

CRISISINSIGHT

YEMEN CRISIS IMPACT OVERVIEW



Key humanitarian developments in 2020
and outlook for 2021



5 KEY DEVELOPMENTS THAT AFFECTED THE HUMANITARIAN SITUATION IN 2020

1. Civilians and civilian infrastructure

Armed violence resulted in several mass casualty events, and conflict continued to impact critical civilian infrastructure – particularly healthcare infrastructure.

Civilians and critical civilian infrastructure continued to be affected by conflict expanding into new areas. In 2020, active frontlines began to move closer to the inhabited areas of Al Jawf and Marib governorates. Nearly 800,000 displaced people continue to live in Marib governorate, which was previously seen as a place of relative peace and safety. At least 20 incidents of more than ten civilians being injured or killed were reported across Yemen in 2020, and over 18 health facilities were hit by either an airstrike or shelling (an increase of 50% from 2019), restricting access to critical healthcare for 200,000 households.

2. Displacement

People in Yemen continued to experience displacement as a result of the war and other factors, such as flash floods and COVID-19; the number of displaced people rose dramatically in Marib and Al Jawf, and overall challenges are increasing for IDPs

Peace negotiations and decreased conflict resulted in the reduced movement of people in governorates such as Hajjah. Other governorates, such as Al Jawf and Marib, saw increased displacement as a result of expanding conflict. Many households have been displaced multiple times throughout the conflict, which resulted in a dramatic reduction of income opportunities and depletion of savings for them and their host communities.

3. Protection and vulnerability

Health workers and people dependent on remittances have emerged as new vulnerable groups.

The protection risks present in previous years have been aggravated by continuous conflict, increased challenges for humanitarian operations, and reduced funding. The COVID-19 pandemic further complicated the situation. Health workers, people dependent on remittances, people with underlying health conditions, and daily wage workers emerged as new groups considered 'vulnerable'.

4. Humanitarian access

COVID-19 and other factors have increased access constraints, affecting the quality of services provided.

While progress was made with authorities concerning programme approval in 2020, the overall operating environment remained extremely challenging. Access was impeded for security, physical, and bureaucratic reasons. Humanitarian operations faced increased restrictions and costs related to reduced funding. An estimated nine million people experienced access constraints in meeting their needs.

5. Economy

Deteriorating economic conditions continued to affect people's purchasing power.

Economic conditions worsened for the Yemeni population because of the conflict and varying macroeconomic trends. The situation has further decreased people's purchasing power, making it harder for households to pay for their needs.

6 HUMANITARIAN DEVELOPMENTS TO WATCH IN 2021

1. Houthis advancement towards Marib city

In early February 2021, the de-facto authority (DFA) in the north of Yemen (also known as the Houthis) announced a new offensive towards Marib city. This offensive has escalated the conflict in several districts, particularly Sirwah. The frontlines have progressed towards Marib city. Between early February and 12 April, further displacement and over 74 civilian casualties were reported. In the Sirwah district, six IDP sites were affected by shelling and two by airstrikes. These events have displaced over 11,800 people. IDPs are either moving to areas away from the conflict or relocating to Marib city or Marib Al Wadi. Some people have also moved to Al Jawf governorate, while others have fled to Amran and Sana'a governorates. This situation will likely continue during 2021, further straining civilian communities across the frontlines, especially IDP sites (CIMP 28/04/2021; UNHCR 29/4/2021).

2. Amplified US efforts for peace in Yemen

Since the beginning of 2021, the US has increased its involvement in Yemen and shifted its strategy by strengthening peace negotiations, indicating its intention to see an end to the conflict. After revoking the designation of the Houthis as a 'terrorist group', the US announced a complete halt to offensive support for the war, as well as a temporary freeze of arms sales to the Kingdom of Saudi Arabia and the United Arab Emirates. President Biden also appointed a US special envoy to support the UN special envoy in mediation efforts. Saudi Arabia proposed an initiative to open the Sana'a airport and allow fuel ships to enter Al Hodeidah. Despite these efforts, fighting has intensified across the frontlines in Marib, Taiz, Al Hodeidah, and Ad Dali, and achieving a middle ground between the Houthis and the Internationally Recognized Government of Yemen (IRG) remains a challenge (The White House 04/02/2021).

3. Fragile peace agreement

In response to escalating hostilities by the Houthis in Marib, Tareq Saleh – the commander of the National Resistance forces for Yemen's Red Sea coast – called on the IRG to withdraw from the UN-brokered 2018 Stockholm Agreement. The Agreement has been credited with reducing violence in Al Hodeidah and decreasing civilian casualties and displacement. Saleh also appealed to the IRG to escalate the war on major static frontlines in order to stretch the Houthis more thinly and stop the push towards Marib city. In March, clashes were reported in

Al Hodeidah, Hajjah, Ad Dali, and Taiz. Progress relating to the Riyadh Agreement has stalled, mainly because of details related to the military aspects of the Agreement. In early April, tension and clashes were reported between the Southern Transitional Council (STC) and the IRG in Abyan. Since the beginning of 2021, the south has experienced daily protests related to deteriorating public services and unpaid salaries. There is a high risk of the Stockholm and Riyadh Agreements failing because of increased tensions. Their failure would aggravate conflict and reduce humanitarian access and imports, leading to increased shortages in basic needs commodities (Crisis Group 23/02/2021).

4. Renewed conflict triggering secondary or onward displacement

Increased fighting between January and March has displaced over 27,000 people, mainly from Marib, Taiz, Al Hodeidah, and Ad Dali governorates. Marib faces a particularly high risk of increased displacement, as it hosts the highest number of IDPs countrywide and has witnessed continuously expanding levels of fighting since 2020. People who have been displaced multiple times are likely to experience acute shelter, protection, food, and WASH needs. Repeatedly displaced IDPs will likely remain one of the key vulnerable groups in 2021 (IOM accessed 04/05/2021).

