



**Abaad Studies & Research Center**

# Annual Report 2025 on International Think Tank Cover

An Analytical Reading of International Attention Trends  
and Their Implications for Decision-Makers and Research Centers

YEMEN

HORN OF AFRICA

2025

# **Annual Report 2025 on International Think Tank Coverage of**

An Analytical Reading of International Attention Trends and Their Implications for Decision-Makers and Research Centers

## **Methodology**

The report is based on twelve monthly files published by Abaad Studies and Research Center in 2025 as part of the “Abaad Translations” series.

The files were read through a thematic coding methodology that tracked four elements: dominant issues, the most visible actors, the geographic framing of the analysis, and the type of conclusions or recommendations advanced in the translated international materials.

The report does not claim to provide exhaustive statistics on everything written internationally about Yemen. Rather, it offers a structured analytical reading of a continuous monthly sample that reveals patterns of coverage and major shifts in international attention.

## **Introduction**

This report provides an annual analytical reading of how international think tanks, media institutions, and policy-oriented research platforms addressed Yemen during 2025. It is based on twelve monthly files published by Abaad Studies and Research Center as part of its “Abaad Translations” series.

The purpose of this report is not merely to summarize the translated materials, but to extract the major trends that shaped how international research institutions viewed Yemen throughout the year, identify the most prominent issues, actors, and shifts, and assess how these developments affected Yemen’s place within regional and international calculations.

The 2025 monitoring shows that Yemen is no longer viewed internationally as merely a local civil-war arena. Rather, it has become a strategic node intertwined with Red Sea security, the Iran-Israel conflict, Saudi-Emirati competition, global trade security, expanding Russian and Chinese influence, and the future of the Yemeni state itself.

## **Executive Summary**

International think tank coverage in 2025 shows that Yemen shifted from being framed primarily as a humanitarian and political file linked to civil war to being treated as an international security issue directly connected to freedom of navigation, global supply chains, regional deterrence, and the role of Iran and its proxies in the Middle East.

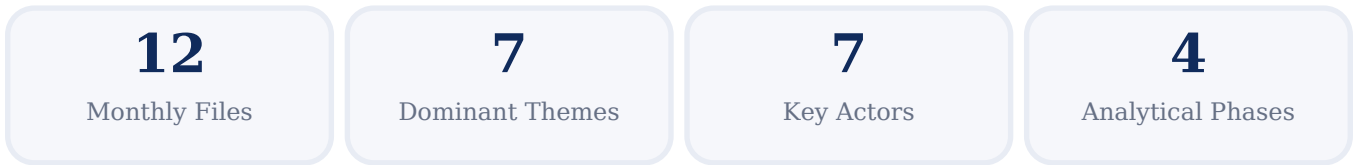
At the beginning of the year, international attention focused heavily on the Houthi threat to navigation in the Red Sea, as well as U.S., British, and Israeli strikes against Houthi positions. By March and April, coverage concentrated on the impact of U.S. strikes, the Houthis' capacity to produce weapons, and the extent of their dependence on Iran.

By mid-year, the scope of attention widened to include cooperation between the Houthis and Somali terrorist organizations, the growth of the Houthi missile arsenal, the role of China and Russia in the Red Sea, and the smuggling of dual-use components. Yemen was increasingly analyzed within a security map extending from Bab al-Mandab to the Horn of Africa, and from the Gulf to East Asia.

In the final quarter, attention shifted toward two parallel questions: first, how to cut the Iranian supply artery to the Houthis and neutralize their threat in the Red Sea; and second, whether Yemen had entered a new phase of internal fragmentation, particularly amid the escalation of the southern question, Hadramout, Al-Mahra, and Saudi-Emirati rivalry.

In this sense, Yemen was no longer treated as an isolated domestic issue in 2025, but as a point of intersection between Red Sea security, axis politics, global competition, and the internal crisis of the Yemeni state.

