

# CRISISINSIGHT

**KEY HUMANITARIAN TRENDS 2019**

**OUTLOOK INTO 2020**

# 6

## 2019 IN REVIEW

### KEY TRENDS

#### 1. **Conflict:** peace talks reduced civilian casualties and displacement, but these gains are fragile and reversible

2019 saw a significant reduction in airstrikes (65%), civilian casualties (34%), and displacement (40%) compared to 2018, largely due to the three peace processes (Stockholm - December 2018, Riyadh - November 2019, and informal Saudi/Houthi talks). However, 2019 was still the second deadliest year since the conflict started, behind only 2018. Peace agreements stalled in implementation and fighting continued along frontlines in Ad Dali', Taiz, Al Hodeidah, and Hajjah.

#### 2. **Casualties:** shelling and explosive ordnance incidents increased the proportion of child casualties

Airstrikes in Yemen have been decreasing since 2017. In 2019, they decreased a further 65% compared to the previous year, reaching the lowest level since the beginning of the conflict. However, shelling increased 75% and injuries to civilians from explosive ordnance increased 25% compared to 2018. 17% more civilian houses were damaged than in 2018 and the proportion of children among all civilian casualties increased from 20% to 25%.

#### 3. **Economy:** economic warfare became the primary driver of needs in 2019

Efforts by the Houthis and Government of Yemen to control imports led to fuel price spikes of up to 60% in April and October 2019, disrupting health, sanitation and water services. A further decline in the value of the riyal pushed food prices higher for the fifth year in a row. Basic commodities are now double their pre-conflict price, far beyond what most Yemenis can afford.

#### 4. **Displacement:** less people were displaced in 2019, but they faced increasingly difficult living conditions

After a significant increase in displacement in 2018, new displacement in Yemen fell 40% in 2019 in line with the decrease in conflict. However, Yemeni host communities are finding it harder to support displaced people. IOM reported over a third of people displaced in 2019 had to move to informal settlements, up from 15% in 2018. Aid workers report increasing tensions between host communities and IDPs.

#### 5. **Protection:** concerns increased as Yemenis turned to riskier coping mechanisms due to depleting resources

Vulnerable groups such as women, children, migrants and displaced people are more exposed to economic hardship, pushing them to find extreme ways to cope. In 2019, aid agencies reported an increase in child recruitment and child marriage. Women had less access to services or aid because of movement restrictions. 2,400 people from Yemen's northern governorates were harassed and forcibly displaced from Aden in August 2019 and thousands of migrants were detained or abused along smuggling routes from the Horn of Africa to the Gulf.

#### 6. **Access:** more people could not receive assistance due to humanitarian access restrictions

Following NAMCHA's change of leadership in mid-2019, the Houthis imposed even more restrictive access measures on humanitarians, prompting the international community to push back and temporarily suspend programs. Access restrictions (interference in programs, movement restrictions, delays in sub-agreements) blocked aid to 8.3 million people - 35% of all people in need - the majority in the north. The authorities also imposed severe restrictions on assessment and data collection, making it harder for aid agencies to understand needs.

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## OUTLOOK FOR 2020

### KEY QUESTIONS

#### Can Yemen's peace deals hold in 2020, or will we see a return to violence and displacement?

Fighting in Marib, Sana'a, Al Jawf, Al Hodeidah and Aden in the first months of 2020 undermined confidence in Yemen's peace deals. The Government of Yemen publicly withdrew from the ceasefire monitoring committee in Al Hodeidah. Implementation of the Riyadh agreement has stalled. Will 2020 see a return to levels of violence and displacement that we have not seen since the Al Hodeidah offensive in mid 2018?

#### Will the humanitarian community pull out of northern Yemen?

The Houthis are continuing to restrict humanitarian access, leaving humanitarian organisations unable to deliver assistance. In February 2020, the US announced it would withhold funding unless the Houthis allow greater access, leading to a scale down in some programs. NGOs, concerned about compliance and their ability to operate in accordance with humanitarian principles, are shifting programming to southern governorates. However, the south brings its own challenges. The Ministry of Planning in Aden has begun to introduce its own restrictive measures and the south is home to a bewildering array of armed groups.

#### Will the riyal collapse in 2020, pushing up food and commodity prices?

The Houthis and the Government of Yemen are reliant on external funding. The Government of Yemen has been relying on \$2.2 billion in Saudi finance which has not been renewed for 2020. The Houthis rely on foreign aid and remittances. Sharp reductions in any of these sources could see the riyal lose more than half its value, pushing food and basic commodity prices further beyond the reach of ordinary Yemenis. (See ACAPS drivers of currency instability report).

#### Will economic desperation and lack of services push Yemenis into unsustainable returns?

After five years of conflict and repeated displacement, IDPs have depleted their savings and struggle to find jobs. More Yemenis are being displaced because they cannot afford rent or because of a lack of services. Humanitarians worry that economic desperation may force IDPs to return prematurely to unsafe areas, or areas that cannot support them.

#### Can Yemen's health system survive COVID 19?

Only 51% of health centres are fully functional in Yemen. The country has limited capacity to test and treat patients and is already dealing with major health outbreaks (cholera/AWD, diphtheria). Could COVID 19 overwhelm health services, leading to casualties among COVID-19 patients and other people in need of health care? Read ACAPS COVID 19 Risk Report [here](#).

#### Will humanitarian actors be able to reach highly vulnerable groups in Yemen?

Lack of access to aid and services drives high levels of needs and vulnerability, particularly among Muhamasheen, vulnerable IDPs, migrants, women, and children. Protection actors report dire needs amongst excluded populations because of limited service provision in hard to reach areas, conflict, low social status, and inter-communal tensions. Access to services is likely to further deteriorate in 2020 because of conflict and restrictions on humanitarian operations. Will humanitarian actors find innovative ways of targeting and reaching vulnerable groups to prevent and reverse their exclusion?

#### Can we get the right mix of aid approaches to both deal with urgent humanitarian needs and help to improve jobs and services during Yemen's protracted conflict?

Yemen is a dual crisis. Parts of the country (particularly the east) have not seen conflict for many years, if at all. These areas need sustained development support to promote jobs and services. Other areas need ongoing humanitarian support to address the impacts of conflict and displacement. The aid community needs to find the right balance between development and humanitarian programming and remain flexible to adapt as the context changes in different regions. The temptation to divert funding to COVID-19 could make this even more challenging in 2020.

See [ACAPS' risk and scenarios reports](#) to find out more.

## Executive summary

**Following five years of conflict between the Houthis and the internationally recognised Government of Yemen (IRG), peace efforts in 2019 reduced the number of civilian casualties and displacement in Yemen.** Airstrikes significantly decreased in the second half of the year and civilian casualties decreased by 34% compared to 2018. However, humanitarian needs remained high, particularly for the most vulnerable groups.

**Economic warfare became a major driver of needs in Yemen in 2019.** Political actors wrestled for control over key import revenues and hard currency, leading to fuel shortages, fuel price spikes of up to 60%, and disruptions to health, water, and sanitation services. Food prices continued their slow steady rise for the fifth year in a row, reaching double pre-conflict levels. Yemenis are struggling to cope with rising costs as years of conflict depleted their resources and halved the job market. Yemenis are becoming increasingly dependent on humanitarian aid and remittances.

**Humanitarian access further deteriorated in 2019.** Yemenis are caught in the middle of a power struggle, with parties to the conflict attempting to control and exploit humanitarian aid. Operational conditions for humanitarians became extremely restrictive in the north and to a lesser extent deteriorated in the south, blocking access to assistance for up to 8.3 million people countrywide – roughly 35% of all people in need.

**With decreased access to income and depleted resources, Yemenis are facing increasingly difficult living conditions.** IDPs, migrants, ‘northerners’ in the south, women, and children are bearing the worst consequences of the protracted crisis. Negative coping mechanisms such as child marriage or child recruitment are on the rise. Communities, which used to be the main source of support, are finding it harder to support vulnerable IDPs. Competition over depleted resources is increasing tensions within communities. Key vulnerable groups are increasingly excluded from aid and services, according to protection actors.

**Displacement, although much lower than in the beginning of 2019, continued to affect thousands of people every month.** Although the number of airstrikes decreased sharply, the number of shelling and explosive incidents increased. These weapons had a higher impact on civilians, especially children. Renewed conflict could see civilian casualties, displacement, and economic desperation rise sharply again in 2020.

This report aims to provide a summary of key trends that affected the humanitarian situation in 2019, and key trends to watch in 2020, to support humanitarian planning.