5. Increased food prices as a result of the continuous depreciation of the Yemeni rial (YER)

The Houthis and the IRG are highly reliant on external funding to maintain fragile monetary, fiscal, and economic stability. Yemen relies on foreign currency inflows from Saudi support, aid funding, and remittances. In 2021, these funding sources will continue to face serious downward risks, pushing food and basic commodity prices beyond the reach of the majority of the Yemeni population.

6. Deteriorating humanitarian access

Humanitarian access in Yemen faces extreme constraints. While access in Houthi-controlled areas improved in 2020, it is unknown if this will be sustained as the DFA continue to impose new regulations. The IRG has also increasingly constrained access to areas under its control – specifically Aden and the west coast – by enforcing new administrative requirements and demands, making it hard for humanitarian responders to deliver timely assistance.

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Executive summary

In the past six years, the war between the Houthis and the IRG has killed over 18,400 civilians in Yemen. Nearly 2,000 of these deaths occurred in 2020. In the same year, there were several attempts at peaceful solutions or ceasefires. While these attempts contributed to decreased civilian casualties and resulted in smaller pockets of conflict, the agreements were usually bilateral and focused on a specific location and/or issue, making them fragile and often brief.

In 2020, thousands of people were displaced each month, often multiple times. Such displacement strained their resources, interfering with their ability to meet their own needs and/or requiring them to engage in risky behaviours to do so. The influx of large numbers of IDPs to new locations placed an additional burden on resources and infrastructure in hosting communities. These communities are often conflict-affected and already have significant unmet needs. COVID-19 had a direct impact on existing vulnerable groups and was the main cause of newly emerged vulnerable groups.

Economic conditions in 2020 worsened because of the depreciation of the Yemeni rial, exchange rate diversion between the north and the south, drop in foreign currency inflows, continued depletion of the Saudi deposit – which had not been renewed as at early May 2021 – and reduced overseas aid and humanitarian funding to Yemen. These factors led to increased prices, making many items unaffordable for the majority of households.

The number of civilians killed as a direct result of the conflict was lower in 2020 than in 2019. Despite periods of decreased hostilities in major centres, the conflict is continuing and evolving.

The overall humanitarian operating environment remains extremely challenging because of continuous restrictions imposed on humanitarian operations, as well as complications from the COVID-19 pandemic. The conflict has made humanitarian needs even harder to address, as people's coping strategies and resources are stretched or depleted.

Purpose of the report

This report aims to inform humanitarian decisions and planning by summarising key developments that affected the humanitarian situation in Yemen in 2020 and highlighting issues to watch in 2021.

Methodology

ACAPS developed this product through:

- daily monitoring of media and social media sources in Arabic and English throughout 2020 and in early 2021
- secondary data review of key documents in Arabic and English
- analysis of key data on conflict, the economy, displacement, prices, imports, and humanitarian access
- joint analysis and key informant interviews with experts in humanitarian organisations to shape and test the findings.

