

RESEARCH STUDY

EICTP Policy Paper

The Conflict in Yemen: Outlook and Consequences for Europe

September 2020



E·I·C·T·P

Imprint

The European Institute for Counter Terrorism and Conflict Prevention (EICTP) is a research association operating worldwide and with its headquarters in Vienna, Austria. As a non-profit institution the focus of EICTP is on key topics around security policy-related issues. It carries out projects with renowned partners in Austria and abroad, maintains close relationships with high-level research organizations and a network of prominent experts and scholars, offers profound sets of actions, consultations and strategies related to counter-terrorism, hybrid conflicts, and de-radicalization measures and aims at creating policy-related recommendations based on scientific research and expert assessments for decision-makers.

Address:

European Institute for Counter Terrorism and Conflict Prevention (EICTP)
Esslinggasse 17/5, AT-1010 Vienna
www.eictp.eu

Media owner, editor, producer: EICTP

Place of publication: Esslinggasse 17/5, 1010 Wien

Proof-reading and formal editing: EICTP

Graphic Design: Citypress GmbH

Print: Citypress GmbH

Disclaimer of liability: The contents of this publication have been researched and created with utmost diligence and care. EICTP provides no guarantee for the correctness, completeness and topicality of the information given. Neither EICTP nor other parties involved in the creation of this publication shall be held liable for damages of any kind arising from the use, application or circulation of the provided information. Should this publication contain references to other media of third parties and over which no influence can be exerted by EICTP, no liability whatsoever of such contents shall be assumed. The relevant media owner shall be responsible for the correctness of the contents of the information provided. The contents of this report do not necessarily reflect the opinion of position of the EICTP.

Table of Contents

- Executive Summary1
- Introduction..... 3
- Map of Yemen 4
- Background and Current Situation..... 5
- A Conflict Set to Continue 10
 - The Saudi Side 10
 - The Side of the Huthi Movement and Iran13
 - The Situation in the South14
 - The Involvement of Oman15
- The Impact on Europe16
 - Threat to the Passage of the Bab al-Mandab.....16
 - Threat to Oil Exports from Yemen.....18
 - Possibility to Increased Flow of Migrants from Yemen.....19
 - Implications of the Conflict with Regards to Technology.....21
 - Implications of the Conflict with Regards to Terrorism..... 22
 - Increasing Accusations of Western Complicity 23
- A Diplomatic Solution to the Crisis 25
- Conclusion.....27
- References 29

Executive Summary

Der derzeitige Konflikt im Jemen geht zurück auf die Entstehung der Huthi-Bewegung Anfang der 2000er. Nach dem Fall des jemenitischen Regimes unter Präsident Ali Abd Allah Salih im Zuge des Arabischen Frühlings und der Einsetzung einer Übergangsregierung unter Interimspräsident Abd Rabboh Mansur Hadi übernahm die Huthi-Bewegung 2015 die Kontrolle in weiten Teilen des Landes.

Nach der Flucht Hadis nach Saudi-Arabien im April 2015 begann das Königreich an der Spitze einer Koalition aus zehn arabischen und afrikanischen Staaten im Jemen gegen die vom Iran unterstützte Huthi-Bewegung zu intervenieren. Trotz der Härte, mit der der Krieg von allen Seiten bis heute geführt wird, und der Auswirkungen auf die Zivilbevölkerung blieb der Konflikt in westlichen Medien bisher relativ unbeachtet. Ungeachtet dessen ist es essenziell die potentiellen Auswirkungen des Konfliktes für Europa nicht zu unterschätzen.

- Die derzeitige Lage im Jemen und die engen internationalen Verflechtungen der konfliktführenden Parteien machen es äußerst unwahrscheinlich, dass der Krieg ein baldiges Ende findet.
- Sein Engagement im Jemen gibt dem Iran Einfluss an der Meerenge des Bab al-Mandab und damit die Möglichkeit europäische Wirtschaftsinteressen empfindlich zu gefährden.
- Eine weitere Eskalation des Konfliktes könnte die Erdölförderung nationaler und internationaler Firmen, wie etwa der österreichischen OMV, gefährden.
- Eine weitere Verschlechterung der humanitären Situation birgt das Risiko einer verstärkten Fluchtbewegung aus dem Jemen in umliegende Länder und in weiterer Folge möglicherweise nach Europa.
- Die Verbreitung des *know-how* in der Drohnenkriegsführung, die insbesondere von der Huthi-Bewegung in großem Stil bevorzugt angewandt wird, ist verhältnismäßig wahrscheinlich.

- Menschenrechtsorganisationen streben zunehmend Verfahren gegen Vorsitzende europäischer Rüstungskonzerne sowie Beamte europäischer Nationen auf Grund ihrer mutmaßlichen Mitschuld an Kriegsverbrechen an.

Introduction

For nearly 20 years, Yemen has been embroiled in a constant internal war. The last chapter of this war from around 2015 onward has seen a coalition of ten Arab and African states led by Saudi Arabia to fight a Shiite Islamist entity, known as Huthi movement or *Ansar Allah* (Supporters of God). In 2015, the Huthi movement brought large parts of northern Yemen under its control, including the capital Sanaa. While officially fighting to reinstate the internationally recognized government to power, the coalition's main actors, Saudi Arabia and the United Arab Emirates (UAE), exploit the conflict for their own interests. The war has led to a humanitarian crisis, with widespread famine and the outbreak of diseases. Estimates place the number of conflict-related fatalities at upwards of 100,000.¹

Due to Western support for the coalition and the Huthi movement's alliance with Iran, the war has a strong supranational dimension. While often reduced to a proxy war between Saudi Arabia and Iran, the conflict is far more complex with regional, national, local and hyper-local actors and interests closely intertwined. This multifacetedness of the war is one of the reasons why it has received far less attention in the West than other more or less comparable crises in the Middle East. Another major reason for this dearth of concern is the lack of immediate fallout in the West.

Despite being of less importance to Western interests than for example the war in Syria or recent developments in West Africa, the situation in Yemen has potentially far-reaching international implications that deserve to be scrutinized more closely. After a brief introduction to the current conflict and its background, this paper will discuss the likelihood of a continuation of the conflict and, building on that, an analysis of the most important aspects of the crisis relating to European security and economic interests.

