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POLICY PAPER

"YEMEN'S PATH TO STABILITY: EVALUATING THE PRESIDENTIAL LEADERSHIP COUNCIL'S ROLE AND IMPACT"



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This paper provides a comprehensive analysis of the role and impact of Yemen's Presidential Leadership Council (PLC), formed in April 2022, in navigating the complexities of Yemen's ongoing civil conflict. The PLC was created to unite various anti-Houthi factions under a single governance framework, with the support of Saudi Arabia and the UAE, and to steer Yemen toward peace and stability. However, the PLC has faced numerous obstacles, including internal divisions, resistance from the Houthi movement, and significant external influence from regional powers such as Iran. This paper explores the PLC's efforts to stabilize the political landscape, revive Yemen's economy, and manage diplomatic relations with both regional and international actors. It also examines the Council's military coordination challenges and the impact of shifting regional dynamics, particularly the involvement of Saudi Arabia, the UAE, and Iran. The paper concludes by assessing the PLC's potential to address Yemen's ongoing conflict and its broader implications for regional stability.

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INTRODUCTION

In April 2022, Yemen embarked on a pivotal chapter in its tumultuous political history with the establishment of the Presidential Leadership Council (PLC). This body was conceived to steer the nation through an era characterized by protracted civil conflict and an unprecedented humanitarian crisis. The formation of the PLC was met with a cautious sense of optimism, both domestically and within the international community, as it represented a potential mechanism for fostering stability and governance.

Over the past two years, the PLC has undertaken a range of initiatives aimed at addressing Yemen's multifaceted challenges. These efforts have encompassed attempts to stabilize the political landscape, improve economic conditions, and alleviate the dire humanitarian situation. However, the path has been fraught with obstacles, and the effectiveness of the Council's actions remains a subject of considerable debate.

This policy paper endeavors to provide a comprehensive analysis of the PLC's performance, delineating its accomplishments and identifying areas of deficiency. The Council's approach to governance and conflict resolution will be scrutinized to understand the broader implications of its policies and actions. Additionally, the paper will examine the PLC's interactions with various domestic and international stakeholders, assessing the impact of these relationships on Yemen's trajectory.

I. THE ROOTS AND RAMIFICATIONS OF YEMEN'S CONFLICT: FROM ARAB SPRING UPHEAVAL TO THE FORMATION OF THE PRESIDENTIAL LEADERSHIP COUNCIL

Yemen's contemporary conflict has its roots in the political upheaval that began during the Arab Spring in 2011. The uprising led to the resignation of long-time President Ali Abdullah Saleh, who was succeeded by his deputy, Abdrabbuh Mansur Hadi, in a transfer of power intended to stabilize the country. However, the political transition failed to address the deep-seated issues within Yemen, including widespread poverty, corruption, and the marginalization of various groups.

In 2014, the Houthi movement, a Zaidi Shia group officially known as Ansar Allah, capitalized on the political instability. The Houthis, advanced from their northern stronghold of Saada, eventually seizing control of the capital, Sana'a, in September 2014. By early 2015, they had forced President Hadi to flee to Aden and subsequently to Saudi Arabia.

Who are the Houthis?

The Houthis are followers of the Jaroudi branch of Zaidism, a sect of Shia Islam that historically diverges from other Zaidi interpretations in its stricter stance against Sunni dominance. In 983 CE, Yehya bin al-Husayn, a religious and political leader from the Hijaz region (now part of Saudi Arabia), founded the first Zaydi theocratic state in what is now Saada Governorate, earning the title al-Hadi al-Haqq ("the Guide to the Truth") for his mission to lead Yemenis toward "the true path of Islam"¹. This ideology underpins the Houthis' religious and political motivations, aligning them with a tradition of resistance against perceived oppression. As Jaroudi Zaidis, the Houthis advocate for a stronger Zaidi identity and autonomy, particularly in Yemen's northern highlands, where they have traditionally been concentrated. Zaidism holds that the spiritual leader must be a Hashemite, a descendant of the Prophet, and this leader should also serve as the head of the state². This religious and ideological stance has heightened their opposition to the central government and intensified their struggle for greater influence and control within Yemen.

External interventions by regional powers, including Saudi Arabia and Egypt, occurred during the 1960s in Yemen. This period was characterized by a civil war between royalists, who supported the continuation of the Zaidi Imamate under Imam Muhammad al-Badr, and republicans, who aimed to establish a republic following the 1962 coup d'état that overthrew the Imamate.

Egypt, under President Gamal Abdel Nasser, supported the republican forces, viewing the conflict as part of its broader strategy to promote Arab nationalism and counter monarchical rule in the Middle East. Nasser sent Egyptian tens of thousands of troops to Yemen to aid the republicans, seeing the war as an opportunity to spread his vision of pan-Arabism and diminish the influence of monarchies like in Saudi Arabia and Jordan.³

In contrast, Saudi Arabia, fearing the spread of Nasser's revolutionary ideology and the potential overthrow of monarchies in the region, provided substantial support to the royalist forces. Saudi Arabia's intervention included financial aid, weapons, and logistical support to the royalists, aiming to prevent a republican government aligned with Nasser from emerging on its southern border⁴.

1. Al-Dawsari, N. (2024, January 22). The ideological underpinnings of the Houthis' Red Sea attacks. Middle East Institute. <https://www.mei.edu/publications/ideological-underpinnings-houthis-red-sea-attacks>

2. Al-Dawsari, N. (2024, January 22). The ideological underpinnings of the Houthis' Red Sea attacks. Middle East Institute. <https://www.mei.edu/publications/ideological-underpinnings-houthis-red-sea-attacks>

3. Paul, C., Clarke, C. P., Grill, B., & Dunigan, M. (2013). Yemen, 1962–1970: Case Outcome: COIN Loss. In *Paths to Victory: Detailed Insurgency Case Studies* (pp. 250–264). RAND Corporation. <http://www.jstor.org/stable/10.7249/j.ctt5hhsjk.32>

4. Paul, C., Clarke, C. P., Grill, B., & Dunigan, M. (2013). Yemen, 1962–1970: Case Outcome: COIN Loss. In *Paths to Victory: Detailed Insurgency Case Studies* (pp. 250–264). RAND Corporation. <http://www.jstor.org/stable/10.7249/j.ctt5hhsjk.32>

Egypt's military engagement became a costly quagmire, often described as "Egypt's Vietnam," leading to significant human and financial losses⁵. The war eventually ended in a stalemate in 1970, with the establishment of the Yemen Arab Republic, where the republicans consented to the creation of a more moderate government, which afforded the imam's supporters substantial political autonomy⁶.