YEMEN 2020 TIMELINE

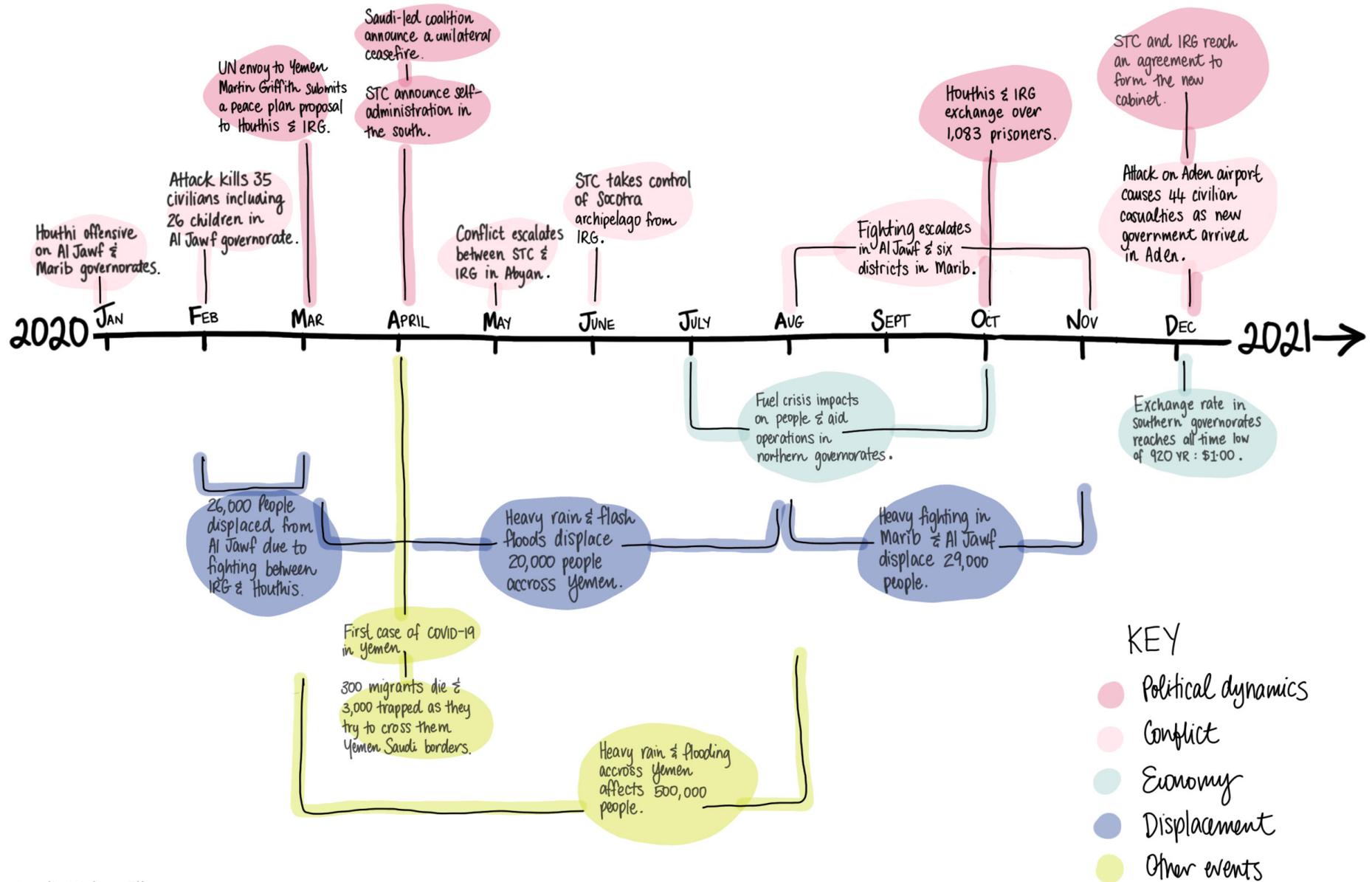
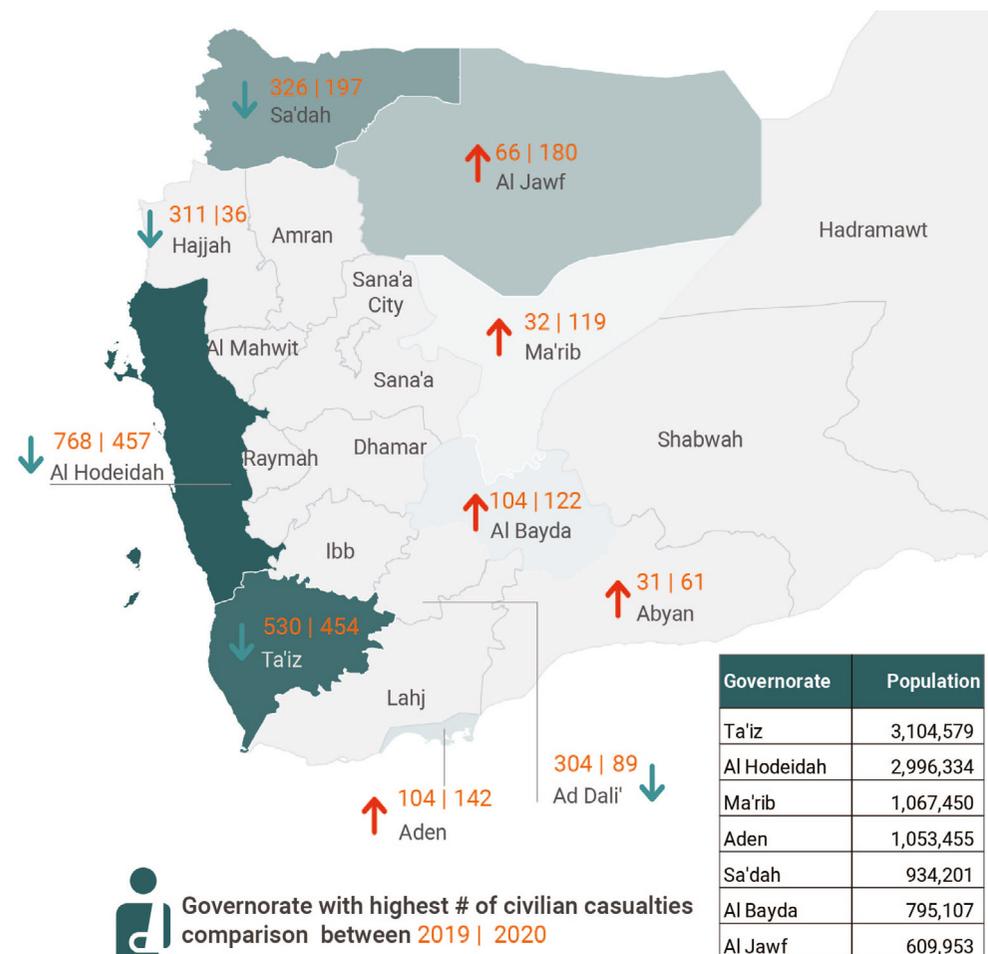


Illustration by Sandie Walton-Ellery

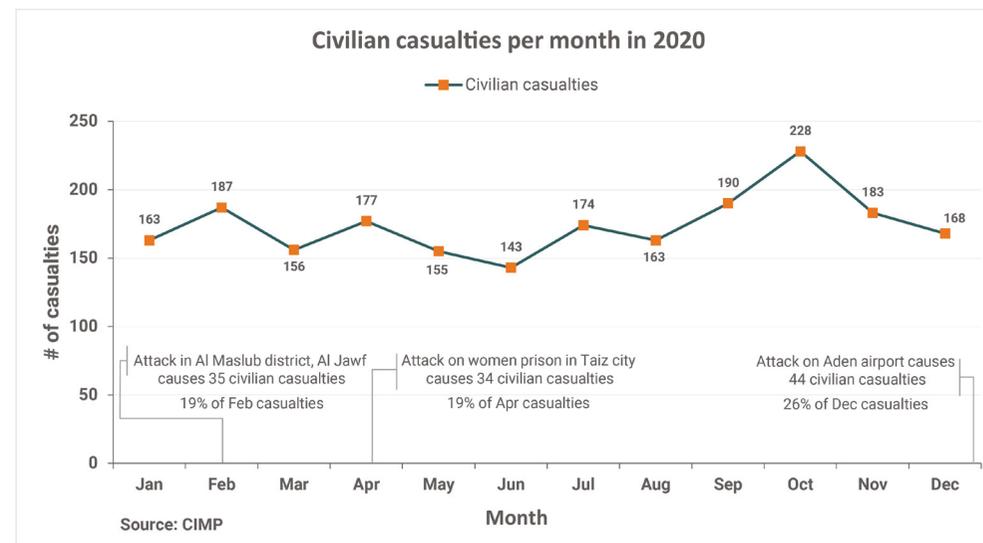
Armed violence resulted in several mass casualty events, and conflict continued to impact critical civilian infrastructure – particularly healthcare infrastructure

Civilian casualties decreased from 3,224 in 2019 to 2,087 in 2020 (a decrease of 35%).

The number of civilian casualties and the intensity of the conflict were inconsistent between governorates. The type of armed violence and the nature of the conflict driving these incidents also varied significantly, as each governorate has its own complex set of dynamics that directly impact civilians, including population numbers and density. In 2020, the conflict and associated deaths became more concentrated in certain key locations.