## Methodology

ACAPS developed this product through

- Daily monitoring of media and social media sources in Arabic and English throughout 2019
- Secondary data review of key documents in Arabic and English
- Analysis of key data on conflict, economy, displacement, prices, imports, and humanitarian access
- Joint analysis with 39 experts from 21 organisations to shape and test the findings in this report.

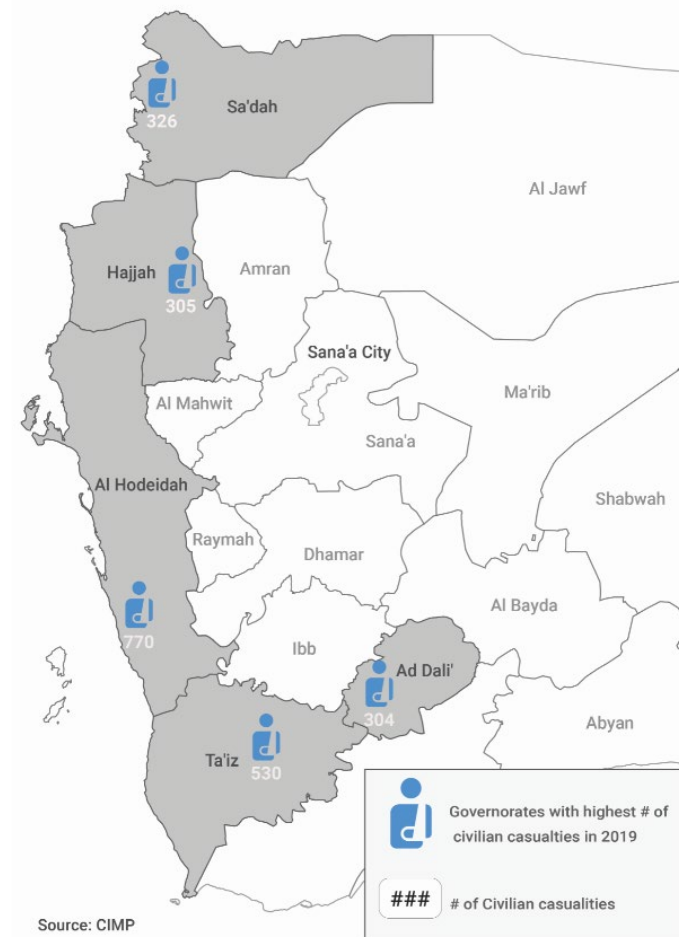
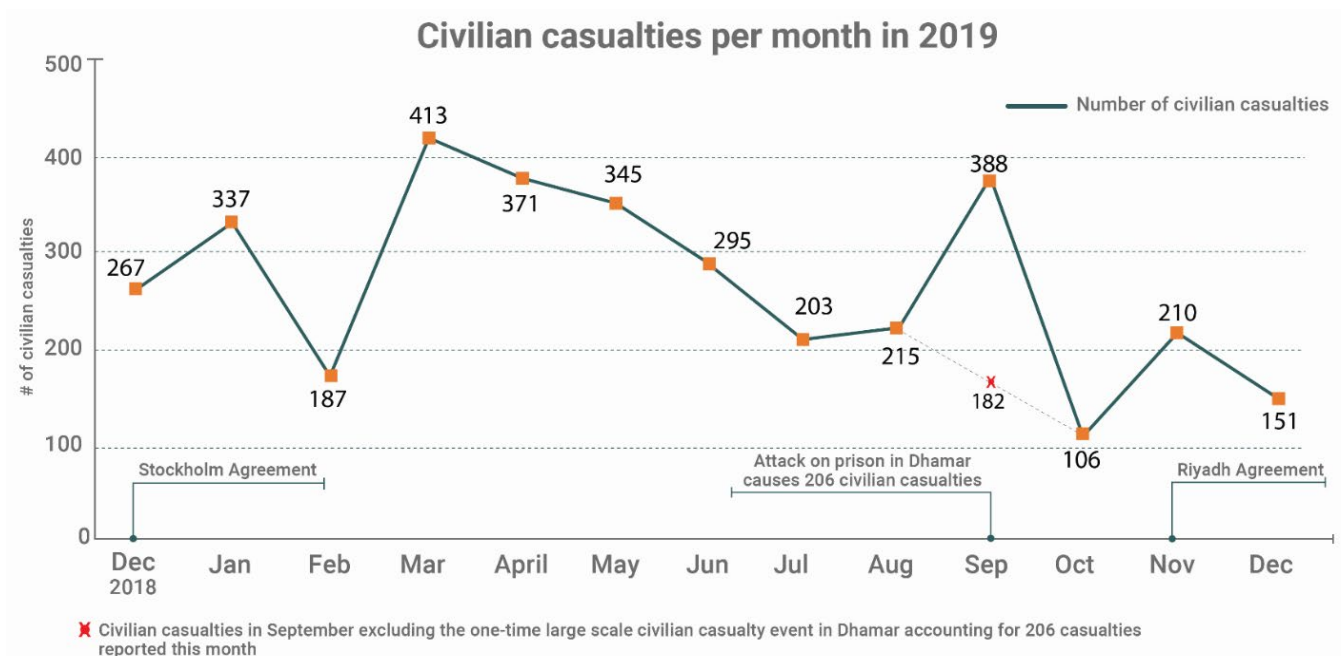
See [ACAPS' core data set](#) and [metadatabase](#).

## Acknowledgements

ACAPS wishes to thank the 39 humanitarian, economic, development and political experts who helped shape the ideas in this report. Any errors are ACAPS' own.

See any mistakes? Want to provide feedback or find out more? Contact us at [yahinfo@acaps.org](mailto:yahinfo@acaps.org)

## Peace talks reduced civilian casualties and displacement, but these gains are easily reversible



### What happened in 2019?

Airstrikes, civilian casualties, and displacement all decreased significantly in 2019, largely due to the ongoing peace negotiations. However, 2019 still recorded the second largest number of conflict-related fatalities since 2015, ground fighting continued along most frontlines, and the peace agreements stalled in implementation (IOM 22/12/2019, YDP 31/12/2019, CIMP 31/12/2019, ACLED 31/12/2019).

In 2019, airstrikes decreased by 65%, civilian casualties by 34%, and displacement by more than 40% compared to 2018. These reductions were widely attributed to the **Stockholm Agreement** signed in December 2018 which introduced a ceasefire in Al Hodeidah; the **Riyadh Agreement** signed in November 2019 to end the conflict between the Government of Yemen and the Southern Transitional Council (STC) in the southern governorates; and **informal talks between the Houthis and Saudi Arabia**, which were publicly announced in September 2019, following a period of increased airstrikes and Houthi attacks on Saudi territory (IOM 22/12/2019, YDP 31/12/2019, CIMP 31/12/2019).

The Stockholm Agreement successfully averted a potentially catastrophic offensive on Al Hodeidah city and its critical ports, which bring in up to 80% of Yemen's essential

goods (OCHA 13/11/2017). The agreement also contributed to a 50% decrease in civilian casualties in the first quarter of 2019, compared to the previous quarter. Although most elements of the agreement have not been implemented, parties to the conflict agreed to establish five observation points around Al Hodeidah city in October 2019. This resulted in an 80% decrease in the number of security incidents in the city, reaching the lowest level of conflict incidents affecting civilians in at least two years (CIMP 31/12/2019).

However, Al Hodeidah continued to be the most dangerous governorate for civilians, recording 24% of all civilian casualties countrywide in 2019. Numerous ceasefire violations were reported in 2019 by both parties to the conflict (Ashraq Al Awsat 16/12/2019, MEMO 10/10/2019).

The Riyadh Agreement helped to bring an end to fighting between the IRG and the STC in Aden, Abyan, and Shabwah governorates following an escalation in August 2019. However, the agreement has not been implemented and key questions - southern independence, marginalisation of people from the north of Yemen, and control over local governance - were not resolved. Sporadic clashes continue between the STC and the

Government of Yemen in Abyan and Shabwah governorates and the STC announced it was implementing southern self-rule in April 2020. The announcement was rejected by most southern governors (OHCHR 10/09/2019, Security Council report 30/08/2019, ACAPS 16/8/2019, Al Jazeera 26/04/2020).