Saudi Arabia initially supported the Zaidis during the conflict against the republican forces in Yemen, as the kingdom saw them as a counterbalance to the spread of republicanism. However, after the war and the recognition of the Yemen Arab Republic, a Zaidi reformist movement began to take shape. This movement sought to preserve and revive Zaidi traditions. Within this context, a split occurred within the broader Zaidi community. One of the key offshoots of this reformist movement was "Shabab al-Mu'min" ("The Believing Youth"), a Zaidi revivalist group that emerged in northern Yemen⁷. The movement aimed to reinvigorate Zaidi thought and practices, appealing especially to young Yemenis. In 1999, Shabab al-Mu'min came under the leadership of Hussein Badr al-Din al-Houthi, who, through his association with the Al-Haqq Party, consolidated his control over the group⁸. This would eventually lead to the group's transformation into the Houthi movement, which played a pivotal role in Yemen's subsequent conflicts.

The current Yemeni Civil War erupted in 2014 when the Houthi movement, seized the capital, Sanaa, and overthrew the internationally recognized government of President Hadi. In March 2015, the Saudi-led coalition launched a military intervention aimed at restoring Hadi's government. The rapid expansion of Houthi control and their initial alignment with former President Saleh, a Zaidi himself who retained significant influence and military support, alarmed regional powers. However, this alliance was short-lived. Tensions between the Houthis and Saleh grew as both sides sought to assert dominance over the political and military landscape in Yemen. Saleh, who had ruled Yemen for decades, viewed the Houthis as potential tools to regain power, while the Houthis saw Saleh as a means to bolster their military strength.

In 2017, this fragile partnership unraveled when Saleh attempted to negotiate with the Saudi-led coalition in an effort to end the conflict, a move the Houthis saw as a betrayal⁹. In response, the Houthis turned against Saleh, ultimately leading to his death in December 2017 during clashes with militia's forces¹⁰. This marked a critical turning point in the war, deepening the conflict and further complicating efforts to achieve peace.

Amidst this ongoing conflict, various peace talks, and ceasefire agreements have been attempted, but lasting peace has remained elusive. The complex web of local, regional, and international interests has made the resolution of the conflict particularly challenging.

5. Ferris, J. (2015, April 3). Egypt's Vietnam. *Foreign Policy*. <https://foreignpolicy.com/2015/04/03/egypts-vietnam-yemen-nasser-sisi/>

6. Paul, C., Clarke, C. P., Grill, B., & Dunigan, M. (2013). Yemen, 1962–1970: Case Outcome: COIN Loss. In *Paths to Victory: Detailed Insurgency Case Studies* (pp. 250–264). RAND Corporation. <http://www.jstor.org/stable/10.7249/j.ctt5hhsjk.32>

7. Al-Goidi, F. (2024, April 19). Iran's role in the Yemen War: real influence and regional gains - Middle East Council on Global Affairs. Middle East Council on Global Affairs. https://mecouncil.org/publication_chapters/irans-role-in-the-yemen-war-real-influence-and-regional-gains/

8. Al-Goidi, F. (2024, April 19). Iran's role in the Yemen War: real influence and regional gains - Middle East Council on Global Affairs. Middle East Council on Global Affairs. https://mecouncil.org/publication_chapters/irans-role-in-the-yemen-war-real-influence-and-regional-gains/

9. Browning, N., & Aboudi, S. (2017, December 5). Ex-president Saleh dead after switching sides in Yemen's civil war. *Reuters*. <https://www.reuters.com/article/world/ex-president-saleh-dead-after-switching-sides-in-yemen-s-civil-war-idUSKBN1DZ0E2/>

10. Dwyer, C. (2017, December 4). Yemeni Ex-President Ali Abdullah Saleh Killed In Houthi Attack. *NPR*. <https://www.npr.org/sections/the-wo-way/2017/12/04/568283444/yemeni-ex-president-ali-abdullah-saleh-apparently-killed-in-houthi-attack>

The war has fragmented Yemen, with multiple factions controlling different parts of the country, and has created an environment of profound suffering and instability.

Saudi Arabia's involvement in Yemen is driven by its concerns over regional security and the influence of its rival, Iran. The kingdom first intervened in 2015, leading a coalition of Arab states to restore the government of President Hadi after the Houthi movement seized the capital, Sanaa. For Saudi Arabia, the rise of the Houthis on its southern border posed a direct threat to its national security. This intervention was part of a broader strategy to prevent Iran from gaining a foothold in Yemen, which could allow Tehran to exert influence in the region.

The UAE has played a pivotal yet distinct role in the Yemeni conflict, driven by its concerns over regional security. A significant aspect of the UAE's involvement in Yemen is its focus on maintaining security of crucial maritime routes, particularly the Bab el-Mandeb Strait. This strait plays a vital role in global trade and energy shipments. In 2019, the UAE announced a partial military withdrawal from Yemen, scaling back its direct involvement on the ground¹¹. Despite its reduced military footprint, the UAE remains a key player in southern Yemen.

Iran's involvement in the Yemeni conflict is a key element in its broader strategy to challenge Saudi Arabia's regional influence and assert its own power across the Middle East. Although Iran's initial engagement in Yemen was relatively limited, its role has grown significantly over time, particularly as the Houthi movement gained strength and emerged as a powerful force in the ongoing civil war.

From the outset, Iran has provided the Houthis with political, ideological, and military support, framing the movement as part of the "Axis of Resistance," which opposes both Western intervention in the Middle East and the influence of Sunni Arab powers like Saudi Arabia. While the Houthis are Zaidis, a branch of Shia Islam distinct from the Twelver Shia doctrine practiced in Iran, Tehran saw an opportunity to strengthen its geopolitical ambitions. By aligning with the Houthis, Iran extended its regional footprint, complementing its involvement in other conflicts in Iraq, Syria, and Lebanon.

Iran's support for the Houthis has been both symbolic and material. It has provided financial aid, military training, and crucially, arms shipments, which have included advanced missile and drone technology¹². These weapons have allowed the Houthis to strike deep into Saudi territory, including targeting major infrastructure such as oil facilities and airports¹³. The growing sophistication of Houthi attacks, largely attributed to Iranian technology and expertise, has intensified the security risks in the region.

Despite its support, Iran's role in Yemen is often indirect. Tehran's influence over the Houthis is not absolute, as the movement maintains its own domestic and political agendas. While Iran provides valuable assistance, the Houthi movement is not a mere proxy but a local actor with its own ambitions.

