



YEMEN

GAPS AND NEEDS ANALYSIS (GNA)

ASSESSMENT AND RECOMMENDATIONS REPORT

MAY 2023



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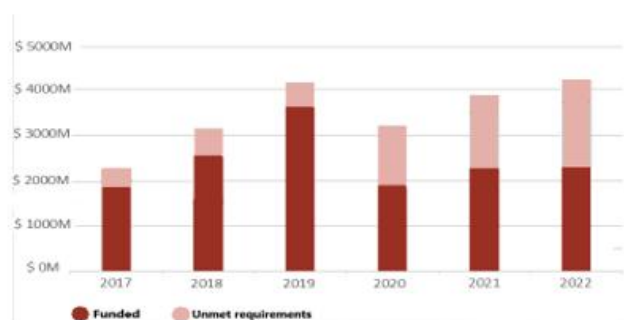
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1. BACKGROUND:

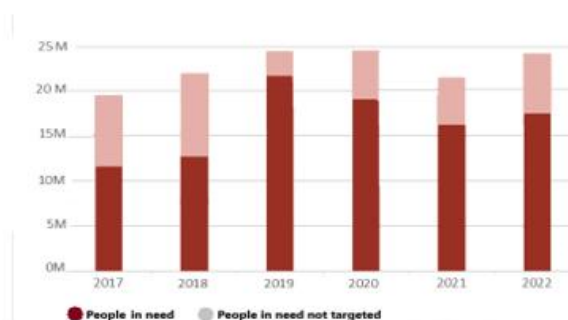
1.1. HUMANITARIAN CONTEXT

Between 2021 and 2022, humanitarian operations in Yemen experienced a substantial percentage of funding drop. As stated in the 2023 HRP report, while the 2022 HRP was one of the best funded globally, the 55% coverage impacted the delivery of humanitarian assistance and caused a decrease in the emergency food assistance ration size. Nevertheless, humanitarian partners reached 10.5 million people in need per month and achieved key successes in food security, malnutrition, and disease (cholera) outbreak response. Please click the following link for more information: [Yemen Humanitarian Response Plan 2023](#)

According to the 2023 HRP report, the total number of people in need in 2023 has decreased from 23.4 million to a projection of 21.6 million comparing by the last year. The change is due largely to technical changes in cluster-level needs assessments, revised food security projections released in late 2022, as well as limited and fragile improvements in levels of needs. At the same time, the cost of response to those needs, due to both changes in interventions, as well as the increased cost of many existent interventions, has mitigated the limited savings that



(Chart No. 01) Financial requirements (US)



(Chart No. 02) Number of people in need versus targeted

might otherwise have accompanied the slight decrease in the figure of people in need.

2. CURRENT LOGISTICS CLUSTER ACTIVITIES

2.1. COORDINATION AND INFORMATION MANAGEMENT

Coordination and Information management is a core mandate of the Logistics Cluster in Yemen. The availability of the Logistics Cluster platform ensures that humanitarian partners' concerns connected with logistics and supply chains are discussed and effectively addressed.

The Logistics Cluster is holding regular coordination meetings, as well developing communication platforms among the humanitarian partners. Teleconference coordination meetings are organized on monthly basis, to ensure humanitarian partners physically based in Sanaa, Hodeidah, Aden and Amman can join and contribute. In 2022, 8 meetings were held with an average participation of 25 organizations. The meetings aimed to address common logistics gaps to minimize duplication of efforts, address bottlenecks and enhance operational decision-making. The following activities were also undertaken by the Logistics Cluster in collaboration with partner organizations and key stakeholders across Yemen:

- Gathering and sharing logistics capacity information/assessments among Cluster participants, including contact details.
- Facilitating knowledge transfer through consolidation and dissemination of agreed best practices.
- Identifying and addressing gaps, bottlenecks or duplication in operations as well as provide advice and troubleshooting assistance to its partners.

To inform operational decision-making and improve the effectiveness of the logistics response, the Logistics Cluster is also:

- Collecting, managing, and disseminating logistical information to support operational decision-making and improve the efficiency of the logistics response.
- Consolidating and sharing updated operational information, including Operational Overviews, Meeting Minutes, UNHAS flight schedules, forms, and Standard Operating Procedures (SOPs). In the last five years, the logistics cluster created and shared more than 16 SOPs in their website, among them are Air, Sea and Road Transport, Temporary Common Storage, Fuel Provision and many other SOPs. For more information, please click on the following link: [**Standard Operating Procedures-Yemen Logistics Cluster.**](#)
- Maintaining information sharing platforms including a common mailing list for more than 280 contacts and a dedicated operations Webpage on the Logistics Cluster website, to disseminate relevant and up-to-date logistical information to the humanitarian community. In 2022, the number of visits to the Logistics Cluster website reached 4,437 views.
- The website also includes a Logistics Operational Guide (LOG) containing relevant technical information and guidance.

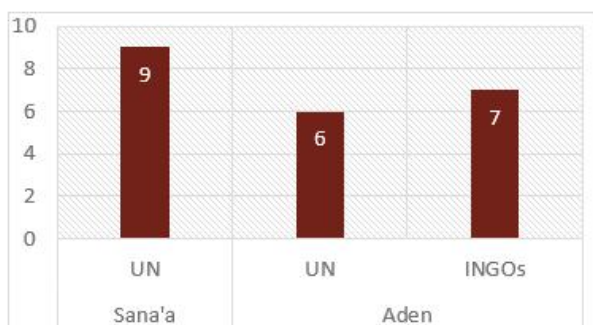
The Cluster has maintained since then a GIS mapping capacity to support partners, consolidating the access constraint information shared by the group. For more details, please click on the following link: [**Yemen - Access Constraints Map.**](#)

In agreement with its core mandate on Information Management, starting from October 2022, the Logistics Cluster is also working together with the local authorities (both in Sanaa and Aden), on consolidation and dissemination of the [**Importation and Customs Procedures**](#), including full set of current guidance relevant to the importation of humanitarian supplies into Yemen. This work is under process and will be finalized in 2023.

2.2. COMMON STORAGE SERVICE:

Common storage is intended for short-term storage of humanitarian cargo. The Logistics Cluster facilitated access to storage facilities in Aden (5,100 m², including 600 m² of temperature controlled and cold chain storage) and in Sana'a (3,000 m²). In 2022 alone, over 10,500 CBM of cargo (with estimated value of \$47,2M) for 15 humanitarian partners was temporarily stored in these facilities. Availability of these storage facility, especially in Aden Free Zone is appreciated by humanitarian partners, as it allowed partners to temporarily store humanitarian cargo (free from port storage charges), before cargo is fully customs cleared and/or approvals for distribution/transport received. Considering overall utilization indicators, the Logistics Cluster dry warehouse in Sanaa was closed from April 2023.