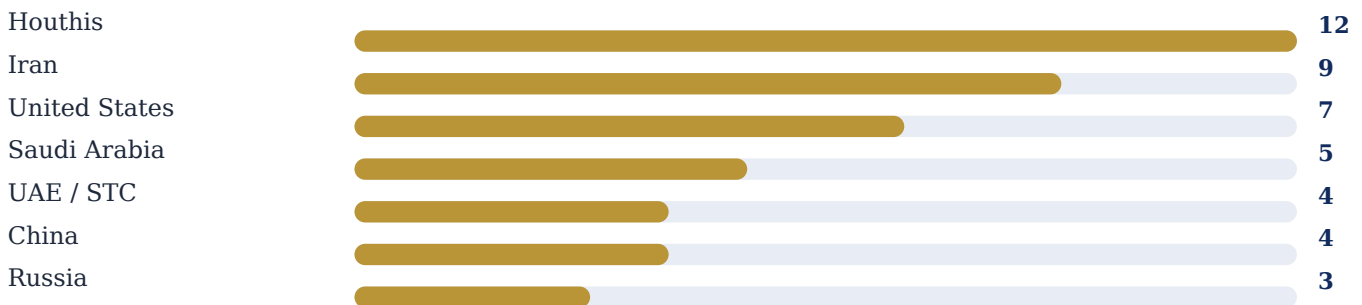
# Infographic Snapshot



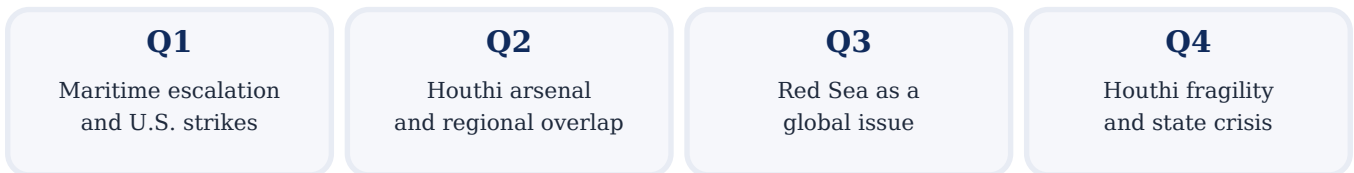
## Theme frequency across the files



## Most discussed actors



## Quarterly shift of focus



The metrics below are based on thematic coding of the 12 monthly files.

## I. The Map of International Attention to Yemen in 2025

1) The Houthis as a regional actor, not merely a local group: the defining feature of 2025 coverage is that the Houthis were no longer presented merely as an internal Yemeni party. Instead, they were increasingly portrayed as a regional arm capable of affecting Israel, the Red Sea, international trade, and the calculations of both Washington and Tehran. Coverage focused heavily on the Houthi missile and drone arsenal and on the supply networks that enable the group to rearm and adapt.

2) The Red Sea and Bab al-Mandab: the Red Sea was the most prominent issue in international coverage of Yemen during 2025. It was no longer treated simply as a theater for Houthi operations, but as a testing ground for the success or failure of Western deterrence and as an indicator of Iran's and its proxies' ability to disrupt global trade, affect the Suez Canal, maritime insurance, supply chains, and even digital infrastructure linked to submarine cables.

3) Iran: the relationship between the Houthis and Iran was one of the most constant themes across the files. Yet the tone shifted over the year. Early coverage focused on Iran as the principal supplier of weapons, technologies, and components. Later coverage increasingly described Iran as an exhausted patron restructuring the Axis of Resistance and relying on more flexible smuggling and indirect financing channels.

4) Russia and China: the 2025 files showed growing interest in the role of Russia and China in Yemen and the Red Sea. Russia was discussed as a power seeking a foothold in the equation of a divided Yemeni state, while China appeared through the lens of dual-use components, maritime positioning, and a pragmatic approach to Red Sea instability.

## **II. Annual Analysis by Phase**

Phase One: January–April. The first months of 2025 were marked by intense international focus on U.S. escalation against the Houthis and on whether airstrikes could deter the group or destroy its capabilities. The dominant conclusion, however, was that strikes alone are not a decisive solution unless linked to a broader strategy involving supply interdiction, financial disruption, and the unification of anti-Houthi Yemeni actors.

Phase Two: May–August. This phase witnessed an expansion in the angles of coverage. Yemen was no longer analyzed only through the lens of the Houthis and the United States. Russia, China, al-Shabaab, smuggling networks, and maritime corridors all entered the analysis. Yemen thus appeared in international writing as an open regional node where arms flows, armed groups, and great-power competition intersect.

Phase Three: September–October. The focus on the Red Sea reached its peak in this phase. Discussion expanded to submarine cables, Bab al-Mandab traffic, plans to neutralize the Houthi threat, and efforts to cut Iranian supply lines. The Red Sea became a structural issue in the international system, affecting trade, data, deterrence, Washington's credibility, and the calculations of China, Russia, and Iran.

Phase Four: November–December. The end of the year witnessed an important analytical shift. While the Houthis and the Red Sea remained central, think tanks increasingly focused on Houthi fragility, changing Saudi calculations, the southern crisis, the Southern Transitional Council’s moves in Hadramout and Al-Mahra, and the risks these dynamics pose to the unity of the anti-Houthi camp and the future of the Yemeni state.

