



مركز أبعاد للدراسات والبحوث  
Abaad Studies & Research Center

## Abaad Analytical Monitor

# 2025

## Annual Review

Trends in the Yemeni Scene  
and Their Implications for Decision-  
and Research Centers

## Report Themes

# Abaad Analytical Monitor - Annual Review 2025

## Trends in the Yemeni Scene and Their Implications for Decision-Makers and Research Centers

This report provides an expanded analytical reading of Yemen's monthly event-monitoring trends throughout 2025, based on Abaad Monitor's monthly files from January to December. It does not merely re-present events; it converts the news material into a structured analytical review that explains the trajectory of developments, identifies structural shifts, and assesses their implications for decision-makers, research centers, and Yemen-focused analysts.

## Executive Summary

- 1 In 2025, the crisis shifted from a narrow focus on the Houthis to a broader crisis of the state itself, exposing weaknesses within the internationally recognized authority and the multiplication of decision-making centers.
- 2 The Red Sea and Bab al-Mandab became a strategic international file, no longer only a military extension of the Yemeni conflict.
- 3 U.S. strikes against the Houthis demonstrated the limits of standalone military deterrence: they did not end the Houthi threat or produce a political settlement.
- 4 The economy became the government's central challenge, especially in salaries, public services, revenues, and market regulation.
- 5 The crises in Hadramawt and Al-Mahra became mirrors of the legitimacy crisis and revealed the danger of multiple forces, loyalties, and external influence networks.
- 6 The Southern Transitional Council moved from being a disruptive partner to an explicit challenge to the idea of the state and unified decision-making.
- 7 The Houthis continued to combine external military threats with internal repression, including targeting international organizations and UN staff.

- 8 Iran remained a central explanatory factor in arms smuggling and in the use of the Houthis to destabilize Yemen and the region.
- 9 International actors were highly present but not decisive; they managed the crisis more than they resolved it.
- 10 By the end of the year, the greatest risk was not only the continuation of war, but fragmentation and the loss of a unified state decision.

# Major Monthly Headlines of 2025

Month	Key Analytical Headline
January	The Houthis on the List of Terrorist Organizations
February	Yemen Conditions Red Sea Security on Support for Its Sovereignty
March	U.S. Forces Launch Strikes Against the Houthis
April	U.S. Strikes Against the Houthis: Containment or Re-legitimization?
May	A New Government, Rising Hardship, and Division on Unity Day
June	Yemen's Economy: The Government's Most Important Challenge
July	Iran Continues to Invest in the Houthis; the Government Pledges to Control Markets
August	Yemen and the United States: Enhancing Efforts Against Arms and Drug Smuggling
September	The President Calls for an International Coalition Against the Houthis; His Deputy Hints at Secession
October	The Houthis Accuse UN Agencies of Espionage and Launch an Abduction Campaign
November	Red Wave Exercises, the Hadramawt Crisis, and Mass Death Sentences in Sana'a
December	The UAE Withdrawal from Yemen

The year's trajectory moved from pressure on the Houthis and the Red Sea in the first quarter, to the economic crisis in mid-year, and then to the legitimacy crisis in Hadramawt and Al-Mahra in the final quarter.

## First: The Overall Political Trend

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2025 showed that Yemen's political track remained dominated by continuous UN and international activity, but that activity was insufficient to produce a comprehensive settlement. The UN envoy appeared in Sana'a, Muscat, Riyadh, Abu Dhabi, and Aden, while numerous international positions reiterated support for Yemen's unity and sovereignty. Yet none of this turned into a decisive political breakthrough.

### A stalled settlement and continued crisis management

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The political process remained largely within the boundaries of crisis management and de-escalation, rather than final settlement-making. This was reflected in continued references to the roadmap, the three references, and negotiation tracks, while there was no concrete progress on arms, state institutions, power-sharing, or detainees.

### The rise of the "restoring the state" narrative

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From January onward, anti-Houthi forces emphasized the need to capitalize on international shifts and support political and military efforts to end the coup. Over the year, the language of restoring the state became the central discourse of the recognized authority, especially as unilateral actions in the eastern governorates escalated.

