

## RED SEA REDLINES AND YEMEN'S INFLECTION POINT

Relevant for: International Relations | Topic: Effect of policies and politics of developed & developing countries on India's interests

Yemen is in the south-west corner of the Arabian Peninsula. Though most Yemenis vouch for national unity, the northern and southern parts of the country are two distinct entities. While the north is hilly and fertile and has some oil reserves, the southern part is mostly desert. The country has a population of around 27 million, with most living in the north. With GDP per capita of \$944, which is less than half of India's, Yemen's poverty is a sharp contrast to the oil-riches of her northern neighbours.

The country is a tribal society with a strong sense of identity and kinship. While almost all Yemenis are Muslims, the population in the north is mostly Zaidi which is closer to the Shia sect followed in Iran. The southerners are mostly Sunnis akin to a majority of the Gulf Cooperation Council (GCC) citizens. While the north remains rooted in esoteric Zaidi traditions, the south which was colonised by the British to protect the sea route to India became relatively more westernised. South Yemen also had close links with India — the Nizam of Hyderabad relied on troops from Hadhramaut and the founder of Reliance Industries, Dhirubhai Ambani, began his career in Aden.

The roots of the current imbroglio can be traced to the 1930s when north Yemen's Imam ceded to the resurgent Kingdom of Saudi Arabia three provinces that many Yemenis still considered theirs. In the 1960s, north Yemen passed through a six-year-long civil war between the Imam's fighters with Saudi support, against the Republican forces backed by Egypt. The civil war resulted in formation of Yemen Arab Republic in 1968; it also established a quasi-tradition of foreign dabbling in Yemeni politics.

A united Republic of Yemen was finally established in 1990. In 1994, a section of the south tried to secede, but the insurrection was put down after a short civil war. In 2004, the northern Shia militia called "Ansar Allah" began an insurgency led by dissident cleric Hussein Badreddin al-Houthi, head of the Zaidi sect, against President Ali Abdullah Saleh. In November 2011, the Yemeni Arab Spring movement managed to remove Saleh who was replaced by his southern deputy Abdrabbuh Mansour Hadi; Saleh and his clan remained influential till his assassination in 2017. The al-Houthis rebelled against Mr. Hadi, ousting him in 2014 and forcing him to flee to Riyadh where he currently heads an 'internationally recognised' but largely ineffective government of Yemen. Saudi Arabia, apprehensive of an al-Houthi led Yemen becoming a surrogate of Iran (a regional Shia rival), cobbled a military coalition comprising the United Arab Emirates (UAE), Egypt and other Sunni powers, with Pakistan reluctantly opting out. This coalition began a military campaign ("Operation Decisive Storm") against the al-Houthis in March 2015, mostly through aerial bombardment, with army units supporting Mr. Hadi's forces in southern Yemen; it also imposed a naval blockade. Four years on, the civil war has ground to a stalemate, with the al-Houthis hunkering it out in the north. The United Nations has described Yemen to be currently in the grip of the world's worst humanitarian catastrophe, with over 11,000 deaths and 3 million internally displaced.

During the past month, the Yemeni civil war seems to have entered its endgame, crossing two watersheds which could cast a shadow over India's strategic national interests. Though both these developments were a long-time coming, each arrived with a bang and the potential to alter the future course of the conflict.

The most significant recent development in the Yemeni war has been the coordinated pre-dawn

drone attacks last Saturday on the two Saudi upstream oil facilities at Abqaiq and Khurais. Though al-Houthi militia claimed responsibility, the details (10 drones were said to have engaged 17 targets) and sophistication (accurate hits nearly 1,300 km away from the Yemeni-Saudi border) leaves many questions unanswered. The strikes managed to put 5.7 million barrels per day of crude production out of action — over half of Saudi output and nearly 5% of global supplies. This caused an unprecedented 19% initial surge in oil prices on Monday, with Brent crude topping \$71 a barrel. In a worst case scenario of the hostilities escalating or long-term derailment of Saudi production, oil prices could rise above \$100 a barrel. These game-changing attacks not only mark a dramatic escalation of the conflict but also showcase the efficacy of an asymmetric warfare. With most hydrocarbon assets in the Gulf region currently defenceless against such attacks, this vulnerability is a foretaste of any future conflict in this tension-prone region.

The second development has been the growing rift within the Saudi-led coalition. In July 2019, the UAE announced a drawdown of its forces from Yemen where they have anchored the coalition ground forces. By the end of August, Yemeni government forces were compelled to withdraw from southern port of Aden leaving it to the UAE-backed units of the Southern Transitional Council (STC), formed in mid-2017.

The STC calls for an independent South Yemen and is vehemently against the presence of Islamists in Yemen such as Islah party (member of Saudi-led coalition), al-Qaeda in the Arabian Peninsula and the Islamic State. The UAE is estimated to have trained and equipped thousands of fighters for the STC and other Yemeni militias. Abu Dhabi has also been expanding its strategic presence in neighbouring Eritrea and Somaliland.

Many observers foresee the current civil war coagulating into a de facto division of the Republic of Yemen roughly along the pre-1990 border: between an al-Houthi-led north and an STC-dominated south. Yemeni re-partition, if realised, may strongly impact the intra- and inter-state dynamics from Yemen itself to Yemen-Saudi ties and to the UAE-Iran-Saudi Arabia triangle. Riyadh's inability to attain its objectives in Yemen — despite enormous military resources at its disposal — may have long-term consequences, possibly making it more reliant on the large Sunni states such as Pakistan and Egypt. If a viable South Yemeni state takes shape, the STC's symbiotic ties with the UAE would put Abu Dhabi in the driving seat along the geo-strategic Bab al-Mandeb Strait — a choke point connecting the Arabian Sea with the Red Sea onwards to the Suez Canal.

These two aforementioned developments are significant as most of India's west-bound sea trade passes through Bab al Mandeb. India, therefore, needs to watch the evolving situation carefully and revive long-standing ties with the emerging stakeholders in Yemen, particularly along the southern coastal belt. The weekend's drone attacks on Saudi oil facilities, too, have direct and serious implications for India as world's third largest crude importer (with Saudi Arabia supplying nearly a fifth). The oil price surge hits India precisely when the economy is already struggling. A rise of oil price by even a dollar raises India's annual oil bill by \$1.5 billion, the country having spent \$112 billion on crude imports in 2018-19.

A highly volatile oil market and a tense regional situation would also affect India's thriving economic engagements as well as its manpower there. Additionally, the attacks could affect Saudi Aramco's ongoing negotiations of two major upstream investments in India totalling over \$30 billion with Reliance Industries and the proposed Ratnagiri Refinery, respectively. In view of direct negative fallout on our interests, India has rightly condemned the Abqaiq-Khurais attacks. Further, it needs to take evasive actions in order to avoid being trapped in the worst case scenario; such steps could include frontloading India's biofuel programme, expanding its strategic petroleum reserves and diversifying its crude sources away from the West Asia.

At a different level, drones could emerge as a weapon of choice for motley anti-Indian non-state actors. Indeed, many of them are no worse than the al-Houthis in their resourcefulness and foreign sponsorships. Much of our infrastructure could be vulnerable to copy-cat attacks using such affordable and effective platforms available virtually off-the-shelf internationally. India's defence and security experts need to urgently devise counter measures to mitigate such vulnerabilities.

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