



The Annual Mokha Strategic Report

Fourth Edition

(Yemen 2024)



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Expanded Summary

2025

The Mokha Center for Strategic Studies issued its fourth annual strategic report for 2024, which includes a comprehensive analysis of political, economic, military, social, educational, environmental and humanitarian developments in Yemen. The report provides rich research material supported by data, illustrations, documented information and rigorous scientific analyses. It relied on an integrated analytical methodology that combines descriptive and quantitative approaches, while also forecasting future trends and offering recommendations to help decision-makers, and those interested in Yemeni affairs, understand the current situation and its future paths. Each of its 10 chapters was prepared by an expert or researcher specializing in Yemeni affairs.

The First Chapter: Political Developments and Foreign Relations in Yemen

The chapter Reviews political developments and foreign relations, providing an in-depth and comprehensive analysis of these developments. It monitored and evaluated the main trends of both the internal and external fronts and their impact on Yemen's future. The chapter focuses on developments in 2024 within the framework of the internationally recognized legitimate government and the main active entities and components within it, such as the Presidential Leadership Council (PLC), the legitimate government, the Parliament, political parties and the Southern Transitional Council (STC). It also examines efforts to unify the military forces under the legitimate government. Additionally, the chapter discusses developments within the areas controlled by the Houthi insurgent group, analyzing the group's behavior as it attempted to shift from a local actor to a regional player by launching attacks on ships in the Red Sea and Israel, and consolidating itself within the so-called Axis of Resistance, led by Iran in the region. The chapter also analyzes the interactions of regional and international actors in the Yemeni file, with a focus on the roadmap and negotiations for peace.

The Second Chapter: Economic Crisis and Financial Struggles in Yemen

It focuses on the economic situation and developments in 2024, which represented an extension of the ongoing economic crisis the country has been experiencing for a decade, which has compounded the Houthi-caused crisis group's blockade of oil exports since late 2022 and their seizure of the Yemeni government's resources. The chapter also provides an analysis of key macroeconomic indicators and their relationship to popular discontent, the fragility of the economic and political environment, the difficulty of conducting economic activities, as well as increased regional tensions.

The chapter analyzes the law issued by the Houthi group regarding the “temporary exceptional mechanism to support the payment of state employee salaries and address the issue of small depositors”. Through an economic analysis of this mechanism, the chapter concludes that it is hasty and illegal, primarily aimed at manipulating the rights of public employees and replacing their rightful salaries with new lists prepared by the group, which are subject to its whims and conditions.

The chapter also highlights that the Houthi authority seeks to extend its control over all companies and government sector units, seizing their resources under the pretext of paying salaries to general employees. Moreover, the Houthis are using this mechanism to impose a new reality regarding public employees' salaries, which is based on the lists they provide, many of which include their own members who have replaced public employees, whether displaced, internally displaced, or those who have stopped working due to the dire living conditions.

The Third Chapter: Military and Security Dynamics in Yemen

This tracks the developments in the military and security situation and analyzes the future trends of these interactions. It focuses on the impact of international events and transformations on military and security interactions in the Yemeni context, particularly in the Red Sea. The chapter examines various rounds of fighting between the legitimate government forces and the Houthi militia during 2024 and concludes that — despite numerous ceasefire violations — the year saw relative stability in the frontlines. The Houthis continued using drones, missiles and expanding their military tunnel network. The chapter also analyzes the competition between the Yemeni army and the Houthi militia in building capabilities and enhancing training in various fields. It highlights the stalled government efforts to reintegrate the armed forces of different components within the legitimate government framework, where differences still exist within the government forces, most of which are independent of the Ministry of Defense's command.

The chapter also notes the rise of the Popular Resistance, through the Higher Council for Popular Resistance, which provided logistical support to government forces and the resistance in Marib and Taiz. This return indicated early popular preparedness to support government forces in anticipation of any potential new armed conflict with the Houthi militia. Additionally, the chapter addresses the security situation in 2024, analyzing several military-related security concerns raised by the Houthis in the Red Sea, the Gulf of Aden, and illicit activities by other violent actors, such as transnational organized crime, local crime, and terrorist organizations, especially Ansar al-Sharia.