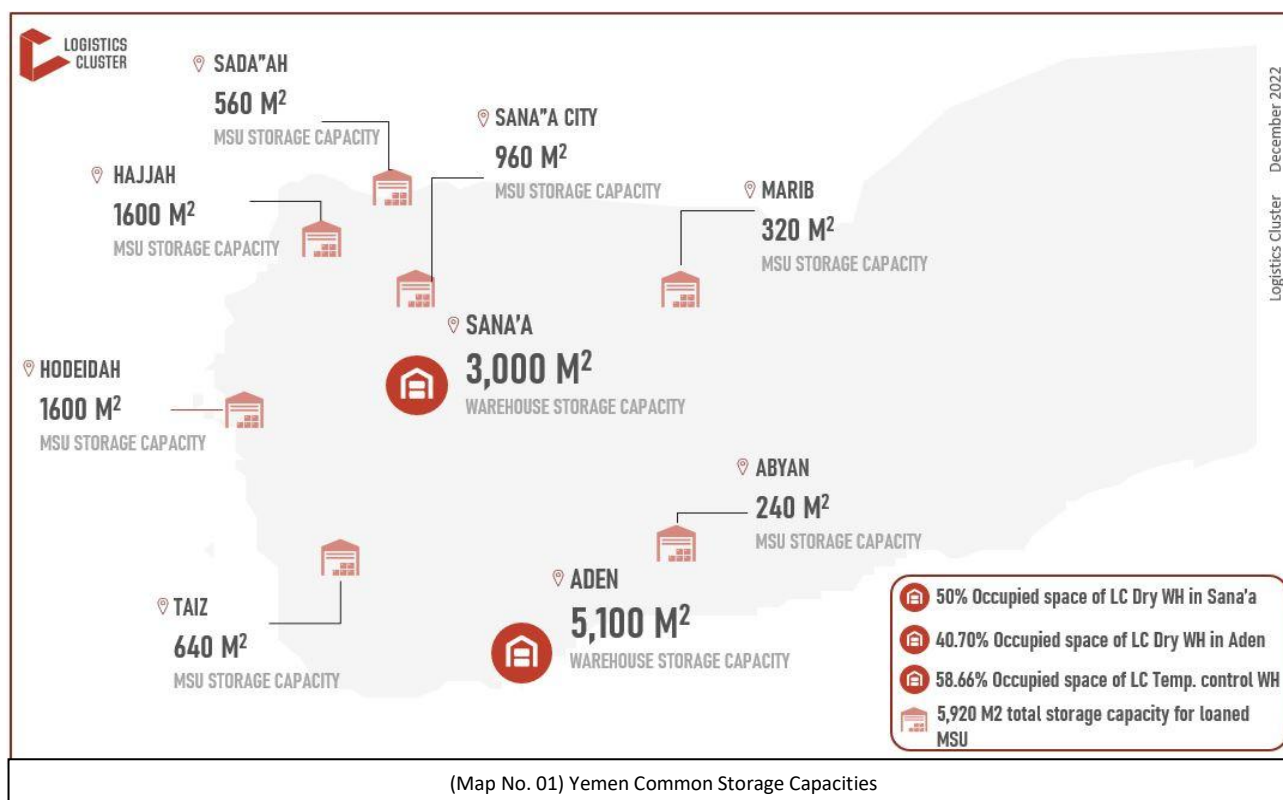
The Logistics Cluster is also supporting INGOs in facilitating access to Mobile Storage Units (MSUs), in remote areas, where renting of a dedicated warehouse is either impossible or not practical. Below (table 01) demonstrate the 19 MSUs, which were loaned to 7 partners in 2022 (DRC, NRC, UNICEF, IOM, WHO, PUAMI and MSF OCA).



(Chart No.03) No. of storage requests received 2022-2023

Partner	No of MSUs	Total square meter
UN	5	1,520
INGO	14	4,400
Total	19	5,920

(Table No. 01) Loaned MSUs for Logistics Cluster partners 2022-2023



3. DEFINITION OF GAPS AND NEEDS ANALYSIS (GNA) EXERCISE

The GNA is a series of interviews with the logistics coordinators and managers working on behalf of organisations that have humanitarian logistics operations in country. The GNA is conducted by the in-country Logistics Cluster team and representatives from the Global Logistics Cluster (GLC) and aims to specifically identify the broad logistics gaps and the bottlenecks faced by the community. Should the GNA report identify gaps and needs, the WFP Country Office (CO) can use the report and its recommendations to advocate accordingly to the Humanitarian Country Team (HCT), the Humanitarian Coordinator (HC), and relevant government authorities.

The expected results of this exercise are to:

- Identify existing and potential logistics gaps and bottlenecks in logistics coordination, information sharing and logistics services.
- Propose solutions, if possible, to solve any crucial operational gaps identified.
- Make recommendations regarding the relevance of maintaining or developing an active humanitarian logistics cluster/platform in the country, transition to Sector operations, working group or exit strategy for the cluster.
- Make recommendations regarding the way forward for the logistics cluster strategy and activities in the country.

3.1. METHODOLOGY OF GNA

The undertaken exercise is to focus on identifying existing and potential partners' logistics gaps and clarifying potential needs of the wider humanitarian logistics community existing within the respective government agencies, international and national NGOs, in the areas of:

- **Coordination:** coordination mechanisms, strategic planning, standards, and guidance, etc.
- **Information process and regulations:** monitoring and reporting, communication flow, logistics-related information sharing mechanisms and products, etc.
- **Trainings:** online/face-to-face trainings focused on management of logistics working groups, preparedness for emergencies and specific technical trainings.

Recognizing and addressing logistics gaps is essential for the Logistics Cluster. It is necessary to take action to facilitate people's access to the services provided by WFP as the lead organization, including transportation and other essential resources as provider of a "Last resort". The Logistics Cluster aim to work together with partners to make a meaningful impact in the lives of those who need it most.

From this standpoint, the Yemen Logistics Cluster team, with the support of the Global Logistics Cluster (GLC) referent, were tasked for the following two stages:

- ✓ Online questionnaire was shared with the Logistics Cluster partners, containing questions related to the activities and the logistical capacity of organizations, gaps and needs, in preparation for the second stage.
- ✓ In-Depth interviews with key stakeholders participating in the Yemen Logistics Cluster activities: remote calls with partners located in the Country. Collection of partners' information focused on these areas:
 1. Their Humanitarian Response Plan activities.
 2. Their operational supply chain / logistics strategy / needs and challenges.
 3. Their bottlenecks and gaps faced while implementing their supply chain strategy.
 4. Identify common logistics gaps and bottlenecks.
 5. Provide common solutions -if possible- to address -if identified- common logistics gaps and bottlenecks.