### **III. The Most Prominent Issues in 2025 Coverage**

**Smuggling and supply networks:** smuggling emerged as one of the most repeated themes, whether through the Red Sea, Oman, Yemeni ports, Chinese components, or Iranian shipments. Cutting supply lines was treated as an essential condition for reducing Houthi capabilities.

**Missiles and drones:** coverage repeatedly focused on the Houthis’ missile and drone capabilities, with two parallel trends—one viewing them as a direct result of Iranian support, and another noting the growth of limited local capacity in assembly and manufacturing.

**The Red Sea and international trade:** this file remained present throughout the year and evolved from discussion of attacks on ships to broader analysis of their impact on the Suez Canal, maritime insurance, inflation, submarine cables, and supply chains.

**Iran and the Axis of Resistance:** the analyses viewed the Houthis as part of a wider equation connected to the Axis of Resistance, while end-of-year coverage showed that this axis was adapting rather than collapsing, moving toward more decentralized and gray-economy-based patterns.

**The South and Saudi–Emirati competition:** the southern file emerged strongly in the latter part of the year, especially after the Southern Transitional Council’s moves in Hadramout and Al-Mahra, turning Saudi–Emirati competition into a factor that threatens to reignite the anti-Houthi internal front.

### **IV. The Most Discussed Actors**

**The Houthis:** the most prominent actor across nearly all files. They were discussed as an armed movement, a de facto authority, an Iranian arm, a maritime threat, a propaganda actor, and a group facing internal fragility.

**Iran:** Iran appeared as the sponsor, financier, and enabler, but also as an actor under pressure and restructuring its tools.

**The United States:** the United States appeared as the striking power in the Red Sea, but also as an actor lacking a coherent strategy between strikes, deterrence, negotiation, and supply interdiction.

Saudi Arabia: Saudi Arabia appeared at the beginning of the year as a cautious actor, and by the end as a power possibly recalibrating its position toward the Houthis and as a key party in the Hadramout and Al-Mahra crisis.

The UAE and the Southern Transitional Council: their presence increased in the second half and at the end of the year, especially in relation to the south, Bab al-Mandab, relations with Israel, Hadramout, and Al-Mahra.

Russia and China: both appeared as powers investing in the strategic vacuum and influencing the Red Sea through politics, armaments, diplomatic cover, or dual-use components.

## **V. Implications for Decision-Makers**

1) The Houthis cannot be separated from the Red Sea. Any policy toward the Houthis must treat them as both an internal and external threat, because their impact extends from Yemeni territory to Bab al-Mandab, the Suez Canal, Israel, the Gulf, and international trade.

2) Military strikes alone are not enough. Most coverage converged on the view that airstrikes may temporarily weaken Houthi capabilities, but they will not end the threat unless accompanied by supply interdiction, financial disruption, the building of a unified Yemeni force, and the activation of inspection and sanctions mechanisms.

3) Division within the anti-Houthi camp is the greatest vulnerability. End-of-year coverage shows that the greatest danger to Yemen is not only the Houthis, but also the fragmentation of the forces opposing them, the escalation of Saudi-Emirati rivalry, and the Southern Transitional Council's moves in Hadramout and Al-Mahra.

4) The economy is not a secondary file. Discussions of the blue economy, ports, fisheries, submarine cables, and maritime energy show that rebuilding Yemen cannot be limited to a political settlement; it requires a long-term maritime economic vision.

5) Yemen has become part of international competition. A narrow Yemen-only reading is no longer sufficient, because China, Russia, Iran, Israel, the United States, Saudi Arabia, and the UAE are all present in the scene, and each actor views Yemen through the lens of its own strategic interests.

## **VI. Recommendations for Abaad Center and Decision-Makers**

Build a specialized Red Sea monitoring unit: Abaad Center should establish a permanent research track on the Red Sea and Bab al-Mandab, monitoring navigation, submarine cables, insurance, ports, military movements, and the role of major powers.

Issue a monthly Houthi threat index: the index could include maritime attacks, missiles, drones, smuggling shipments, Iranian movements, propaganda discourse, and levels of internal repression.

Monitor Saudi-Emirati competition in Yemen: end-of-year developments proved that this competition has become a central factor in the future of legitimacy and decision-making unity. A regular file should therefore be dedicated to analyzing its impact on Hadramout, Al-Mahra, Aden, Shabwa, and the western coast.

Track the role of China and Russia: monitoring should not be limited to the Iranian role. International reports increasingly link Yemen to Chinese and Russian expansion in the Red Sea, whether through weapons, components, political cover, or naval behavior.

Develop a database of international research centers: a monthly database should include the center's name, country, author, issue, actors mentioned, overall trend, recommendations, and potential biases.

Turn monitoring into policy papers: instead of limiting the work to translating international materials, Abaad could issue short papers under the title: "What does this coverage mean for the Yemeni decision-maker?" This would convert translations into instruments of influence.