11. Reuters. (2019, October 30). UAE withdraws its troops from Aden, hands control to Saudi Arabia. <https://www.reuters.com/article/world/uae-withdraws-its-troops-from-aden-hands-control-to-saudi-arabia-idUSKBN1X923J/>

12. Robinson, K. (2024, March 1). Iran's support of the Houthis: What to know. Council on Foreign Relations. <https://www.cfr.org/in-brief/irans-support-houthis-what-know>

13. Robinson, K. (2024, March 1). Iran's support of the Houthis: What to know. Council on Foreign Relations. <https://www.cfr.org/in-brief/irans-support-houthis-what-know>

Iran has also used the conflict as a means of diplomatic and media leverage. It has consistently framed the war in Yemen as part of a larger struggle against Saudi and Western aggression, portraying itself as the defender of oppressed groups in the region. Tehran has criticized the Saudi-led coalition's airstrikes and blockade, and has called for an end to foreign intervention, positioning itself as a voice for peace while quietly supporting the Houthis' military campaign¹⁴.

Amidst this complex geopolitical landscape, it was against this backdrop of protracted conflict that the Presidential Leadership Council was formed in April 2022, as part of renewed efforts to unify the anti-Houthi factions and negotiate a political solution to the war.

II. THE STRUCTURE AND STRATEGIC FORMATION OF THE PRESIDENTIAL LEADERSHIP COUNCIL: UNIFYING YEMEN'S ANTI-HOUSHI FACTIONS

The formation of the PLC in April 2022 was a pivotal step aimed at unifying the various anti-Houthi factions under a consolidated leadership structure, thereby creating a more cohesive front to address Yemen's multifaceted challenges and negotiate a path towards peace.

The Council consists of a chairman, a vice-chairman, and in total 8 members representing diverse political and regional factions within Yemen. This inclusive structure aims to ensure broad representation and balance among the different groups that oppose the Houthi movement¹⁵.

The chairman of the PLC holds the primary executive authority, tasked with leading the Council and representing Yemen in diplomatic engagements. The vice-chairman supports the chairman and may assume leadership responsibilities in his absence. The other members of the Council are leaders of key factions and regions. This structure is intended to foster collaboration and mitigate internal conflicts among the anti-Houthi factions¹⁶.

III. EXTERNAL INFLUENCES SHAPING THE PRESIDENTIAL LEADERSHIP COUNCIL: THE ROLES OF SAUDI ARABIA AND THE UAE IN YEMEN'S POLITICAL LANDSCAPE

The formation of the PLC was influenced by external forces, particularly Saudi Arabia and the UAE. Saudi Arabia's primary interest in Yemen is to prevent the establishment of a hostile, Iranian-aligned regime on its southern border. The Kingdom has been a major supporter of President Hadi's government and has led the coalition against the Houthis.

14. Al Jazeera. (2015, April 19). Iran's Rouhani criticises Saudis over Yemen strikes. Al Jazeera. <https://www.aljazeera.com/news/2015/4/19/irans-rouhani-criticises-saudis-over-yemen-strikes>

15. South24 Center for News and Studies. (2022, April 7). The End of Hadi's Rule: Wide Welcome for the Yemeni Presidential Council. South24 Center for News and Studies. <https://south24.org/news/newse.php?nid=2610>

16. South24 Center for News and Studies. (2022, April 7). The End of Hadi's Rule: Wide Welcome for the Yemeni Presidential Council. South24 Center for News and Studies. <https://south24.org/news/newse.php?nid=2610>

The creation of the PLC was part of Saudi Arabia's broader strategy to unify anti-Houthi forces and facilitate a political solution that ensures regional stability and security.

The UAE has significant regional security interests in southern Yemen, focused on safeguarding vital maritime routes, particularly the Bab el-Mandeb Strait, which is crucial for global trade.



Source: The Economist. (2023, August 9). Can Yemen hold together? The Economist. <https://www.economist.com/middle-east-and-africa/2023/08/09/can-yemen-hold-together>

Current members of the PLC¹⁷

Rashad al-Alimi	Chairman of the Presidential Leadership Council. He is a prominent politician who served as an advisor to former President Abdrabbuh Mansur Hadi and has a background in security and political affairs. Al-Alimi originates from the Taiz governorate, located in the southwest of Yemen, and has garnered acceptance from all members of the governing council.
Sultan al-Arada	Governor of Marib, a significant region due to its oil and gas resources. He is a key figure in the anti-Houthi coalition and has substantial influence in central Yemen. Al-Arada possesses an extensive network of tribal connections, and while he is recognized by various tribes across Yemen, his influence is particularly prominent in the eastern governorates.
Tariq Saleh	Nephew of the late President Ali Abdullah Saleh and a military commander. He leads the National Resistance Forces on Yemen's western coast and is a crucial military leader in the anti-Houthi efforts. Saleh maintained an alliance with the Houthis until 2017, when his uncle, the former President Ali Abdullah Saleh, was killed by them.
Abdullah al-Alimi	Former director of the Presidential Office under President Hadi. He plays a significant role in political and administrative coordination within the Council. He is affiliated with the Islah party and was actively involved in the protest movement that led to the ousting of President Saleh in 2011. Al-Alimi hails from the Shabwa governorate, a region noted for its tribal prominence.
Aidarus al-Zoubaidi	President of the Southern Transitional Council (STC), a secessionist group that seeks the independence of southern Yemen. He represents the interests of the southern regions in the PLC. Al-Zoubaidi is known for his pragmatic approach, frequently shifting alliances throughout the conflict in pursuit of his goal, which is the "restoration of the southern state."
Abdurrahman Abu Zaraa al-Mahrami	Leader of the Giants Brigades, a powerful Salafi military faction that has been instrumental in the fight against the Houthis.
Othman Hussein Megally	A representative of the northern regions and a leader in the General People's Congress party, which was formerly led by the late President Ali Abdullah Saleh. Megally is a tribal sheikh from the Saada governorate and surrounding areas who opposes the Houthis. He has strong ties to Saudi Arabia and commands several loyal army battalions drawn from Saada's tribal forces.
Faraj al-Bahsani	Governor of Hadramawt and commander of the Hadrami Elite Forces. He represents the eastern regions of Yemen and has significant military and political influence. Bahsani, once a military leader in the south, went into self-imposed exile in Riyadh following the southern secessionist party's defeat in the 1994 civil war. He returned to Yemen as the Houthis' influence began to rise.