Map of Yemen



Source: Christopher Boucek, *The Saada War: From Local Insurrection to National Challenge*, Carnegie Paper Series, 2010.

Background and Current Situation

The current conflict in Yemen goes back to the early 2000s, when a young Yemeni cleric adhering to the Zaydi denomination of Shia Islam, founded the eponymous Huthi movement, since 2011 also known as *Ansar Allah*. From the beginning, the movement's ideology has been a blend of anti-Western, anti-Jewish and Third-Worldist ideas based on a relatively strict interpretation of Zaydi Islam. Zaydi Islam is a minority faction of Shiism to which the majority of the population in northern Yemen adheres. While sharing certain core concepts with the much larger Twelver Shiite faction found in Bahrain, Iraq and Iran, Zaydism is a denomination in its own right, characterized by a distinct set of ideas and interpretations.

Between 2004 and 2010, the movement, based in the (easy to defend) mountainous highland province of Saada, fought six wars with the Yemeni government under Ali Abdallah Salih. Salih had risen to power in 1978 and ruled until 2012 when he had to resign in the wake of the Arab Spring. During Salih's more than three decades in power, Yemen experienced tremendous change, most notably perhaps the unification of the Yemen Arab Republic, ruled by Salih himself, and the socialist People's Democratic Republic of Yemen in the south in 1990. While on the one hand modernizing the country, Salih played different religious, societal and tribal factions off against each other in order to stay in power, thus prohibiting the development of a unified Yemeni state. By the end of the first decade of the 2000s, the regime was embroiled in a protracted conflict with the Huthis in the north and renewed calls for southern independence, manifesting themselves in 2007 in the formation of an independence movement called *al-Hirak al-Janubi* (Southern Movement).

After the fall of the old regime in 2012, Salih's vice-president, Abd Rabboh Mansur Hadi was elected interim president and the National Dialogue Conference convened in order to bring the most important political actors to the table. While initially hailed as a successful example of political transition, the resurfacing of old differences between the Huthi movement, the Southern Movement, the old political elites and the interim government plunging the country increasingly into chaos. Exploiting the political instability and the unpopularity of the interim government,

the Huthi movement in alliance with former enemy Ali Abd Allah Salih and large parts of the Yemeni army loyal to him overran wide parts of northern Yemen. In September 2014, the movement conquered the capital Sanaa. Initially striking a deal with the movement, President Hadi fled to Aden in February 2015. In April the same year, Hadi arrived in Saudi Arabia and petitioned the Gulf Cooperation Council to intervene in Yemen. Soon a coalition formed, consisting of the United Arab Emirates, Sudan, Bahrain, Qatar (until 2017), Egypt, Jordan, Kuwait, Morocco and Senegal, headed by Saudi Arabia. This state formation soon began to engage in Yemen in order to restore President Hadi to power.

By mid-2020, five years of fighting and the imposition of an air, land and sea blockade, have not resulted in neither political nor military success, much less in a resolution of the conflict. The war has led to what UN calls the worst humanitarian crisis in the world² with widespread food insecurity and famine, a cholera outbreak as well as the almost complete destruction of civil infrastructure, private property and cultural heritage sites. The coalition, in which Saudi Arabia and the UAE play the leading role, as well as the Huthi movement, stands accused of grave violations of international humanitarian law and possible war crimes by the UN.³

While the coalition is supported by several Western countries, most notably the US and Great Britain, the Huthi movement is allied with Iran. While the movement's cooperation with Salih ended violently in 2017, resulting in Salih's death, Iran has remained an important strategic partner of the Huthis. Iranian support comes through material supplies and the provision of know-how, intelligence and possibly training. The amount of aid is hard to quantify, yet Iranian expenditures in Yemen remain marginal compared to the resources allocated to the war by the coalition. Largely due to Iranian support, the Huthis are currently arguably the most prolific and proficient non-state user of ballistic missiles and unmanned aerial vehicles (UAV), commonly referred to as drones. How far Iranian influence over the Huthi movement reaches in operational terms is still a matter of dispute. Most observers, however, point to a rather loose alliance, with the Huthi movement at times contravening explicit Iranian advice.⁴ The Huthi movement's claim to responsibility for the 2019 attacks of the refinery at Abqayq, however, point to a closer

relationship. While Western as well as UN investigations have disproved the claims and indicate the attack came from either Iran or Iranian-affiliated groups in Iraq, the fact that these claims were made and remain undisputed from the Iranian side indicates at least some degree of coordination between Iran and the Huthis.

Iran's involvement in the conflict is not based on religious loyalty between Shiite entities, but on Yemen's geostrategic importance in Iran's struggle for regional influence opposite Saudi Arabia. This importance lies primarily in Yemen's position at the maritime strait of the Bab al-Mandab. Connecting the Indian Ocean with the Red Sea, and by extension also the Mediterranean Sea, the strait is a crucial choke point for international trade. In 2018 an estimated 6.2 million barrels of crude oil and refined petroleum products alone passed the strait per day, with an estimated 3.6 million going north to Europe.⁵ With the military and economic rise of East Asian powers such as China, India, Japan and South Korea the strait has also become immensely important for export from the Indo-Pacific region to Europe. Additionally, a great number of communication cables from that region, as well as from the Persian Gulf, pass the Bab al-Mandab.