Source: CIMP



Several mass casualty incidents were reported in 2020. There were 20 incidents across the country in which at least ten civilians were killed or injured. More than four incidents resulted in over 30 civilian casualties, including two airstrikes in Al Jawf in February – where 35 civilians were killed – and July – where 34 civilians were killed. Of the various types of conflict, **shelling had the biggest impact on civilians for the second consecutive year**, accounting for 46% of all civilian casualties nationwide and resulting in mass casualties in Aden, Taiz, and Al Hodeidah. Small arms fire caused 30% more civilian casualties in 2020 than in 2019 (CIMP 2020 annual report 02/2021).

Since the beginning of 2020, the northern part of the country (Marib, Al Jawf, and Al Bayda) witnessed a surge of fighting between the IRG and the Houthis, forming 14 new frontlines and resulting in heightened civilian impact. Airstrikes, shelling, small arms fire, and explosive ordnance caused over 421 civilian casualties in the three governorates – more than double the 202 civilian casualties recorded in the same governorates in 2019.

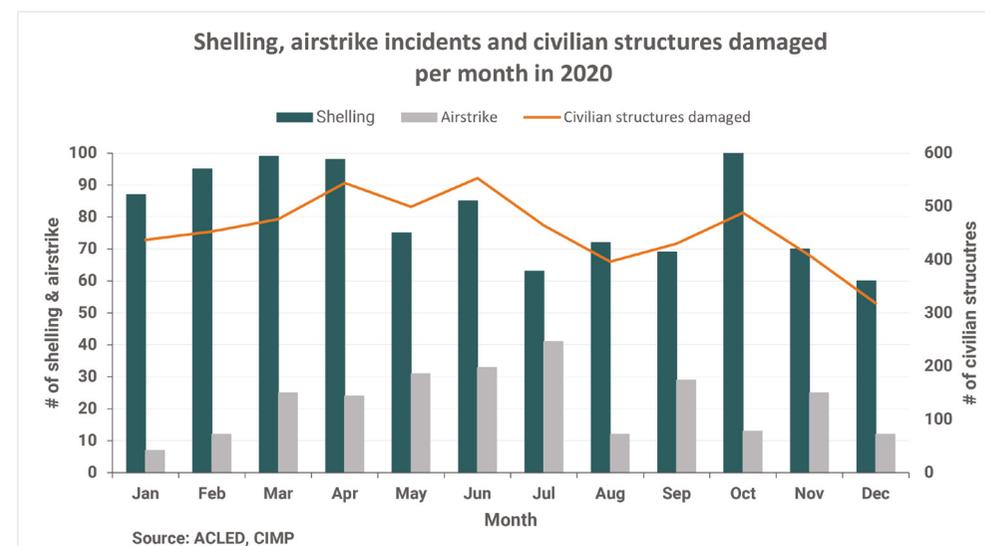
TYPE OF ARMED VIOLENCE	RESULTING NUMBER OF CIVILIAN CASUALTIES			MOST AFFECTED GOVERNORATES		
	2020	2019	2018	2020	2019	2018
Airstrike	216	796	2,588	Marib, Sadah, and Al Jawf	Sadah, Hajjah, and Sana'a	Sadah, Al Hodeidah, and Hajjah
Shelling	853	1,216	1,337	Al Hodeidah, Sadah, and Taiz	Al Hodeidah, Sadah, and Ad Dali	Sadah, Al Hodeidah, and Hajjah
Small arms fire (including civil unrest and security incidents)	347	267	156	Taiz, Sadah, and Aden	Sadah, Al Hodeidah, and Taiz	Sadah, Al Hodeidah, and Hajjah
Small arms/light weapon	187	304	256	Al Hodeidah, Taiz, and Aden	Al Hodeidah, Taiz, and Aden	Sadah, Al Hodeidah, and Hajjah

Shelling was responsible for 70% of civilian casualties in Al Bayda and Marib governorates, and airstrikes caused 64% of casualties in Al Jawf. **Airstrikes were reported in Al Jawf, Sadah, Marib, and Al Bayda governorates, with the greatest civilian impact being in Al Jawf. The governorate experienced several mass casualty incidents**, the largest of which was in February, when 35 civilians were killed and 23 were injured in Al Maslab district. The escalating fighting is particularly concerning for Marib, which hosts the largest number of displaced people in the country. Many of these IDPs have been displaced multiple times over the last six years, resulting in extreme vulnerability to further displacement as the conflict continues and their resources are depleted. As the fighting moved closer to the governorate, Marib city and Marib Al Wadi experienced an influx of displaced people, making it harder for public institutions and humanitarian organisations to respond to the daily flow of IDPs. Many districts in Al Jawf and Marib governorates also became inaccessible for humanitarian response.

Al Hodeidah governorate recorded the highest number of civilian casualties (almost 21% of all civilian casualties) for the third consecutive year. Taiz governorate reported the second-highest number, with more than 454 civilian casualties. Over 62% of these casualties were reported in Taiz city and were caused mainly by shelling, small arms fire, and explosive ordnance. A mass casualty incident in Taiz city affected 34 women when artillery shells hit the women's section of the central prison in the Al Jibali area of Al Mudhaffar district.

The southern part of the country (Aden and Abyan) saw an increase in civilian casualties. **Following several insecurity incidents and civil unrest, Aden experienced a 37% increase in civilian casualties from 2019. Small arms fire and the mass casualty incident at Aden**

airport – where shelling was responsible for 44 civilian deaths – accounted for most of the reported casualties in the governorate. From May–September, Abyan saw a 50% increase in civilian casualties as a result of small arms fire and shelling between the IRG and STC. These events subsided after the Riyadh Agreement (CIMP 2020 annual report 02/2021).



The conflict continued to affect critical civilian infrastructure, particularly health, transportation, and telecommunications infrastructure. Over 18 health facilities were hit by either an airstrike or shelling in 2020 (an increase by 50% from 2019), restricting access to critical healthcare for 200,000 households, mainly in Al Bayda, Taiz, Hodeidah, Ibb, and Ad Dali governorates. Continuous damage to health facilities limits people's access to all types of healthcare, including services for emergencies, chronic illness, and preventative measures (such as vaccinations).