The Fourth Chapter: Humanitarian and Human Rights Conditions in Yemen

This focuses on addressing and reviewing the humanitarian situation and human rights amidst the ongoing humanitarian crisis in Yemen, which is considered one of the worst humanitarian crises in the world. The chapter documents the humanitarian and human rights situation across several areas, painting a grim picture of the humanitarian Yemen's landscape. In 2024, according to United Nations estimates, the humanitarian crisis in Yemen remains one of the worst in the world. More than 80% of the population lives below the poverty line, and over half the population (18.2 million people) still requires humanitarian aid and protection services. Nearly 17.6 million people suffer from severe food insecurity, including approximately 2.7 million pregnant and lactating women, and well as about five million children under the age of five who suffer from acute malnutrition. Furthermore, 39% of school-age children are not attending school, and nearly 90% of the population lacks access to electricity provided by the government.

About 49% of the population does not have enough access to water, and there are still 4.5 million internally displaced persons (about 14% of the population), with 31% of displaced families having been displaced multiple times, living in camps or rented homes outside of them.

The chapter also examines the state of human rights in 2024. As the conflict continued in various forms, the parties to the conflict continued to commit serious violations of international humanitarian law and international human rights law, including arbitrary detention, enforced disappearance, torture and medical neglect. Journalists, human rights activists and civil-society activists faced harassment and ill-treatment, such as prolonged detention without trial or the issuance of arbitrary sentences against them. The chapter concludes that most of these violations were carried out by the Houthi group.

The Fifth Chapter: The State of Education and Scientific Research in Yemen

This Addresses the state of education in Yemen across its various stages — primary, secondary, university and graduate studies. It also tracks developments in the field of scientific research, which witnessed a noticeable decline in 2024. The chapter concludes that, after more than 10 years of war, education in Yemen continues to suffer from a complete division between the Ministry of Education under the legitimate government and the Houthi-controlled Ministry of Education. In general, education faces a rapid decline at all levels and across various aspects. There are divergent educational authorities, a high dropout rate among Yemeni children and different curricula resulting from the Houthi group's alterations to the educational content to serve their extremist sectarian ideology. Furthermore, the ongoing armed conflict has led to the closure of many educational facilities or their complete or partial destruction. The war's severe repercussions on education and its outcomes have been exacerbated, and it has also affected teachers' salaries, prompting many of them to leave the profession.

The Sixth Chapter: Identity Shifts and Societal Transformations in Yemen

This chapter aims to track and analyze shifts in identity and society in 2024. It concludes that the protracted armed conflict, lasting over 10 years, has produced deep ideological trends and shifting, competing interests. It has also paved the way for the emergence of regional identities, leaving clear marks on Yemeni society. The conflict has deepened societal fragmentation and eroded the social fabric at the levels of identity, structure and internal relationship, as well as political interaction patterns. It has worsened societal problems. The Houthis have promoted their own sectarian concept of identity, which they call “the faith-based identity” and is based on the idea of divine selection and guardianship, which is incompatible with the concept of a modern state and equal citizenship.

This concept fosters a hierarchical social structure. The chapter also explores various manifestations of identity and societal shifts, particularly the resurgence of regional identities and tribal structures that transcend political organizations, such as the councils and alliances that have appeared in many governorates. Additionally, it examines the growing separatist sentiment from the Republic of Yemen, reinforced by the Southern Transitional Council (STC).

The Seventh Chapter: Public Services and Infrastructure Challenges in Yemen

This focuses on tracking developments in public service sectors (health, electricity and communications) during 2024, with a focus on the reality and challenges facing these vital sectors. This chapter discusses the public health sector witnessing significant deterioration and is in an extremely poor state due to the ongoing armed conflict and the difficult economic conditions. Many diseases and epidemics, such as cholera and other fevers, have spread, alongside an unfortunate and severe shortage of basic medical services. The state of hospitals has also worsened, with only 51% of health facilities operating at full capacity. The chapter highlights the poor condition of the medical staff, many of whom have been adversely affected. The war has led to the migration of skilled doctors seeking better living opportunities abroad, particularly to Gulf countries and Europe. Indicators show a shortage of specialized doctors in Yemen, with doctors inside Yemen struggling in harsh conditions, including irregular salaries in government hospitals, especially in Houthi-controlled areas.

The chapter also discusses a continuous deterioration in key health indicators, such as mortality rates and the spread of diseases. The decline in international funding has led to the closure of nearly 1,000 health centers, alongside a lack of immunization, nutrition and care for pregnant women.

Regarding the electricity sector, this chapter discusses the electricity crisis in Yemen, which is one of the most prominent challenges facing the country amid its ongoing war since 2014. The root cause of the electricity crisis in Yemen's governorates lies in the damage to the electrical infrastructure, its lack of mainte-

nance, which has led to the deterioration of equipment, and the recurrent fuel shortages. The chapter also addresses the power outages in high-temperature areas in Yemen, such as Aden and coastal governorates, which experienced electricity cuts for most of 2024's summer months.