The Houthis and Saudi Arabia publicly announced they were beginning talks in September 2019, following a Houthi decision to suspend missile attacks on Saudi territory (though there has been informal contact since the start of the conflict). **The announcement reduced the number of airstrikes in Yemen and Houthi missile attacks on Saudi Arabia.** Airstrikes decreased by 55% in the last quarter of 2019, compared to the previous three months and civilian casualties due to airstrikes decreased by 95%. No Houthi missile attacks on Saudi territory were reported in the last quarter of 2019 (YDP 31/12/2019).

Unfortunately, these gains are fragile and reversible. **Each peace process stalled in implementation towards the end of the year and deteriorated in early 2020.** Though some conflict indicators decreased in 2019, more than 100 civilians continued to be killed or injured and thousands of people displaced every month of 2019.

## What does it mean for humanitarian action?

**Conflict and conflict related displacement have been the main drivers of needs in Yemen in the past and could see humanitarian needs spike rapidly again.** Peace processes helped to reduce the intensity of conflict in Yemen, particularly reducing the number of airstrikes. As the peace negotiations stall, renewed fighting should be expected along the main frontlines. Renewed conflict will particularly affect people who have already been displaced in the past. They are more likely to rely on humanitarian assistance and be forced to resort to negative coping mechanisms.

**There is a moderate risk of the Stockholm and Riyadh agreements failing, which would aggravate conflict and reduce humanitarian access and imports.** Clashes were reported in Al Hodeidah and Aden in early 2020. Intense fighting would likely disrupt the functioning of Yemen's main ports - Aden and Al Hodeidah - leading to basic commodity shortages. People living in Houthi controlled territories are likely to be even harder to access. Humanitarians already struggle to access people near conflict front lines in the north as the Houthis are reluctant to allow international actors to operate in active conflict areas.

**As the conflict continues, Yemen is becoming increasingly fragmented.** Local forces, many reporting to outside actors, are exerting increasing control over their local areas. Humanitarians need to manage a more complex set of relationships with different armed groups to get access to Yemenis in need. The fact that Yemen's largest aid donors are all parties to the conflict makes it particularly challenging for humanitarian actors to maintain their impartiality.

## Conflict trends to follow in 2020

### Renewed conflict as peace agreements fail

Renewed fighting in Marib, Sana'a, Al Jawf, Al Hodeidah, and Aden in the first months of 2020 undermined confidence in the political negotiations in Yemen. The IRG publicly withdrew from the committee monitoring the ceasefire in Al Hodeidah in March 2020. The STC announced self-rule in the south, raising serious questions about the future of the Riyadh Agreement. Renewed fighting is expected across all major frontlines, increasing the number of airstrikes, civilian casualties, and displacement.

Renewed fighting around Al Hodeidah and Aden is moderately likely due to the fragility of the Stockholm and Riyadh Agreements and the plethora of powerful armed groups in these areas. Tariq Saleh has been consolidating his military and political influence in Al Hodeidah. Saleh is the only leader who has enjoyed unwavering political, military and financial backing from both the UAE and Saudi Arabia (Sana'a Center 30/01/2020). In the south, the conflict between STC and the IRG is likely to increase as the Riyadh Agreement stalls.

### Temporary ceasefire due to COVID-19

Yemen's first COVID-19 case was announced on 10 April in Ash Shihr district in Hadramawt governorate. As of 7 May 2020, new cases of COVID-19 were being announced across Yemen and the UN warned that cases could be circulating undetected within communities. In light of the potentially catastrophic impact the outbreak could have on Yemen's health system, the United Nations Secretary General called for a ceasefire between the warring parties. The Saudi-led Coalition announced a temporary ceasefire on 9 April 2019. However, conflict continued between the Houthis and IRG in Marib, Al Dhale'e, and Al Jawf. Commentators are currently pessimistic that the COVID-19 ceasefire can be developed into a lasting peace agreement.

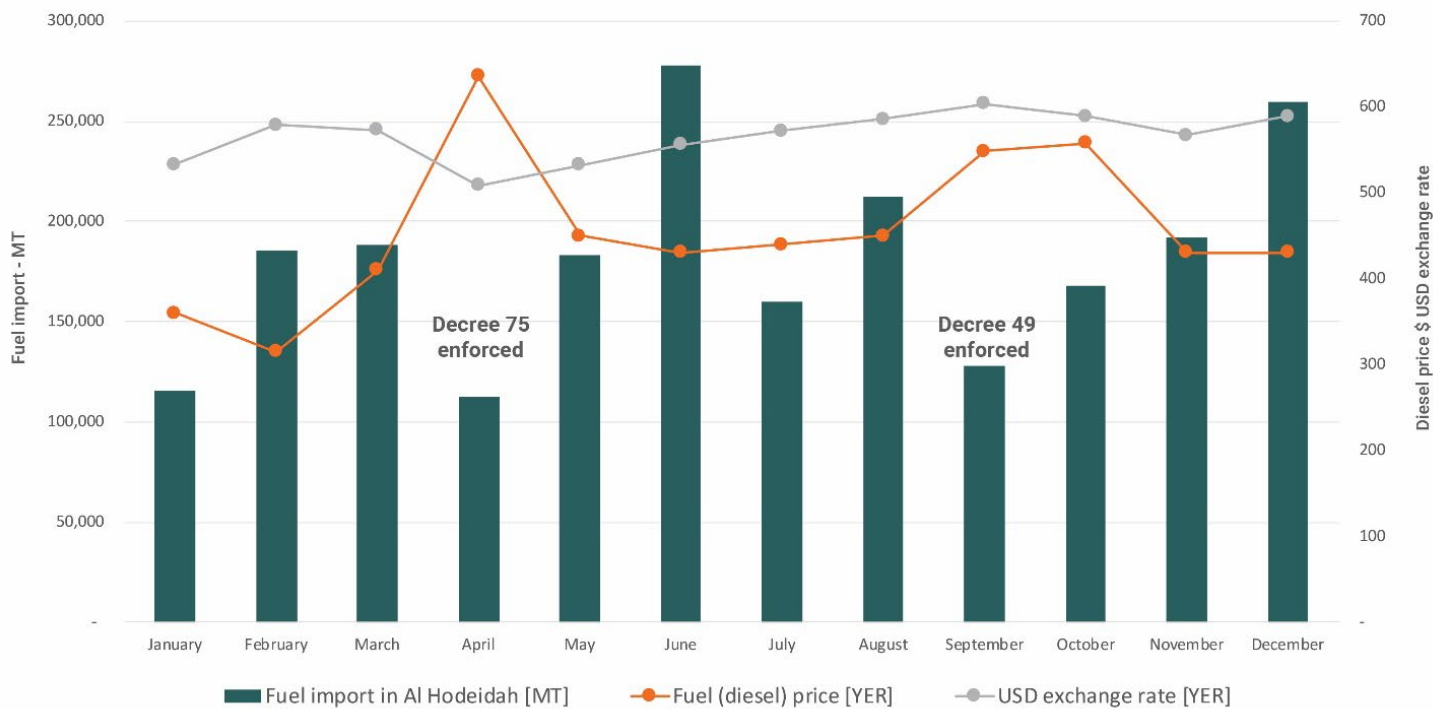
### Houthi advance on Marib and Al Jawf

Since the beginning of 2020 violence has been increasing in Sana'a, Marib, and Al Jawf governorates. In early April 2020, Houthi forces advanced on Marib governorate to the east. This opened a new frontline which, if successful, could shift the balance of power further towards the Houthis. Further large scale fighting in and around Marib city would sharply increase humanitarian needs in a governorate that already hosts over 750,000 IDPs. Fighting in Marib risks further displacing up to 500,000 people and blocking humanitarian access as major highways into the governorate are cut off. A successful Houthi takeover of Marib will likely exacerbate conflict with government and Saudi forces.

[Read ACAPS' risk briefing on the Marib conflict.](#)

## Economic warfare became the primary driver of needs

Trends in fuel imports, prices, and exchange rate (2019)



Source: UNVIM, WFP-VAM 2019 and World Bank Data

### Key events

**October 2018** - Decree 75 first introduced

**March 2019** - Houthis place restrictions on banks and food importers engaging with IRG letters of credit

**March/April 2019** – Competition over fuel revenues between the Houthis and IRG led to a fuel crisis

**June 2019** - IRG bans fuel imports from Omani and Iraqi ports as well as Al Hamriya Port in Sharjah, UAE

**July 2019** – Decree 49 introduced

**September 2019** – Competition over fuel revenues between the Houthis and IRG led to a second fuel crisis and international pressure on the IRG to lessen restrictions

**December 2019** – The Houthis extend a ban on new banknotes in the north and push for use of their electronic currency (e-Riyals) to combat cash shortages

### What happened in 2019?

Though 2019 saw a decrease in conflict, **the economy continued its slow and steady decline for a fifth year in a row, with prices reaching double pre-conflict levels.** Economic warfare between the internationally recognised government (IRG) and Ansar Allah (the Houthis) led to fuel shortages and price hikes of up to 60% compared to 2018. More than half of Yemenis needed food and livelihood assistance in 2019 (World Bank 9/04/2020, ACAPS 04/2020, WFP VAM 02/2020).