### The Presidential Leadership Council crisis

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The PLC's crisis peaked at the end of the year, when President Rashad al-Alimi's decisions, the positions of some council members, the STC's escalation, and the Saudi-UAE dimension all intersected. This revealed that the PLC was no longer simply a consensus formula for managing the transition; it became a test arena for the unity of sovereign decision-making.

### Yemeni unity against fragmentation projects

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Warnings of secession and fragmentation recurred throughout the year, from the Unity Day debate in May to September statements and the December escalation in Hadramawt and Al-Mahra. By year-end, defending Yemen's unity, sovereignty, and territorial integrity had

become a shared theme across government, parliament, political parties, Saudi Arabia, the EU, China, Egypt, Russia, the UK, and Qatar.

**Political implication:** Yemen's crisis in 2025 was no longer only about ending the Houthi coup. It became a test of whether the recognized authority can reconstitute a unified national center capable of preventing parallel authorities and decisions.

## Second: The Economic Trend

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The monitoring showed that the economy was not a background issue, but a direct factor in the government's legitimacy and the stability of liberated areas. In June, the economy emerged as the government's most important challenge, followed by recurring issues of salaries, electricity, fuel, market regulation, revenues, government accounts, and financial reforms.

### The economy as a test of legitimacy

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Public trust in government institutions declined whenever salaries were delayed or services failed. In a context of multiple armed forces and local authorities, economic weakness gave unofficial actors an opportunity to present themselves as alternatives or to channel public frustration against the government.

### Salaries and services as sources of social tension

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Throughout the year, employees, teachers, diplomats, and soldiers repeatedly demanded unpaid salaries. Protests also surfaced over electricity, fuel, illegal levies, and public services. These are not merely service-delivery issues; they affect the cohesion of the internal front and the government's minimum social legitimacy.

### Financial reforms between necessity and risk

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Measures such as closing government accounts in commercial banks and transferring balances to the Central Bank appeared as part of efforts to unify public finance. Yet the success of these measures requires broad political cover and executive capacity, otherwise reform itself can become another arena for conflict among power centers.

### External support as temporary rescue

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Saudi and international support for economic reforms recurred, alongside development agreements. However, the year showed that external support cannot substitute for internal reforms in revenue collection, spending control, salary payment, and service delivery.

**Economic implication:** In 2025, the economy moved from being a service file to a decisive factor in political and social stability. Any state-restoration strategy will fail if salaries, services, and revenues are not treated as national security priorities.

## Third: The Military and Security Trend

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The military and security file remained highly present, but its center of gravity changed from month to month. In the first quarter, the monitoring focused on the Houthis, the Red Sea, and U.S. strikes. In mid-year, smuggling, arms, and drugs became more prominent. In the final quarter, the center of tension shifted to Hadramawt, Al-Mahra, and the unity of military decision-making within the anti-Houthi camp.

### The Houthis: a persistent threat despite the strikes

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Despite U.S. strikes in March and April, the Houthis remained a military and security actor capable of threatening the Red Sea, mobilizing fronts, and operating a system of internal coercion. This confirms that external military strikes are insufficient to weaken the group without a comprehensive Yemeni strategy.

### Smuggling, arms, and drugs

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Yemeni-U.S. cooperation against arms and drug smuggling emerged as a central file. This reflects growing recognition that the war is not fought only on frontlines, but also through cross-border smuggling, finance, logistics, and regional networks. This file is directly tied to Iran's role and the Houthis' ability to replenish military capabilities.

### Hadramawt and Al-Mahra: from relative stability to open tension

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In the final quarter, the eastern governorates became the center of crisis. Mobilizations escalated in Hadramawt, local and tribal demands for the exit of outside forces increased, and Saudi Arabia intervened to calm the situation. By December, the crisis had become a genuine test of unified military and security decision-making and of the state idea itself.

### Multiple armed forces weaken the state

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The end of the year revealed that armed formations outside formal institutions threaten not only local security, but also the legal and political center of the state. The issue is no longer

only who keeps local order; it is who owns the military decision, who controls territory, and who defines Yemen's relationship with its regional environment.

**Security implication:** Restoring the state in Yemen remains impossible without consolidating arms under state authority, rebuilding unified military and security decision-making, and linking any political settlement to clear security arrangements.

## Fourth: The Humanitarian and Rights

### Trend

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The year showed that the humanitarian file is not merely about needs; it is also about protection, funding, access, and rights. This dimension escalated particularly when the Houthis accused UN agencies of espionage and launched abduction campaigns against UN and humanitarian staff.