17. Abaad Studies & Research Center. (2022, June 8). Challenges to the Presidential Council.. Complications of peace and war in Yemen. <https://abaadstudies.org/en/policy-analysis/topic/59903>

IV. KEY OBJECTIVES OF THE PRESIDENTIAL LEADERSHIP COUNCIL: ESTABLISHING STABILITY AND PEACE IN YEMEN

The primary goal of the PLC is to provide a unified governance structure capable of steering Yemen towards stability and peace. This involves several key objectives:¹⁸

- One of the foremost goals of the PLC is to establish a stable and functional political environment in Yemen. By consolidating leadership and fostering cooperation among various factions, the Council aims to create a government that can effectively govern and implement policies.
- The council is intended to represent all Yemeni regions, with each member aligned with specific areas, ensuring broad representation across the country.
- The council seeks to consolidate efforts against Houthi control and restore peace across Yemen. Many council members possess extensive military backgrounds and have directly engaged in combat against Houthi forces, indicating a readiness to address the insurgency through both dialogue and military action if necessary. By incorporating all political and military factions, the PLC aims to strengthen its legitimacy under a unified Yemen.
- Nevertheless, the PLC is prioritizing peace talks. It states its commitment to pursuing negotiations for lasting peace, contingent on the Houthis' willingness to engage. Thereby, the members agree that Political agendas will be set aside temporarily until the government's authority is fully restored.

The Saudi-led coalition initially adopted a military strategy to counter the Houthi insurgency in Yemen. However, this approach did not achieve its intended objectives. Direct attacks by the Houthis on Saudi and Emirati territories followed, including on facilities for critical energy infrastructure. These attacks underscored the risks posed to the domestic economies and security of the Gulf states. Consequently, a strategic shift was deemed necessary to foster long-term stability, emphasizing the need for a political solution.

One major obstacle to the previous military-centric approach was the existence of various factions within Yemen, which hindered a unified front against the Houthis. President Hadi's influence was notably weak; his inability to consolidate these factions and his prolonged exile in Saudi Arabia further limited his effectiveness.

In addition, internal divisions, have hindered the government's effectiveness in confronting the Houthis.¹⁹ The Presidential Leadership Council intended to address the internal divisions by fostering a unified strategy.

In response, the formation of the Presidential Leadership Council represented a strategic pivot towards a more robust political framework. The PLC aims to unify the disparate factions within Yemen, thereby enhancing the prospects for a cohesive and sustainable approach to resolving the conflict.

18. Al-Qadami, H. N. (2022, April 14). The formation of new leadership council in Yemen. Futureuae. <https://www.futureuae.com/tar/Main-page/Item/7247/legitimacy-united-the-formation-of-new-leadership-council-in-yemen>

19. Al-Qadami, H. N. (2022, April 14). The formation of new leadership council in Yemen. Futureuae. <https://www.futureuae.com/tar/Main-page/Item/7247/legitimacy-united-the-formation-of-new-leadership-council-in-yemen>

V. THE HOUTHIS' DEFIANCE: UNDERMINING THE LEGITIMACY AND EFFECTIVENESS OF YEMEN'S PRESIDENTIAL LEADERSHIP COUNCIL

The Houthis have maintained a firm and dismissive stance towards the Presidential Leadership Council since its formation in April 2022. From the outset, the Houthis have characterized the PLC as a product of external manipulation rather than a legitimate representative body of the Yemeni people.²⁰

The Houthis have publicly denounced the PLC, labeling it a “desperate attempt to rearrange the ranks of the mercenaries”²¹ under foreign influence. This rejection has significant implications for the PLC’s ability to function effectively and negotiate a comprehensive peace settlement, as the Houthis control significant portions of northern Yemen, including the capital, Sana’a.

Moreover, the Houthis’ stance has complicated efforts to broker a nationwide ceasefire and facilitate humanitarian aid. There has been continued engagement in parallel diplomatic efforts, often directly with international actors, bypassing the PLC. This independent approach to negotiations undermines the Council’s position as the central authority in Yemen.

The Houthis were excluded from the formation of the PLC. However, it is important to note that the council includes representatives who are close to Saudi Arabia and the UAE, and its structure allows for the potential inclusion of additional members, including the Houthis. This presents an opportunity for a more inclusive dialogue in the future, fostering the possibility of broader engagement and reconciliation with the Houthis.²²

VI. THE HOUTHIS' STRATEGIC EXPLOITATION OF CRISIS AND ITS IMPACT ON REGIONAL DYNAMICS AND INTERNATIONAL RELATIONS

The Houthis have strategically taken advantage of the crisis that emerged following the Israeli war on Gaza after the Hamas attacks on October 7, 2023. By positioning themselves as staunch defenders of the Palestinian cause, they have sought to strengthen their domestic political standing and legitimacy. This maneuver places them prominently at the forefront of the “Axis of Resistance.” Since November 2023, the Houthis have conducted multiple attacks on commercial and military vessels in the Red Sea, claiming to target ships with connections to Israel. However, it is crucial to recognize that many of the targeted vessels

20. France 24. (2022, April 17). Yemen’s new leaders say focused on peace path. <https://www.france24.com/en/live-news/20220417-yemen-s-new-leaders-say-focused-on-peace-path>

21. France 24. (2022, April 17). Yemen’s new leaders say focused on peace path. <https://www.france24.com/en/live-news/20220417-yemen-s-new-leaders-say-focused-on-peace-path>

22. Young, M., & Nagi, A. (2022, April 12). Finally, Some Movement in Yemen? Carnegie Endowment for International Peace. <https://carnegie-ieendowment.org/middle-east/diwan/2022/04/finally-some-movement-in-yemen?lang=en>

have little or no connection to Israel.²³ These attacks pose a significant threat to global maritime trade. In these cases, the Houthis act as a heavily manipulated proxy for Iran, advancing Tehran's geopolitical interests by disrupting international trade and targeting ships in critical waterways to challenge regional rivals and project power.