**Economic warfare focused on two areas: control of fuel imports and control over currency.** The IRG used letters of credit (backed by \$2.2 billion in Saudi funding) to lend to importers at subsidised rates, enticing them to comply with IRG regulations. The Houthis used coercion to pressure companies not to comply with GoY regulations. Yemen's business community, the majority of whom are based in the north, found themselves stuck between two entities imposing competing economic policies

and attempting to regulate or coerce them into submission (ACAPS 29 January 2020, ACAPS discussions with operational actors 4/08/2020).

**Competition over the regulation and taxation of fuel imports led to fuel crises in April and September 2019. Both crises triggered 60% spikes in prices and fuel shortages which disrupted health, water, and sanitation services for several weeks.** In September 2019, fuel importers were prohibited from advancing from the coalition holding area to Al Hodeidah port due to issues over compliance with Decrees 75 and 49. Decree 49 requires fuel importers to pay taxes and customs fees to the Central Bank in Aden. Decree 75 requires fuel importers to submit applications to the Economic Committee in Aden and work with the formal banking sector. The Houthis put significant pressure on traders not to comply with the regulations, viewing it as a threat to their control over an important commodity and revenue source. On 10 September 2019, ten fuel ships, carrying

163,00 metric tons of fuel, began to build up off the port of Al Hodeidah, with both sides trading blame for the crisis. Fuel prices jumped 60% and electricity, water, sanitation and health services, which rely heavily on imported fuel to operate, began to shut down. **In mid-October, the IRG and the Houthis agreed on a temporary solution, allowing importers to pay taxes to the local branch of the Central Bank in Al Hodeidah for local public sector salaries. However, as of April 2020, there was still no agreement over who would be paid.** Fuel prices and supplies quickly returned to pre-September levels. (Sana'a Centre 2020, ACAPS 10/2019).

**Competition to control hard currency and assert monetary policy led to currency depreciation and price increases in 2019.** The riyal was more stable than the previous year. Competition for hard currency among fuel importers saw the riyal briefly spike to YER 850 to the USD in September 2018, up from YER 250 before the conflict. However, the riyal continued to slowly and steadily decline throughout 2019, sliding from YER 533 in January to YER 589 in December 2019, pushing prices 3% higher to reach double pre-conflict levels (ACAPS 25/09/2020, ACAPS five year dataset May 2020).

**In December 2019, following 18 months of restrictions, Ansar Allah announced a full ban on newly issued riyal notes printed by the Central Bank of Yemen in Aden.** Ansar Allah offered to trade the new riyal notes for its own electronic currency – the e-Riyal – but experts doubt the stability of this currency. **Monetary policy has now effectively split between the north and the south**, with the YER trading at around 60 YER to the USD lower in the south than the north for the first quarter of 2020. This makes it very difficult to introduce coherent policies to stabilise prices. The north also faces a shortage of physical cash notes which will make it harder to pay staff and conduct daily business (Sana'a Centre 21/01/2020).

## What does it mean for humanitarian action?

**Economic warfare is becoming the main driver of needs in Yemen.** In 2014, 48% of the population fell below the poverty line, of whom 75% were rural and 25% urban. Following five years of conflict, the World Bank estimated between 71-78% of the Yemeni population (a minimum of 21 million people) had fallen below the poverty line at the end of 2019. A sudden depreciation of the YER and consequent inflation will have a direct and negative impact on everyone around and below the poverty line (World Bank 9/04/2020, ACAPS 04/2020, World Bank 30/03/2020).

**Attempts by parties to the conflict to control imports and revenues are making it challenging for humanitarian agencies to guard against fraud, waste, and diversion.** The split in monetary policy between north and south makes it more costly and complex for humanitarians to operate across conflict frontlines. Banks and money exchangers are now charging fees of around 10% for transfers between Ansar Allah and Government of Yemen controlled areas in Yemen (Sana'a Centre 21/01/2020).

**The riyal is likely to further depreciate due to a countrywide recession.** New restrictions that reduce Yemenis' access to income (salaries or remittances), increase import costs, or reduce business revenue would further weaken the riyal. This would increase the cost of humanitarian operations inside the country, reduce the value of cash assistance being provided to beneficiaries and further expand the list of people relying on aid to survive.

**Aid agencies need to carefully monitor exchange rates during times of currency instability.** The Sana'a Centre for Strategic Studies estimated that between January and August 2017 one of the main banks used for humanitarian cash activities in Yemen gained almost \$80 million in currency arbitrage. The riyal was more stable in 2019 but this could change and humanitarians need to be ready to adapt (Sana'a Centre 6/09/2017, ACAPS 29 January 2020).

## Economic trends to follow in 2020

### The Yemeni Riyal risks further depreciation, which would increase food prices

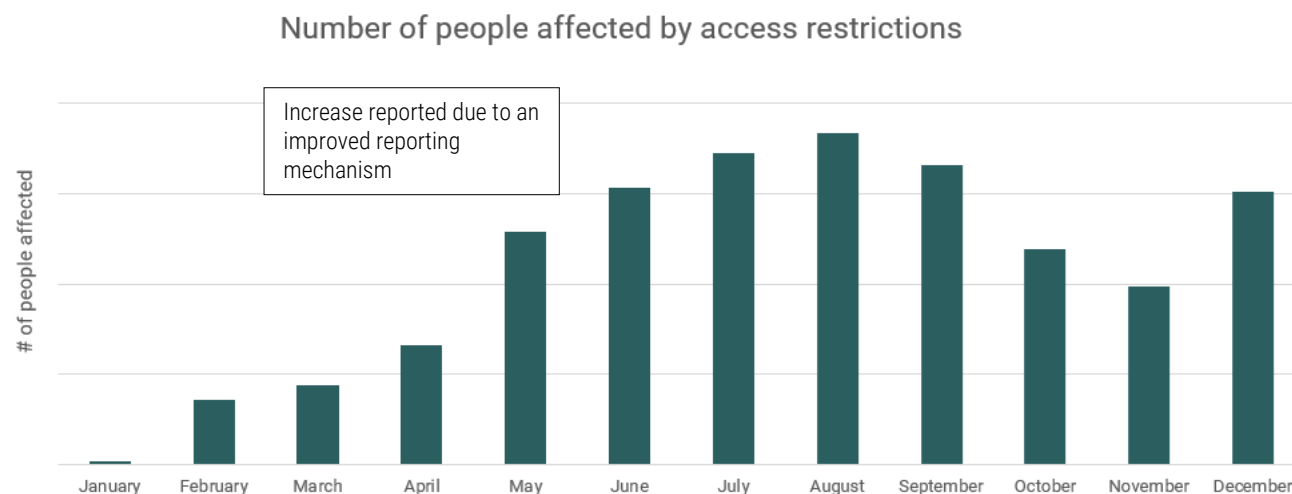
The Houthis and the Government of Yemen are highly reliant on external funding to maintain a fragile monetary, fiscal, and economic stability. Yemen relies on foreign currency inflows from Saudi support (\$2.2 billion in 2019, plus around \$100 million a month in military expenditure), aid funding (probably around \$2.5 billion of which flows through Yemen), remittances (\$3 to \$7 billion per year), and crude oil exports from Marib and Hadramawt (crude oil production and exports are yet to return to pre-conflict levels). Each of these funding sources faces strong downward risks for 2020 (Sana'a Centre 06/04/2020).

The US has already frozen aid to north Yemen in 2020 in protest against Houthi access restrictions. COVID-19 is prompting reduced remittance flows to Yemen. The Saudi-Russia fuel price war which began in March 2020 saw global prices plummet which will reduce Yemen's crude oil export earnings. The e-Riyal could also collapse in the north, triggering price inflation. Worst case, the riyal could lose half its value, triggering another doubling in basic commodity prices. IMF debt relief announced on 13 April 2020 will provide some help, but is unlikely to be enough on its own to arrest the slide (ACAPS 29/01/2020, ACAPS Economic Scenarios – due for release in May 2020).

