah, Al Hodeidah and Sana’a governorates. Numbers peaked in June but then decreased in July to around the same number as in May. Most civilian casualties due to airstrikes were recorded in Al Jawf (64) and Sa’adh (36) governorates (YDP data set ,CIMP June 2020).

The UN Secretary General called for a country-wide ceasefire in light of the COVID-19 pandemic in April. The Saudi –led coalition announced a unilateral ceasefire between the IRG and Houthis but the conflict continued on the ground and parties to the conflict kept violating the ceasefire. (UNSG 08/04/2020).

The Al Riyadh agreement, signed on 5 November 2019, saw conflict reduce for five months in the south of Yemen. However, implementation stalled and conflict increased in Abyan from April 2020. The Southern Transitional Council and the government of Yemen resumed talks in the beginning of September 2020 after the STC suspended its participation in the Riyadh agreement for the second time on 26 August due to ongoing fighting in Abyan. The suspension comes after two months of consultations in Saudi Arabia to agree on ways to implement the agreement after the STC took control of Socotra on 20 June 2020 and declared self-administration in the south in 25 April 2020. Talks resulted in the appointment of a new governor and security director for Aden in July 2020. However, they failed to form a new cabinet by the end of August in accordance with the agreed timeline. The IRG and the STC continued to clash sporadically in Abyan which resulted in an increase in civilian casualties by 29% compared to the same period in 2018 and 2019. Civil unrest continued in other southern governorates including Aden, Shabwah and Hadramaut which reported assassinations and protests due to deteriorating public services (Security Council 31/08/2020).

About this report

The Yemen Crisis Impact Overview provides decision makers with a short, accessible overview of key trends and emerging challenges that may affect humanitarian needs in Yemen.

The product combines trends in key conflict and humanitarian data with daily media monitoring, secondary data review, and ongoing joint analysis with a broad spectrum of Yemen analysts.

This report covers January to August 2020. Read our trends in 2019 and outlook to 2020 analysis here.

Have we got anything wrong? Do you have ideas for other issues we should look at?

Write to us on yahinfo@acaps.org

RELIABILITY



ACAPS has a high degree of confidence in the reliability of this report as it is based on primary data analysis, secondary data review, and joint review by Yemen experts. However, there is a risk of availability bias (focussing more on issues where there is information available), and more of our analysis focuses on the western part of the country than the east.

Limitations

ACAPS analysis is based predominantly on publicly available reports and datasets. This makes us susceptible to availability bias. To mitigate this, ACAPS cross-checks information with operational actors and actively seeks out alternative sources to provide the broadest possible basis for analysis. The majority of agencies ACAPS consults with engage in humanitarian response predominantly in the north and west of the country. We have a less comprehensive understanding of the east of the country and hard to reach areas.

Methodology

ACAPS developed the Yemen Crisis Impact Overview by:

Maintaining a core dataset of around 90 cross-sectoral indicators (quantitative and qualitative) at district level (see ACAPS' core data set)

Conducting analysis of key conflict, displacement, economic, social and humanitarian indicators to identify trends

Daily monitoring of Yemeni media and, social media in English and Arabic

Secondary data review of key analysis products published on Yemen (see ACAPS' metadatabase)

Regular joint analysis with operational and analysis experts working on Yemen to test and refine assumptions, and

Quality review by ACAPS' expert readers group to try to identify and address errors and bias.