According to European Parliamentary Research Service the Red Sea crisis has resulted to the following challenges:²⁴

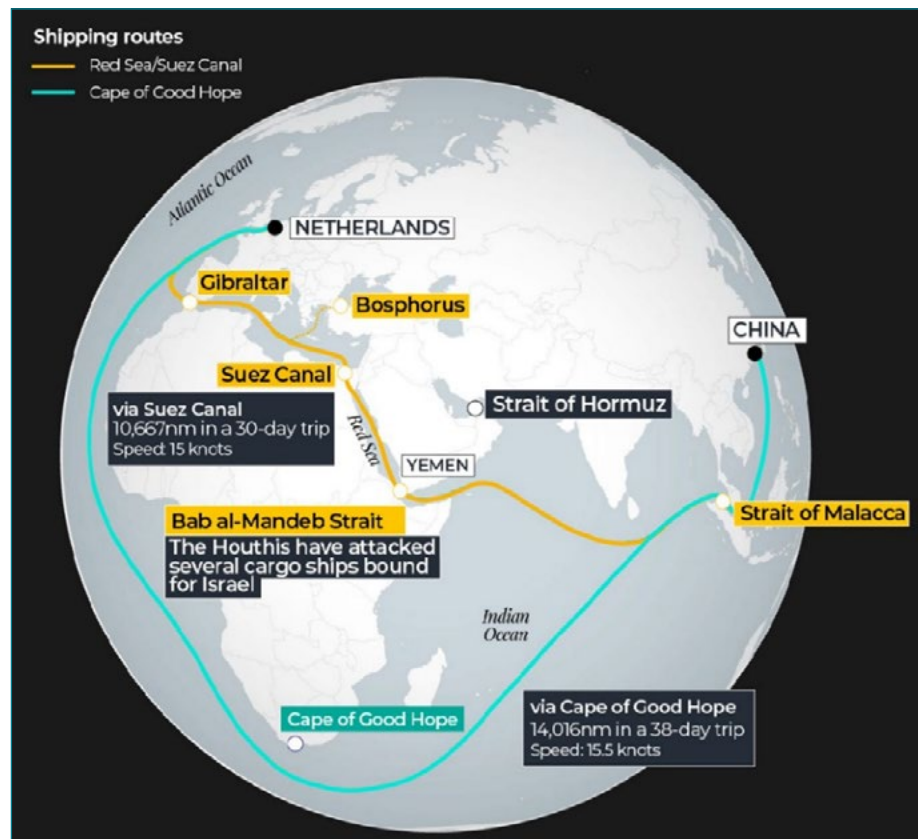
- **Shipping Route Adjustments:** In response to the Houthi attacks since mid-November 2023, major shipping companies are bypassing the Red Sea and the Suez Canal, opting for alternative routes instead.
- **Cape of Good Hope Route:** The Cape of Good Hope in South Africa has become the shortest alternative route between Asia and Europe, extending shipping times by 8-10 days.
- **Traffic Redistribution:** Trade volumes in the Bab el-Mandeb Strait and the Suez Canal have dropped by over 50% by end-January 2024. Meanwhile, traffic through the Cape of Good Hope has increased by 60% since mid-December 2023.
- **Red Sea Trade Significance:** The Red Sea is vital for global maritime trade, accounting for about 11% annually and supporting economies in the Middle East, Europe, Asia, and Africa.
- **Economic Repercussions:** Shipping costs have surged, with container spot freight rates rising by \$500 in late December 2023, the highest weekly increase reported by the United Nations Conference on Trade and Development (UNCTAD). Insurance premiums have also spiked.
- **Varied Industry Impact:** Bulk carriers, which transport less valuable cargo, may risk crossing the Red Sea, while cargo ships carrying more valuable goods prefer the longer route via the Cape of Good Hope. Ships from Russia and China continue to cross unimpeded as they have not been targeted.
- **Energy Supply Concerns:** There is potential for energy supply disruptions and price increases.
- **Supply Chain Risks:** The prolonged delays particularly threaten industries reliant on just-in-time manufacturing and inventory, such as tech, automotive, and retail sectors, leading to delays and higher costs.
- **Food Security Challenges:** Disruptions in grain shipments from Europe, Russia, Ukraine, and rice shipments from India may affect global food prices.
- **Impact on Maritime Fees:** Countries like Egypt and Djibouti, which depend on maritime fees, are experiencing significant revenue losses. By January 2024, Egypt's Suez Canal revenues had dropped by 40%, causing substantial fiscal strain.

23. BBC. (2024, March 15). Who are the Houthis and why are they attacking Red Sea ships? <https://www.bbc.com/news/world-middle-east-67614911>

24. Delivorias, A. (2024). Recent threats in the Red Sea Economic impact on the region and on the EU. In European Parliament. European Parliamentary Research Service. [https://www.europarl.europa.eu/RegData/etudes/BRIE/2024/760390/EPRS_BRI\(2024\)760390_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2024/760390/EPRS_BRI(2024)760390_EN.pdf)

- **Economic Pressure:** Egypt is grappling with currency devaluation (-70% against the US dollar since 2022) and high inflation (35%), intensifying the economic impact of reduced canal revenues.

Figure 1:
Maritime Route Shifts Triggered by Houthi Attacks



Source: [Al Jazeera](#)

In response to the escalating situation in the Red Sea, the United States and the United Kingdom initiated Operation Prosperity Guardian in December 2023. This military initiative aims to prevent further Houthi attacks. It is noteworthy that despite the heavy reliance of both Egypt and Saudi Arabia on the Red Sea for their economic activities, neither country is participating in this initiative.²⁵

The Presidential Leadership Council leverages the Houthi attacks in the Red Sea to strengthen its relations with the United States and assert its claim to the entire Yemeni territory within the international community. US Ambassador to Yemen, Steven Fagin, has reaffirmed Washington's support for the Yemeni government in enhancing its legal authority which was conveyed during meetings with the Chairman of the Yemeni Presidential Leadership Council, Rashad Al-Alimi, and Council members, including Aidaroos Al-Zubaidi, Tariq Saleh, and Othman Megally.²⁶

25. Sabbagh, D. (2023, December 19). US announces naval coalition to defend Red Sea shipping from Houthi attacks. *The Guardian*. <https://www.theguardian.com/us-news/2023/dec/19/us-announces-naval-coalition-to-defend-red-sea-shipping-from-houthi-attacks>

26. Rabih, A. (2024, July 18). Yemen's Presidential Council Calls for Comprehensive Strategy to Deter the Houthis. *Asharq Al-Awsat*. <https://english.aawsat.com/arab-world/5041310-yemen%E2%80%99s-presidential-council-calls-comprehensive-strategy-deter-houthis>

Al-Alimi, in a meeting with Fagin in Riyadh, highlighted the necessity of supporting the government's efforts to uphold state legitimacy, control the entire Yemeni territory, and secure international shipping routes and critical national infrastructure and urged the donor community to fulfill their commitments to Yemen's humanitarian response plan through the Central Bank of Yemen, expedite the relocation of international organizations to Aden, and respect the legal status of Yemen as a United Nations member state.²⁷

The PLC views the actions of the Houthis as a renewed opportunity to mobilize the international community to combat the group. At the start of the Biden presidency, the effectiveness of this strategy diminished when the US President ended the classification of the Houthis as a terrorist organization.²⁸ This led anti-Houthi factions to seek non-military solutions. However, the latest developments in the Red Sea and the new direction of the US administration could introduce a new dynamic. The U.S. administration has reclassified the Houthis as a terrorist organization.²⁹ During a video call with Fagin, Al-Zubaidi expressed the Council's willingness to participate in regional and international efforts to combat Houthi terrorism in Yemen, whether through peaceful or military means.³⁰ Nevertheless, the involvement of Saudi Arabia and the United Arab Emirates in any of these measures seems unlikely, as both countries are now prioritizing the development of their domestic economies over engaging in renewed conflict.