It also highlights the widespread corruption in the electricity sector under the legitimate government, where energy or fuel is purchased from private companies. A key feature of corruption in this regard is the signing of energy or fuel purchase contracts with private companies without competitive bidding, as required by law. The chapter references a statement made by Prime Minister Ahmed bin Mubarak in February 2024, in which he mentioned that Yemen burns nearly two million dollars daily in the skies over Aden and that the government spent over ten billion and one trillion Yemeni riyals on electricity alone in 2023. He also pointed out that 31% of state revenues are consumed by electricity costs and that, if the amount spent had been used properly, strategic power plants would have been built.

In parallel with the corruption in the electricity sector in areas under the control of the legitimate government, the chapter also addresses corruption in areas controlled by the Houthi group. It notes that commercial power station companies have become widespread in all Houthi-controlled cities, and electricity is sold to consumers at very high prices.

The group earns huge profits from these companies through taxes imposed on them, as well as from renting state-owned infrastructure. The chapter also describes how the Houthis have taken control of these stations, turning them into a tool for revenue collection. The corruption extends beyond the takeover of stations and state infrastructure for the group's benefit, as it also involves granting exemptions to power stations owned by individuals linked to the Houthis, allowing them to bypass regulations and operate generators within residential neighborhoods without adhering to safety standards.

Regarding the telecommunications sector, the chapter discusses the reality of this sector, including the disruption of infrastructure and the economic impacts that led to a shortage of resources and difficulties in providing telecommunications services consistently. It focuses on analyzing the power struggle over telecommunications companies, which is divided between Sana'a, controlled by the Houthi group, and Aden, controlled by the legitimate government.

The chapter also touches on the efforts of the legitimate government, which have so far been unsuccessful in restoring the telecommunications sector and breaking the Houthi group's control over this strategic sector, which generates substantial financial revenues and is considered one of the group's key financial resources, amounting to hundreds of billions.

The Eighth Chapter: Women and Children: The Most Vulnerable in Yemen's Conflict

This chapter focuses on the conditions of women and children in various areas related to these vulnerable groups in society, with a focus on analyzing the severe impacts accumulated by the ongoing armed conflict, which has lasted for more than 10 years. The greatest impact of the crisis has been on women and children. Children suffer malnutrition and by dropping out of school, while women face increasing economic, social, and health challenges. Both women and children are living in deteriorating conditions.

In education, girls face low enrollment rates, high illiteracy, and difficulty accessing universities due to high costs and a lack of safe housing. In healthcare, more than 13 million women and children lack access to health services.

Women face severe reproductive health challenges, with one death recorded every two hours due to childbirth complications. In terms of nutrition, more than 10 million children and women suffer from severe malnutrition, with rising levels of food insecurity. Additionally, over 4.5 million children are deprived of education and face such huge risks as malnutrition, early marriage, forced recruitment, begging and child labor. Women also suffer from violence, high divorce rates, spinsterhood and "tourism marriages".

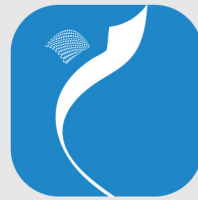
The Ninth Chapter: Climate Change and Environmental Challenges in Yemen

This chapter addresses climate and environmental changes, focusing on the impact of climate and environmental changes during 2024, analyzing the phenomena associated with them and highlighting the increasing climate challenges in Yemen. These include drought, floods, flash floods, water scarcity, desertification and changing weather patterns, as well as environmental problems caused by the lack of state intervention or flawed policies. The chapter also analyzes the interactive relationship between these challenges and their effects on the environment, agriculture, economy, public health and society. It further discusses appropriate responses to mitigate the serious impacts of these changes and enhance adaptation capacity.

The Tenth Chapter: Media and Cultural Landscapes in Yemen's Ongoing Conflict

This chapter explores the media and cultural landscape in 2024, examining the shifts in the media scene and reviewing the media landscape in terms of visual, audio and written media for both sides of the conflict in Yemen: the internationally recognized legitimate government and the Houthi insurgent group. This chapter also investigates and analyzes the most prominent digital media campaigns used by both sides to mobilize public opinion. The chapter delves into the media battle between the legitimate government and the Houthi group, focusing on the main narratives employed by each side's media outlets and their counter-narratives in response to the other side. Additionally, the chapter covers cultural, artistic and intellectual activities and other events throughout 2024 in the governorates that were controlled by the legitimate government or the Houthi group.

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