In five years, comparative little has changed in terms of territorial influence. The Yemeni highlands in the north of the country, including Sanaa, and parts of the Western coastline are still held by the Huthi movement, while the rest of the country is controlled by forces allied with the Yemeni government under President Hadi and the Saudi-led coalition. While Yemen has been a hub of Islamic extremism and terrorism since at least the late 1990s, al-Qaida in the Arabian Peninsula (AQAP) and especially Islamic State in Yemen (ISY) are currently of little influence.⁶

From the onset of the conflict in 2015, the UAE as well as Saudi Arabia have supported different local actors. While Saudi Arabia mainly acted through the internationally recognized government under President Hadi and the Yemeni army, the UAE actively supported forces affiliated with the southern independence movement, most notably the Southern Transitional Council (STC). This split reflects the different incentives and aims of Saudi Arabia and the UAE. While Saudi Arabia's interests lie primarily in the pacification of its southern border and the curbing of Iranian

influence, the UAE's main objective was to gain more power along the shipping routes in the Arabian Sea. Together with the sprawling war economy, the promise of material support by coalition powers created additional incentives and opportunities to exploit the conflict on a local and hyper-local level. The result was the proliferation of an array of countless small, in most cases local groups aligning themselves with the side most beneficial to their own interests.⁷

Mainly due to the lack of success and the costs associated with the conflict, the UAE and with it Sudan began to withdraw from direct involvement in Yemen in 2019. Despite the Emirates remaining indirectly engaged over local proxy forces, this development gives local actors additional room of maneuver in the south. As the UAE also halted payments to some of its allies, most notably in Aden, the STC declared its independence in April 2020. Even though this was not the first time the STC acted this way and not all of the local outfits followed the call, the movement was able to take control over Aden and the local institutions this time. The STC's push for southern independence was denounced by the coalition and fights between government forces and the STC flared up again. In June 2020, a ceasefire was agreed, granting the STC a government position, thus leaving the group strengthened.⁸

As the Saudi Kingdom also seems to become increasingly frustrated with the course of the war, its support for the government of President Hadi, which is still primarily based in Riyadh and more or less completely dependent on the kingdom, begins to alternate. This comes as a severe blow to the government as the Huthi movement has exploited the infighting of its enemies over the last months in order to advance into the provinces al-Jawf and Ma'rib, the two main territorial bases of the Hadi government in northern Yemen.

This dependency of the Hadi government on Saudi Arabia make it seem unlikely that the Yemeni Muslim Brotherhood – who act in form of the Islah party and constitute an integral part of the government – seek a rapprochement with Qatar and especially Turkey. While the UAE levelled allegations to this end against Islah, they seem to be exaggerated and at least in part fueled by the fear that Turkey could

attempt and repeat its success in Libya also in Yemen. On the other hand, however, Turkey has voiced its ambitions to play a larger role in the Bab al-Mandab and Red Sea region. If and in how far Turkey wants to become involved in Yemen remains to be seen. As of now, there is no proof that Turkey is actively involved in Yemen.⁹

A Conflict Set to Continue

The Saudi Side

After the UAE and Sudan began to withdraw from Yemen in 2019, the main brunt of the coalition's efforts is now carried by Saudi Arabia. At least since the beginning of 2020, signs that the kingdom is seriously looking for a way out of the largely self-inflicted quagmire in Yemen are becoming increasingly apparent, as is attested by the continuing efforts to hold talks with Huthi officials and the deceleration of a unilateral ceasefire with the Huthi movement in April 2020. While the ceasefire followed a UN appeal to halt armed conflict globally in order to contain the spread of COVID-19, Saudi Arabia's swift willingness to follow that appeal was widely interpreted to be fueled by a wish to justify a reduction of military efforts on the one side and to provide a basis for talks on the other. The offer was dismissed by the Huthis and clashes as well as airstrikes continued, albeit in case of the airstrikes at a lower level than before.

Saudi Arabia's reasons for wanting to bring the conflict to an end are tied to the coalition's failure to achieve the goals it set for itself. The monetary and human cost of the war are becoming increasingly apparent in Saudi Arabia. Saudi state finances are drained by the oil price war with Russia and the impact of the COVID-19 crisis on the global economy. In addition, the conflict seems to be becoming more and more unpopular among the Saudi population.

Despite the coalition's efforts to contain the negative public relations fallout of the conflict, Saudi Arabia has been particularly the focus of growing international criticism. As main actor inside the coalition, the kingdom is made responsible for the humanitarian crisis and stands accused of violations of international human rights law, possibly amounting to war crimes. This comes at a time that the relationship between Saudi Arabia and the West reached a historic low point in the first half of 2020. The United States' geo-strategic reorientation towards the Pacific region together with the more recent oil price war, threatening the US oil and gas economy as well as the global stock market, strained Saudi Arabia's relationship

with its international main ally, further undermining the kingdom's international leverage to distract from its failures in Yemen.

Saudi Arabia's engagement in Yemen is, rightly or wrongly, widely perceived to be fueled by the personal ambitions of Saudi Defense Minister and since 2017 also Crown Prince, Muhammad b. Salman. The coalition's failure, the humanitarian crisis and the consequent loss of international reputation is also a personal setback for his obvious ambitions to secure his succession to the throne as well as to his international standing, which is already severely tarnished by his suspected implication in the murder of journalist Jamal Khashoggi and the alleged kidnapping of Lebanese Prime Minister Saad Hariri in 2017, as well as the Jeff Bezos phone hacking scandal in 2019.

While ending the war is thus vital to protect Saudi Arabia's and its likely future king's international reputation, walking away from the conflict without a resolution is no option. The considerable efforts to portray the conflict to the West as a humanitarian intervention on the one side and towards its own population and the wider Sunni world as an attempt to curb the expansion of Iranian influence on the other, means that Saudi Arabia cannot abandon the conflict unilaterally without a further significant loss of face.

Most importantly, however, Saudi Arabia's security interests do not permit unilateral withdrawal. The Huthi movement has repeatedly attacked and damaged military as well as commercial vessels in the Red Sea with rockets, drone boats and through indiscriminate naval mining. Besides that, the movement's proficiency and experience in missile and drone warfare has allowed it to strike Saudi military and infrastructure targets as far north as Yanbu, around 1000 km from the Yemeni border. To a large degree these efforts were provided by Iran to the movement. Even if these attacks were to stop, however, the mere continuation of Iranian influence in Yemen, in combination with Iran's increasing military and political influence in Iraq, its geographic proximity to the Arabian Peninsula and Saudi fears of Iranian influence in Bahrain and the eastern Shi'i provinces of Saudi Arabia itself, would be understood in Saudi Arabia as inimical to national security interests.

