



Abaad Studies & Research Center

Annual Strategic Assessment of Abaad Studies 2025

Yemen between Pressure on the Houthis,
State Fragmentation, and Regional Shifts

Strategic Assessment Directed at Decision-Makers



• 2025 •

Executive Summary



Brief Introduction

The 2025 annual review of Abaad Studies shows that Yemen moved from an internal conflict file into a strategic knot where pressure on the Houthis, state fragility, and regional shifts intersect.

Five Key Insights

- 1 The Red Sea became a central gateway for reading Yemen internationally and regionally.
- 2 Pressure on the Houthis did not produce a decisive shift because the anti-Houthi camp remained fragmented.
- 3 Iran re-adapted its tools in Yemen through smuggling and indirect support.
- 4 The recognized authority faced a structural crisis: multiple centers of decision, institutional weakness, and erosion of fiscal sovereignty.
- 5 Hadramawt, Al-Mahra, and the south became a test of state unity and Gulf security.



12
Studies Published
in 2025



5
Strategic Tracks



4
Analytical Phases



3
Major Risks

Analytical Milestones During 2025



Key Insight



“ The greatest danger revealed by Abaad’s studies in 2025 is not only the survival of the Houthis, but also the simultaneous fragmentation of decision-making centers within the Yemeni state and the escalation of regional competition over Yemeni geography. ”

Track One: The Houthis and the U.S. Approach



The Shift in Approach

The redesignation of the Houthis as a terrorist organization restored a harder U.S. posture and created broader legal and institutional tools.



Limits of Impact

Washington sought to protect navigation and reinforce deterrence, but it did not produce a decisive transformation because the anti-Houthi camp remained fragmented and loyalties were divided.



Potential Repercussions

The move produced military, political, economic, and humanitarian effects that reshaped both the Yemeni and the regional landscape.




US\$620 million
U.S. assistance in 2024



10%
of global trade



30%
of world oil and gas



24.1
million people in need of assistance




80%
of the population

Track Evolution During 2025

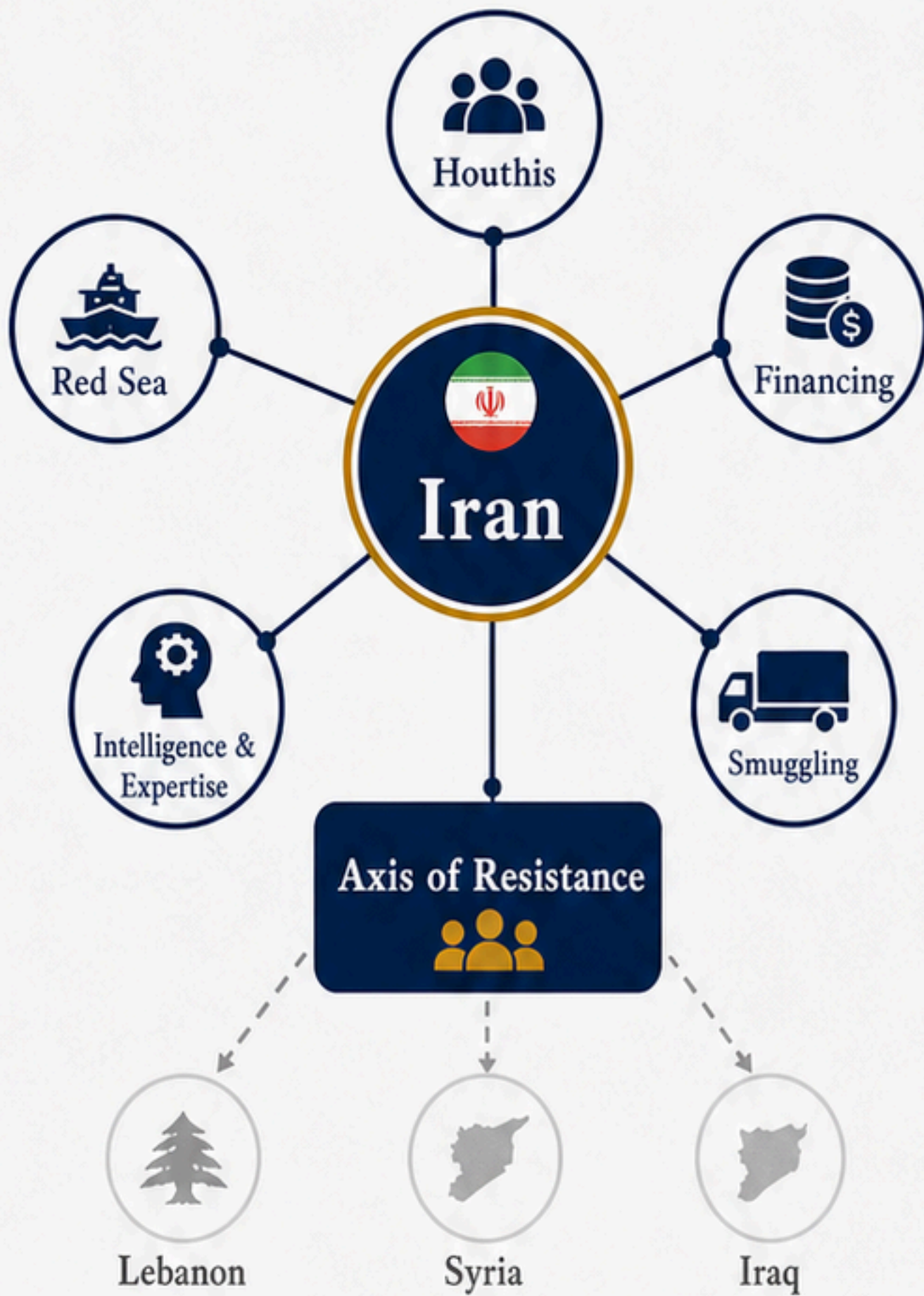


Key Insight



U.S. pressure can shake the status quo, but it does not produce a decisive shift unless it is paired with a unified Yemeni partner and a coordinated regional deterrence capability.