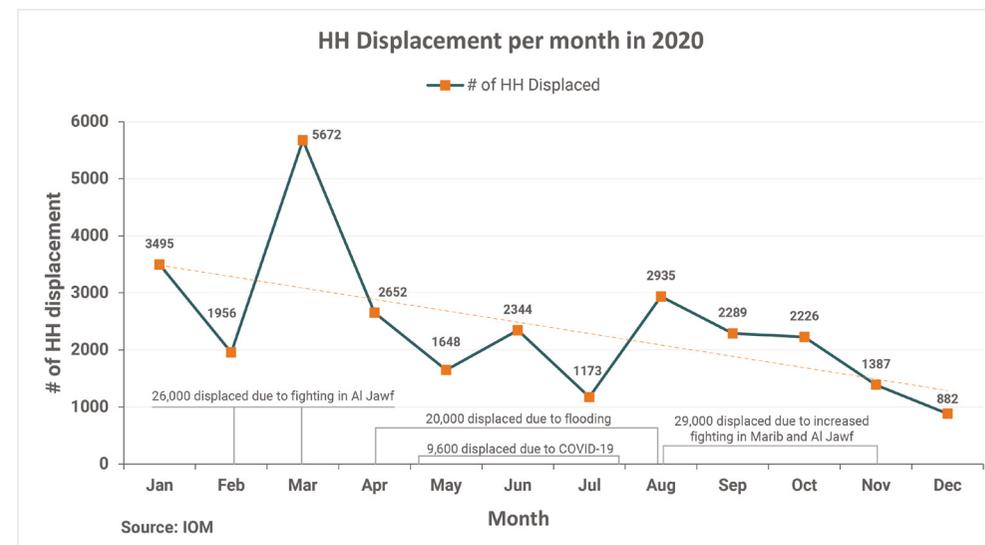
The conflict also affected transportation infrastructures, such as roads and bridges, restricting movement to Sadah and Sana'a governorates. Telecommunication attacks were doubled in 2020, preventing internet and mobile access for over 100,000 households, mainly in Amran and Al Bayda. People living in remote areas were the most affected by these restrictions. The increased damage to critical infrastructure highlights that the conflict, regardless of its intensity, limits people's access to necessary services and affects their overall wellbeing (CIMP annual report 2020 02/2021).

People in Yemen continued to experience displacement as a result of the war and other factors, such as flash floods and COVID-19; the number of displaced people rose dramatically in Marib and Al Jawf, and overall challenges are increasing for IDPs



 Governorate with highest # of HH displacement in 2020

Source: IOM



In 2020, displacement decreased by 57% from 2019. This reduction was inconsistent across the country and reflects the relationship between displacement and conflict. Displacement decreased in Hajjah, Taiz, and Ad Dali, where violence decreased, and increased in Marib and Al Jawf, where violence increased. While the overall number of newly displaced households decreased, thousands of people were displaced each month, often multiple times.

People were displaced for several reasons, including conflict, evictions, flooding, and deteriorating public services. While COVID-19 emerged as a new source of displacement, conflict remains the key driver, accounting for 83% of all IDPs. Marib and Al Jawf reported the highest level of displacement in 2020 as a result of escalating conflict. The majority of people displaced from Al Jawf and Marib migrated towards Marib city and Marib Al Wadi. While Al Hodeidah, Taiz, and Ad Dali continued to report relatively high displacement as a result of the conflict, the governorates experienced a decrease in the number of IDPs from 2019. Many of the people in these governorates changed location but stayed inside the governorate.

Displacement caused by flooding increased in 2020. Between April–August, flooding affected over 500,000 people (both IDPs and people who were not displaced). Of those affected, around 20,000 people in Marib, Aden, Al Hodeidah, and Sana’a governorates lost shelters, houses, livestock, and livelihoods. Many IDP sites were flooded, forcing people to move to public buildings. IDPs in spontaneous sites are most at risk during the rainy season (April–October) because their shelters cannot withstand the weather conditions.

As the number of COVID-19 cases increased between March–July 2020, fear of contracting the virus emerged as a new cause of displacement, particularly in the southern part of the country. Over 9,500 people were displaced from Aden and surrounding areas in Lahj, migrating mainly to mountainous, remote, and sparsely populated areas around Lahj, northwestern Abyan, and southern Ad Dali. IDPs across Yemen faced increased discrimination, as they were already seen as vectors of communicable diseases – a perception intensified by fear surrounding COVID-19 (IOM 23/08/2020).

IDPs living in informal settlements face an increased risk of eviction. Most IDP sites, particularly in southern governorates (Aden, Shabwah, Abyan, and Lahj), are settled on private land with no formal land agreement established between landowners, authorities, or IDPs. Many IDPs face or have faced eviction as a result of the lack of tenancy agreements with landowners and/or tensions with host communities. In Sana’a, Marib, and Amran, reported evictions were tied to either natural disasters, armed conflict, or land ownership. Evictions are one of the reasons IDPs face multiple displacements. People who are forced to move lose the shelter they have established and any livelihood options they have found. They are often at risk of exploitation and face increased pressure on their limited strategies and resources in order to cope with their circumstances and meet household needs.

In 2020, many people were displaced within their own governorate, often multiple times. Marib governorate continues to host around 800,000 IDPs – the highest number of IDPs in any governorate – and reported the highest number of displacements in 2020. Displacement in Marib is caused by increased conflict, and almost all IDPs moved within the governorate. Displacement continues to grow in Marib, and IOM reports that 80% of recently displaced people are settling in camps – an increase from the 60% reported in the initial months of 2020. This increased displacement often results in overcrowding in existing IDP sites and the establishment of ad hoc settlements with little or no access to services. Other governorates, such as Al Hodeidah, Taiz, and Ad Dali, also experienced increased internal displacement (IOM 11/10/2020).