### Houthi escalation against international organizations

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October was the clearest month in this trend. The Houthis accused UN agencies of espionage and launched arrests, making the humanitarian environment more dangerous. This policy threatens not only organizations, but also the millions of people who depend on aid.

### Food security as a dangerous indicator

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Reports throughout the year continued to point to severe food insecurity amid weak funding, economic disruption, and access restrictions. Hunger in Yemen is not only the result of food shortages; it is also produced by war, poor governance, and institutional division.

### Rights and freedoms under pressure

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Cases involving journalists, abductees, sham trials, and mass death sentences in Sana'a recurred. This indicates that the rights crisis in Houthi-controlled areas is not incidental; it is part of a governance system based on control, deterrence, and fear.

### Migration and displacement as reflections of a compound crisis

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Irregular migration and displacement appeared as outcomes of intertwined security, economic, and humanitarian pressures. At year-end, the government called for addressing

the root causes of migration, implicitly recognizing that this issue has become both a humanitarian and security challenge.

**Humanitarian implication:** The humanitarian file in 2025 revealed the fragility of the aid environment, the politicization of needs, and the need to link assistance to protection, access, and accountability guarantees.

# Fifth: Most Prominent Issues During the Year

## The Houthis and terrorist designation

The year began with the designation and expectations of financial and political pressure, but the year showed that designation alone is not enough without enforcement tools.

## The Red Sea and Bab al-Mandab

The maritime file became an international security issue linked to trade, energy, and Yemeni sovereignty.

## The economic crisis and salaries

The economy became one of the most influential files affecting government legitimacy and social cohesion.

## Hadramawt and Al-Mahra

The eastern governorates became a test of the state, unified decision-making, and the Saudi-UAE role in Yemen.

## The STC and secession

The STC's role escalated from a problematic partner to a direct challenge to the unity of decision and the state idea.

## The UN between mediation and targeting

The UN appeared as a political mediator and humanitarian actor, while also being directly targeted by the Houthis.

## Sixth: Most Influential Actors

Actor	Role During the Year	Implication
Yemeni government and PLC	Central in political and economic monitoring, but weakened by internal divergences and decision-making crises.	State restoration begins with unifying the center of legitimacy.
Houthi movement	Maritime and military threat, internal repression, and targeting of organizations.	The group remained the main spoiler despite pressure.
Southern Transitional Council	Political and military escalation in the south and east, and repeated secessionist discourse.	One of the major challenges to unified decision-making.
Saudi Arabia	Support for legitimacy and unity, intervention to reduce escalation in Hadramawt and Al-Mahra.	A central regional balancing actor.
United Arab Emirates	Prominent at year-end through the withdrawal file and links to the STC.	The Saudi-UAE divergence became part of the crisis calculation.
United States	Strikes against the Houthis, anti-smuggling cooperation, and support for the government.	Strong security presence without political resolution.
United Nations	Political mediation and humanitarian action, while staff faced abduction.	Important but limited role in an unsafe environment.

## Seventh: Rising and Declining Trends

### Rising Trends

- The discourse of restoring the state and disarming militias.
- The Red Sea and Bab al-Mandab in international calculations.
- The crisis in the eastern governorates.
- Pressure on the Houthis through designation, strikes, and anti-smuggling efforts.
- The economic crisis and salaries as political factors.
- Growing international warnings against fragmentation and unilateral actions.

### Declining Trends

- Momentum for a comprehensive political settlement.
- Confidence in the PLC's ability to function as a single bloc.
- The effectiveness of military strikes alone in deterring the Houthis.
- The UN's ability to operate safely in Houthi-controlled areas.
- The humanitarian file as an independent priority beyond politicization.