Track Two: Iran and the Axis of Resistance



Retreat of influence and capabilities

 <p>700 tons Seized shipment</p>	 <p>2,500 tons Major shipment</p>	 <p>3 Tracks Smuggling / Financing / Training</p>
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Repositioning

Iran did not abandon support for the Houthis. Instead, it reconfigured its tools after the retreat of some regional arms, making the Houthis a more central card in its Red Sea-related strategy.

Tools of Support

- **Smuggling:** weapons, components, and techniques across sea and land.
- **Indirect financing:** through financial and commercial networks and fronts.
- **Intelligence and expertise:** intelligence, operational planning, and technical training.

Implications for Yemen

- An increase in attacks in the Red Sea and greater threats to international navigation.
- A deepening humanitarian and economic crisis in Yemen.
- A more complicated political path amid continued external intervention.

Why It Matters

- Iranian influence in Yemen and the Red Sea persisted despite the retreat of some regional arms.
- Adaptive networks are capable of sustaining support through nonconventional means.
- The deterrence equation becomes more complicated and the long-term cost of confrontation rises.

Key Insight



With the retreat of some of Tehran’s regional arms, the Houthis acquired higher strategic value as a low-cost, high-impact instrument in the Red Sea and Yemen.



Track III: The Red Sea and Bab al-Mandab



1. Strategic Importance

- The Red Sea and Bab al-Mandab became the principal gateway through which Yemen is read internationally in 2025.
- The corridor links the Suez Canal and the Indian Ocean and carries around 12% of global trade.
- It forms a vital node for trade, energy, and digital infrastructure through subsea cables.

2. Impact of Attacks

- Higher risk levels and insurance costs.
- Rerouting of vessels and longer voyage times.
- Effects on supply chains and energy markets.
- Threats to digital infrastructure through subsea cables.

3. Trends in Coverage

- A shift from local crisis framing to international maritime security.
- Closer linkage between Yemen and global trade security.
- Expansion of deterrence and maritime alliance approaches.
- A growing intersection between maritime security and regional politics.

Affected Maritime Dimensions



Navigation
Ship safety and freedom of movement in international routes.



Insurance
Higher risk and marine insurance prices.



Supply Chains
Delays, added shipping costs, and pressure on availability.



Subsea Cables
Critical digital communications and global digital transformation.

Analytical Milestones during 2025



Dimensions of the Issue



Highlighted Insight



In 2025, Yemen was no longer read as a local crisis only, but as part of the architecture of international maritime security, where Bab al-Mandab intersects with trade, deterrence, and regional politics.



Track Four: The State, Legitimacy, and the War Economy

Structural Crisis Components

<p>1</p>  <p>Multiple Decision Centers</p> <p>Overlapping authorities and competing loyalties among de facto power centers.</p>	<p>2</p>  <p>Institutional Weakness</p> <p>A collapse of governance rules, oversight, and institutional planning.</p>	<p>3</p>  <p>Failed Force Integration</p> <p>No unified national army and multiple armed formations with divergent loyalties.</p>	<p>4</p>  <p>Halted Oil and Gas Exports</p> <p>Exports stalled and the state's main revenues were cut off.</p>	<p>5</p>  <p>Erosion of Fiscal Sovereignty</p> <p>Fragmented revenues, the absence of a unified central bank, and divided accounts.</p>
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Fragility of Legitimacy
Effective authority rests on de facto arrangements and local or tribal loyalties without a clear popular mandate, weakening the ability to enforce law and unify state institutions.