Also on the ground, Saudi Arabia is vulnerable to Huthi attacks, with the movement frequently attacking border posts and making incursions into Saudi territory. While it is still too early to assess the actual impact of the Huthi movement's takeover of al-Jawf province in April 2020, these territorial gains attest to Saudi Arabia's vulnerability towards Huthi action. With the movement now having practically doubled its influence along the Saudi-Yemeni border, it has further increased its ability to advance inside Saudi territory along the edges of the inhospitable and difficult to control desert areas of the Empty Quarter. While such additional incursions into Saudi territory would put further strain on Saudi capacities, the movement now also threatens the security of the last functioning significant border crossing between the two countries in al-Wadi'a.¹⁰

The Side of the Huthi Movement and Iran

Also the Huthi movement is not seriously interested in ending the conflict. Much of its legitimacy within the population is predicated upon its claims to fight against the alleged imperialist ambitions of the West, threatening Yemen and the Islamic community as a whole. Since Saudi Arabia in this narrative is only a Western proxy, squaring its rhetoric and a peace treaty with Saudi Arabia would be virtually impossible to communicate to the population without a huge loss of legitimacy.

The movement's publication of a political long term strategy until 2030, called the *National Vision (al- Ru'iyya al-Wataniyya)*, in combination with increasing institution building, indicate the Huthis' ambition to further enmesh itself in the fabric of the Yemeni state and remain in power for the foreseeable future.¹¹ It is thus mandatory for the movement to be able to present the population with a perspective of a degree of normality in order to be perceived as legitimate. It is also in the interest of the group to continue to participate in negotiations. Meeting with Saudi state and UN representatives on an international stage gives the Huthi movement a degree of international recognition and could lead to an easing of the humanitarian crisis, which the movement then in turn could sell as a victory for itself. From this standpoint, the movement's interest is the normalization of the conflict with Saudi Arabia on a low level of intensity.

To do this, the Huthis are dependent on Iranian support, which gives Iran a certain degree of leverage over them. Retraining influence in Yemen affords Iran the opportunity of credible power projection on the southern tip of the Arabian Peninsula. It is therefore unlikely that Iran would not try to avert any agreement leading to a permanent pacification of Yemen.

The Situation in the South

With the time being too early to assess the fallout of the developments surrounding the UAE's withdrawal and the STC's deceleration of independence and the consequent reconciliation with the Yemeni government, especially also in the light of the reported spread of COVID-19 and a recent flood in Aden, the future of the south of Yemen is more uncertain than ever. While some observers anticipate a continuation of infighting among coalition-affiliated forces,¹² which in turn would take pressure of the Huthi movement, others point to the possibility of Saudi Arabia further severing its ties with the Yemeni government and drawing closer to the STC. This would allow the Saudi state to keep the Huthi movement in check from the south.¹³ Either way, fighting is likely to continue also in the south.

The Involvement of Oman

At least since 2018, Saudi Arabia's ambitions in Yemen's eastern-most province, al-Mahra, have led to tensions between Saudi Arabia and Oman. Oman sees the province as crucial for its own security interests and within its own sphere of influence. Clashes between forces associated with Saudi Arabia and Oman have begun to destabilize the province and dragged the sultanate into the conflict.¹⁴ This of course seriously hampers the possibility of Oman playing a prominent role in the resolution of the conflict. Oman has traditionally played a behind-the-scene role in the region, keeping diplomatic equidistance to other regional actors. The Sultanate has used its self-assigned role to keep diplomatic back channels open, facilitating talks between enemy nations.

Over the years, Oman has built and maintained a good relationship with the Huthi movement and tried to act as mediator in the Yemeni conflict. Notably, at the end of 2019, Oman organized video conferences between Huthi leaders and Saudi officials, which unfortunately remained unsuccessful. Especially given the extraordinary circumstances around the outbreak of COVID-19, it is still too early to assess the regional role that Oman is going to play after the death of Sultan Qabus in January 2020. While his successor Sultan Haytham b. Tariq has declared to continue his predecessor's neutral foreign policy, Saudi Arabia's increasing engagement in al-Mahra constitutes a growing challenge for Oman, thus undermining its status as neutral actor, as well as possibly its willingness to mediate a lasting resolution of the conflict.

The Impact on Europe

Threat to the Passage of the Bab al-Mandab

The geopolitical importance of the Bab al-Mandab is, as aforementioned, hard to overstate and considerations of protecting free passage have led to an increased militarization of the area, with multiple Western, Middle Eastern and East Asian countries having set up ports and permanent military facilities in Djibouti, Eritrea and Somalia over the last decade.

After striking a deal with Eritrea in 2008, Iran also attempted to set up a permanent naval presence in the region. When Eritrea joined the Saudi-led coalition in 2015, Iran had to give up its facilities there. Iran's engagement at the Horn of Africa has to be seen in connection with the strategic importance of the Strait of Hormuz, the maritime chokepoint at the Persian Gulf between Iran and the Musandam Peninsula, belonging to Oman. Around 30% of all trade in crude oil and refined petroleum liquids as well as 30% of all liquefied gas pass the Strait of Hormuz on a daily basis.¹⁵ Due to Iran's repeated threats to block the Strait of Hormuz, both Saudi Arabia and the UAE have built pipelines circumventing the strait, the UAE via the Habshan-Fujayrah Pipeline to the Gulf of Oman and Saudi Arabia via the East-West Pipeline across the peninsula to the Red Sea. The pipeline has currently a capacity of around 5 million barrel per day, with less than half of this capacity used.¹⁶ Nevertheless, in 2019 ARAMCO announced it would expand the pipeline's capacity to 7 million barrel crude oil, thus being able to reroute a great fraction of its daily export volume to the Red Sea.¹⁷

Especially since the vast majority of Saudi Arabian oil exports is destined for the Asia-Pacific region the Bab al-Mandab gains additional relevance for Saudi Arabia's oil exports as the Hormuz Strait's importance declines. Control over the Bab al-Mandab thus continues to give Iran, at least to the degree to which it controls the Huthi movement, the possibility to severely disrupt the global oil economy and weaken one of the West's most important strategic partners in the region. The tight coordination of Iran and the Huthis in terms of attacks in the Red Sea is underscored

by the presence of the Iranian registered cargo vessel "Saviz", which has been moored off Yemen's western coast since several years, functioning as a mother-ship, and thought to provide the movement's navy with targeting information.