[Read ACAPS' risk report to find out more.](#)



## Increasing numbers of Yemenis could not receive assistance due to access restrictions



Source: OCHA

### Why is it important?

**Restrictions imposed on humanitarian operations were the main barrier to supporting vulnerable Yemenis in 2019.** Operational conditions for humanitarians became extremely restrictive in northern Yemen and to a lesser extent deteriorated in the south, affecting access to assistance for up to 8.3 million people countrywide – roughly 35% of all people in need (OCHA 22/04/2020).

**In 2019, the Houthis attempted to extend their control over, and at times exploit, humanitarian aid.** Humanitarian actors started reporting increasing constraints following the change of leadership in the National Agency for the Management and Coordination of Humanitarian Affairs (NAMCHA) in mid 2019. Agencies reported interference in activities (including increased taxation, aid diversion, tampering with beneficiary registration), severe restrictions on movement (checkpoints, delays/denials of various travel permits), and delays in project approvals (OCHA 22/04/2020).

In May 2019, WFP announced a temporary suspension of food distribution in Sana'a in protest against restrictions on the piloting of a biometric registration and targeting system. Although the Houthi authorities and WFP reached a compromise and distributions resumed in late August, most of the provisions of the agreement have not



Source: OCHA

yet been implemented. In October 2019, the UN Resident and Humanitarian Coordinator for Yemen wrote to the Houthi Prime Minister asking to lift restrictions on principle agreements, project approvals, independence of operations, movement, and assessments. The Houthis announced that NAMCHA would be reformed into the Supreme Council for the Management and Coordination of Humanitarian Affairs and International Cooperation (SCMCHA), remaining under the leadership of Abdul Mohsen Tawoos. SCMCHA immediately imposed new restrictions on humanitarians and launched a media campaign against humanitarian organisations (Sana'a Center 16/12/2019).

**In the south, humanitarian agencies struggled to access communities because of political instability, especially after the conflict between the Southern Transitional Council (STC) and IRG forces in August 2019.** Humanitarians had to work with an increasing number of political and military stakeholders to secure approvals and negotiate access. In the second half of 2019, the Ministry of Planning and International Cooperation in the south began imposing more restrictions on humanitarian operations, often replicating policies from the north. However, attempts to control humanitarian access in the south were not as widespread or institutionalised as in the north (ACAPS discussions with operational actors 03/2020).

**Political and religious leaders spread more anti-humanitarian messages in 2019, leading to backlash against humanitarians.** Humanitarian organisations in Ad Dali', south Yemen, were targeted by violent attacks in December 2019 and had to temporarily suspend operations. Death, kidnapping, and arrests of aid workers in Yemen almost doubled in 2019 (45 incidents up from 24 in 2018) (Insecurity Insight 2019).

**Humanitarians struggled to collect any data due to extreme restrictions imposed by the authorities, preventing assessments needed to support humanitarian decision making.** At the time of writing, multi-sectoral needs assessments remained delayed both in the north and in the south, severely limiting the amount of information available for humanitarian planning and decision making (ACAPS discussions with operational actors 03/2020).

### What does it mean for humanitarians?

**Anti-humanitarian messages were widely distributed in 2019** among political actors and communities, undermining trust in humanitarian operations. National staff are most at risk of harassment, even in their own communities.

**As the Houthi authorities continue to impose bureaucratic constraints, humanitarian actors are considering either suspending activities or withdrawing from the most problematic areas.** Although withdrawal might be necessary, it would likely further undermine the reach and legitimacy of the response in the eyes of affected communities, local staff, and authorities. Once suspensions are in place it may be difficult to restart operations.

**Anti-humanitarian campaigns often accused humanitarians of not respecting Yemeni norms around gender and culture,** particularly concerning the position of women in society. Humanitarian actors need to consider gender-related restrictions (the inability to travel without a male companion, limited livelihoods) to facilitate women's access to aid. Agencies need to find ways to boost their numbers of female staff in order to deliver effective assistance, particularly in areas like protection and health.

**In the south, some INGOs raised the need to increase capacity for access negotiations and civil-military coordination** to increase access to communities.

## Access trends to follow in 2020

### Humanitarian presence is likely to decline in the north, leaving people without assistance

As the standoff between the international community and the Houthis continues in the north, more humanitarian actors are beginning to consider withdrawing or suspending activities in response to increasing access restrictions. This threatens to undermine the reach and legitimacy of the response in the eyes of affected communities, local staff, and authorities in the north. Despite coordinated advocacy by the UN, NGOs and donors, the US suspended aid funding to north Yemen in April 2019 until the Houthis removed restrictions on humanitarian operations. Some agencies have reportedly already started scaling down programs.

### Increasing access restrictions in the south

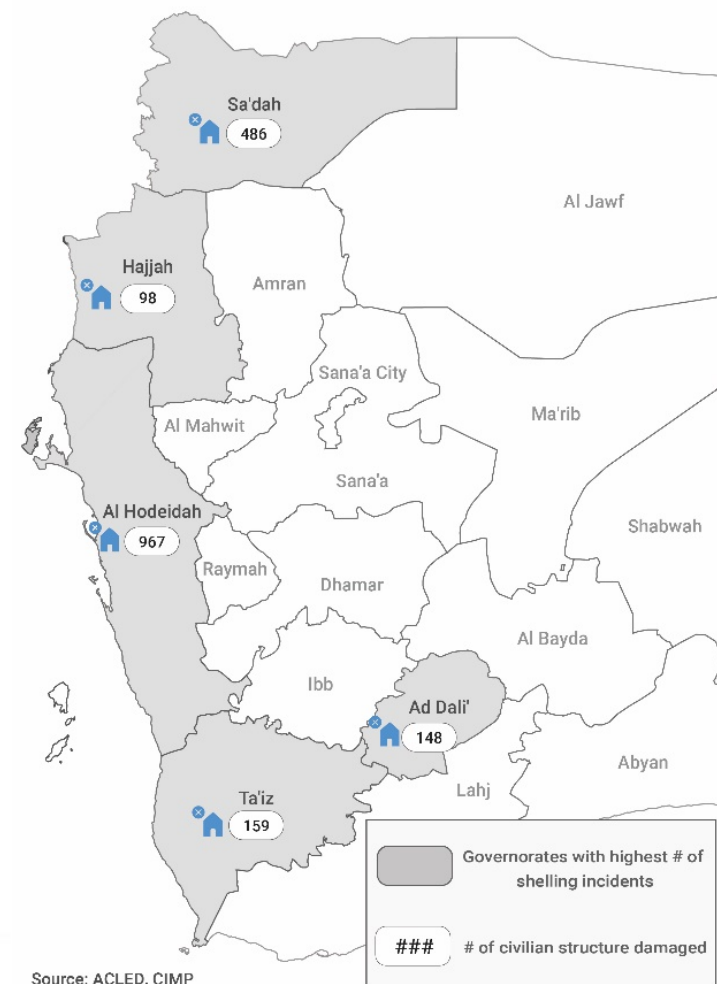
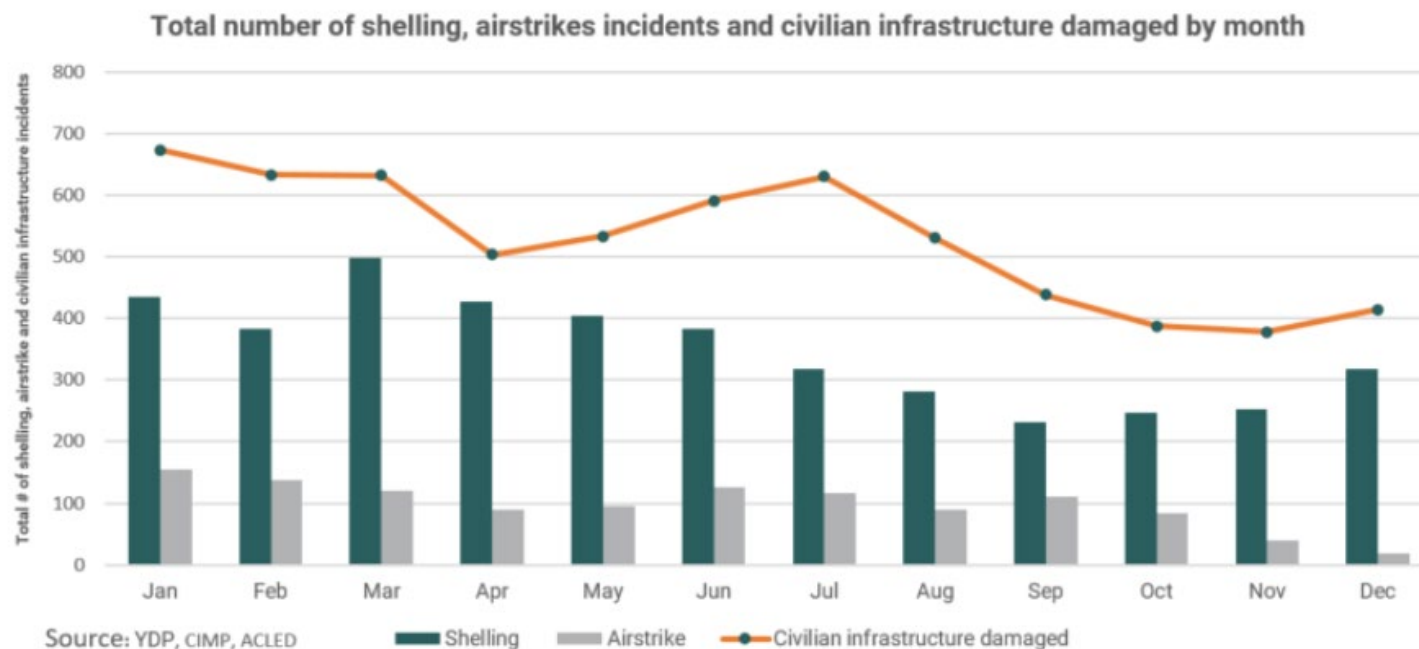
Access restrictions started to deteriorate in southern Yemen in 2019. Humanitarian agencies started to report similar strategies as those being implemented by the Houthis in the north. Southern governorates are also at high risk of renewed fighting between the STC and the IRG, which could limit humanitarian operations, particularly in Aden, Shabwah, and Abyan.