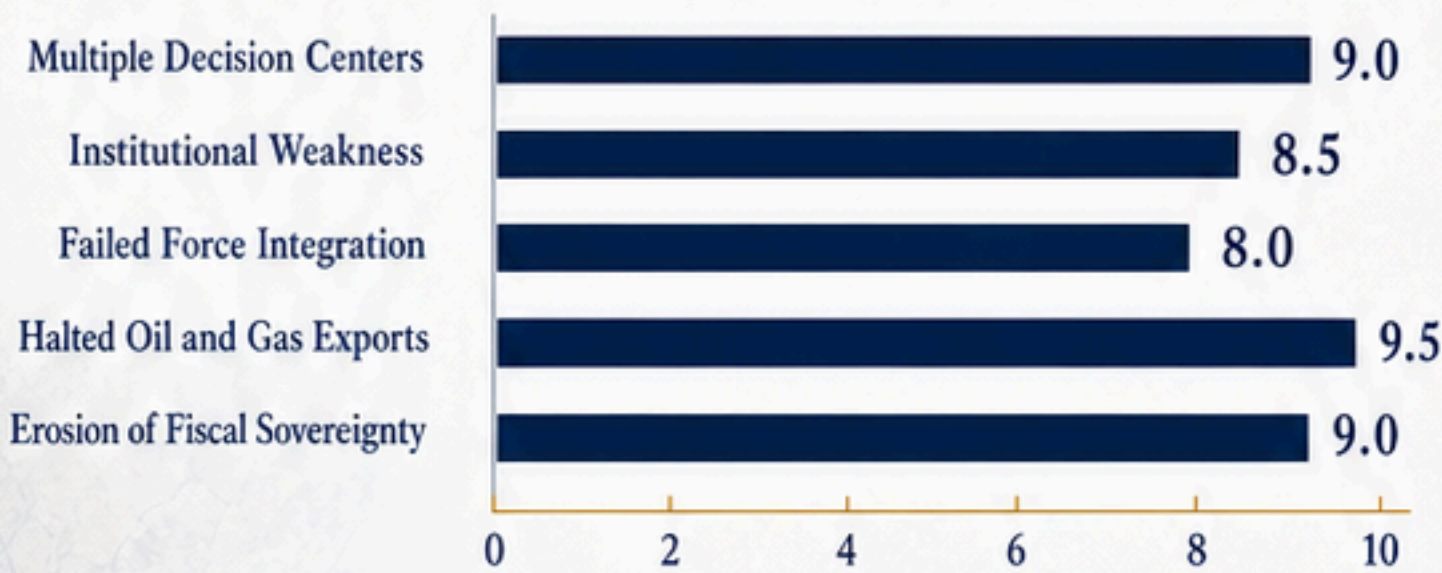


War Economy
Alternative financial and economic networks formed to fund the conflict parties, with growing reliance on levies and non-oil revenues amid the shrinkage of the formal economy.



Institutional Repercussions
Most state institutions stopped performing their core functions, while public finance and service imbalances deepened the loss of trust between citizens and the state.

Severity Assessment of Structural Crisis Components



“ The retreat of external support and the expansion of corruption and aid mismanagement eroded both financial and political legitimacy and weakened the state’s capacity to respond and perform. ”



24.1 million
in need of assistance



80%
of the population



2
competing financial authorities

Key Insight



The core of the crisis in 2025 was not only military. It was also reflected in the erosion of the state’s capacity to make decisions, enforce fiscal sovereignty, and build functioning institutions.



Track Five: Southern and Eastern Yemen

Hadramawt, Al-Mahra, and the Southern Transitional Council



Geopolitical Shift

Moves by the Southern Transitional Council and the growing competition over Hadramawt and Al-Mahra reshaped southern and eastern Yemen from a local issue into a matter of sovereignty and Gulf security.



Risks of Competition

Regional competition and intersecting local agendas deepen division, weaken state institutions in the east and south, and create security vacuums that threaten shipping lanes and regional stability.



Implications for Decision-Makers

Managing this file requires a comprehensive approach that supports state unity, restrains regional competition, and promotes a participatory local framework that safeguards both Yemeni and Gulf interests.

Dimensions of Impact on Gulf Security and Stability



1 State Unity

Any political fragmentation in the east and south undermines the project of a unified Yemeni state.



2 Saudi Security

Instability in the south and east affects the Kingdom's border and maritime security.



3 Balance with Oman

Al-Mahra and Socotra carry particular sensitivities for Oman and its regional interests.



4 Emirati Influence

The UAE reinforces its presence on the eastern coast and in the south through political, security, and service tools.

Possible Path Scenarios



Containment

A Gulf-sponsored internal arrangement reintegrates the east and south into state institutions.



Attrition

Continued competition and polarization lead to a prolonged crisis-management condition.



Fragmentation

Escalating conflict and collapsing understandings threaten the de facto breakup of the east and south.