The withdrawal of U.S. support for Saudi Arabia's military campaign against the Houthis in Yemen, under the Biden administration, may provide a partial explanation for Saudi Arabia's absence from Operation Prosperity Guardian. The Saudi government expressed dissatisfaction with the U.S. decision at the time, and the recent escalation of tensions in the Red Sea has reinforced its sense of validation regarding its previous policies and actions.

Furthermore, Saudi Arabia and the UAE started to prioritize their economic development goals, and any renewed conflict with the Houthis would put obstacles to these efforts. In March 2022, the Houthis targeted a Saudi Aramco energy facility in Jeddah, causing damage to two storage tanks.³¹ The incident, which coincided with the Formula 1 Grand Prix in Jeddah, not only caused damage to the country's economy but also showed to which extent the attacks could harm the Kingdom domestically.

The resumption of diplomatic relations between Saudi Arabia and Iran, brokered by China, has resulted in a cessation of Houthi attacks on Saudi Arabia and the UAE. Participating in Operation Prosperity Guardian could potentially disrupt this fragile success.

From a strategic perspective, the conflict with Israel presents numerous strategic opportunities for the Houthis. The group faces substantial economic challenges that heavily influence public opinion. The conflict has enabled the Houthis to divert attention from these domestic struggles. Not only has it bolstered domestic support, but it has also

27. Rabih, A. (2024, July 18). Yemen's Presidential Council Calls for Comprehensive Strategy to Deter the Houthis. Asharq Al-Awsat. <https://english.aawsat.com/arab-world/5041310-yemen%E2%80%99s-presidential-council-calls-comprehensive-strategy-deter-houthis>

28. Picciotto, R. (2024, January 17). Biden designates Houthis terrorist group, as U.S. ramps up Red Sea counterstrikes. CNBC. <https://www.cnbc.com/2024/01/17/biden-designates-houthis-terrorist-group-as-us-ramps-up-red-sea-counterstrikes.html>

29. Picciotto, R. (2024, January 17). Biden designates Houthis terrorist group, as U.S. ramps up Red Sea counterstrikes. CNBC. <https://www.cnbc.com/2024/01/17/biden-designates-houthis-terrorist-group-as-us-ramps-up-red-sea-counterstrikes.html>

30. Rabih, A. (2024, July 18). Yemen's Presidential Council Calls for Comprehensive Strategy to Deter the Houthis. Asharq Al-Awsat. <https://english.aawsat.com/arab-world/5041310-yemen%E2%80%99s-presidential-council-calls-comprehensive-strategy-deter-houthis>

31. El Yaakoubi, A., & El Dahan, M. (2022, March 26). Saudi Aramco petroleum storage site hit by Houthi attack, fire erupts. Reuters. <https://www.reuters.com/world/middle-east/saudi-air-defences-destroy-houthi-drones-state-tv-2022-03-25/>

allowed the group to position itself internationally as defenders of the Palestinian cause.³² Additionally, the Houthis attempt to blame Israel for Yemen's internal problems, portraying the West and other external forces as responsible. According to the Houthis' standpoint, the US-UK-led operation and the lack of direct involvement from other Arab states in the Gaza conflict reinforce their narrative.

VII. HOUTHİ DRONE STRIKE ON TEL AVİV HEIGHTENS REGIONAL INSTABILITY AND HUMANITARIAN CONCERNS

On July 19, 2024, the Houthis claimed responsibility for a drone attack on Tel Aviv, which resulted in one fatality and several injuries. This incident marks the first time the Houthis have struck Tel Aviv, with the attack occurring just a few hundred meters from the US embassy.³³

In retaliation, Israel attacked the port of Hodeidah on July 20, killing at least six people. These developments could further exacerbate the humanitarian crisis in Yemen, as the port of Hodeidah is a critical access point for humanitarian aid. The Israeli military has identified the Houthi drone as a Samad-3, an Iranian-manufactured object modified to extend its range.³⁴

VII. IRANIAN FOREIGN POLICY POST-ELECTION: CHALLENGES AND OPPORTUNITIES UNDER PEZESHKIAN'S PRESIDENCY AND THE IMPACT ON THE HOUTHIS

On July 5, 2024, Masoud Pezeshkian won the second round of the Iranian presidential elections. Pezeshkian's presidency in Iran, despite being characterized by limited formal power, holds the potential for influence over foreign policy, particularly through diplomatic efforts. This nuanced power dynamic highlights both the constraints within which Pezeshkian operates and his ability to effect change in specific areas. One of his primary goals is to improve relations with Western states to alleviate international sanctions, aligning with broader Iranian economic interests. Easing these sanctions could significantly boost Iran's economy, providing a strong incentive for Pezeshkian to adopt a more conciliatory foreign policy stance.

A pivotal aspiration of Pezeshkian is the reestablishment of the Iran nuclear deal (JCPOA), despite the current improbability of such an outcome.³⁵ His efforts toward this goal may necessitate demonstrable steps to show Iran's willingness to engage constructively with

32. Feierstein, G. M. (2024, January 11). Houthis see domestic and regional benefit to continued Red Sea attacks. Middle East Institute. <https://www.mei.edu/publications/houthis-see-domestic-and-regional-benefit-continued-red-sea-attacks>

33. Cordall, S. S., & Salhani, J. (2024, July 19). Houthi drone strikes Tel Aviv: How significant is the attack? Al Jazeera. <https://www.aljazeera.com/news/2024/7/19/houthi-drone-strikes-tel-aviv-how-significant-is-the-attack>

34. Cordall, S. S., & Salhani, J. (2024, July 19). Houthi drone strikes Tel Aviv: How significant is the attack? Al Jazeera. <https://www.aljazeera.com/news/2024/7/19/houthi-drone-strikes-tel-aviv-how-significant-is-the-attack>

35. Tahavori, P. (2024, July 1). Pezeshkian Vs. Jalili: Foreign Policy Visions for Iran. IRANWIRE. <https://iranwire.com/en/politics/131262-pezeshkian-vs-jalili-foreign-policy-visions-for-iran/>

the international community. This could include moderating the activities of regional allies such as the Houthis. The strategic significance of the Houthis to Iran's regional influence is considerable. Pezeshkian may need to exert pressure on the Houthis to desist from aggressive actions, such as attacking international vessels and Israel, to enhance Iran's international image and foster an environment conducive to negotiations with the West.