## Eighth: Strategic Impact Matrix for 2025

Issue	Impact Level	Implication	Recommendation
Houthis and terrorist designation	High	Political pressure without military resolution	Link the designation to financial and security measures
Red Sea	Very high	Yemen at the heart of global trade security	Build a national strategy for maritime security
Economic crisis	High	Threatens legitimacy and stability	Prioritize salaries, revenues, and services
Hadramawt and Al-Mahra	Very high	Reveals state crisis and multiple power centers	Withdraw outside forces and empower local institutions
Southern Transitional Council	High	Threatens unified political and military decision-making	Recalibrate partnership within state references
Detainees and humanitarian work	High	Threatens aid work and deepens Houthi isolation	Internationalize the file and link it to rights and sanctions
Iranian role	High	Continued use of the Houthis to destabilize Yemen	Restrict smuggling and financing networks
UAE withdrawal	Very high	A turning point in coalition and legitimacy balances	Manage the withdrawal within political and security guarantees

## Ninth: Annual Assessment

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2025 shows that Yemen moved from a phase focused on pressuring the Houthis to a broader and more complex phase centered on a fundamental question: who protects the Yemeni state from fragmentation? In the first quarter, the terrorist designation and U.S. strikes seemed capable of opening a window to weaken the Houthis. Later events showed that the group could endure, and that the lack of unity among anti-Houthi forces reduced the impact of external pressure.

By mid-year, the economic crisis had become the government's most important challenge. By the final quarter, the crisis moved from confronting the Houthis to a deep internal crisis within the structure of legitimacy, especially in Hadramawt, Al-Mahra, and Aden.

The greatest risk revealed by 2025 is the convergence of three factors: an armed and regionally supported Houthi movement, a divided recognized authority burdened by economic crisis, and local/regional projects that threaten unified state decision-making.

If these factors are not addressed together, 2026 may witness deeper fragmentation, even if international efforts continue under the banner of peace. State restoration should therefore be the organizing framework for any Yemeni, regional, or international policy in the next phase.

# Tenth: Recommendations for Decision-Makers

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1. **Redefine the priority of the phase:** The priority should not be reduced to confronting the Houthis; it should be restoring the state as the umbrella for confronting the coup, controlling arms, and ending parallel formations.
2. **Unify the Presidential Leadership Council's decision-making:** No political or military track can succeed while the center of legitimacy remains divided.
3. **Treat Hadramawt and Al-Mahra as sovereign files:** Support state authority, withdraw outside forces, and prevent unilateral actions.
4. **Make the economy a national security priority:** Salaries, currency stability, electricity, fuel, and revenues are elements of stability or collapse.
5. **Build a Yemeni Red Sea strategy:** Link Yemeni sovereignty to maritime security and international trade.
6. **Link any settlement to disarmament:** A settlement that does not address Houthi weapons and armed formations will remain superficial.
7. **Internationalize the detainees and humanitarian staff file:** It should become a sustained international pressure file, not merely a subject of statements.
8. **Rebuild the relationship with the coalition:** The framework should protect Yemeni sovereignty and prevent the multiplication of influence centers inside the country.

# Eleventh: Research Opportunities for Think Tanks

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1. Yemen in 2025: From Houthi Designation to the Crisis of the State.
2. The Red Sea and Bab al-Mandab: The Limits of Military Deterrence and the Priority of Yemeni Sovereignty.
3. The Presidential Leadership Council: From Consensus Formula to Decision-Making Crisis.
4. Hadramawt and Al-Mahra in the Equation of Regional Influence.
5. The Yemeni Economy as a Political and Security Decisive Factor.
6. Houthi Abductions of UN Staff: Implications and International Options.
7. The Southern Transitional Council: Partnership, Secession, and the Crisis of the State.
8. Saudi Arabia and the UAE in Yemen: From Coalition to Divergent Agendas.
9. U.S. Strikes Against the Houthis: Deterrence or Managed Escalation?
10. The Future of Political Settlement Under Multiple Arms and Decision Centers.

# Final Conclusion

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The annual review of 2025 confirms that Yemen has entered a more complex phase than in previous years. The country is not facing the Houthi coup alone; it is also facing the erosion of legitimacy from within, multiple decision-making centers, economic exposure, divergent regional agendas, and escalating local crises in the eastern governorates.

Although the year saw extensive international activity, military and political pressure on the Houthis, and declared support for the government and Yemen's unity, none of this produced a decisive transformation because there was no unified national center capable of converting external support into organized internal power.

**The most important lesson of 2025:** restoring the state must be the central title of any Yemeni, regional, or international policy in 2026. Without a unified state decision, clear references, control over arms, salary payments, service delivery, and protected sovereignty, all other efforts will remain temporary management of an open crisis.

Sources: Abaad Monitor monthly reports for 2025, January through December.