After six years of war, IDPs face significant challenges, and their increased needs are becoming harder to address. Many people have been displaced for an extended period, and some multiple times. The continuing conflict in some areas and recently established conflict in others has caused increased displacement. Some IDPs are living in rented accommodations, while others reside in temporary shelters in crowded sites. An estimated one-third of IDPs chose to stay in isolated locations. While these locations are distanced from active fighting, they are also detached from needed services. The number of isolated IDPs is particularly high in Al Jawf. The various circumstances and living arrangements that IDPs experience – whether they are living in crowded sites, sheltering in isolated locations, or staying at rented accommodations in host communities – represent different challenges. In all cases, it has become more difficult for humanitarian responders to reach people in need and for people in need to access goods and services. In 2020, over 23% of IDPs stayed in host communities. These populations are at risk of being excluded from essential supportive services, as IDP sites are usually prioritised for assistance.

Health workers and people dependent on remittances have emerged as new vulnerable groups

Displacement and lack of livelihoods increase vulnerability to protection risks because people have to (or perceive that they have to) engage in risky behaviours to meet their needs. This vulnerability is intensified by strained protection services as a result of restrictions from authorities and severe funding shortages.

In 2020, patterns of vulnerability and the protection risks and violations that have existed throughout the conflict continued. Such vulnerability and risks are aggravated by the strain of more than six years of conflict. 2020 also saw some vulnerabilities increase and new groups emerge as vulnerable. Child recruitment, child marriage, smuggling, and trafficking continued.

Discrimination and harassment against vulnerable and marginalised groups increased in 2020. IDPs, Al Muhamasheen, and migrants have been stigmatised as potential carriers of diseases, including COVID-19. This stigmatisation relates to pre-existing discrimination, as well as fear of potential COVID-19 transmission. The conditions in which IDPs live – including poor sanitation, limited water supply, and overcrowding – may facilitate the spread of COVID-19 in the event of an outbreak (Sana'a Center 10/10/2020).

Migrants continue to face increased protection concerns linked to COVID-19. In 2020, migration flows from the Horn of Africa to Yemen declined by 73% from 2019 as a result of COVID-19 restrictions. Since the Houthis declared the first case of COVID-19 – a Somali migrant – in April, a discriminatory narrative that labels migrants as carriers of the virus has become widespread. This discrimination has resulted in violent attacks, denial of access to essential services, and forced movement. Over 15,000 migrants were forcibly transferred from northern to southern governorates, particularly to areas with active frontlines and/or areas close to the Saudi border. These movements have caused the death of approximately 350 migrants and prevented over 3,000 people from accessing basic necessities. **Traditionally, local communities supported migrants by providing food, water and shelter; this support has progressively decreased following the rise in stigmatisation related to COVID-19. With very limited options, migrants have turned to smuggling networks to meet their basic needs, exposing themselves to risks such as forced labour, torture, physical and sexual abuse, and abduction for ransom** (IOM 26/01/2021; Mixed Migration Centre 18/11/2020; HRW 13/08/2020; UN Security Council 25/01/2021).

KEY VULNERABLE GROUPS IN YEMEN	IMPACTS ON VULNERABILITY IN 2020
IDPs	The number of IDPs increased as a result of the duration of their displacement and the possibility of being displaced multiple times. IDPs were stigmatised because of concerns around COVID-19.
Al Muhamasheen	Al Muhamasheen were already extremely vulnerable. They faced increased stigma following concerns around COVID-19.
Migrants	Vulnerability and stigma related to migrants increased in 2020 because of concerns around COVID-19. Nearly 15,000 migrants were transported from the north to the south of Yemen or pushed to the frontlines.
People with underlying medical conditions	This group became more vulnerable in 2020 as a result of damaged health facilities, access constraints, and COVID-19. The pandemic placed pressure on health providers, including pharmacies, and caused people to avoid health providers for fear of transmission. Some comorbidities make people more vulnerable to death if they do contract the virus.
Health workers	Health workers emerged as a new vulnerable group in 2020 because of the risk of exposure to COVID-19. Over 100 health workers, including pharmacists, died in 2020 after contracting the virus.
Women-headed households	No new impacts.
Children	No new impacts.
Daily wage workers	COVID-19 restrictions – including the partial closure of markets between May–June – impacted wage workers' daily income.
People relying on remittances as their only income	This group became particularly vulnerable following the COVID-19 pandemic. Many Yemenis abroad either lost their jobs or faced conditions that resulted in reduced earnings.

Sources: (UNHCR 11/12/2020; Amnesty International 17/02/2020; CCY 1/12/2020; Med Global 22/07/2020)

Health workers, people with underlying medical conditions, and daily wage workers were among the newly emerged vulnerable groups. More than 100 medical workers, including doctors and pharmacists, have died from COVID-19 in 2020. Over 13% of all health workers are pharmacists, who often act as the first point of contact for people with COVID-19 – many of whom are not aware of being infected. Prior to the pandemic, the healthcare system in Yemen was already under severe strain. The addition of COVID-19 restrictions and concerns has made **people with underlying medical conditions – including diabetes, high blood pressure, asthma, epilepsy, kidney disease, and cancer – more vulnerable to further progression of their illness.** Associated complications related to the inability to access regular or emergency treatment or medication because facilities were closed, as well as fear of contracting the virus, have also increased (Med Global 22/07/2020). **Restrictions imposed by the authorities between May–July to contain the spread of COVID-19 have led to the closure of markets and shops. Following these restrictions, daily wage workers face reduced working hours and income and the inability to meet their needs (CCY 1/12/2020).**

Child recruitment (mainly boys) and the use of children by armed groups continued to rise in 2020. More than 200 children (ages 13–17) were recruited to either bring supplies to fighters or be directly involved in the fighting. Children are often manipulated into joining the military service under false pretences or as a means for the rest of the family to receive services and/or income. The closure of schools caused by COVID-19 between April–October also heightened the risk of child abuse and recruitment. Global evidence indicates that children who remain out of school for long periods are at increased risk of not returning. Children living in IDP settings are particularly at risk of forced recruitment, family separation, and a lack of civil documentation, such as birth certificates. These conditions reduce their capacity to access education and other basic services (UN Security Council 25/01/2021; OCHA 21/02/2021; Protection Cluster 04/11/2020; Euro-Med Monitor 15/02/2021).