## **VII. Gaps and Potential Biases in International Coverage**

Security-heavy framing: a large share of the coverage read Yemen primarily through hard-security lenses—navigation, missiles, smuggling, and deterrence—at the expense of local social and institutional dimensions.

Limited representation of Yemeni agency: many analyses approached Yemen through regional and international actors, while local Yemeni actors often appeared as arenas shaped by others rather than as producers of political outcomes.

Inflation or simplification: some writings overstated Houthi capabilities to the point of portraying the group as nearly undeterrable, while others assumed that strikes or sanctions alone would be sufficient.

Weak economic-social depth: although the blue economy, ports, and submarine cables entered the discussion, Yemen's domestic economy, livelihoods, and state service capacity remained less visible than military and geopolitical themes.

## Monthly Summary of Coverage Trends

This appendix captures the dominant analytical angle in each monthly file.

<b>January</b>	The year opened with Yemen's shift from a domestic war file to a maritime-security issue, with attention to Iranian spy ships, the Houthis, and the placement of Yemen at
<b>February</b>	Coverage highlighted arms smuggling through the Red Sea, the effectiveness of interdiction efforts, and the impact of designating the Houthis on the international
<b>March</b>	Think tanks assessed the new U.S. strikes, the limits of aerial deterrence, and the costs of the campaign, while questioning the Houthis' ability to continue adapting.
<b>April</b>	Analysis focused on the Houthis' capacity to produce weapons, the depth of their dependence on Iran, and whether Western military action was solving the problem or
<b>May</b>	The scope widened to include Russia and its possible role in a divided Yemen, as well as renewed attention to ceasefire dynamics and Houthi rearmament.
<b>June</b>	Coverage linked the Houthis with Somali terrorist organizations, expanding the perceived threat from Yemen to the Gulf of Aden and the Horn of Africa.
<b>July</b>	The Houthi missile arsenal came into sharper focus, along with debate over whether negotiating with the group was feasible and how it interacted with other non-state
<b>August</b>	China and Russia moved to the center of analysis through dual-use component flows, maritime positioning, and a broader geopolitical reading of the Red Sea.
<b>September</b>	Submarine cables and the digital dimension of Red Sea security emerged strongly, alongside assessments of China's behavior in the maritime corridor.
<b>October</b>	Coverage crystallized around calls for a comprehensive strategy to cut Iranian supply lines and neutralize the Houthis while linking Yemen more explicitly to global trade
<b>November</b>	Think tanks discussed Houthi fragility and isolation, the possibility of changing Saudi calculations, and the role of anti-smuggling efforts and the blue economy in stability.
<b>December</b>	The focus shifted toward the restructuring of Iran's axis, the escalating southern crisis, and the STC's moves in Hadramout and Al-Mahra and their implications for the

## Final Conclusion

The annual review of international think tank coverage of Yemen in 2025 shows that Yemen has entered a new stage in international perception. It is no longer a forgotten country in a long war, but a central arena where four major files intersect: Red Sea security, the rise of the Houthis as a regional actor, the restructuring of Iran's axis, and the internal fragmentation of the Yemeni state.

The year showed that the Houthis, despite pressure and strikes, remain capable of survival and adaptation. At the same time, they face increasing fragility as a result of military strikes, internal repression, and the declining strength of Iran. The year also revealed that the greatest danger to Yemen's future does not come from the Houthis alone, but from the convergence of the Houthi threat with the division of their opponents and the rivalry among their allies.

For research centers and decision-makers, the most important lesson from 2025 is that Yemen must be read through three overlapping maps: the map of the divided Yemeni state, the map of the Red Sea and maritime corridors, and the map of regional and international conflict. Any policy that fails to bring these maps together will remain unable to understand the crisis, let alone address it.

## About Abaad



### Abaad Studies & Research Center

Abaad Studies & Research Center (Abaad) is a non-profit organization that has a license from Yemen's Social Affairs Ministry No. (436) issued on October 18 2010.

It focuses on politics, intellect, democracy, election, political parties, terrorism, freedoms as well as economic and social issues.

The Center produces research papers, situation assessments, monitoring outputs, and translations that help explain Yemeni and regional developments and provide decision-oriented knowledge for policymakers, researchers, and media professionals.

#### Center links

[abaadstudies.org](http://abaadstudies.org)

[x.com/abaadstudies](https://x.com/abaadstudies)

[t.me/abaadstudies](https://t.me/abaadstudies)

[facebook.com/AbaadStudies](https://facebook.com/AbaadStudies)

[youtube.com/@AbaadStudiesYemen](https://youtube.com/@AbaadStudiesYemen)