The outcome of the forthcoming United States elections is of critical importance in this context. A victory for presidential candidate Trump could significantly undermine Pezeshkian's efforts to improve relations with the West. Moreover, the ongoing conflict in Gaza introduces an additional layer of complexity to Pezeshkian's capacity to influence the Houthis. The protraction of the conflict complicates his ability to justify and manage any pressure on the Houthis. This complexity illustrates the interconnected nature of Middle Eastern conflicts and their consequential impact on Iranian foreign policy.

Pezeshkian's presidency is characterized by a delicate balancing act. He must adeptly navigate domestic political constraints, regional alliances, and international pressures. This intricate balancing act will define the impact of his presidency on the Houthi movement and, by extension, on Iran's broader foreign policy objectives. The interplay of these multifaceted factors will ultimately determine the extent to which Pezeshkian can achieve his overarching goal of improving relations with the West and mitigating international sanctions.

IX. CHALLENGES AND OPPORTUNITIES: THE PRESIDENTIAL LEADERSHIP COUNCIL'S EFFORTS TO UNIFY YEMEN AMIDST COMPLEX DYNAMICS

Competing Interests and Political Divisions

Designed to unify various anti-Houthi factions and create a more inclusive governance framework, the PLC has faced numerous challenges and opportunities. One of the PLC's primary goals was to consolidate leadership among the anti-Houthi factions. By bringing together diverse political, regional, and military leaders, the PLC has managed to create a body of the different factions in Yemen.

Despite efforts of unification, the PLC continues to face significant internal divisions. The diverse composition of the Council, while a strength in representation, also poses a challenge in maintaining cohesive decision-making. The differing interests of the council members complicate the situation even more. A notable example is the Southern Transitional Council, which advocates for the secession of South Yemen. The inclusion of the Southern Transitional Council in the Presidential Leadership Council may be viewed by some as a potential challenge to the PLC's goal of unifying the country, given the STC's advocacy for southern autonomy.

The split between the actors of the PLC is apparent in their diverse interests in the region of Hadramawt. Being Yemen's largest governorate, Hadramawt is critical to the country's economy and geopolitical standing, owing to its rich natural resources and its strategic location adjacent to Saudi Arabia. The establishment of the Hadramawt National Council (HNC) in June 2023, brought a new dimension into the region and confirmed the existing

division between the factions in Yemen.³⁶

This HNC's goal is to address the challenges facing the governorate, create a unified political vision, and offer a counter solution to the secessionist goals of the Southern Transitional Council. During consultations among the political and tribal leaders of Hadramawt, held in Riyadh from May 21 to June 19, 2023, a charter was adopted emphasizing the right of the Hadramawt people to manage their own political, economic, security, social, and cultural affairs with over 70 prominent leaders signing the charter, that aims to alleviate the human rights situation, promote development, and restore stability in Hadramawt.³⁷

Hadramawt, rich in natural resources and strategically located near Saudi Arabia, plays a crucial role in Yemen's geopolitical landscape.³⁸ The STC views Hadramawt as vital for its secessionist ambitions but has faced resistance in the governorate. The STC and Hadramawt's leaders present two competing visions: the STC's push for a separate southern state (including Hadramawt) versus Hadramawt's pursuit of independence or incorporation into a unified Yemen.³⁹

The PLC's Diplomatic Engagement with Global Stakeholders

The PLC has made significant strides in engaging with international stakeholders. It has worked to garner support from key regional and global actors, including the United Nations, the United States, and the European Union. These diplomatic efforts have helped to secure humanitarian aid and political backing, both of which are essential for Yemen's stabilization. Furthermore, the PLC's recognition by the international community as the legitimate governing body of Yemen has bolstered its position in securing international support and fostering broader cooperation.

The Challenge of Territorial Control: The Houthis' Dominance in Yemen

Nevertheless, the Presidential Leadership Council exercises control primarily over less populated regions of Yemen. The Houthis govern approximately one-third of Yemen's territory, which includes regions that are home to 70 to 80 percent of the population.⁴⁰ This extensive control underscores the substantial influence the Houthis have within the country and presents a formidable challenge to the efforts of the PLC to unify Yemen and restore stability.

36. Ezzi, Y. (2023, June 26). Hadramawt National Council: A new player in Yemen's politics. The New Arab. <https://www.newarab.com/analysis/hadramawt-national-council-new-player-yemens-politics>

37. Ezzi, Y. (2023, June 26). Hadramawt National Council: A new player in Yemen's politics. The New Arab. <https://www.newarab.com/analysis/hadramawt-national-council-new-player-yemens-politics>

38. Ezzi, Y. (2023, June 26). Hadramawt National Council: A new player in Yemen's politics. The New Arab. <https://www.newarab.com/analysis/hadramawt-national-council-new-player-yemens-politics>

39. Ezzi, Y. (2023, June 26). Hadramawt National Council: A new player in Yemen's politics. The New Arab. <https://www.newarab.com/analysis/hadramawt-national-council-new-player-yemens-politics>

40. United States Department of State. (n.d.). 2021 Report on International Religious Freedom: Yemen. Retrieved June 20, 2024, from <https://www.state.gov/reports/2021-report-on-international-religious-freedom/yemen/#:~:text=During%20the%20year%2C%20the%20Houthis,80%20percent%20of%20the%20population>

The PLC's Military Coordination Challenges

The PLC has partly improved military coordination among anti-Houthi forces. In response to the political and security crises in Yemen, the Presidential Leadership Council was formed as a crucial national initiative to unify all anti-Houthi armed factions under a single command, aiming to coordinate their efforts towards a unified military objective.⁴¹ Nevertheless, a significant issue is the lack of centralized military coordination within the Presidential Leadership Council. Each member of the council maintains control over their own military divisions, resulting in substantial power imbalances among the different factions. There is no central authority within the PLC overseeing all military divisions, which undermines the authority of the PLC's President.⁴² Moreover, the members are unwilling to relinquish control over their respective military units to a central governing body, further complicating efforts to achieve cohesive and unified military operations. To counteract this challenge, the Nation Shield Force, has been established by Presidential Leadership Council President Al-Alimi to unify various armed groups and units within government-controlled areas.⁴³

Economic Challenges

Economic recovery has been slow and uneven. The PLC faces significant challenges in reviving Yemen's economy, which has been devastated by years of conflict. Issues such as rampant inflation, unemployment, and the destruction of infrastructure persist, making economic stabilization a daunting task.⁴⁴ The Presidential Leadership Council currently lacks a cohesive economic strategy beyond its focus on revenue generation and stabilizing the exchange rate. While these priorities are crucial, efforts to enhance revenue generation are significantly impeded by a lack of trust and coordination among its various factions. This disunity hinders the Council's ability to implement effective and unified economic policies.