The GNA report was prepared on three phases:

1. One on one meetings conducted with partners in Q3 and Q4 of 2022 by the Yemen Logistics Cluster.
2. Online questionnaire that was shared with the logistics cluster partners, which contains questions related to the activities and the logistical capacity of organizations, gaps and needs.
3. In-depth online interviews and discussions with key stakeholders participating in the Yemen Logistics Cluster activities. Information on the exercise was shared during the Cluster coordination meetings on several occasions. Contacts were established with 16 active humanitarian actors participating on a regular basis with the Yemen Logistics Cluster activities.

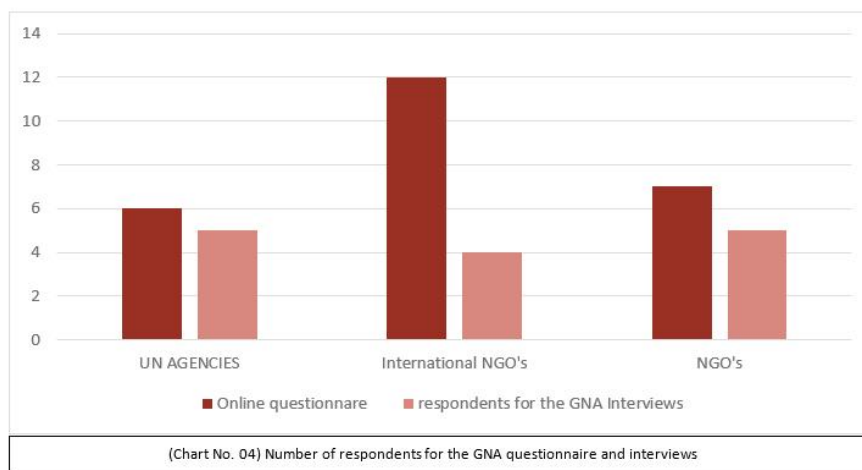
A total of 14 expressions of interest were received and online meetings were then organized (please refer to Table 02 and Chart 04 below). The invitation email included a file of the filled questionnaire by the partner. The same questionnaire was used to guide direct discussions.

The overall response rate, interest, and participation from actors was high. Based on the feedback from the interviews and key information on humanitarian activities in-country, the analysis formulate recommendations on the way forward to continue strengthening humanitarian logistics responses in Yemen.

This GNA report summarizing the key findings from all actors consulted will be shared in the second quarter of 2023 with the humanitarian community in-country.

OGRANISATION	TYPE OF AGENCY
International Organization for Migration (IOM)	UN
United Nations High Commissioner for Refugees (UNHCR)	UN
United Nations Children's Fund (UNICEF)	UN
Food & Agriculture Organization of the United Nations (FAO)	UN
Save the Children (SCI)	INGO
International Rescue Committee (IRC)	INGO
International Committee of the Red Cross (ICRC)	INGO
Médecins Sans Frontières - CH (MSF)	INGO
Sustainable Development Foundation (SDF)	NGO
Yemen Family CARE international Yemen Association (YFCA)	NGO
Building Foundation for Development (BFD)	NGO
Society for Humanitarian Solidarity (SHS)	NGO
National Foundation for Development and Humanitarian Response (NFDHR)	NGO
World Food Programme (WFP)	UN

(Table No. 02) GNA Yemen participation

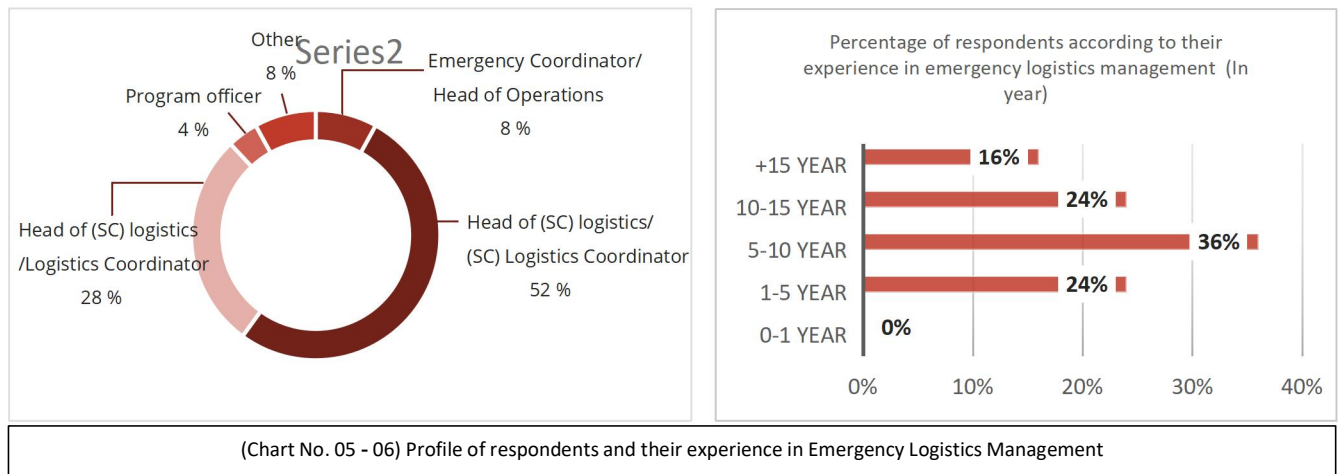


3.2. INFORMATION RELIABILITY

As with any research type, there are several aspects of the information that need to be kept in mind when considering the findings and analysis. The most important in this exercise are:

- The standard GNA scope and methodology is comprehensive: it has been contextualized in this case by reducing the scope and forgoing some data collection elements, in respect of the scope of Cluster activities, the stability of the situation, and the availability and quality of information – so ensuring that outputs produced are as relevant, reliable, and accurate as possible.
- Data quality and availability: Cluster partners' inputs have been collected through a relatively large number of in-depth partner interviews (14) with resort to the questionnaire that was filled by partners to ensure reliability of data, and reasonable representation of the main groups.