Key Insight



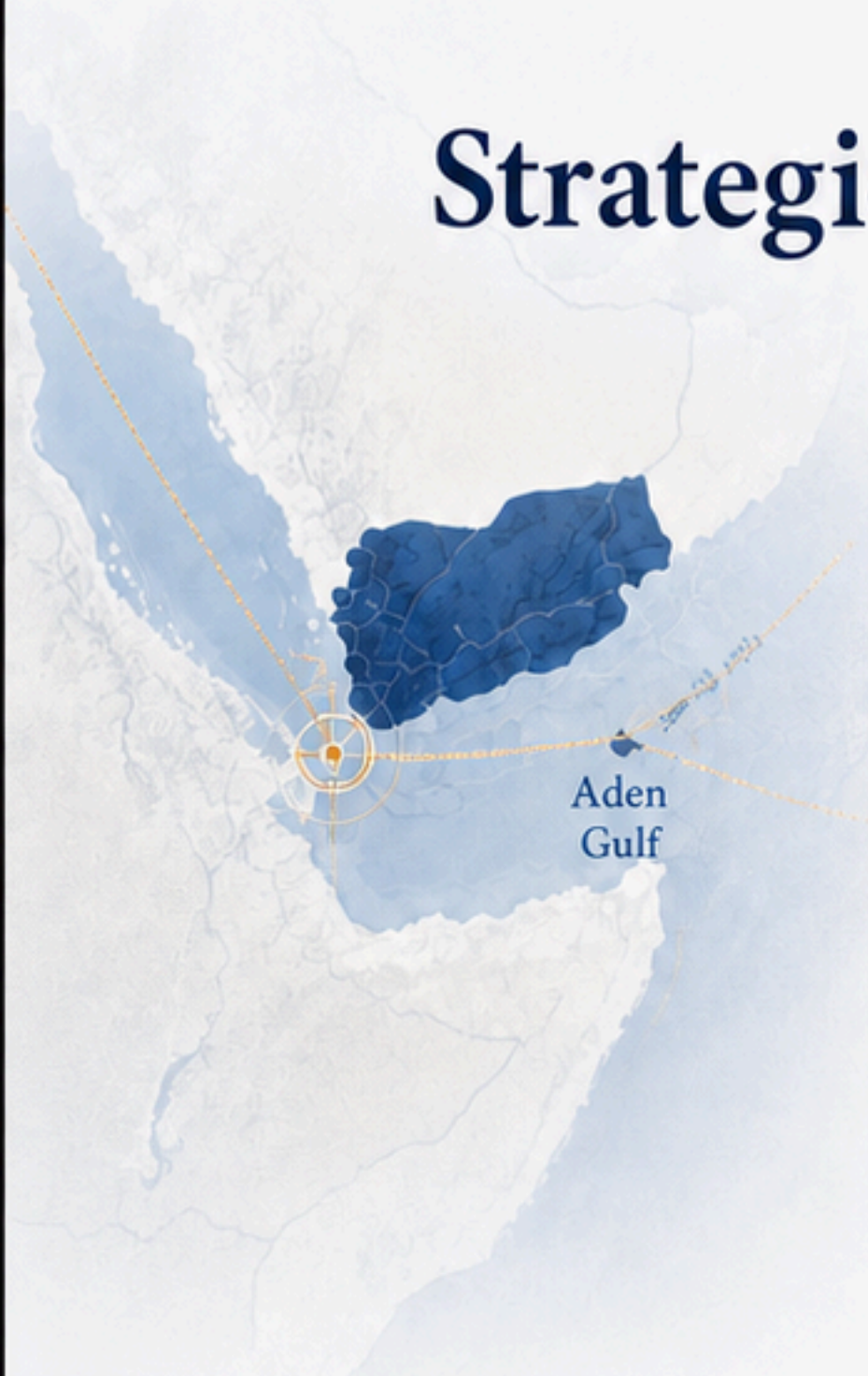
Hadramawt and Al-Mahra are no longer marginal local files; they have become a testing ground for Yemen's unity, the limits of regional influence, and Gulf security equations.






Strategic Assessment and Scenarios

Priorities for Decision-Makers in 2026

Future Scenarios (2026)