### Lack of reliable data and assessment is likely to decrease humanitarian funding

The restrictive access environment in Yemen has resulted in a lack of reliable data to support the evidence base for humanitarian decision making. Authorities often block or delay assessments or limit the scope of questions organisations are allowed to ask. The Multi Cluster Location Assessment was severely delayed. Third Party Monitors, a common tactic used by donors in remote settings to confirm that aid is reaching its intended beneficiaries, are struggling to operate effectively. Lack of reliable information is increasingly raised as a concern by donors and decision makers and is likely to decrease the level of funding available for the response in 2020.

See ACAPS' risk and [scenarios](#) reports to find out more.

## Airstrikes decreased, but shelling and explosive ordnance incidents increased the proportion of child casualties



### What happened in 2019?

Political negotiations in 2019 were successful in decreasing the number of airstrikes and civilian casualties to their lowest levels since the beginning of the conflict. Airstrikes decreased by 65% and civilian casualties by 34% compared to 2018. However, other types of armed violence increased.

Shelling and missile attacks increased by up to 75%, small arms fire and sniper incidents with direct impact on civilians more than doubled, and explosive ordnance (landmines, IEDs, UXOs) caused 23% more civilian casualties in 2019, compared to 2018. Shelling resulted in the biggest impact on civilians in 2019, accounting for 38% of all civilian casualties nationwide. Although the peace talks prevented major escalations and territorial exchanges, daily ground fighting continued along all major frontlines (ACLED 31/12/2019, CIMP 31/12/2019).

Al Hodeidah governorate recorded the highest number of civilian casualties as a result of armed violence in 2019 – almost 25% of all civilian casualties were reported in Al Hodeidah, mostly due to shelling, small arms fire, and explosive ordnance. Taiz governorate reported the second highest number of civilian casualties. Taiz city reported an 81% increase in civilian casualties compared to 2018, due to intense fighting in residential neighbourhoods in the first half of the year (CIMP 31/12/2019).

Shelling and explosive ordnance incidents are most common around existing and new frontlines in Al Hodeidah, Taiz, Ad Dali', and Al Bayda. These weapons tend to be less accurate (particularly with the older generation rockets used by armed groups in Yemen), resulting in higher impact on civilians and civilian infrastructure. 17% more civilian houses were impacted in 2019 than in 2018, mostly due to shelling. Over 50% of all civilian casualties as a direct result of armed violence were recorded within houses. This

disproportionally affects women and children, who are more likely to be at home during attacks (CIMP 31/12/2019).

**Airstrikes were reported predominantly in Hajjah and Sa'ada governorates. However, most civilian casualties on account of airstrikes were recorded in Dhamar governorate, largely due to a single mass casualty event, an airstrike on a prison in Dhamar on 31 August 2019 which caused 206 civilian casualties, more than 25% of all airstrike-related casualties in 2019 (YDP 31/12/2019, CIMP 31/12/2019).**

**From 2018 to 2019, the proportion of children among all civilian casualties increased from 20% to 25%.** Children were killed and injured in attacks on houses, explosive ordnance incidents, and violence against schools. Education facilities were the most frequently hit critical infrastructure in 2019, particularly in Al Hodeidah. A weapons warehouse exploded in Sana'a city on 7 April 2019, hitting a nearby school and causing 110 civilian casualties, most of whom were women and children (CIMP 31/12/2019).

**Conflict is likely to continue to displace and injure people in 2020, requiring ongoing shelter and protection support and reducing people's livelihoods and freedom of movement.** People who have been displaced multiple times or those who are unable to move from areas of active conflict will need the most support.

## What does it mean for humanitarian action?

**The humanitarian situation in Yemen is closely tied to political dynamics.** Key donors are parties to the conflict and any progress in peace negotiations has a direct impact on levels of violence. Although airstrikes decreased significantly, other types of violence such as shelling or explosive ordnance increased in 2019. These types of violence trigger less political outcry and are often underreported by media, yet they cause a high impact on civilians.

**Conflict escalated again in 2020 with fighting on new frontlines in Marib and Al Jawf, leading to new explosive ordnance contamination and new displacement of vulnerable Yemenis.**

**Humanitarian actors need to closely monitor the changing conflict dynamics to increase preparedness** and response, particularly in shelter support, livelihood support, infrastructure rehabilitation, and psychosocial support. Operational actors report that the demining capacity of the response is dangerously low. This increases the risk of children becoming casualties due to landmine contamination.

**Landmines and infrastructure damage pose a threat to returning populations. If demining efforts are not increased, landmines are likely to deter returns and pose an increased threat to returnees who are pushed back by economic desperation.** 2019 saw an increase in civilian houses hit, particularly by shelling. This makes the task of resettling returnees

even more challenging, as many returnees will likely be going back to damaged houses without services or critical infrastructure. The shift in conflict dynamics with shelling replacing airstrikes as the most common type of violence impacting on civilians poses higher risks for residential areas and civilian houses.

## Conflict trends to follow in 2020

### Increased explosive ordnance contamination

Fighting in Marib, Sana'a, Al Jawf, Al Hodeidah, and Aden in the first months of 2020 shifted frontlines and undermined confidence in Yemen's peace deals. As the peace agreements remain stalled, we will likely see more fighting in 2020. Warring parties in Yemen commonly plant landmines in areas they are pushed out from. Civilians face particularly high risks in areas of recent conflict or shifting frontlines. The number of explosive ordnance incidents is expected to continue increasing, complicating humanitarian access and cutting people off from livelihoods and services.