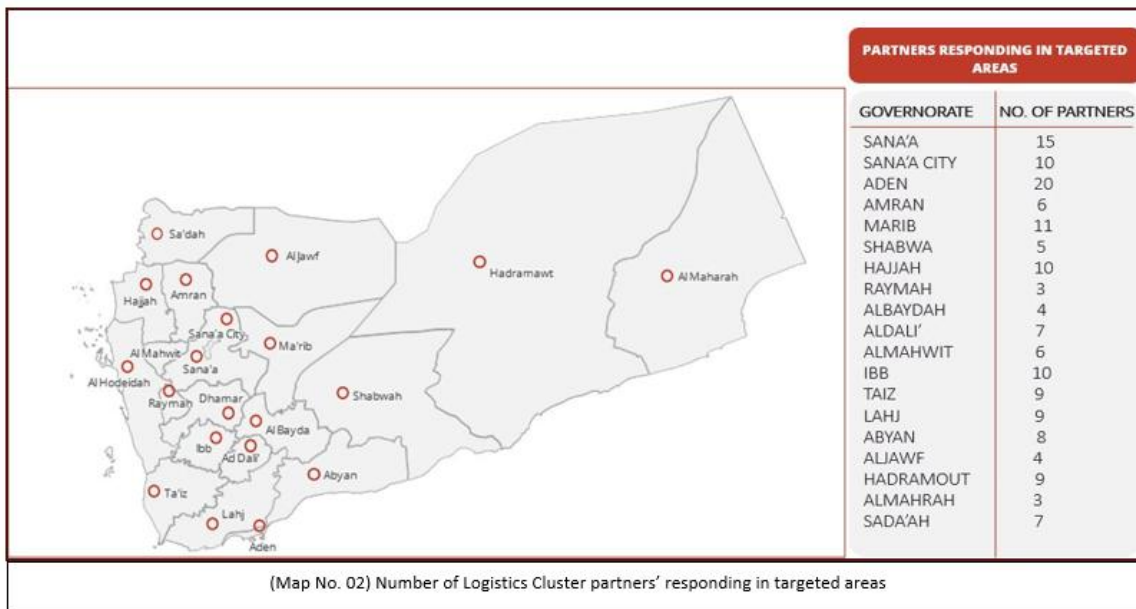
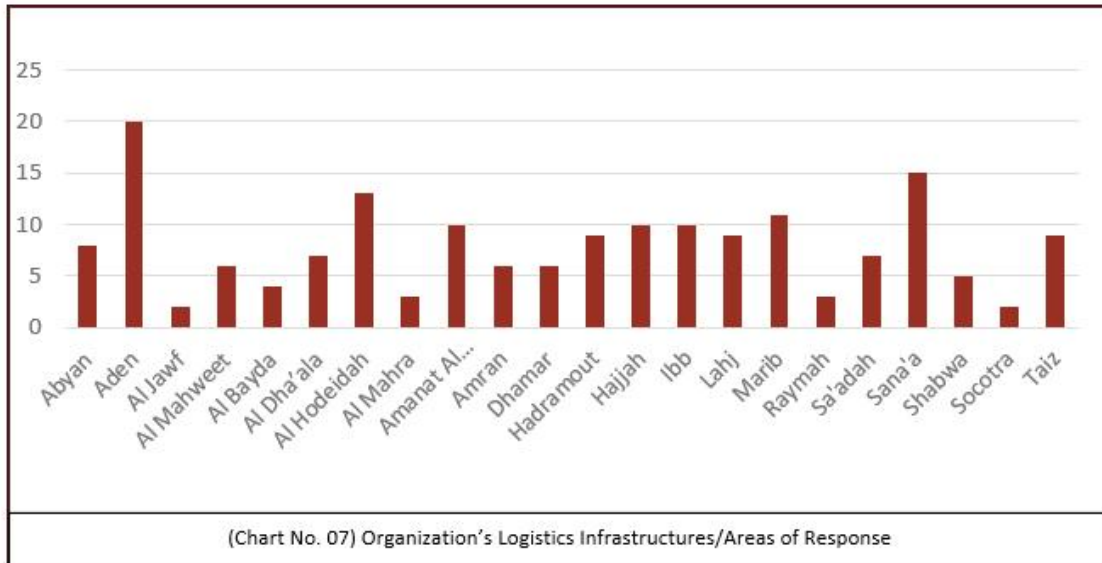
- It is important to mention that all partner interviewees were highly experienced and responsible in the logistics field, with deep knowledge of the context, culture, and way the country operates. Discussions held allowed to obtain an accurate and extensive overview of the challenges faced when implementing humanitarian and logistical programs in Yemen. There was a good balance of representation between the UN agencies and the INGOs.
- By incorporating the perspectives of both UN and INGOs, they can effectively bring important perspectives from humanitarian organizations, this leading to fair and inclusive outcomes.



4. PRELIMINARY FINDINGS AND STATISTICS

4.1. ORGANIZATIONS' LOGISTICS INFRASTRUCTURE

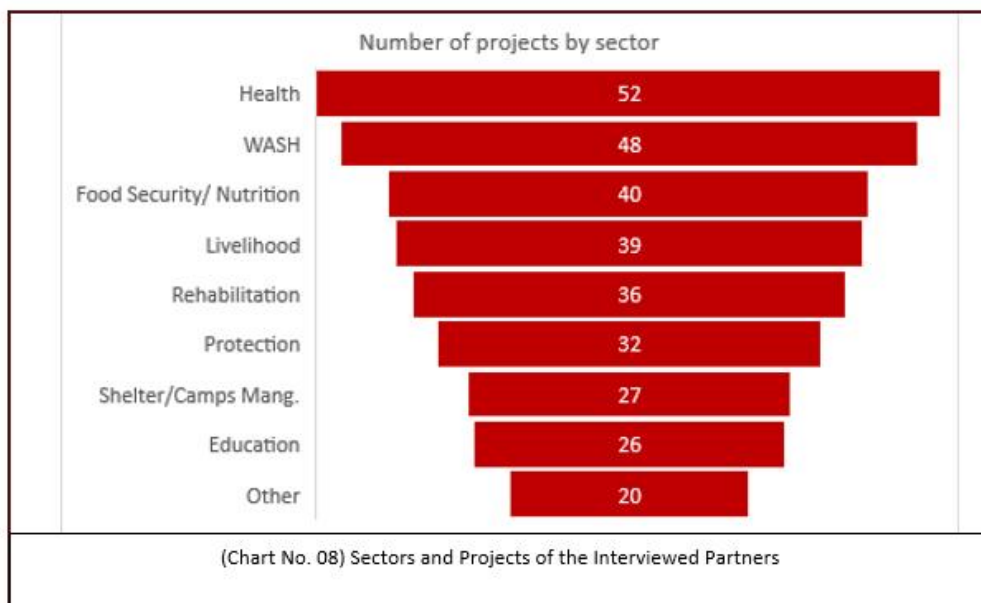
This GNA report indicates the Organization's logistical infrastructure. The Logistics Cluster partners are covering all 22 Governorates in the country, with majority located in Aden, followed by Sanaa and Hodeidah.



4.2. ORGANIZATIONS' LOGISTICS PROJECTS

Yemen's public services and infrastructure have been severely impacted by conflict, economic decline, and recurrent natural hazards. As stated in the 2023 HRP report, more than 80% of the country's population struggles to access food, safe drinking water and adequate health services. Less than half of health facilities across the country are functioning and many that remain operational lack basic equipment and are not able to deliver minimum essential services.