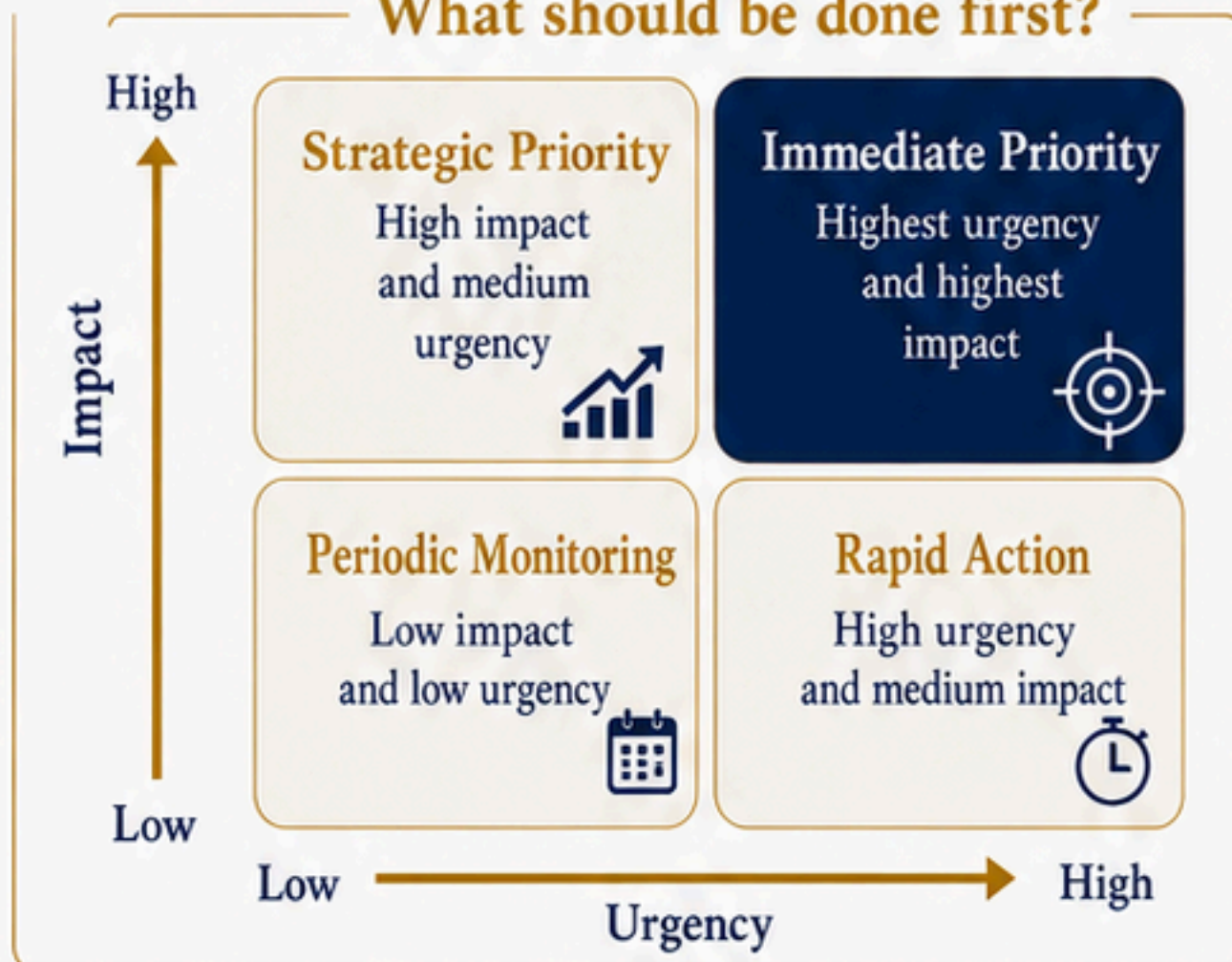


 Gradual Fragmentation	 Multi-Front Escalation	 Troubled Containment
Institutional erosion continues, fronts fragment, security control declines, and humanitarian and economic costs rise.	Confrontation expands regionally and domestically, risks to maritime lanes and energy rise, and the Houthis exploit the fragmentation of their rivals.	International and regional pressures create a degree of restraint without producing a decisive solution, while the threat remains and crises recur in close succession.

Recommendations for Decision-Makers

1. Unify sovereign decision-making. 1
2. Establish a genuine joint operations room. 2
3. Link the Red Sea file to a Yemeni national security strategy. 3
4. Treat Hadramawt and Al-Mahra as a sovereign file. 4
5. Dry up smuggling networks. 5
6. Make the economy a national security priority. 6

What should be done first?



General Conclusion

- 2026 will be a decisive year for reshaping the conflict equation in Yemen and the region.
- Any successful path requires a unified national decision center and a coherent security-economic vision.
- The available opportunity today must be used to prevent Yemen from sliding toward deeper chaos and fragmentation.



Highlighted Insight



State restoration should be the central title of any Yemeni or regional policy in 2026, because continued pressure on the Houthis without a unified national decision center will merely manage the crisis rather than resolve it.



Executive Summary

The 2025 annual harvest of Abaad Studies shows that Yemen moved from a file of internal conflict into a strategic knot where Houthi pressure, state fragility, and regional shifts intersect.

Key takeaways

- The Red Sea became a central gateway for reading Yemen in both international and regional terms.
- Pressure on the Houthis did not produce a decisive shift because the anti-Houthi camp remained fragmented.
- Iran adapted its tools in Yemen through smuggling, indirect financing, and advisory support.
- The internationally recognized government faced a structural crisis: multiple decision-making centers, institutional weakness, and erosion of fiscal sovereignty.
- Hadramawt, Al-Mahra, and southern/eastern Yemen became a direct test of state unity and Gulf security.

2025 phases

Q1 Tougher U.S. approach	Q2 Expanding threat	Q3 Red Sea centrality	Q4 State crisis
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Highlighted Insight

The greatest danger revealed by Abaad’s 2025 studies is not simply Houthi endurance, but the coincidence of that endurance with the fragmentation of sovereign decision-making inside the Yemeni state.

Track I: The Houthis and the U.S. Approach

In 2025 Washington redefined the Houthis through renewed designation and a mix of sanctions, legal instruments, military pressure, and managed de-escalation.

24.1m People in need of assistance	30% Share of world oil and gas transiting the corridor	10% Share of global trade crossing Bab al-Mandab	
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Key takeaways

- U.S. policy sought to protect navigation and restore deterrence, but it did not produce a decisive transformation in the Yemeni balance of power.
- The fragmented anti-Houthi camp and divided loyalties reduced the impact of pressure.
- The policy generated intertwined military, political, economic, and humanitarian effects.

2025 phases

1 Re-designation	2 Sanctions	3 Limited strikes	4 Containment
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Highlighted Insight

U.S. pressure can shake the status quo, but it cannot create a decisive shift unless it is paired with a unified Yemeni partner and coordinated regional deterrence.

Track II: Iran and the Axis of Resistance

Iran did not abandon support for the Houthis. Rather, it reconfigured support after the weakening of some regional arms, making the Houthis more central to its low-cost, high-impact strategy in Yemen and the Red Sea.

<p>2,500 tons Major intercepted shipment in Aden</p>	<p>700 tons Seized shipment</p>	<p>3 tracks Smuggling, finance, and training</p>	
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Key takeaways

- Support moved through three channels: smuggling of weapons and components, indirect finance, and intelligence/advisory expertise.
- This network enabled the Houthis to sustain maritime pressure and influence beyond the confines of a purely local actor.
- Continued Iranian backing deepened humanitarian and economic stress inside Yemen and complicated any political process.

Highlighted Insight

As some Iranian proxies weakened elsewhere, the Houthis gained greater strategic value as a low-cost, high-impact instrument in Yemen and the Red Sea.

Track III: The Red Sea and Bab al-Mandab

Abaad's reading of 2025 shows the Red Sea turning into the main gateway for understanding Yemen - linking local conflict to global trade, energy security, maritime insurance, and digital infrastructure.

Key takeaways

- Threats to shipping safety and marine insurance increased the cost of voyages and encouraged route diversion away from the Red Sea.
- Bab al-Mandab became more tightly connected to the Suez Canal and the Indian Ocean, making Yemen part of the architecture of global trade security.
- Subsea cables and digital infrastructure entered the maritime security equation, widening the definition of threat from ships to data flows.






Highlighted Insight

In 2025, Yemen was no longer read as a purely local crisis, but as part of the architecture of international maritime security where Bab al-Mandab intersects with trade, deterrence, and regional politics.