### Increasing vulnerability of civilians affected by conflict

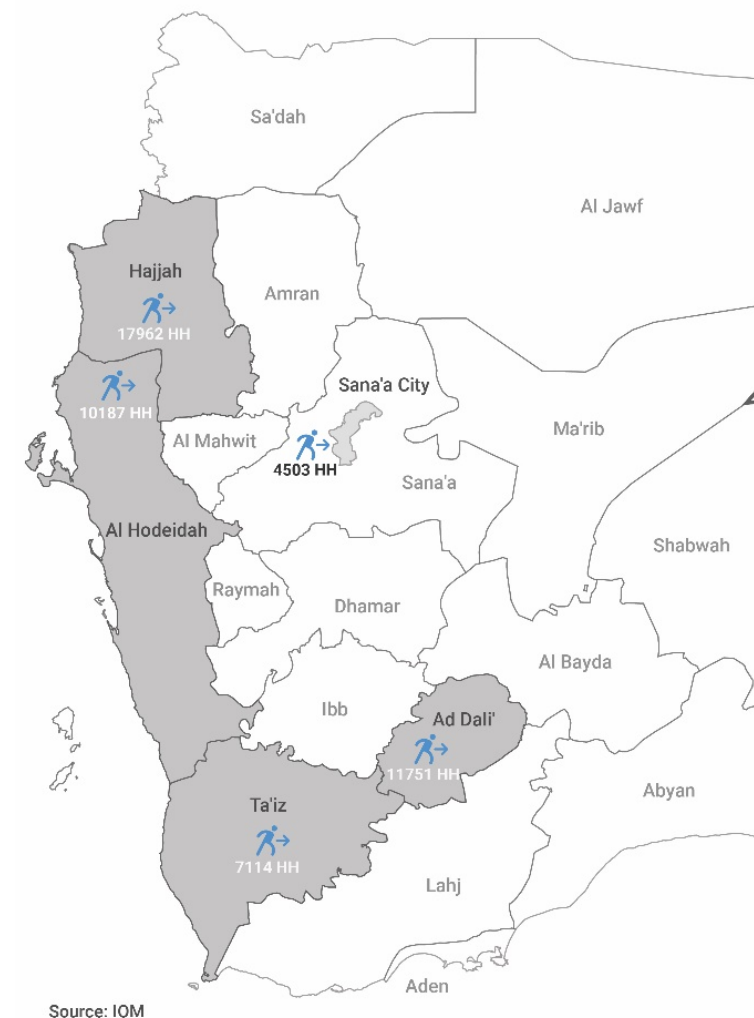
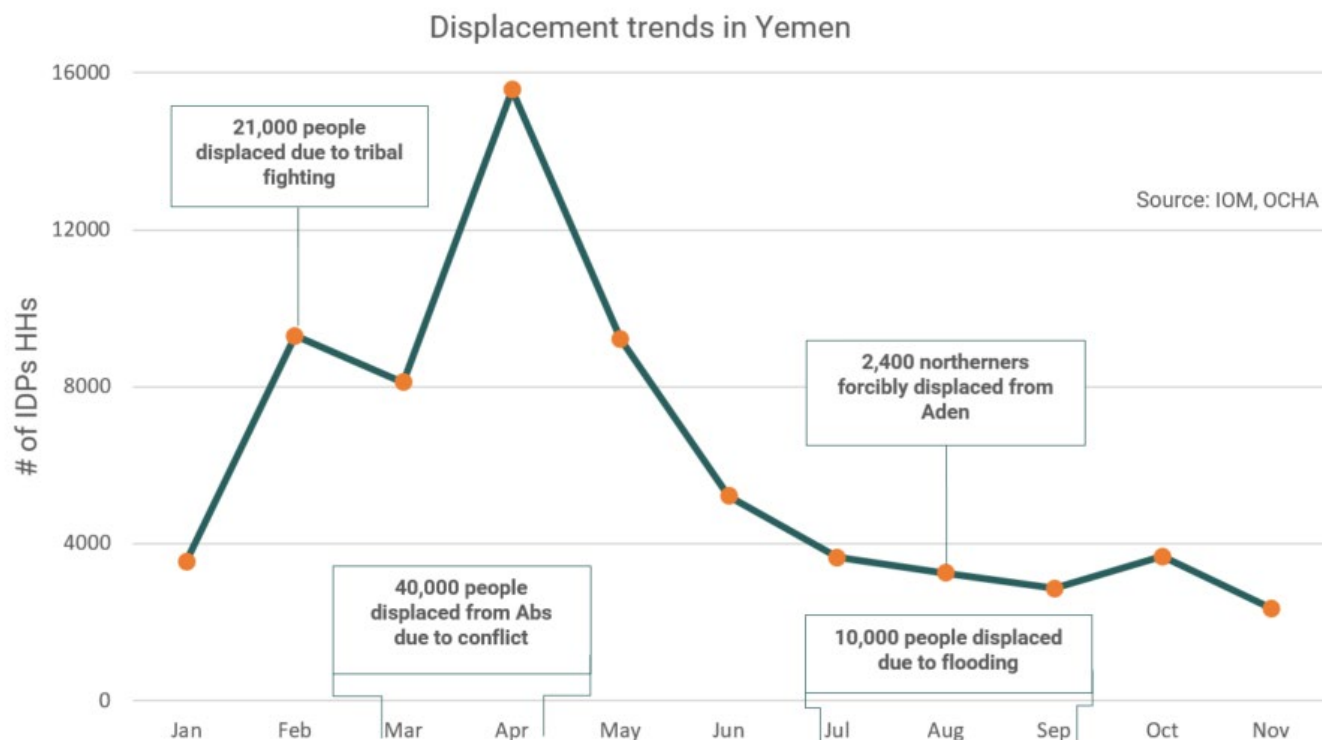
**Even though the intensity of conflict impact has decreased, people affected in 2020 will likely present more severe humanitarian needs and use progressively more desperate coping mechanisms.** As the conflict in Yemen enters its sixth year, people are facing increasingly difficult living conditions. Conflict in Yemen in 2020 is likely to impact on people who have already suffered from conflict related displacement and loss of livelihoods in previous years. The impact of repeated violence, displacement, disrupted livelihoods, reduced income earning opportunities, combined with steady increases in prices, is eroding people's capacity to cope with new shocks.

**CIVILIAN IMPACT MONITORING PROJECT**  
a service of the Protection Cluster Yemen



This section was developed based on the data and support provided by the Civilian Impact Monitoring Project. If you are interested in learning more about the Civilian Impact Monitoring Project or would like to discuss any of the data, please contact the CIMP team via their website or at [contact@civilianimpact.org](mailto:contact@civilianimpact.org)

## Less people were displaced in 2019, but they face increasingly difficult living conditions



### What happened in 2019?

Displacement decreased significantly in 2019, particularly in the second half of the year, in line with the decrease in conflict. Even though the number of newly displaced households reduced more than 40% in comparison with 2018, thousands of people were still displaced each month and they faced increasingly difficult living conditions.

Despite the decreasing displacement, the vulnerability of both new and existing IDPs increased. IOM reported that over a third of newly displaced people in 2019 had to move to informal settlements, up from 15% in 2018, when the largest proportion of displaced families stayed in rented accommodation or with host families. Many new IDP sites were created in Hajjah and Al Hodeidah governorates in the second quarter of 2019 due to fierce fighting in Abs district, Hajjah governorate (IOM 22/12/2019).

In the south, many IDPs faced increasing threats of evictions due to tensions with host communities, their perceived affiliation with armed groups, inability to pay rent, and discrimination. Many IDPs were evicted by force and suffered physical abuse and detention. At least 2,400 people of northern origin living in Aden and Lahj governorates were forcibly deported after conflict in Aden in August 2019, majority to Tur Al Bahah district, which borders Taiz governorate.

In 2019, more IDPs were displaced within their own district or governorate, with many displaced multiple times. Hajjah governorate reported the highest level of displacement in 2019 due to the conflict in Kushar and Abs districts in the first half of the year. Almost all of the approximately 100,000 people displaced in Hajjah in 2019 were displaced within the same governorate (IOM 22/12/2019, UNFPA 28/02/2020).

Although conflict remains the most important driver of displacement in Yemen, 2019 saw increasing displacement as a result of flooding or due to lack of access to basic services or livelihoods. More than 150,000 IDPs were affected by flooding between May and October 2019, particularly in Hajjah and Al Hodeidah governorates. IDPs and host communities lost shelters, houses, livestock, and livelihoods. Many IDP sites were flooded, displacing people to public buildings, including schools (OCHA 19/08/2019, ECHO 4/10/2019).

**Lack of access to services is the second most important driver of displacement in Yemen**, according to protection actors. This could also lead to premature returns. IDPs that were displaced for a long time (for example IDP communities in Marib, Aden, Sana'a, Amran) lack adequate services and livelihoods. Protection actors report large demands for basic services in IDP hosting sites.

**IDPs living with host communities are at higher risk of being excluded from services**, as IDP sites are usually prioritised for assistance. IDPs often rely heavily on host communities for support, which is increasing tensions. Protection actors reported more social cohesion concerns across the country in 2019, including attacks on IDP camps and forced displacement, suggesting that the capacity of host communities to accommodate IDPs has been depleted.

## What does it mean for humanitarians?

**Given the strong correlation between conflict and displacement in Yemen, it is expected that displacement could increase again in 2020** in line with the rise in conflict. However, no data has been collected on displacement in 10 out of 22 governorates since late 2019, predominantly in the north, hampering the international community's ability to respond.

**There are gaps in the response mechanisms for short-term and rapid displacement.** The WASH response is reportedly not able to cover IDP needs. Newly displaced people often face gaps in food assistance when the initial Rapid Response Mechanism support is over.