Also, the East-West pipeline is not safe as drone attacks in 2019 have proven. These attacks resulted in considerable damage, mandating in a temporary shutdown of the pipeline. No matter whether these attacks came from Yemen as the Huthis claimed, or from Iraq as US sources seem to indicate, Saudi Arabia considers Iran's threats to block or at least seriously impede its oil exports via the East-West pipeline and the Bab al-Mandab as credible. This explains why Saudi Arabia seems to have revived its plans to build a pipeline from its eastern coast to the Arabian Sea via Yemen's easternmost province, al-Mahra. While these plans have been around for decades, recent developments in al- Mahra indicate that the kingdom is stepping up its efforts to build such a pipeline.

Threat to Oil Exports from Yemen

Yemen's own oil and natural gas reserves are modest yet economically vital for the country, contributing over half of Yemen's budget before the war. While international oil and gas companies in Yemen were more numerous before the war, at the moment the only two international companies active at a comparatively low level are the Indonesian Medco and the Austrian OMV. The bulk of Yemeni oil and gas production, however, is stemmed by state run companies Safer and PetroMasila, both of which are under the control of the Yemeni government under President Hadi. Yemen's most important oil reserves are located in Marib and Shabwa province.²² While government forces were able to repel attacks of the STC in Shabwa during the last months, these efforts permitted the Huthi movement to advance into Marib province where they now threaten local facilities. The OMV's wells are in Shabwa and it is unclear how much these facilities as well as their supply infrastructure are affected by recent developments. Should the situation in the south, however, unravel further, this could put the continuation of oil production at risk. While threats to the wells themselves are one of the dangers, also the threat to pipelines, tank trucks and supply routes could render oil production unfeasible. In the case that the STC should in the long term succeed in making the south independent from the government held area, this territory would most likely not encompass Marib, which before 1990 has not been part of the southern Yemeni state. With the border between Shabwa and Marib then splitting Yemen's main oil producing area, border skirmishes are highly likely, as this was already the case in the border war between north and south in the 1970s. This possibility is especially likely if Marib comes completely under Huthi control.

Possibility to Increased Flow of Migrants from Yemen

Nearly 20 years of conflict have seen the number of internally displaced persons (IDPs) rise to around 3.6 million.¹⁸ Compared to these numbers, migration to surrounding countries is particularly low. In 2018, the UN estimated the number of people fleeing from Yemen to neighboring countries to be around 190,000. Only around 64,000 of these persons, however, are Yemenis, the rest comes primarily from the Horn of Africa. Despite the conflict and the humanitarian crisis, 2019 saw the arrival of around 138,000 migrants to Yemen. 90% of these migrants are Ethiopians seeking to reach the Gulf countries in order to find work.¹⁹ The strait between the Horn of Africa and Yemen, especially its south-western shoreline, is therefore considered one of the busiest maritime migration routes.

While the infrastructure for migration from Yemen to Africa thus exists, fleeing the country is difficult. With the hardest hit areas also often being the poorest, most Yemenis are simply unable to afford the passage to Africa. The air, land and sea blockade hinders people in the north from leaving the country and the way inside Yemen is perilous. The Saudi border is fortified with a fence and traveling through the desert is dangerous. In addition, except for work migration to the Gulf, Yemen has no history of large scale out-migration in recent decades. Many Yemenis thus simply still refuse to leave their country.

Most of the people that left the country are stranded in Jordan, Egypt, Djibouti, or Oman. There are, however, also a few examples of Yemenis making their way to Europe, often on unofficial routes. Some followed the routes taken by inner-African migrants to the Mediterranean or traveled from Oman via Iran to Turkey, others made their way south to the French overseas department Mayotte north of Madagascar in the hope of being granted asylum status there.²⁰ While Yemeni out-migration to Europe is numerically not very important, there are clearly ways for Yemeni migrants to reach the European continent.

Given that recent migration flows to Europe were mass events, to a large degree incited in the last consequence by the knowledge about the likelihood of success and

the existence of contacts in the destination country, European decision-makers should be aware of the possible long term implications of a worsening or even continuation of the crisis in Yemen with regards to migration flows. While Yemenis accounted for only around 0,1% of UNHCR registered refugees in Libya²¹ between 2016 and 2019, there is no guarantee that this is to stay that way. Especially in the light of the likelihood of a worsening of the humanitarian situation, as international aid donation dropped sharply in 2020, placing a majority of UN-led relief programs at risk, at a time that the country is additionally hit by the COVID-19 crisis and recent floods in the south of Yemen, it should come as no surprise if Yemenis, especially in the richer south, increasingly reevaluate their decision to stay. Even though Europe is very rarely the final destination of migration, the ways lead towards the continent regardless. Especially a larger Yemeni presence at the Horn of Africa, taking away the first barrier of crossing the sea and most likely soon to overburden the capacities of local countries, increases the likelihood of Yemeni migrants collectively seeking to reach the Mediterranean region and Europe in the long-term.

Implications of the Conflict with Regards to Technology

Given that the Huthi movement's ideology is based on the Zaydi interpretation of Islam, endemic only to Yemen, there is little likelihood of the movement inspiring allegiance in the West. While the movement's ideology is also decidedly anti-Western, the movement's ambitions are clearly regional and there are no calls to hit targets in the West. The movement does not espouse strategies and tactics commonly associated with Islamic terrorism and in general aspires to be perceived as legitimate actor in the international arena. Especially the movement's proficiency in drone warfare, however, should be reason for concern. While Islamist groups in other theaters, most importantly the terror organization Islamic State, have used UAVs, these efforts were comparatively modest. The Huthis are currently able to operate satellite guided drones up to at least 800 kilometers into Saudi territory. Since neither Yemen nor Iran has satellites, the drones most likely use GPS or similar positioning signals for navigation.²³

While UN reports indicate that some of the drones used by the Huthis are virtually identical with Iranian models,²⁴ the movement seems to be increasingly able to copy relevant technology and re-engineer and develop drones on their own. Therefore, they operate a wide array of UAVs as well as drone boats. Since the technology behind these drones is still extremely simple, with most of them being in effect guided bombs, exploding on impact, the movement demonstrates the potential of this comparatively cheap technology to cause fear and inflict especially economic damage on a militarily superior enemy. Since it is practically certain that the use of drone technology in terrorism and non-conventional warfare is going to increase, it is very likely that technologies, tactics and strategies pioneered by the Huthi movement will appear in other theaters. How vulnerable Western nations are even to unarmed drones is exemplified by the Gatwick drone incident, as hundreds of flights to London had to be canceled in December 2018.