Track IV: The State and the Economy

The core of Yemen's crisis in 2025 was not only military; it was also institutional and economic. State authority weakened as competing centers of power, fragmented revenues, and war economy networks expanded.

Analytical intensity

Indicator	Level
Halted oil and gas exports	 9.5
Multiple decision centers	 9.0
Erosion of fiscal sovereignty	 8.8
Institutional weakness	 8.5
Failure to integrate forces	 8.0

Key takeaways

- Overlapping authorities and conflicting loyalties impaired state decision-making.
- The halt in oil and gas exports cut off the main source of state revenue.
- The economy became a matter of national security, not a merely service-oriented file.

Highlighted Insight

Restoring the state requires dealing with the economy and security as one file: salaries, revenue, currency, ports, and energy are instruments of sovereignty - or gateways to collapse.

Track V: Hadramawt, Al-Mahra, and Eastern Yemen

Events in December 2025 redefined the political geography of eastern Yemen. Hadramawt and Al-Mahra became a strategic hinge connecting state unity, Gulf security, and regional competition.

Key takeaways

- Eastern governorates risk becoming an arena of direct regional competition affecting Saudi and Omani security and the limits of Emirati influence.
- Escalation in the east could deepen splits within the anti-Houthi camp and hand the Houthis political opportunities.
- The struggle over resources, crossings, and borders could further weaken the government’s capacity to pay salaries and finance services.

2025 phases

1 Containment	2 Attrition	3 Fragmentation	4 Internationalization
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Highlighted Insight
<p>Hadramawt and Al-Mahra are no longer marginal local files; they have become a testing ground for Yemeni unity, the limits of regional influence, and Gulf security equations.</p>

The Central Equation

Abaad's 2025 studies present a composite image: the Houthis are stronger than a local faction yet weaker than a stable state; the government is internationally recognized yet institutionally and economically fragile; regional allies oppose the Houthis yet compete for influence; and the Red Sea internationalized the Yemen file without producing a unified Yemeni center of decision.

Key takeaways

- Yemen shifted from an internal war theatre to a regional-international security node linked to the Red Sea, Iran, and global trade.
- Restoring the state became a precondition for any settlement, because any peace that leaves weapons outside the state will reproduce the crisis.
- The economy has become a tool of conflict and sovereignty: whoever controls resources and crossings gains greater power to impose political realities.

Highlighted Insight

The central question for 2026 is no longer only how to pressure the Houthis, but how to build a national center of decision capable of converting pressure into state restoration.

Priority Matrix for 2026

The risks facing Yemen in 2026 combine security, economic, political, and regional dimensions, and therefore must be treated as one system rather than separate files.

Key takeaways

- Renewed maritime escalation: high risk. The Houthis may again use the Red Sea as a tool of political and economic coercion.
- Fragmentation in the east and south: high risk. Continued contestation in Hadramawt and Al-Mahra may open hard-to-contain pathways of disintegration.
- Deeper economic collapse: high risk. The stoppage of oil revenues and the expansion of the war economy threaten state survival.
- Partial understandings with the Houthis: medium risk. Any arrangement that ignores weapons and resources only postpones the next explosion.

Highlighted Insight

Risk management requires a shift from reactive responses to integrated political, security, and economic engineering that starts with unifying sovereign decision-making.

Brief Introduction

This strategic assessment addresses the annual harvest of Abaad Studies during 2025 as a compound reading of Yemen's transformations, rather than a simple thematic summary of published material.

The paper focuses on what the studies reveal about Yemen's shift into a strategic knot where Houthi threats, the retrenchment of Iran's wider axis, Red Sea security, state fragility, and competition among allies in the south and east all intersect.

- The Houthis are no longer only a local actor; they have become a regional pressure tool that affects the Red Sea, Israel, bargaining with Iran, and global supply chains.
- U.S. pressure, designation, and military strikes narrowed the Houthis' room for maneuver, but did not produce a decisive turn because the Yemeni anti-Houthi front remained weak and divided.
- Iran did not lose the Houthi card after the weakening of some proxies; instead, it raised their value and relied more heavily on smuggling and indirect financing.
- The economic crisis became an issue of national security because the war economy and the erosion of fiscal sovereignty undermined the state's capacity to impose decisions.
- Hadramawt, Al-Mahra, and the wider east/south became a direct test of Yemeni state unity, Saudi-Emirati relations, and Gulf security.

Highlighted Insight

The greatest danger in 2025 was not only Houthi survival, but its coincidence with the fragmentation of the state's decision-making center and competition among allies over Yemeni geography.

Methodology and Numerical Indicators

This paper is based on a strategic reading of eleven Abaad Studies files published in 2025. The materials were organized into five tracks: the United States and the Houthis; Iran and the Axis of Resistance; the Red Sea and Bab al-Mandab; the state and the economy; and southern and eastern Yemen.

Numerical indicators cited in the studies were extracted to feed the infographic and provide a rapid visual entry point into some of the key facts.

<p>10% Global trade through Bab al-Mandab</p>	<p>30% World oil and gas linked to the corridor</p>	<p>731 U.S. strikes assessed</p>	<p>24.1m People needing assistance</p>
<p>700 tons Seized shipment</p>	<p>2,500 tons Major shipment in Aden</p>	<p>87 Missiles toward Israel</p>	<p>80% Oil reserves in Hadramawt</p>

Highlighted Insight

These figures are analytical indicators drawn from Abaad’s studies; they are not presented as a final statistical database for the entirety of the Yemeni scene.