Therefore, based on the GNA exercise and the [HRP 2023 report](#), humanitarian partners are focused more on the fields of Health, WASH, and Food Security, and it aligns with the list of the most targeted projects. See below (chart No. 09).



4.3. ORGANIZATIONS' LOGISTICS STORAGE CAPACITY

Partners store different types of humanitarian aid in warehouses scattered in most areas of the country. Among the most significant cities with large storage capacities are Sana'a, Aden, and Al-Hodeidah. While Sana'a serves as the country's capital, the ports of Aden and Al-Hodeidah are the two primary locations for receiving humanitarian aid, which is then distributed either to the partner's warehouses or to the recipients directly. The Gaps and Needs analysis show that Aden tops the list of cities in terms of storage capacity, as (36%) of partners are using more than 400 cubic meter of storage capacity, followed by the capital Sana'a (32%) and Al-Hodeidah (28%). Whilst availability and accessibility of dry commercial warehouses has significantly improved compared with the past years, same for the temperature-controlled warehouses is still posing a significant challenge for humanitarian partners in Yemen.

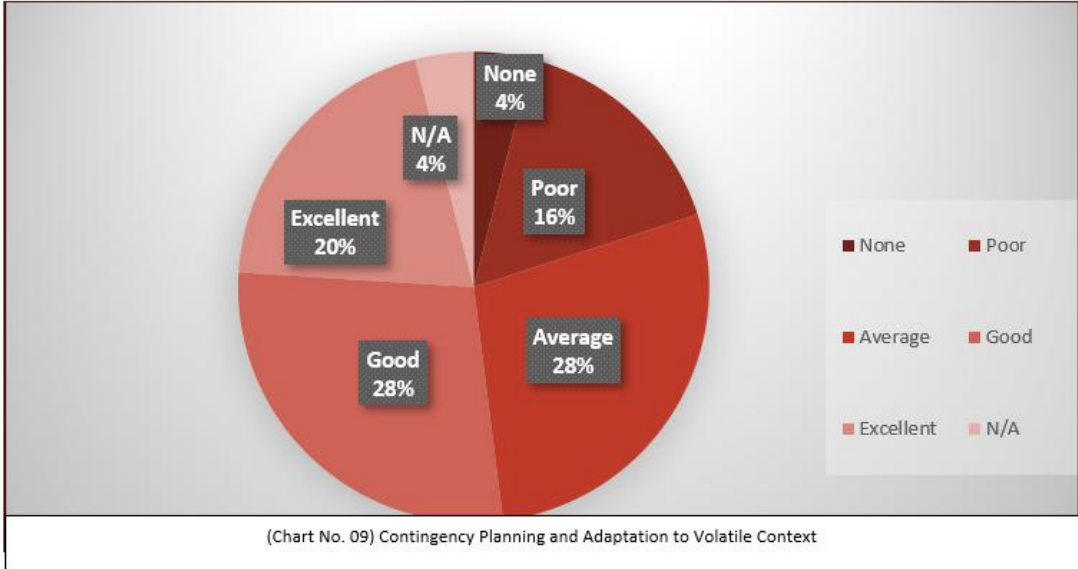
4.4. ORGANIZATIONS' LOGISTICS PLANNING AND PROCUREMENT STRATEGY

According to GNA questionnaire, it is obvious, that most of the partners are using short-term plans. Accordingly, 32% of partners have planning horizons of below 6 months, 12% of partners do a logistics planning for 6 -12 months plans, and only 16% have annual planning in place. Partners relate this to the unstable security situation in the country, deteriorating economic situation and funding constraints. Dealing with the local authorities is also considered as one of the most important challenges faced by the local and international partners that hinder the planning process.

4.5. CONTINGENCY PLANNING AND ADAPTATION TO VOLATILE CONTEXTS:

To address the issue of inadequate planning capacity within organizations, it is crucial to emphasize the importance of contingency planning and adaptation to volatile contexts. While larger organizations seem to have a better grasp

on this concept, smaller ones struggle due to limited resources and budget constraints. This is where the Logistics Cluster can step in and provide vital support in terms of planning, coordination, and execution.



5. PERCEIVED LOGISTICS GAPS AND NEEDS CATEGORY

As we reflect on the gaps and needs analysis of 2021, it becomes apparent that certain common logistics gaps from the year of 2021 continued to persist in 2022. According to recent customer satisfaction survey 97% of partners mentioned that Logistics Cluster-led activities in country add the essential value in their logistics and supply chain operations. Whilst most of the partners appreciated this fact also during GNA discussions, they alluded to the fact:

- a) of absence of alternative humanitarian logistics coordination mechanism or platform in Yemen
- b) of absence of other/substitute government-affiliated logistics coordination entity in the country (due to fragile security and political situation)
- c) last Logistics Capacity Assessment (LCA) was completed in 2012 and outdated (due to prevailing security situation and political landscape).

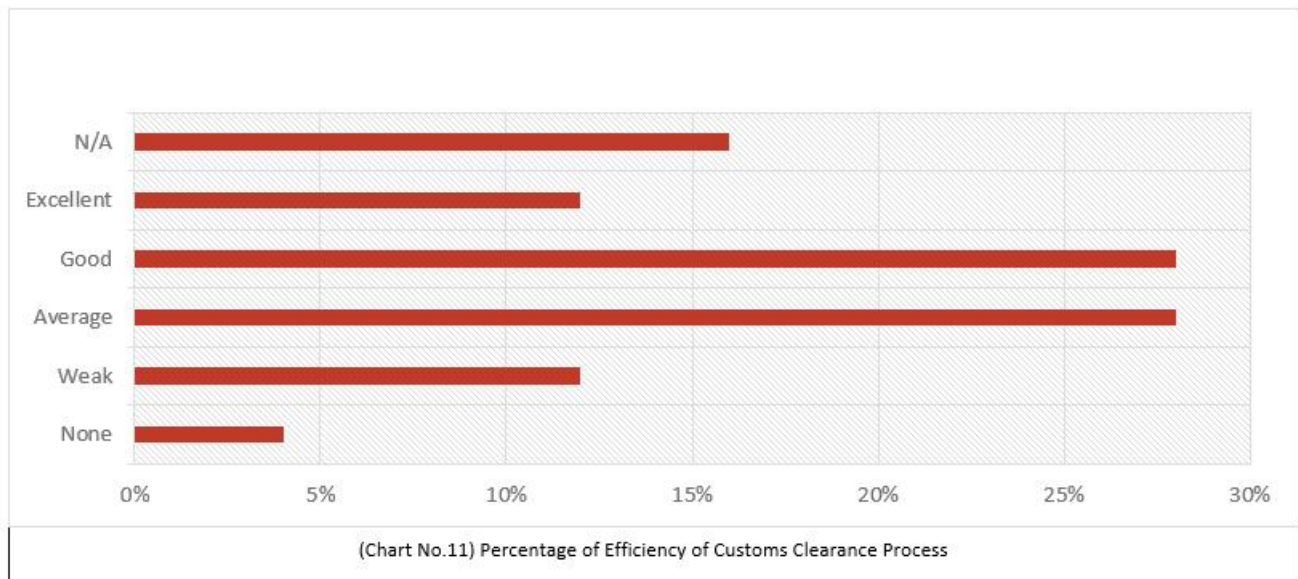
Hence, majority of the interviewed partners' expectation was for the Logistics Cluster to fill such logistics gaps.