Protection responders continued to report cases of child marriage (mainly girls), particularly among displaced people living in Hajjah, Al Hodeidah, and Marib governorates. Early marriage is a complex phenomenon in Yemen that serves to protect girls from sexual harassment and abuse and often relates to building alliances and networks. Girls from displaced households face increased security concerns and are more vulnerable to early marriage (ACAPS discussion with operation actors; Protection Cluster 04/11/2020).

In 2020, women continued to face discrimination, increased cases of gender-based violence (GBV), and movement restrictions. There was an increase in reports of domestic violence against women, with 90% of the cases being reported by newly married women. This increase may be caused by stress from loss of livelihood opportunities (the most reported concern for people in Yemen) or the recent shift in gender roles. Throughout the years of conflict, women have become increasingly involved in both paid and subsistence labour. While this has helped enhance their social status, it has also caused tension between married couples or family members. Men have become displaced from their traditional roles and may feel increasingly frustrated by their inability to provide materially for their families. **The context and nature of GBV against women and girls vary between locations, making generalisations difficult. In rural areas and villages, women and girls are exposed to heightened risks of GBV, as they must travel long hours to collect water. In urban contexts, women workers – especially those working with humanitarian organisations – face discrimination and movement restrictions and must be accompanied by a male guardian when travelling between districts (IRC 29/01/2020; Protection Cluster 04/11/2020).**

COVID-19 and other factors have increased access constraints, restrictions, and the cost of operating, affecting the quality of services provided

While operating conditions in Yemen improved in 2020, the overall environment remains extremely challenging as a result of continuous restrictions imposed on humanitarian operations. These restrictions have affected the quality of humanitarian services provided, and costs implicated by the COVID-19 operating environment have increased amid funding shortfalls. These factors make humanitarian needs harder to address, while such needs continue to expand. Up to nine million people – roughly 45% of the total people in need in Yemen – have been unable to access assistance or have experienced delayed or interrupted assistance at some point during the year.



Governorate with highest # of incidents in 2020

Source: OCHA

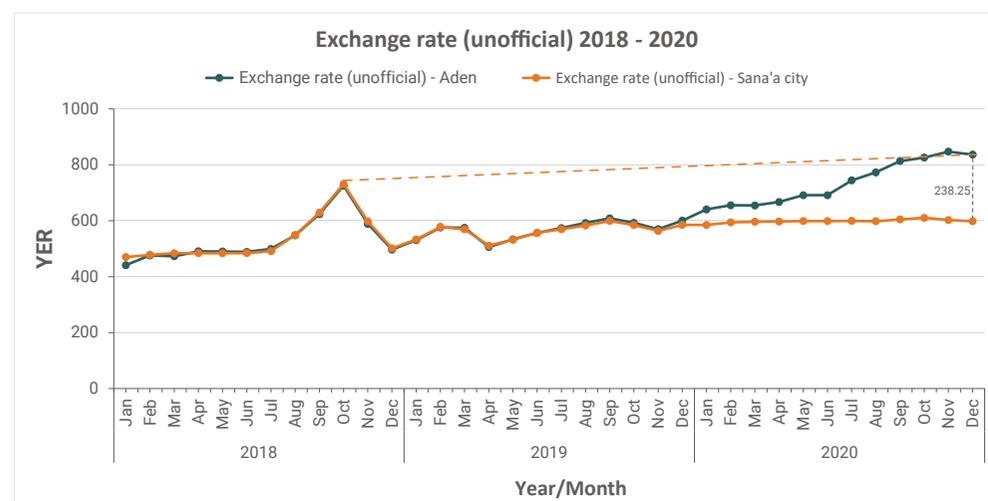
Although access remains challenging in the northern part of Yemen, operating conditions have seen a slight improvement following a meeting conducted with humanitarian officials in Brussels in March 2020. During the meeting, donors developed a technical monitoring group with UNOCHA and INGOs to monitor aid access improvements in northern Yemen. The group identified seven preconditions and 16 related benchmarks that the Houthis should comply with. Some improvement has been seen, including the approval of subagreements and NGO principal agreements, as well as the rescinding of a 2% tax imposed on NGO projects (OCHA 15/03/2021).

Political instability and deteriorating security in IRG-controlled areas – especially at the central level in Aden and the west coast – have caused increasing access constraints that were not present in earlier years of the conflict. Obstacles increased because of political dynamics between the IRG and the STC, and ministries slowed the approval process of aid projects and travel permits, preventing timely responses to millions of Yemenis. Aden reported the highest number of access incidents – 808 in total – and a dramatic increase compared to the 68 incidents reported in 2019. Visas and residency requests between March–June also took longer than usual, and authorities imposed additional bureaucratic processes. **The west coast witnessed increased challenges throughout the year following new administrative requirements and demands by the local authority represented by Tareq Saleh. These requirements further disturbed timely movement and aid delivery** (OCHA 15/03/2021; ACAPS discussion with operational actors).

COVID-19 has caused particular implications for humanitarian responders. The quality of their response was affected by restricted movements, preventing technical advisors from monitoring the quality of the services provided and leading to remote management. The protocols associated with COVID-19 also increased the cost of operations and delivery time. Humanitarian responders had to adjust planned activities to observe social distancing and provide personal protective equipment to staff to adhere to COVID-19 prevention protocols. Food distribution, which previously took three to four days to complete, now takes six to eight days, requiring more fuel and staff time. Flight suspensions and the closure of international airports in Yemen and the greater region have prevented humanitarian staff from entering the country (ACAPS discussion with operational actors).