Implications of the Conflict with Regards to Terrorism

While profiting from the Arab Spring and in 2015-2016, *de facto* running a state in the eastern parts of the province of Hadhramawt, local allegiance to AQAP was always based primarily on local pragmatic interests rather than ideological conviction. AQAP could only assert itself to a significant degree in Yemen's heavily armed tribal society when it made concessions to its religious fervor, providing security and stability in accordance with local customs. This relative ideological leniency led to strong disagreements with Islamic State in Yemen which made its entry to Yemen in the wake of the Arab Spring, yet was never as successful as al-Qaeda in the Arabian Peninsula.

The sprawling war economy, together with local unrest and other economic opportunities offered by the crisis, however, constitutes the ideal breeding ground for a future resurgence of the trend in Yemen. The money generated by activities such as the levying of local taxes, extortion at checkpoints, and smuggling of weapons, petrol and people, makes it comparatively easy for localized groups, including terror groups, to emerge and maintain itself outside traditional tribal structures. While it is thus entirely possible that AQAP, or a similar group, grows stronger again as the conflict in the south continues, it is unlikely that such a development would have a significant immediate impact on Western security interests.

For religious, historic and cultural reasons, the local population has proven relatively resilient against terrorist propaganda and the fact that only few Yemenis have currently the chance (and/or will have) to leave the country for the West means that the terrorist threat emanating from Yemen is more or less non-existent. Due to AQAP's lack of ideological rigor, the country's poverty and the difficulties in reaching it, Yemen is currently of comparatively little attractiveness for foreign fighters from Europe. This has also to be seen in the context of the growing terrorist threat originating from West-Africa, which is more radical as well as geographically and, in many cases, also linguistically closer to Europe.

Increasing Accusations of Western Complicity

While the conflict in Yemen and the humanitarian catastrophe following in its wake are largely perceived as a regional conflict, voices accusing the West of complicity in the crisis are getting louder both in the Arab world as well as further west. Companies based in several European countries, most notably France, the UK, but also Spain and Germany, have sold weapons and ammunition to the Saudi-led coalition, in several cases through subsidiaries in other countries, less concerned with the consequences of such actions. In addition, Great Britain, together with the US, play significant roles providing training and technical, military as well as diplomatic assistance to the coalition.²⁵

In June 2019, the British court of appeals ruled that the export of weapons to Saudi Arabia was unlawful since their future deployment had not been assessed sufficiently. As the British trade secretary declared in September of the same year, the court injunction to stop weapons exports to the Saudi-led coalition had been ignored on several occasions by the administration.²⁶ While the ruling has remained without tangible effect so far, the episode is one of an increasing number of attempts to hold administrations and individuals accountable for the atrocities committed in Yemen. Since neither the US nor any of the members of the Saudi-led coalition is currently signatory to the Statutes of Rome, legal complaints now focus on European nations.

In 2019 a group of international NGOs called on the International Criminal Court (ICC) to investigate and eventually charge government officials issuing relevant export licenses as well as executives of European arms manufacturers for complicity in war crimes.²⁷ Since cases of that magnitude take years, it is still too early to assess how successful this attempt is going to be. While there is also no legal precedent for such a case at the ICC, it should be noted that a comparable national case in Germany in 2019 has led to convictions.

Apart from legal considerations, Western countries continuing to arm entities credibly accused of committing war crimes should be aware of the long-term

consequences of basing important decisions on short-term strategic, diplomatic and monetary interests. Legitimate accusations of complicity in the continuation of the war, be it through active support or the tacit approval, not only further undermine what is left of the West's standing as arbiter of justice on a global level but also subvert societal, value based national and European cohesion from within and may be exploited by anti-Western actors.

Even though the conflict in Yemen largely eludes widespread media attention until now, Western weapons exports to coalition members have caused widespread public criticism. Public pressure, especially in the wake of the murder of Jamal Khashoggi, have prompted the German government to freeze the export of weapons to Saudi Arabia in 2018. While this reduced arms sales, the exports still continued as government numbers of 2019 prove.²⁸ Similarly, public pressure has led the US government to stop the aerial refueling of coalition planes engaged in the conflict.²⁹ Western governments thus seem to be well aware of the ethical implications of supporting the coalition, yet in the absence of popular pressure tend to subordinate them to more immediate interests.

A Diplomatic Solution to the Crisis

From a Western standpoint, a permanent resolution of the conflict must aim for Yemen as a unified, stable, independent and democratic state. Since the Huthis are currently not only the main actor not even vaguely allied with the coalition, but arguably the strongest single actor on the ground in Yemen in general, any resolution of the conflict has to take the movement's role into account. Since the possibility of the movement being defeated looks slimmer by the day, the Huthis will remain an integral actor of Yemen's political landscape for the foreseeable future.

While a rapprochement between Iran and the West could lead to Iran trying to pressure the Huthis to seek a permanent solution of the conflict, such a reconciliation with Iran is highly unlikely at the moment. Even if relations with Iran were to improve significantly, it is hard to see how this could happen to the degree that Iran felt secure enough to relinquish its influence in Yemen, thus giving up part of its international leverage. It is therefore likely that Iran will remain influential in Yemen.

While it is difficult to envision how the Huthis could be integrated into a post-war Yemen, resembling the modern nation state as laid out above, any such attempts are contingent upon the movement's willingness to be integrated. As neither military pressure, nor human suffering have so far resulted in the movement's appeasement, the likeliest way to bring an end to the conflict is a diplomatic solution. While signs of the possibility of a separate peace or permanent ceasefire between the Huthis and Saudi Arabia grew stronger in the first half of 2020, such a peace would largely entrench the *status quo*. While the lifting of the blockade would help to alleviate human suffering to a certain extent, the blockade is not the only factor responsible for humanitarian tragedy. Poverty and hyper-inflation mean that many Yemenis are unable to buy food, even if it is available. Such a separate peace would also further entrench the political as well as territorial fragmentation of the state. A peace in accordance with Western interests, and also the interests of the many Yemenis agreeing with the ideas underlying these interests, is thus a diplomatic solution brokered, if possible, by the UN in a neutral country. In order to

make such a peace more beneficial to the Huthis than a separate peace or ceasefire with Saudi Arabia, such a solution would have to entail far reaching concessions to the movement, including guaranteeing the movement a prominent role in the post-war state.