The Shift in the U.S. Approach

The year 2025 began with a redefinition of the Houthis in U.S. policy through redesignation as a Foreign Terrorist Organization, before later moving into a phase of military strikes and indirect understandings.

Abaad's studies indicate that Washington pursued three overlapping goals: protecting navigation, restoring deterrence, and using pressure on the Houthis as part of broader leverage on Iran.

- The designation provided the Yemeni government and the central bank with legal tools for financial pressure, but also generated humanitarian and logistical risks in Houthi-controlled areas.
- Air strikes demonstrated U.S. capacity to inflict pain, but they did not end the smuggling-and-local-assembly model that preserves Houthi capabilities.
- Managed de-escalation reflected a U.S. preference for threat management at lower cost, but it also gave the Houthis room for repositioning and propaganda.

Highlighted Insight

The U.S. approach produced partial deterrent effects, but did not settle the conflict because smuggling networks, Iranian support, and the multiplicity of Yemeni actors enabled Houthi adaptation.

Repositioning, Not Withdrawal

Abaad's studies show that the weakening of parts of the Axis of Resistance after the Gaza war and the strikes on Iran did not reduce the importance of the Houthis. On the contrary, it increased their strategic value within the Iranian system.

As Iran's cards weakened in Syria, Lebanon, and Iraq, Yemen became more important as a relatively low-cost but high-impact platform.

- Military support continued through smuggling of components and maritime and aerial technologies, preserving Houthi ability to target shipping and the regional depth.
- Indirect financing ran through oil networks, the grey economy, shell companies, and middlemen, reducing the impact of conventional sanctions.
- Knowledge and expertise support - training, guidance, and intelligence - made Houthi capacities greater than those of an isolated local group.

Highlighted Insight

The Houthis' value to Tehran stems not only from local control but from their capacity to combine maritime pressure, political symbolism, and regional disruption at relatively low operating cost.

From a Local Crisis to International Security

In Abaad's reading, the Red Sea became the principal gateway to understanding Yemen in 2025. Houthi attacks were no longer merely an extension of the internal war; they became a test of international deterrence, insurance costs, the stability of trade and energy, and Yemen's position in competition among major powers.

- Threats to ship movement and marine insurance raised voyage costs after some routes were shifted away from the Red Sea.
- The security of Bab al-Mandab became tied to the Suez Canal and the Indian Ocean, making Yemen part of the security of global commerce rather than a purely local file.
- Subsea cables and digital infrastructure entered the maritime security equation, widening the threat definition from ships to data.

Highlighted Insight

This explains why Yemen now appears in global maritime security reports and why dealing with the Yemen file has become tied as much to international economics as to the domestic conflict.

The State's Crisis from Within

Abaad's studies confirm that the core of Yemen's crisis in 2025 was not only military, but also institutional and economic. The state retreated in the face of multiple decision centers, failed force integration, the halt of oil and gas exports, divided financial institutions, and the expansion of war economy networks.

Structural elements

- Multiplicity of decision centers: overlapping powers and conflicting loyalties.
- Institutional weakness: lack of governance rules and effective oversight.
- Failure to integrate forces: multiple armed actors with divergent loyalties.
- Halted oil and gas exports: interruption of the state's main revenue source.
- Erosion of fiscal sovereignty: fragmented revenues and accounts.

Highlighted Insight

Any plan to restore the state will fail if it treats the economy as separate from security. Salaries, revenues, the currency, ports, and oil are no longer technical issues - they are tools of sovereignty and stability, or pathways to fragmentation.

Hadramawt and Al-Mahra as a Strategic Hinge

The events of December 2025 redefined the geopolitical meaning of eastern Yemen. Hadramawt and Al-Mahra are no longer peripheral governorates; they have become a testing ground for state unity, Saudi and Omani security, the limits of Emirati influence, and the future of secessionist projects.

- Turning eastern governorates into an arena of direct regional competition places Saudi Arabia and Oman before sensitive security challenges.
- This dynamic deepens splits in the anti-Houthi camp and gives the Houthis political opportunities to present themselves as defenders of sovereignty.
- Threats to oil resources, crossings, and borders aggravate the government's weakness and its ability to pay salaries and fund services.

Highlighted Insight

The future of the eastern governorates will shape not only the configuration of the south, but also Gulf security equations and Yemen's place within regional competition.

The Central Equation

Abaad’s studies for 2025 present a composite image of Yemen: the Houthis are stronger than a local group yet weaker than a stable state; the government is internationally recognized but institutionally and economically incapable; regional allies oppose the Houthis but compete with one another for zones of influence; and the Red Sea made Yemen an international file without yet producing a Yemeni center of decision able to convert external attention into internal gains.

- Yemen moved from an arena of internal war to a regional-international security knot linked to the Red Sea, Iran, and global trade.
- Restoring the state has become a condition for any settlement, because any peace that leaves weapons outside the state will reproduce the crisis.
- The economy has become an instrument of conflict and sovereignty; those who control resources and crossings gain greater ability to impose political facts.

Highlighted Insight

The central question for 2026 is not only how to pressure the Houthis, but how to build a national center of decision capable of converting pressure into a project of state restoration.

Risk Matrix for 2026

The risks of 2026 combine security, economic, political, and regional elements and therefore must be handled as one system rather than separate files. Below is a preliminary estimate of priorities according to impact and urgency.