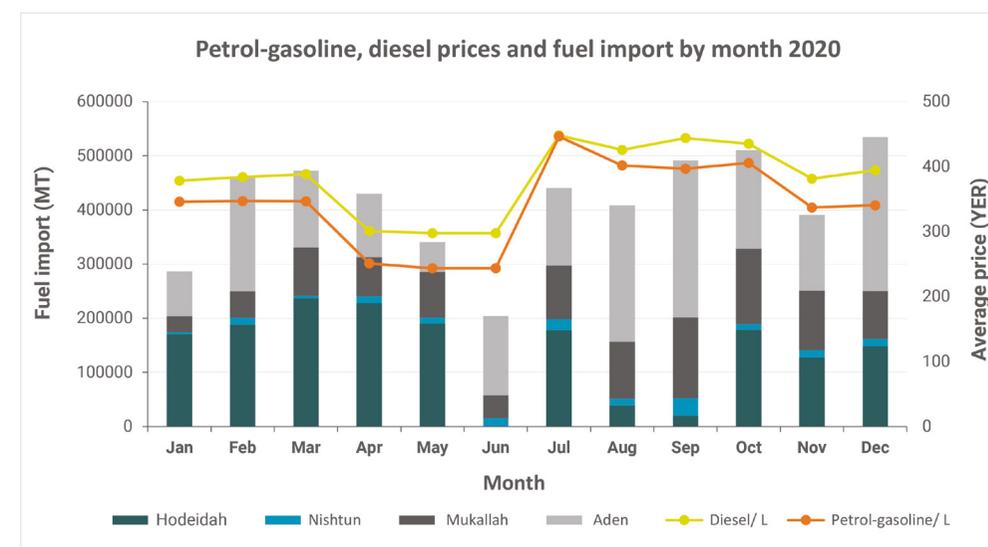
Deteriorating economic conditions continued to affect people's purchasing power and strain their coping strategies

Economic conditions worsened throughout 2020 as a result of converging negative macroeconomic trends. The depreciation of the Yemeni rial and the exchange rate difference between the north and the south led to price increases and reduced people's purchasing power. A drop in foreign currency inflows, the continued depletion of the Saudi deposit, and the reduced overseas aid and humanitarian funding to Yemen – all within the context of the continuous economic warfare between IRG and the Houthis – further deteriorated the economic conditions.



In 2020, the Yemeni rial depreciated, and the exchange rate gap between Sana'a and Aden widened, reaching a rate of YER 320 at the end of December. In December 2019, the Houthis announced the decision to ban the new YER banknotes – those printed and issued by the Central Bank of Yemen (CBY) Aden branch after September 2016. In January 2020, the currency split between the north and the south. By December, the rial was trading at around YER 600 per 1 USD in Houthi-controlled areas and YER 920 per 1 USD in IRG-controlled areas – the highest exchange rate since 2018 (ACAPS YETI accessed 30/4/2021; World Bank 01/09/2020; WFP 16/09/2020).

The rapid depreciation of the Yemeni rial in areas under IRG control is caused by several factors, including conflict between the STC and the IRG, leading to decreased revenues for the IRG and CBY Aden. Other factors include CBY Aden's excessive printing of new banknotes and limited ability to access foreign currency in the market, as well as the sharp decline of remittances between March–June 2020 and the near depletion of the Saudi deposit. The exchange rate in areas under Houthi control only depreciated slightly, reaching a rate of YER 602 at the end of December. This stability is a result of the limited supply of old banknotes in relation to the economic activity, sufficient foreign currency to meet importers' demands, and strict measures adopted by the Houthis to enforce a fixed exchange rate system in areas under their control. To account for the difference in currency, commercial banks and money exchangers raised the fees for local currency transfers from southern to northern governorates by 30–35% from 2019.



Competition over the regulation of Al Hodeidah fuel imports and receipt of Al Hodeidah fuel import taxes and customs continued in 2020. Shifts in import dynamics led to a fuel crisis between June–September. This crisis increased prices and caused further disruption to health, water, and sanitation services for several months. Following the IRG decision to suspend all fuel import activity through Al Hodeidah in June 2020, a clear shift in import and distribution dynamics took place in Yemen. This shift resulted in the closure of formal fuel stations and opened the informal (parallel) market between July–August, leading to increased fuel costs and inflated costs of water, transportation, and goods. During this period, the IRG authorised the entry of additional fuel shipments through Aden and Al Mukalla ports to allow fuel to be delivered overland to the Houthis. The DFA tightened restrictions on the transportation, distribution, and sale of fuel in areas under its control, representing the largest share of the domestic fuel market. After several mediation attempts by the UN envoy, fuel imports resumed between October–December.

COVID-19 and the decline of global fuel prices had a negative impact on remittances between March–June, and the diminished remittances hampered people’s purchasing power in Yemen. Between March–June, the remittance inflow from Yemeni migrants – especially those living in Saudi Arabia and the Gulf region – declined substantially. While remittances began to steadily increase from September–December, they were yet to fully recover to pre-COVID-19 levels at the end of 2020. This lack of recovery placed a huge strain on remittance recipients in Yemen, particularly those without another source of income. **An estimated 10% of Yemeni households rely entirely on remittances as an income source, while 20% of Yemeni households rely on them as a partial income source.** Remittances are considered the largest flows of foreign exchange to Yemen, and importers depend on them for financing. Importers, wholesalers, and retailers in southern governorates reported a lack of hard currency as a result of decreased remittance flows, leading to increased prices for services and commodities. Between March–August, there was a 40% increase in the price of vegetable oil. The prices of rice and sugar have fluctuated (ACAPS 16/12/2020; GIZ promoting peace in Yemen through the economy March 2020).

In 2020, funding for the UN humanitarian response plan was reduced by 56% from 2019, resulting in major programmes being suspended or downsized and causing an indirect impact on the financial system in Yemen. The pledging conference in June 2020 received USD 2.16 billion, which was 50% lower than the stated needs and the amount pledged in 2019. The conference led many programmes to downscale or suspend their assistance. **In April 2020, many agencies began downscaling or suspending their assistance because of the lack of funds.** This lack of funding affected health services, with many facilities closing or reducing the scale and scope of services provided – including 140 facilities that provide reproductive healthcare services. Food assistance was also reduced in northern governorates from full rations every month to every other month, cutting assistance to nine million people by half. **The cut to humanitarian aid in Yemen had an indirect negative impact on the foreign exchange market, further depreciating the Yemeni rial and raising the price of imported goods.**