**Humanitarian actors need to adjust the modalities of response for long-term displaced populations, particularly those at risk of renewed fighting** in Marib, Al Jawf, and Hajjah. These IDPs have been displaced for years and need economic and livelihoods support so they can regain the ability to sustain themselves. Without strengthening livelihoods support, there is a risk of increasing dependency on aid. Vulnerable host communities also need greater support.

**The most vulnerable are IDPs in collective sites and IDPs facing eviction** because of accumulated debt or discrimination. IDPs of northern origin living in the south ('Northerners') face protection risks such as harassment, eviction, and lack of access to services. According to operational actors, these vulnerable IDPs are usually the most difficult for aid workers to access.

## Displacement trends to watch in 2020

### Increasing displacement and premature returns due to lack of access to basic services and livelihoods

After five years of conflict and repeated displacement, IDPs have depleted their savings and struggle to find jobs. More Yemenis are being displaced because they cannot afford rent or because of lack of services. Economic desperation may force IDPs to return prematurely to unsafe areas, or areas that cannot support them. Returnees are likely to be a key vulnerable group in 2020.

### Renewed conflict triggering secondary or onward displacement

New conflicts could quickly trigger widespread displacement. Marib is particularly at risk, as it hosts the highest number of IDPs countrywide and has witnessed increased levels of fighting in 2020. People who have been displaced multiple times are likely to face acute shelter, protection, food, and WASH needs. Repeatedly displaced IDPs are likely to be a key vulnerable group in 2020.

## Protection concerns increased as Yemenis turned to riskier coping mechanisms due to depleting resources

Key protection trends flagged by the operational actors in Yemen



Increase in child recruitment



Increase in child marriage



Increase in smuggling and trafficking



Increasing discrimination of vulnerable groups

### What happened in 2019?

One of the top concerns for people in Yemen is the **lack of livelihood opportunities and sufficient income to meet basic needs**. Five years of war has depleted people's resources while the prices of basic commodities doubled, pushing the majority of Yemenis to resort to coping mechanisms such as eating less food or borrowing money (Sana'a Center 15/12/2019, CARE 11/2016).

**In 2019, people started turning to more harmful coping mechanisms.** Female headed households, children, migrants, and vulnerable IDPs are more exposed to economic hardship and are turning to more severe coping mechanisms. Protection actors in Yemen in 2019 reported an increase child recruitment, child marriage, smuggling, trafficking, and discrimination against vulnerable groups (Sana'a Center 15/12/2019).

**Child recruitment increased in 2019, with more children manipulated into military service under false pretenses or as a means for the rest of the family to receive better services.** Higher remuneration is offered for children who participate in frontline fighting.

**Incidences of child marriage increased.** More children were forced to marry in 2019, either in exchange for money to sustain the rest of family or to decrease the number of children

### Key vulnerable groups in 2019

- **People of northern origin living in the south of Yemen ('Northerners')** – facing harassment, discrimination, and forced displacement. 2,400 people were forcibly displaced from Aden in August.
- **Migrants** – facing kidnapping, people trafficking, and torture. 5,000 migrants were forcibly detained by authorities in Lahj, Aden, and Abyan in April. Around 20% of migrants are unaccompanied minors.
- **Female headed households** – facing increasing gender-based violence, discrimination, and exclusion from assistance due to movement restrictions, lack of information, and strict cultural norms. Over a third of displaced Yemenis live in a female-headed household.
- **Child soldiers** – particularly boys pushed to join fighting forces, exposed to killing, maiming, and pushed to give up their education.
- **Girls subject to early marriage** – protection actors flag that increasingly younger girls are forced to marry, the youngest reported in 2019 being three years old. These girls face gender-based violence, domestic violence, and are forced to give up their education.
- **Vulnerable IDPs in informal settlements** – facing discrimination, lack of services, and risk of evictions. 30-50% of new IDPs were forced to live in informal settlements in 2019.
- **Muhamasheen** – politically, socially, and economically marginalised. Lack access to legal documentation and basic services including health care and education.

requiring care. The average age of child brides has been decreasing. Girls as young as three years old were married off in Yemen in 2019.

**Social tensions increased within communities over rivalry for resources, including land.** Consultations in some urban districts in Sana'a, Taiz, and Dhamar revealed that the inability to pay rent, food, and medical services is affecting IDPs' safety within the host community.

**Harassment and discrimination against vulnerable groups has increased.** At least 2,400 people from Yemen's northern governorates experienced physical assaults, confiscation of identification documentation, disappearances, or forced deportation from Aden and Lahj in August 2019. Communities reported that males and boys were forced to hide in

their houses out of fear. This prevented the affected families from covering their basic needs or accessing assistance as men could not go to work or move freely.

**Migrants were exposed to increasing discrimination** when authorities in Lahj, Aden, and Abyan began to arbitrarily detain irregular migrants (predominantly men from Ethiopia) in makeshift camps. At the peak of detentions (27 April – 3 May 2019) an estimated 5,000 people were detained. The migrants faced extreme living conditions and protection risks due to overcrowding and a lack of basic services. Migrants continue to face abuse along smuggling routes from the Horn of Africa to the Gulf every month. Over 138,000 migrants entered Yemen in 2019, out of which approximately 10% were children, mostly unaccompanied (IOM 19/01/2020).

**Increased gender-based violence (GBV) and restrictive and discriminatory policies against women were reported**, limiting their freedom of movement and making it more difficult for women to access aid. The Houthis implemented increasingly restrictive cultural norms throughout 2019 including shutting down public spaces for women or places where men and women could spend time together. They introduced more restrictive working conditions for women and tightened dress code and appearance rules. Women who did not comply with the more restrictive rules were exposed to violence and harassment, including GBV. Movement restrictions are further reducing women's livelihood opportunities. Due to the war, more women had to start working, on top of their other responsibilities in the household and childcare (Sana'a Center 15/12/2019).

## What does it mean for humanitarians?

**Even though the numbers of airstrikes and casualties decreased in 2019, protection needs appear to actually be increasing, particularly for the most vulnerable groups.** These groups are also often the most difficult to access. Ongoing humanitarian efforts struggle to fully cover the needs of the most vulnerable people.

**Humanitarian actors need to find innovative ways of targeting and reaching vulnerable groups** to prevent their exclusion. More female staff are needed to assess and respond to girls and women affected by GBV or movement restrictions that exclude them from aid. Female humanitarian staff need to be supported as they are likely to face discrimination or movement restrictions themselves.

The economic downturn caused by protracted conflict has exacerbated protection risks. **Yemenis need more livelihoods support, not only for their economic survival but to ensure their safety.** Cash-based programming which targets the most vulnerable and post-distribution monitoring are essential to safeguard against exclusion and other protection risks.

Supporting teachers, doctors, and other groups that have not received regular salaries in years is important to help them begin to regain self-sufficiency and ensure the continuity of basic services.

**Protection actors need the international community's support to increase access for protection programming.** Political actors in Yemen have already banned some humanitarian activities targeting vulnerable groups, such as psychosocial support. There is a need for stronger coordination mechanisms and common positioning between humanitarian actors and donors to ensure the space for protection related humanitarian activities is respected.

## Protection trends to follow in 2020

### Increasing protection concerns for northerners

Northerners are likely to face detention, physical assault, and forced deportation and remain one of the key vulnerable groups in 2020. Historically, the people of northern origin living in the southern Yemen were targeted because of perceived affiliation with northern armed groups. Humanitarians are concerned that Northerners could be targeted again if the separatist agenda in the south becomes stronger. Discrimination and harassment could increase as resources deplete and host communities struggle to sustain themselves.

### Increasing exclusion of vulnerable groups from services and aid

Vulnerable groups such as Muhamasheen, vulnerable IDPs, migrants, women, and children face increasing exclusion from services and aid. Protection actors report that the perceived lower social status of these groups and inter-communal tensions limit their access to assistance and basic services. Protection actors reported concerns around access to excluded populations because of physical and bureaucratic constraints and the lack of assessments. Access to services is likely to further deteriorate in 2020 because of ongoing conflict and increasing restrictions on humanitarian operations.

### Disease outbreaks due to the lack of WASH and health services lead to increased mortality among vulnerable groups

Only 51% of health centres are fully functional in Yemen. Key vulnerable groups are often excluded from aid and services, including health and WASH services. They are likely to be most exposed to malnutrition and diseases such as cholera, dengue fever, or COVID-19. The country has limited capacity to test and treat patients and is already dealing with major health outbreaks (cholera/AWD, diphtheria). Without support, these groups are most likely to die as a result of sickness.



## 2019 in review

