

Beyond the Axis

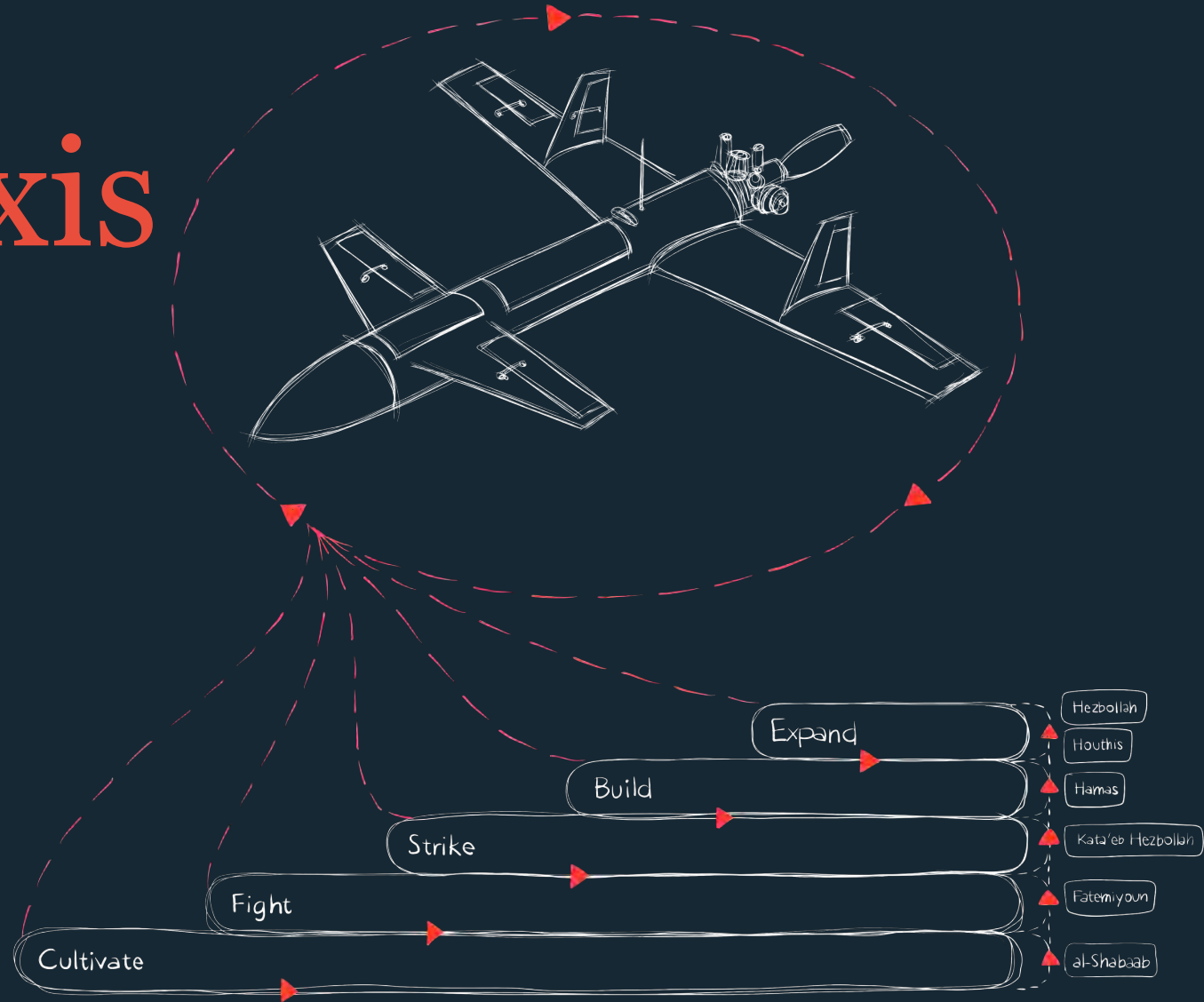
Launch slides

Speakers:

Thanassis Cambanis, Director, Century International

Peter Salisbury, Research Lead, Beyond the Axis

Nadwa al-Dawsari, Researcher, Beyond the Axis



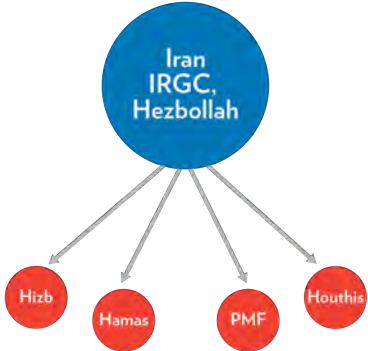
The Beyond the Axis Project

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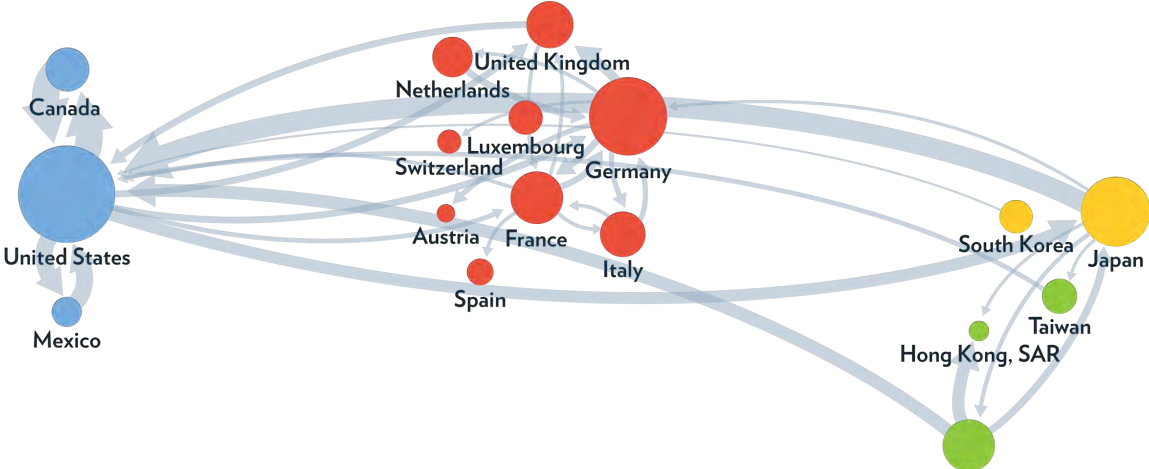
- Project started in 2024, with a focus on Yemeni smuggling networks, and evolved over time to cover the broader 'Axis of Resistance.
- The work helps answer the question of how and why the Islamic Republic of Iran and its Axis of Resistance proved so resilient in the face of successive U.S. and Israeli offensives from 2023 onwards.
- **Our claim:** twin transformations in the inner workings of the Axis of Resistance and the global economy.
- Drones help tell the story.