In April 2020 the Huthi movement released a peace plan detailing how the movement envisages a peace agreement.³⁰ While the plan is certainly not acceptable for the coalition – and be it only because it would mean to accept the movement as the legitimate “leadership of the republic of Yemen in Sanaa” – it is a good indication of the movement's demands. While large parts of the plan concentrate on apparent issues such as ending violence and the blockade, the second half covers details such as the setting up of recovery funds and the continuation of payments of the salaries of government employees by the coalition, international depth-cuts, infrastructure projects and the fight against COVID-19. The last section of the plan deals with political aspects of post-war Yemen. While this part should only come into effect after all the other conditions have been met, it lays out Yemen as a united, peaceful and independent state governed by laws in accordance with a republican constitution. The Yemeni state should also be based on the “agreed upon outcomes of the National Dialogue Conference.” Most importantly, the peace plan should be signed and implemented under the auspices of the UN. Additionally, the *National Vision*, the Huthi movement's political long-term strategy, offers similar possibilities. While being clearly a means to further entrench the movement in the Yemeni state, it calls for the establishment of a free, democratic, republican and unified Yemeni state. Importantly, the plan requires a strengthening of civil society and the implementation of the results of the National Dialogue Conference.

While the points pertaining to Yemen's future political order and plurality may amount to not much more than paying lip service to international expectations, these demands might in the long run offer a pathway to hold the movement to those of its purported standards, which are in accordance with Western interests. Especially the mentioning of the results of the Dialogue Conference and the reference to civil society may offer the possibility to include wider sections of Yemeni society in a broader peace agreement, thus enhancing its acceptance.

Conclusion

Due to a combination of reasons, no participant in the current conflict has an interest in ending the conflict and in accepting the *status quo*:

- Saudi Arabia, while trying to back out of the conflict, is likely to continue as long as the Huthi movement and Iran maintain posing a threat to the kingdom's national and regional interests.
- The Huthi movement is interested in a de-escalation of the conflict in order to be able to balance the population's expectations of security and normality with the need to uphold Iranian support and its main narrative of leading a collective Yemeni effort against Western encroachment.
- While the situation in the south of Yemen is extremely volatile at the moment, it is unlikely to become more peaceful in the near future.

As the conflict had little impact on European interests so far, several aspects warrant closer consideration with regards to their fallout as the war continues:

- Iran's involvement in the conflict is mainly the product of its concerns for the projection of power at the Bab al-Mandab and the southern border of Saudi Arabia. Military efforts against Iranian interests could therefore lead to a serious disruption of global trade and weaken Saudi Arabia, one of Europe's main allies in the region, economically.
- Yemen currently only exports a very small amount of oil and gas. An intensification of the conflict could render oil and gas production of Yemeni as well as international companies like the OMV altogether unfeasible.
- Despite suffering from one of the worst humanitarian crises in recent history, Yemenis have largely abstained from seeking refuge abroad so far. As routes to reach other countries, however, do exist, it is not unlikely that Yemenis will

increasingly begin to seek a better life abroad, including in Europe, if the conflict continues and the situation deteriorates.

- Despite the possibility of terrorism emanating from Yemen for the foreseeable future is extremely low, technologies developed and refined in Yemen are highly likely to be employed by terrorists and non-state actors in other theaters, including possibly Europe itself. This is especially true for drone warfare, which the Huthi movement, undoubtedly with Iranian assistance, has advanced to a new level of sophistication.
- While the perception of Western double standards with regards to the war may in the long- term weaken Europe's international moral standing from within as well as from the outside, humanitarian advocacy groups have taken concrete steps to have European company executives and government officials prosecuted for war crimes.
- A possible peace agreement should be brokered by the UN, and be based as far as possible on the outcomes of the National Dialogue Conference. Even if such a peace treaty was to be agreed upon, however, the Huthi movement would most likely remain a major actor in post- war Yemen.

References

¹ACLED Resources: War in Yemen. Available online:

<https://acleddata.com/2020/03/25/acled-resources-war-in-yemen/>, (21.08.2020).

²Humanitarian crisis in Yemen remains the worst in the world, warns UN, <https://news.un.org/en/story/2019/02/1032811>, Available online: (21.08.2020).

³UN Human Rights Council. *Situation of Human Rights in Yemen, including violations and abuses since September 2014*, A/HRC/42/CRP.1, 2019, p. 1.

⁴International Crisis Group. *Iran's Priorities in a Turbulent Middle East*. Brussels, 2018.

⁵The Bab el-Mandeb Strait is a strategic route for oil and natural gas shipments. Available online: <https://www.eia.gov/todayinenergy/detail.php?id=41073>, (21.08.2020).

⁶Kendall, E. *Contemporary Jihadi Militancy in Yemen: How is the Threat Evolving?* Middle East Institute: Washington, 2018.

⁷Baron, A.; al-Hamdani, R. *The "Proxy War" Prism on Yemen: View from the City of Taiz*. New America, 2019. Available online: <https://www.newamerica.org/international-security/reports/the-proxy-war-prism-on-yemen/>, 21.08.2020.

⁸Yemen conflict: Southern separatists give up on self-rule. Available online: <https://www.bbc.com/news/world-middle-east-53579115>, (17.08.2020).

⁹After Libya, will Turkey defeat the UAE in Yemen? Available online: <https://www.middleeastmonitor.com/20200619-after-libya-will-turkey-defeat-the-uae-in-yemen/>, (17.08.2020).

¹⁰Al-Madhaji, M. *Capture of Al-Hazm Positions Houthis Well, Militarily and Politically*. Sanaa Center for Strategic Studies. Available online: <https://sanaacenter.org/publications/analysis/9140>, (21.08.2020).

¹¹ Majlis al-Siyasi al-Ala. Al-Ru'iyya Wataniyya li-bina' al-Dawla al-Yamaniyya al-Haditha. 2019.