- Renewed maritime escalation - High risk: the Houthis may again use the Red Sea as a tool of political and economic blackmail.
- Fragmentation in the east and south - High risk: continued contestation in Hadramawt and Al-Mahra may open paths of disintegration that are difficult to contain.
- Deeper economic collapse - High risk: the halt of oil and revenues and the expansion of the war economy threaten the state's survival.
- Partial understandings with the Houthis - Medium risk: any understanding that does not address weapons and resources only postpones the explosion.

Highlighted Insight

Managing risk requires moving from reaction to integrated political, security, and economic engineering beginning with the unification of sovereign decision-making and the insulation of resource files from armed competition.

Scenarios for 2026

Abaad's studies suggest four broad scenarios for 2026. None is automatic, but each helps clarify the strategic horizon facing decision-makers.

- Troubled containment: international and regional pressures prevent total explosion, but do not address the roots of the crisis. The Houthis remain a standing threat and crises continue at close intervals.
- Multi-front escalation: confrontation expands regionally and internally, increasing risks to sea lanes, energy, and the economy, while the Houthis exploit the disintegration of their adversaries.
- Gradual fragmentation: the erosion of institutions and fragmentation of fronts continue, while the state's ability to manage security declines and the humanitarian and economic costs rise.
- Rebuilding the state center: decision-making is unified, forces are integrated, resources are controlled, and the Red Sea is linked to a Yemeni national security strategy. This is the least automatic scenario - but the most necessary.

Highlighted Insight

State restoration should be the central heading of any Yemeni or regional policy in 2026, because continued pressure on the Houthis without a unified center of decision will amount to crisis management rather than crisis resolution.

Urgent Priorities

Decision-makers need a package of urgent priorities that links politics, security, economy, and sovereignty.

- Unify the Presidential Leadership Council’s decision-making through a clear mechanism governing war, peace, and economic sovereignty.
- Establish a genuine joint operations room that brings anti-Houthi forces under unified defense leadership and regulates weapons outside the state.
- Transform the Red Sea and Bab al-Mandab into a Yemeni national security file rather than an external file managed solely by international powers.
- Dry up smuggling networks through synchronized maritime, land, and financial oversight, with broader intelligence and customs cooperation.
- Fortify Hadramawt and Al-Mahra as a sovereign file by preventing unilateral measures, protecting resources, and managing Saudi-Emirati competition within the framework of the state.
- Treat the economy as a national security priority: salaries, electricity, currency, oil, and ports should be managed within one political and security plan.

Highlighted Insight

The available window for decision-makers is not open indefinitely. Every delay in unifying decision-making multiplies the costs of fragmentation and gives adversaries space to reposition.

Proposed Research Tracks for 2026

Abaad’s 2025 studies show a clear ability to identify transformations before their outcomes fully mature, especially in the files of the Houthis, the Red Sea, Iran, and southern/eastern Yemen. To maximize impact in 2026, the research output can be transformed into an early-warning and decision-support system.

- Houthi Threat Index: monthly monitoring of attacks, smuggling, discourse, financing, and military movements.
- Red Sea Monitor: follow shipping, cables, insurance, ports, and international naval forces.
- State and Economy File: measure resources, salaries, revenues, currency, services, and the effects of the war economy.
- South and East Monitor: track shifts in Hadramawt, Al-Mahra, Shabwa, Socotra, and regional competition.
- Influence Centers Database: collect international studies, their recommendations, biases, and the actors they most often address.

Highlighted Insight

Abaad’s strongest added value in 2026 lies in converting monitoring and studies into early-warning tools and concise policy memos directly tailored to decision-makers.

Strategic Conclusion

Abaad's reading of 2025 confirms that Yemen has entered a stage more complex than the simple binary of war and peace. The Houthis have become part of a regional security equation; the Red Sea has become the gateway to the internationalization of the crisis; the economy has become an instrument of pressure and collapse; and the south and east have become arenas of regional competition that may redraw maps of influence.

The danger lies not only in Houthi strength or Iranian support, but also in the failure of the forces opposing them to build a unified national center capable of investing international and regional pressure.

- No durable peace without addressing Houthi weapons, resources, and sovereignty.
- No effective pressure without a unified Yemeni front capable of deterrence.
- No economic stability without ending the war economy and restoring revenue centralization.
- No Gulf security without a Yemen able to make unified decisions and control its borders and ports.

Highlighted Insight

The year 2026 will be a test: either pressure is converted into a state-restoration project, or Yemen slides into a prolonged management of an open, multi-centered crisis.

Source Studies

- ◆ 1. The New U.S. Approach Against the Houthis: Challenges and Limits of Influence — February 2025.
- ◆ 2. The U.S. Military Operation Against the Houthis in Yemen: Objectives and Challenges — April 2025.
- ◆ 3. De-escalation Between Washington and the Houthis: Dimensions and Repercussions — June 2025.
- ◆ 4. Repercussions of the Israeli-Iranian Confrontation on Yemen — July 2025.
- ◆ 5. Geopolitical Repercussions of the Military Strike on Iran — August 2025.
- ◆ 6. Transformations of the Houthi Group Within the Retreating Axis of Resistance — September 2025.
- ◆ 7. Continued Arms Smuggling to the Houthis: Is Iran Seeking a New Nuclear Deal Through Yemen's Chaos? — October 2025.
- ◆ 8. Challenges of the War Economy in Yemen — November 2025.
- ◆ 9. Between Strategic Vacuum and Internal Fragility: The Future of the Houthis After the Gaza War — December 2025.
- ◆ 10. The Future of Hadramawt and Al-Mahra After the Expansion of the Southern Transitional Council — December 2025.
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