Below chart indicate the partners' perceived logistics gaps, which was further discussed with them during one-on-one interviews.



5.1. PROCUREMENT STRATEGY, IMPORTATION AND CHANGING REGULATIONS:

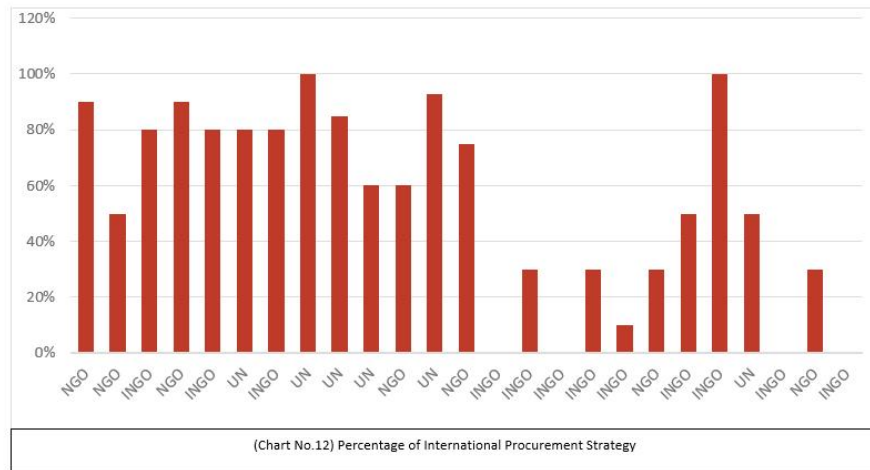
Changing regulations and importation procedures remains also as a major challenge also in 2022, as per GNA findings. These challenge relate to partners' knowledge of the pre-import and arrival procedures (due to the constant and arbitrary change of regulations). These hurdles lead to uncertainty, delays, demurrage and potentially spoilage of short shelf-life items. Over 40% of respondents considered the existing customs clearance processes as unclear and ineffective. Remaining of partners indicated the relevant processes are clear, but very cumbersome and lengthy. Hence, the Logistics Cluster's assistance was requested on (a) publishing the relevant customs and importation guidance, (b) arrangement of awareness sessions or workshops and (c) further advocacy with the local authorities on simplifying the existing importation processes.



The GNA questionnaire has also revealed some interesting insights into the procurement and importation strategies of humanitarian organizations:

- As the (chart no. 08) indicate, Health is the predominant field in which these organizations operate
- (Chart no. 12) indicate that almost 40% of respondents (mainly UN agencies and large INGOs) are depending on international procurement, whilst 60% of respondents (mainly NGOs) rely on local markets for their procurement
- Furthermore, changing importation regulations from local authorities pose significant challenges for these humanitarian organizations in importing medicines.

Therefore, there's a strong relation between the procurement and importation strategies of humanitarian organizations. Further support in streamlining the importation procedures may be of great help for the humanitarian community in Yemen.



5.1.1.RECOMMENDATIONS - PROCUREMENT STRATEGY, IMPORTATION AND CHANGING REGULATIONS:

- The Logistics Cluster should continue being actively involved in the process of advocating for a reduction in the number of access impediments imposed by national authorities, through OCHA.
- Begin working on resources and information products to directly address concerns of partner agencies including:
 - More thorough and more frequently updated guidance on procedures for customs and road movement.
 - In agreement and with contribution of Partners, facilitate sharing of vendor information, including suppliers, transporters, and storage providers among the community of humanitarian logisticians in Yemen.

5.2. GEOGRAPHIC INFORMATION SYSTEM AND MAPPING:

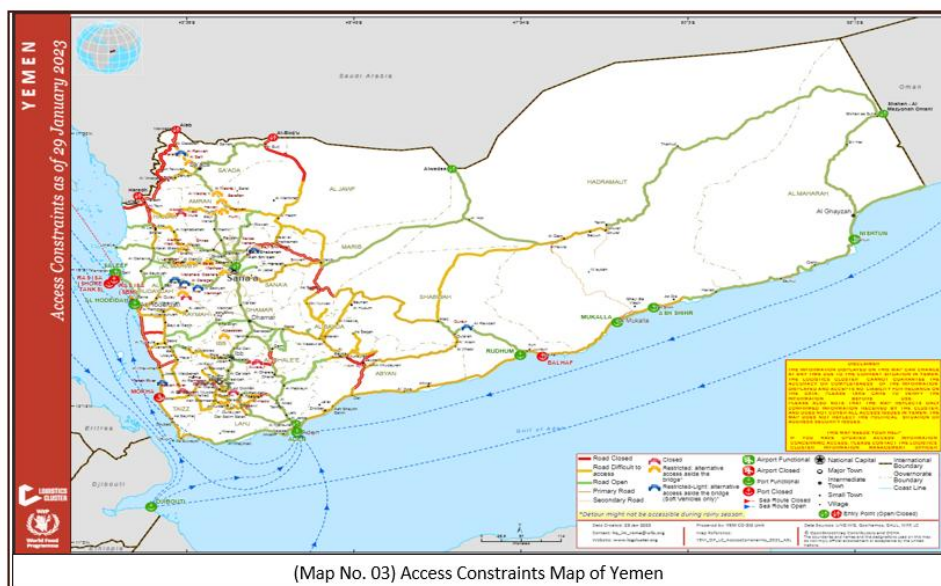
Geographic Information System and Mapping (GIS) is essential tool in today's humanitarian world. As the "Perceived logistics gaps and needs" (Chart no 10) above, almost 44% of partners consider availability of GIS as a gap. With GIS,

partners can collect, analyze, and interpret data, to make informed decisions relevant to logistics. Additionally, GIS mapping can help partners identify new opportunities and optimize their operations for better efficiency.

GIS mapping has proven to be a valuable tool in the Cluster's efforts to support its partners. The Logistics Cluster has carefully maintained its GIS mapping capacity since its inception, which has enabled it to consolidate critical access constraint information shared on regular basis. This has allowed the Cluster to create accurate and up-to-date maps that aid in decision-making and resource allocation, ultimately leading to more effective disaster response efforts.