¹²Lackner, H. *The Yemen conflict: Southern Separatism in Action*. European Council on Foreign Relations. Available online: https://www.ecfr.eu/article/commentary_the_yemen_conflict_southern_separatism_in_action?cf_chl_jschl_tk=0fb9bd1df3e30541d6e83e03856769b70afad8bd-1592995703-0-AcX0LqsUFNYh8kwo2bEiTJoBaX4CizSc4nSfV2V2IS26Mb9ZhNkUnfMUn8ZM_QRS3jjSvVQz-Mss_HpOgU-TdvWBk51f9PYDGBHllj6apNE3ED7j50n4VS_1mt6rCwDG8xgxD8mi6fjx3GTRNrMY3SxK3MMjTCJFrMnxfIKlimJ4qPepZcyrgBJV0Keiu9oODPUSEMp9z2ZyWOR8tH1m-3yP9Vn-LCXVC4ItBcbuBEcyOVS6PU58fBREFKI3vrjFTliNqcgrIFjE01pdzP6BlarBandqlKpL3rHPU4szUdOo_J-JNBh8imkmltNHnKUUzXxd58P2LpEKHCeacLuZHjeLqP1ZbtKwSO2M6hW6l1wml, (21.08.2020)

¹³Alasarar, F. A. *Yemen's competition for Saudi patronage heats up as the STC declares self-rule*. Middle East Institute. Available online: <https://www.mei.edu/publications/yemens-competition-saudi-patronage-heats-stc-declares-self-rule>, (21.08.2020).

¹⁴DeLozier, E. *Challenges Await Oman's New Sultan as Mourning Period Ends*. The Washington Institute. Available online: <https://www.washingtoninstitute.org/policy-analysis/view/challenges-await-omans-new-sultan-as-mourning-period-ends>, (21.08.2020).

¹⁵ Three important oil trade chokepoints are located around the Arabian Peninsula. Available online: <https://www.eia.gov/todayinenergy/detail.php?id=32352>, (21.08.2020).

¹⁶Saudi Aramco fast-tracks East-West pipeline expansion. Available online: <https://www.eia.gov/todayinenergy/detail.php?id=39932>, (21.08.2020).

¹⁷Saudi Aramco fast-tracks East-West pipeline expansion. Available online: <https://www.argusmedia.com/en/news/1952657-saudi-aramco-fasttracks-eastwest-pipeline-expansion>, (21.08.2020).

¹⁷Internal Displacement Monitoring Center. Available online: <https://www.internal-displacement.org/countries/yemen>, (21.08.2020).

¹⁷De Regt, M. *Yemen Has a Migrant Crisis Too*. ISPI. Available online: <https://www.ispionline.it/it/pubblicazione/yemen-has-migrant-crisis-too-22608#nota1>, (21.08.2020).

¹⁸Internal Displacement Monitoring Center. Available online: <https://www.internal-displacement.org/countries/yemen>, (21.08.2020).

¹⁹De Regt, M. *Yemen Has a Migrant Crisis Too*. ISPI. Available online: <https://www.ispionline.it/it/pubblicazione/yemen-has-migrant-crisis-too-22608#nota1>, (21.08.2020).

²⁰Rushing, E. J. *The road from Yemen: Part 1-4*. Internal Displacement Monitoring Center.. Available online: <https://www.internal-displacement.org/expert-opinion/the-road-from-yemen-part-1>, (21.08.2020).

²¹Operational Portal: Refugee Situation. Available online: <https://data2.unhcr.org/en/country/lby>, (21.08.2020).

²²Promising signs for Yemen's oil industry, but civil war rages. Available online: <https://www.spglobal.com/platts/en/market-insights/latest-news/natural-gas/012320-promising-signs-for-yemens-oil-industry-but-civil-war-rages>, (21.08.2020).

²³Gatopoulos, A. *Houthi drone attacks in Saudi 'show new level of sophistication'*. Available online: <https://www.aljazeera.com/news/2019/05/houthi-drone-attacks-saudi-show-level-sophistication-190515055550113.html>, (23.08.2020)

²⁴UN Security Council. *Final report of the Panel of Experts on Yemen*, S/2018/68, 2018, pp. 32-33.

²⁵AlDailami, S. *Jemen: Der Vergessene Krieg*. C.H.Beck: Nördlingen, 2019, pp. 184-194

²⁶Sabbagh, D. *Truss admits UK broke ban on Saudi arms sales three times*. Available online: <https://www.theguardian.com/politics/2019/sep/26/truss-admits-uk-breached-court-order-banning-arm-sales-to-saudis-again>, (23.08.2020).

²⁷European Center for Constitutional and Human Rights. *Made in Europe, bombed in Yemen: How the ICC could tackle the responsibility of arms exporters and government officials*. Available online: https://www.ecchr.eu/fileadmin/Fallbeschreibungen/CaseReport_ECCHR_Mwatana_Amnesty_CAAT_Delas_Rete.pdf, (23.04.2020)

²⁸German arms companies accused of aiding war crimes in Yemen. Available online: <https://www.dw.com/en/german-arms-companies-accused-of-aiding-war-crimes-in-yemen/a-51637420>, (23.08.2020).

²⁹US stops refuelling of Saudi-led coalition aircraft in Yemen war. Available online: <https://www.theguardian.com/world/2018/nov/10/us-stops-refuelling-of-saudi-led-coalition-aircraft-in-yemen-war>, (23.08.2020).

³⁰Muqtarah wathiqa al-hall li-inha' alharb ala al-Jumhuriyya al-Yamaniyya. Available online: <https://www.yemenpress.org/ar/%D8%A7%D9%84%D9%8A%D9%85%D9%86/%D9%86%D8%B5-%D9%88%D8%AB%D9%8A%D9%82%D8%A9-%D9%85%D9%82%D8%AA%D8%B1%D8%AD-%D8%A7%D9%84%D8%AD%D9%84-%D8%A7%D9%84%D8%B4%D8%A7%D9%85%D9%84-%D9%84%D8%A5%D9%86%D9%87%D8%A7%D8%A1-%D8%A7%D9%84%D8%AD%D8%B1/>, (23.08.2020).



E·I·C·T·P

European Institute for
Counter Terrorism and
Conflict Prevention