Uncertain Path to Peace

In addition, the PLC has struggled to make substantial progress in peace negotiations with the Houthis. The Houthis have pursued their own diplomatic channels, often bypassing the PLC entirely. They have engaged directly with Saudi Arabia and other international actors, seeking to negotiate terms independently. This approach has further complicated the peace process, as it undermines the PLC's role as the central authority in Yemen. The PLC's ability to broker a comprehensive and lasting peace agreement remains uncertain.

41. Forum of Federations. (2022). The Future of the Military and Security Situation in Yemen. In Forum of Federations. Retrieved June 20, 2024, from <https://forumfed.org.b-cdn.net/wp-content/uploads/2022/09/ForumFed-Yemen-Report-.pdf>

42. Washington, A. C., DC, & Nasser, A. (2024, May 15). Divergent Saudi-Emirati agendas cripple Yemen's presidential leadership council. Arab Center Washington DC. <https://arabcenterdc.org/resource/divergent-saudi-emirati-agendas-cripple-yemens-presidential-leadership-council/>

43. Al-Batati, S. (2023, January 30). Yemeni leader creates military unit under reconstruction strategy. Arab News. <https://www.arabnews.com/node/2241701/amp>

44. Davies, F., UNDP, & Wennmann, A. (2022). *The Economic Dimensions of the Conflict in Yemen: Final Report*.

CONCLUSION

The establishment of the Presidential Leadership Council in Yemen aimed to bridge the significant divisions among various factions within the country, fostering a more unified approach to governance and peace. However, the PLC's formation has not fully resolved these issues.

Moreover, concerns about inclusivity within the PLC persist. Some key political actors, including the Socialists, Nasserites, and the Rashad party, were not represented in the council, which has raised questions about the extent to which the PLC reflects the full spectrum of Yemen's political landscape.⁴⁵ This exclusion has resulted in a body dominated by military and militia leaders, further limiting its representative scope. Secessionist elements, such as the Southern Transitional Council, present a potential challenge, as their objectives, particularly regarding southern autonomy, may at times appear to be in tension with the broader goal of national unification pursued by the PLC.

Recent negotiations between Saudi Arabia and the Houthis have gained momentum following the rapprochement between Saudi Arabia and Iran. Iran's influence has significantly curbed Houthi hostilities towards Saudi Arabia, leading to promising developments despite ongoing obstacles.

Operation Prosperity Guardian has yet to deliver the anticipated outcomes, as Houthi attacks in the Red Sea have continued, raising concerns about the sustainability of a purely military approach to the conflict. In contrast, Saudi Arabia's case illustrates that direct dialogue with Iran has led to a cessation of Houthi attacks on the Kingdom. In the long term, such diplomatic engagement may present a more promising path toward resolving the conflict.

However, the situation in the Red Sea presents another dynamic that was absent in the Saudi-Iran negotiations: the Gaza war. Without a resolution to the Gaza war, it appears unlikely that the attacks in the Red Sea will cease. This emphasizes the imperative for Operation Prosperity Guardian, driven largely by geo-economic interests, to be embedded within a comprehensive geopolitical framework that addresses the conflict in Israel and Gaza.

A sustainable solution requires a multifaceted approach. While the military operations in the Red Sea are intended to protect crucial maritime routes and economic interests, they fail to address the underlying political and ideological motivations driving the Houthis' actions. Engaging in comprehensive diplomatic efforts that involve all relevant regional actors, including addressing the broader conflict in Gaza, is essential.

Incorporating these broader geopolitical considerations into Operation Prosperity Guardian will enhance its effectiveness. By fostering dialogue and cooperation with Iran and addressing the interconnected conflicts in the region, a more holistic strategy can be developed. This approach not only aims to reduce the immediate threat of Houthi attacks but also seeks to establish a foundation for long-term peace and stability in the region.

The PLC could seize the opportunity presented by the Red Sea crisis to assert itself as the only credible governing body in Yemen. This strategic move comes at a critical juncture, as the Houthis have significantly undermined their own credibility in the international community by engaging in attacks on ships in the region. These aggressive actions have

45. Al Rawhani, O. (2022). Made in KSA: The Risks of an Imposed Presidential Council. In *Sana'a Center for Strategic Studies*. Sana'a Center for Strategic Studies. https://sanaacenter.org/files/Made_in_KSA_The_Risks_of_an_Imposed_Presidential_Council_en.pdf

not only heightened tensions but also endangered international maritime routes, drawing widespread condemnation from the global community.

By positioning itself as a stabilizing force, the PLC can appeal to both domestic and international stakeholders. Domestically, the PLC can highlight its commitment to ensuring the safety and security of Yemen's coastal regions, contrasting sharply with the Houthis' reckless behavior. This distinction can help garner support from Yemeni citizens who are increasingly weary of the ongoing conflict and its detrimental impact on their daily lives.

Internationally, the PLC can leverage this crisis to build stronger alliances and secure more substantial support from key global powers. By presenting itself as a responsible and reliable partner committed to safeguarding international shipping lanes, the PLC can attract much-needed aid and political backing. This approach can also facilitate deeper cooperation with regional powers who have a vested interest in maintaining stability in the Red Sea and the broader Middle East.

Moreover, the PLC can use this moment to push for increased diplomatic engagement and negotiations aimed at resolving the conflict. By emphasizing their role as the legitimate governing body capable of bringing peace and stability to Yemen, the PLC can strengthen its position in peace talks and potentially marginalize the Houthis, whose actions have increasingly isolated them from the international community.

However, it is important to acknowledge the complexities in the southern region of Yemen. The bilateral talks between Saudi Arabia and the Houthis have not included the Presidential Leadership Council, which highlights the multifaceted nature of the Yemeni conflict and underscores that it involves several factions, not just the Houthis. Even if Saudi Arabia manages to secure an agreement with the Houthis, this will not resolve Yemen's internal conflicts. The Southern Transitional Council remains steadfast in its secessionist ambitions for the south, which is fundamentally opposed by the Houthis, who advocate for a unified Yemen. Consequently, the potential for renewed hostilities between the STC and the Houthis remains high. At this point a successful agreement between the Houthis and the PLC seems unlikely due to the STC's opposing stance on the unification of Yemen.

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