The Axis of Resistance

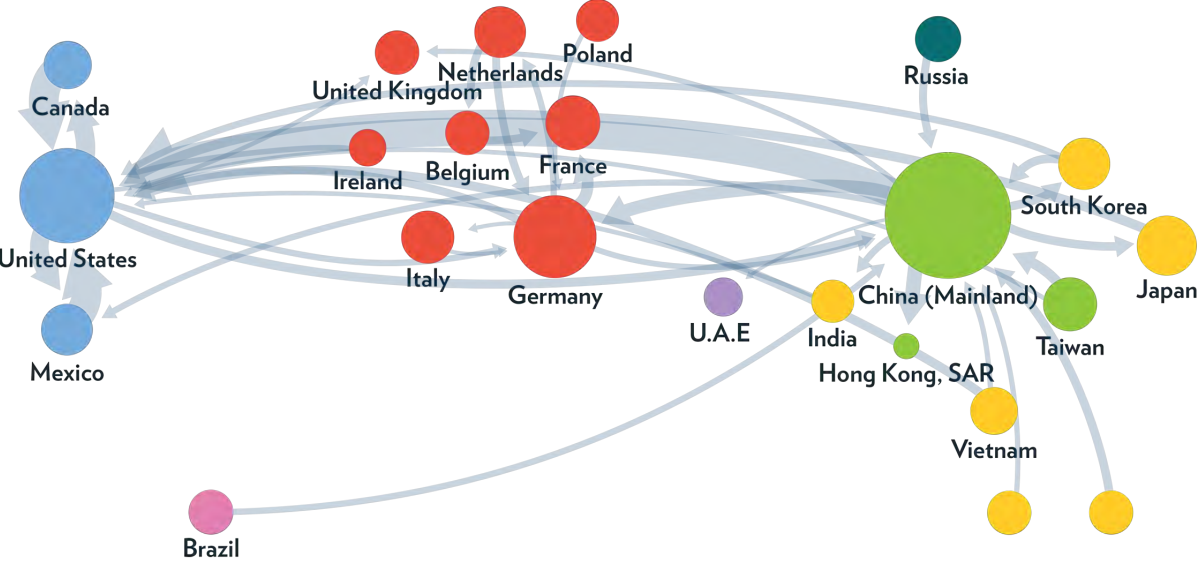
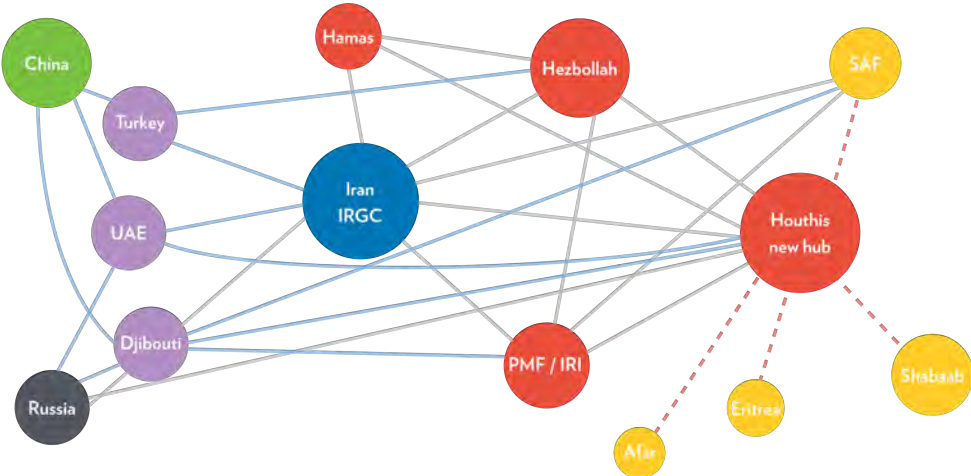
2000