5.2.1.RECOMMENDATIONS (GEOGRAPHIC INFORMATION SYSTEM MAPPING):

- The Logistics Cluster should continue the coordination with OCHA to ensure a consistent message supported by relevant data and testimonial experiences of the humanitarian logistics community.



5.3. STORAGE AND TRANSPORTATION SERVICES:

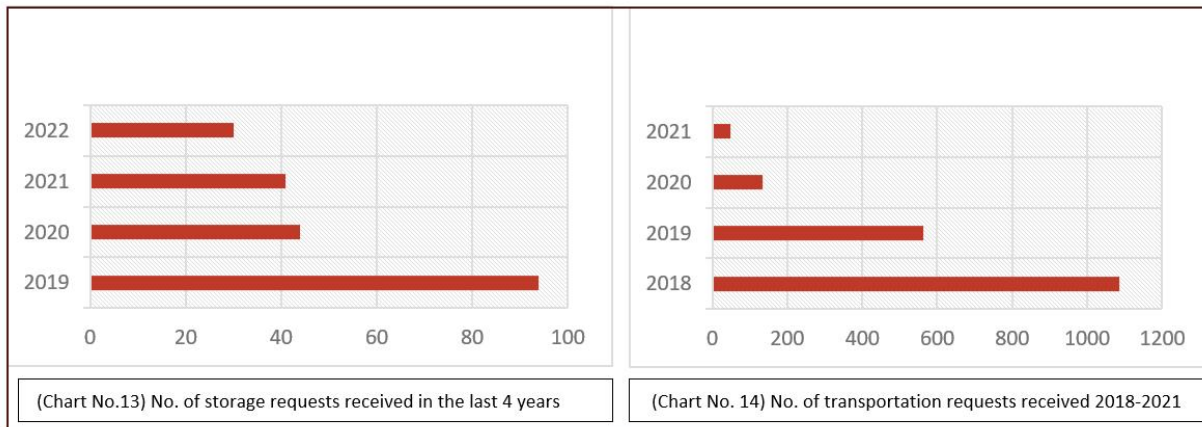
Having reliable storage service is essential components. This is especially true for partners who are looking to bridge the gap between their current storage capabilities and what they need to operate efficiently.

As GNA results have shown, almost 32% of partners are considering investing in storage service to address this issue. With the right storage solution in place, partners can rest assured that their assets are secure, easily accessible, and always available when they need them.

According to the logistics gaps and needs graph above (chart no 10), 44% of interviewed partners identified transportation service as a gap in their logistics operations. This is mainly related to challenges that humanitarian partners face with transportation of goods from South to North.

According to the Logistics Cluster Relief Item Tracking Application (RITA), partners service requests for storage and transportation services have decreased in 2022. This is attributable to the fact, that over the years, Partners

managed to build their in-country transport and storage facilities, either commercially or other means (e.g. WFP Bilateral Service Provision (BSP)).



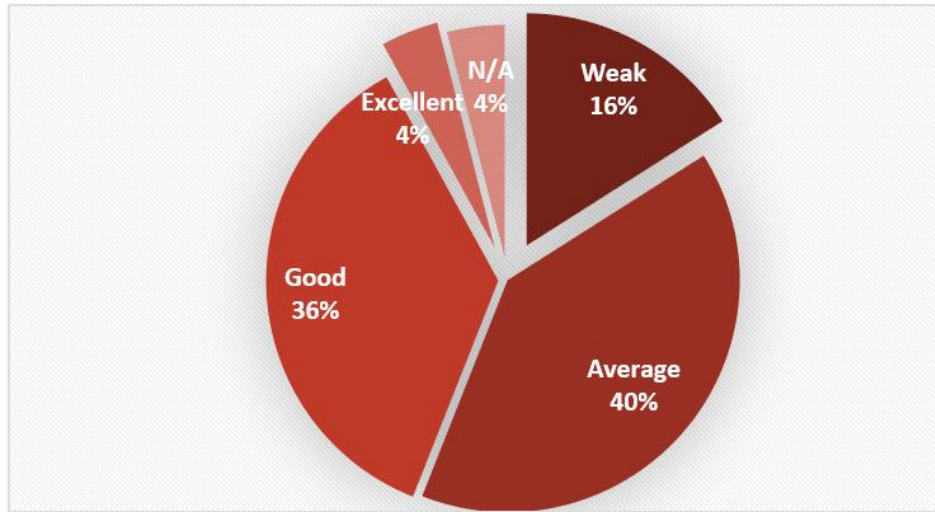
As per GNA findings, although the requirement for dry warehousing can be covered through commercial means, availability of temperature-controlled storage facilities and expertise is considered a common logistics gap.

5.3.1.RECOMMENDATIONS (STORAGE AND TRANSPORTATION SERVICES):

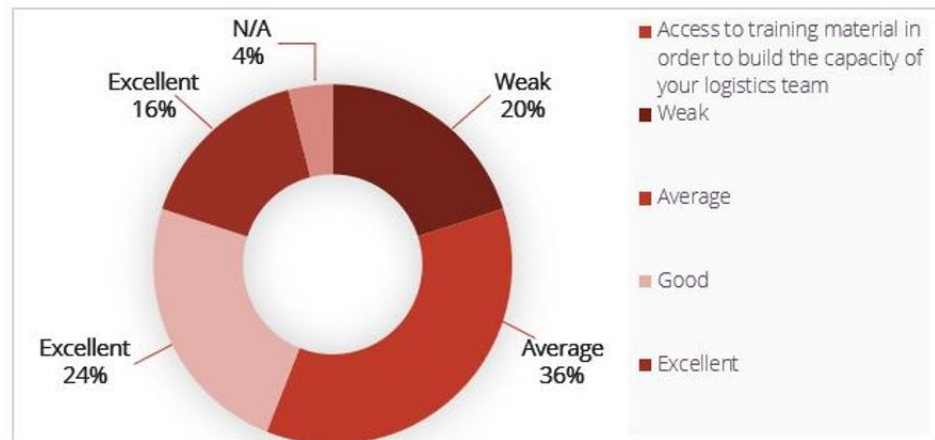
- With good storage capabilities in the governorates and the main hubs, there are still many remote areas where it is difficult to find suitable places for storage. The Logistics Cluster existing service with loan of MSUs should be continued, especially for partners who respond in remote areas. With the ability to transport the unit to different locations, this type of storage allows for flexibility in terms of location and accessibility.
- Logistics Cluster should continue to provide a temperature control storage option in Aden for its partners, with shifting this service under full cost-recovery mechanism (i.e. BSP-type service) as soon as it may be possible.

5.4. CAPACITY BUILDING AND TRAININGS:

As per the logistics gaps and needs graph above (chart no 10), it is evident that 48% of partners are facing challenges with staff capacities. This could be attributed to various factors, such as inadequate resources or a shortage of skilled trainers, and/or inability to send staff for targeted trainings.