The Global Economy



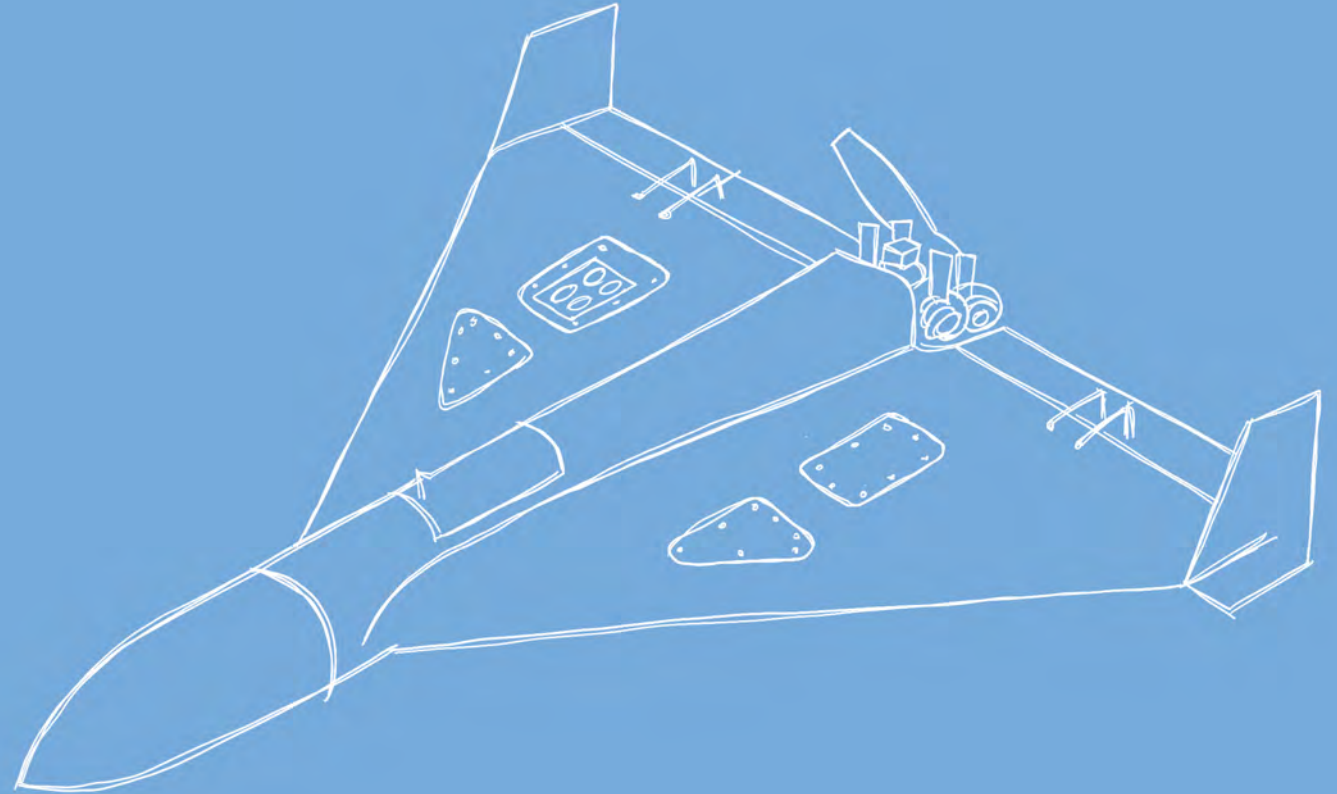
2025



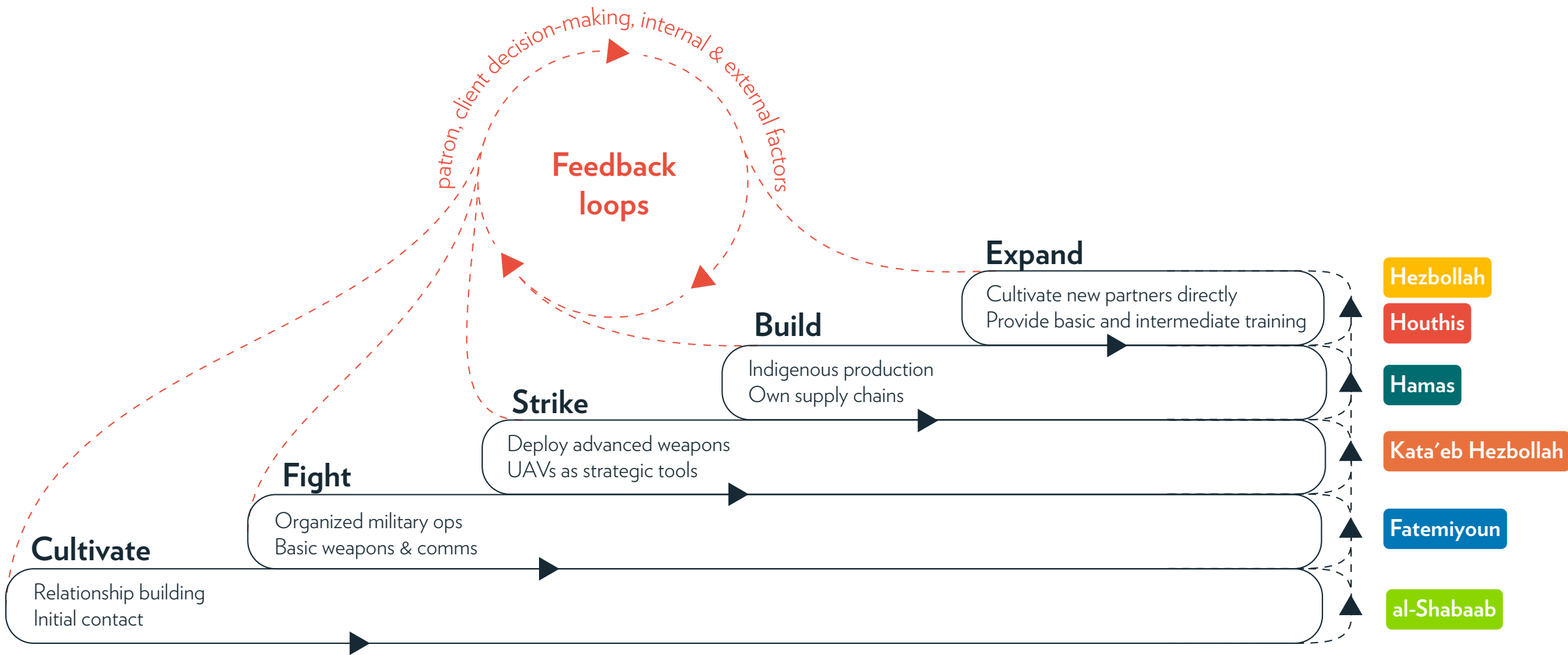
Source: Century International, McKinsey Global Institute