(Chart No. 15) Percentage of the training level required to conduct logistics operations



(Chart No. 16) Access to Training Material

The Yemen Logistics Cluster's strategic realignment in 2022 and 2023 brought a renewed emphasis on trainings. As part of this focus, the cluster implemented partner logistics staff capacity development activities with specific attention to NGOs.

- The Cluster carried out activities aimed at building partner logistics staff capacity, paying special attention to NGOs, as part of this focus.
- These training services aimed at enhancing the operational capacities of the partners responding to Yemen crisis, recognizing their unique challenges and profiles. Also, the Yemen Logistics Cluster continues to prioritize skill development to enable effective response activities in the Southern and Northern regions.
- In 2023, two Warehouse and inventory management workshops were delivered in Yemen (Sana'a & Aden) as part of this initiative and partners expressed immense interest in participating in this training. Thirty-six feedbacks received from the Logistics Cluster partners in Sana'a and Aden. All feedback was positive, and all participants expressed their complete satisfaction with the training.

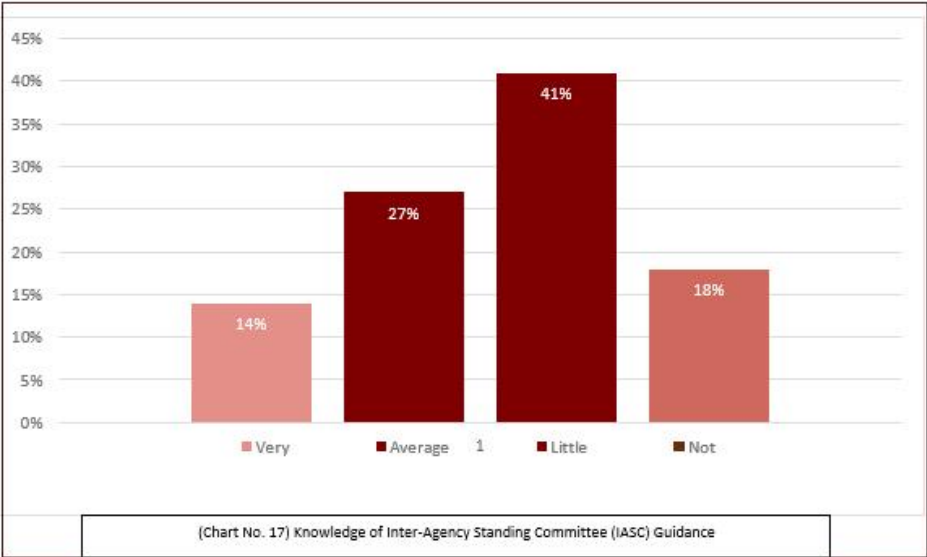
It was also agreed with Yemen Customs Authority to arrange an in-person workshop for humanitarian logistics partners at the Yemen Customs Authority premises for importation procedures in 2023.

5.4.1.RECOMMENDATIONS (CAPACITY BUILDING AND TRAININGS):

- Considering GNA findings, the Logistics Cluster should continue addressing humanitarian partners key and common logistics training requirements through targeted on-line and on-site training and awareness sessions. Such undertakings should be based on detailed capacity needs assessments, and where possible co-delivered with other partners, who have comparative advantage.

5.9 DEFINING CLUSTER AND EMERGENCY SECTORAL COORDINATION:

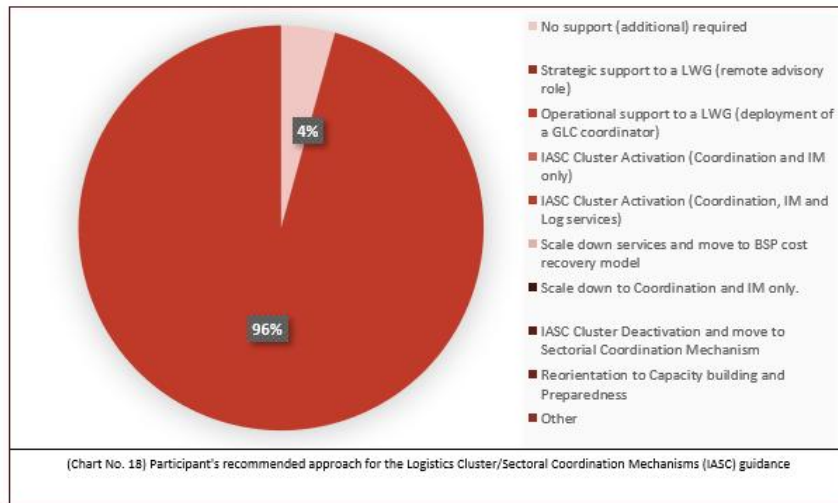
Defining cluster and emergency sectoral coordination is crucial in improving humanitarian response during times of crisis. This highlights the need for information sharing among the coordination meeting participants, especially regarding the IASC-defined cluster. Information about the role and scope of the Logistics Cluster mandate needs to be better disseminated.



Improving our logistics coordination forum is crucial for the success of any humanitarian emergency response. As preliminary findings have indicated, reinforcing our existing logistics-working group, and improving information sharing within it should be a primary focus of the Cluster. By doing so, we can better identify any issues we might not be covering within our current framework and ensure a more efficient, timely and effective response to emergencies.

The Logistics Cluster's role as a liaison between humanitarian actors ensures coordination with other Clusters and provides essential support for operational decision-making. The GNA exercise provided a comprehensive assessment of the logistics gaps and needs in Yemen. It allowed for a reflection on the approach for the Logistics Cluster/Sector coordination mechanism to effectively support the implementation of humanitarian programs. The examination of the activities developed by the logistics cluster enabled identification of constraints and potential

improvements. Overall, this exercise was a valuable opportunity to enhance the effectiveness and efficiency of humanitarian logistics operations in Yemen.



Based on the gaps detected and consensus from partners (96%), we conclude that there is an overall need for the continuity of the Logistics Cluster in Yemen. Let's continue to strive towards enhancing our logistics coordination forum to meet the demands of the ever-evolving humanitarian landscape.

6. CONCLUSION

In summary, the main gaps that were detected in this GNA report could be summarized as follows: (a) changing customs regulations, (b) lack of warehouse capacity in remote areas, (c) lack of temperature-controlled warehousing facilities, available for short-term lease, (d) gaps in capacity building and logistics trainings, (e) lack GIS mapping capacity. The Logistic Cluster will continue its role in facilitating and advocating with the pertinent stakeholders in order to address these gaps.

The primary focus will be on Logistics Cluster core mandate of Information Management and Coordination, with targeted logistics capacity strengthening activities for local authorities and humanitarian partners in Yemen.