Drones help tell the story

- Drones were a defining feature of the 2026 U.S.–Israeli war with Iran.
- Iran’s drone doctrine was honed via its proliferation of UAVs to its Axis allies and other states.
- Drones also act as an “isotope tracer,” revealing where groups are on the capability ladder, and how they have plugged into the global economy

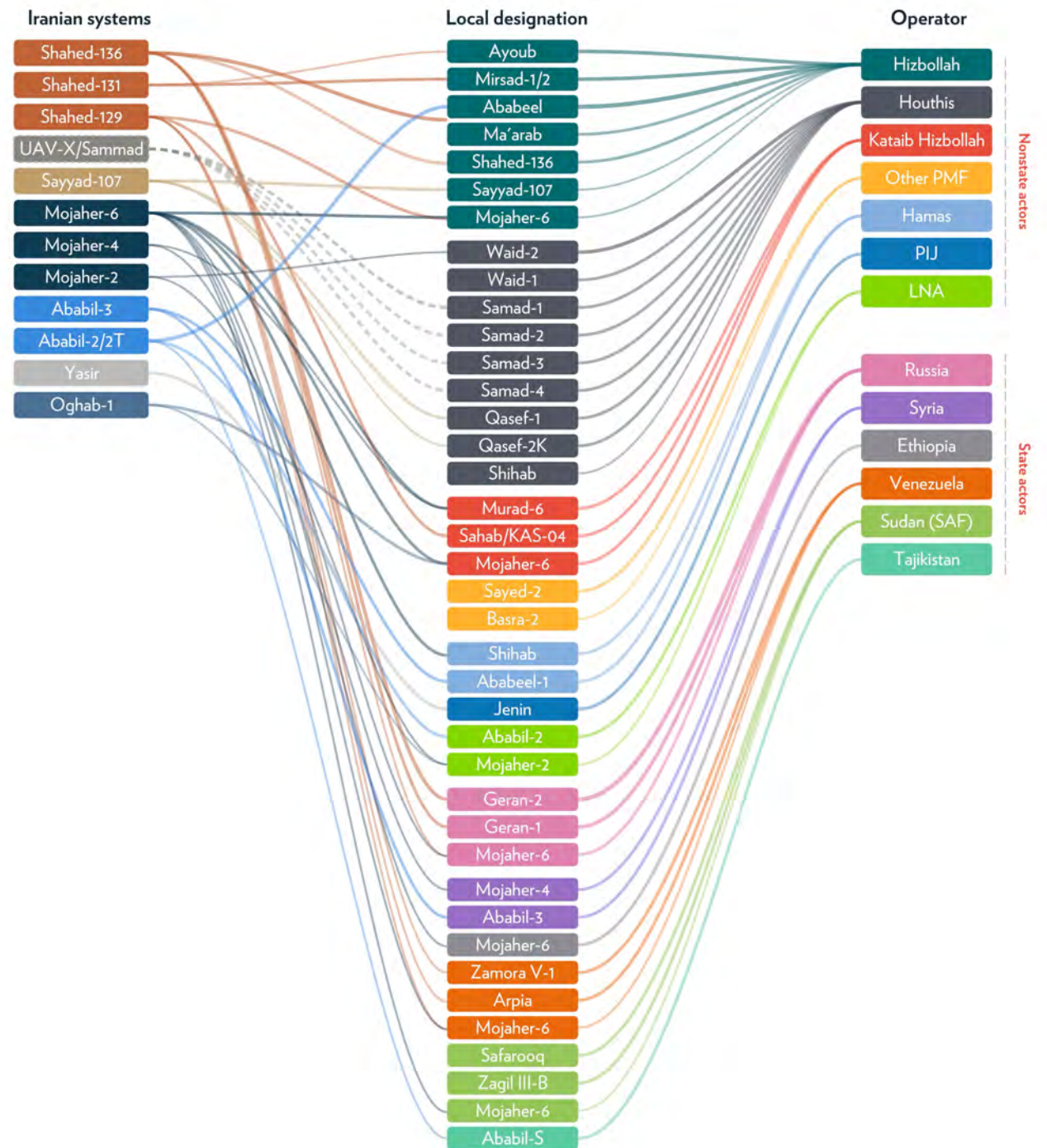


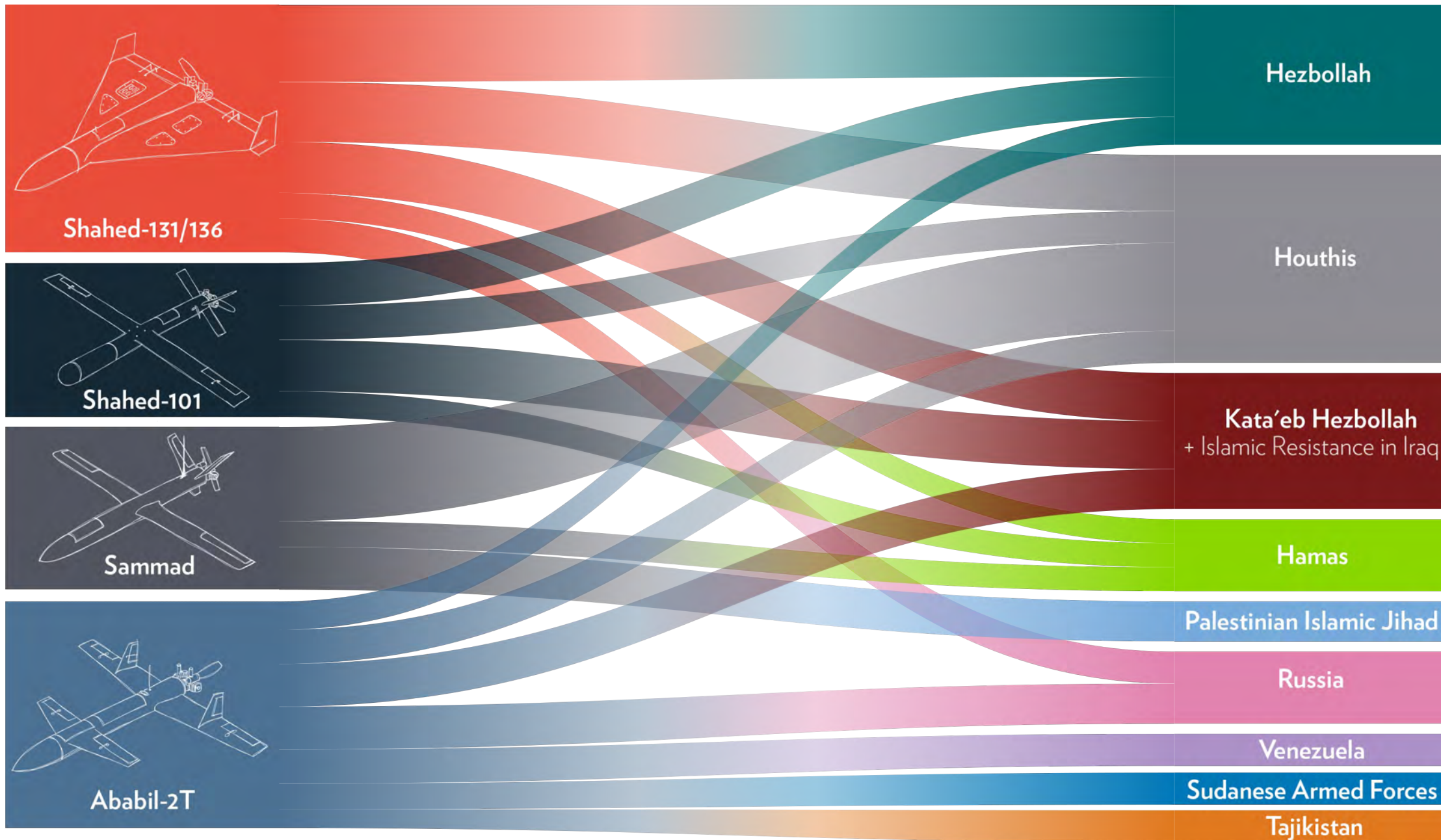
1. The Capability Ladder



Watch the Drones

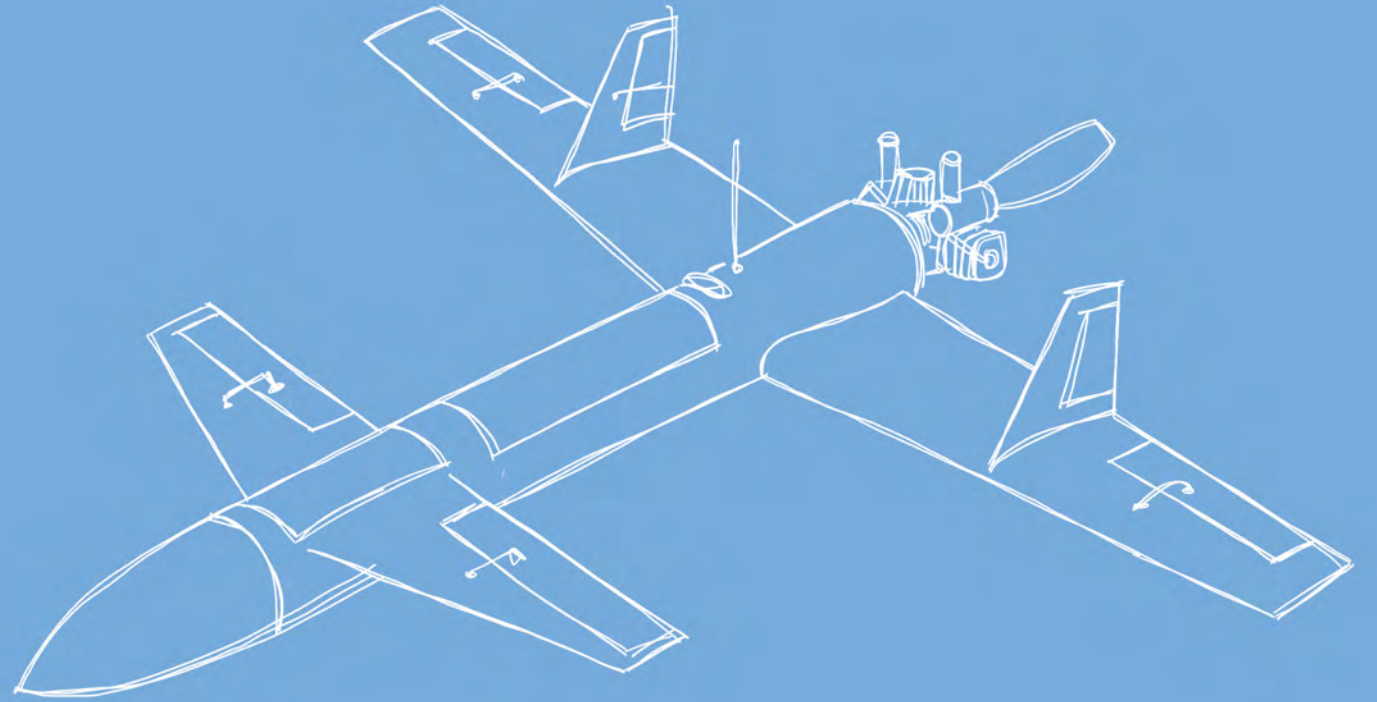
- Iran proliferates drones to state and nonstate actors
- A handful of systems are transferred to both Axis groups and state partners.
- Watching which system reaches which group, and when groups start building their own, is an isotope tracer for the capability ladder



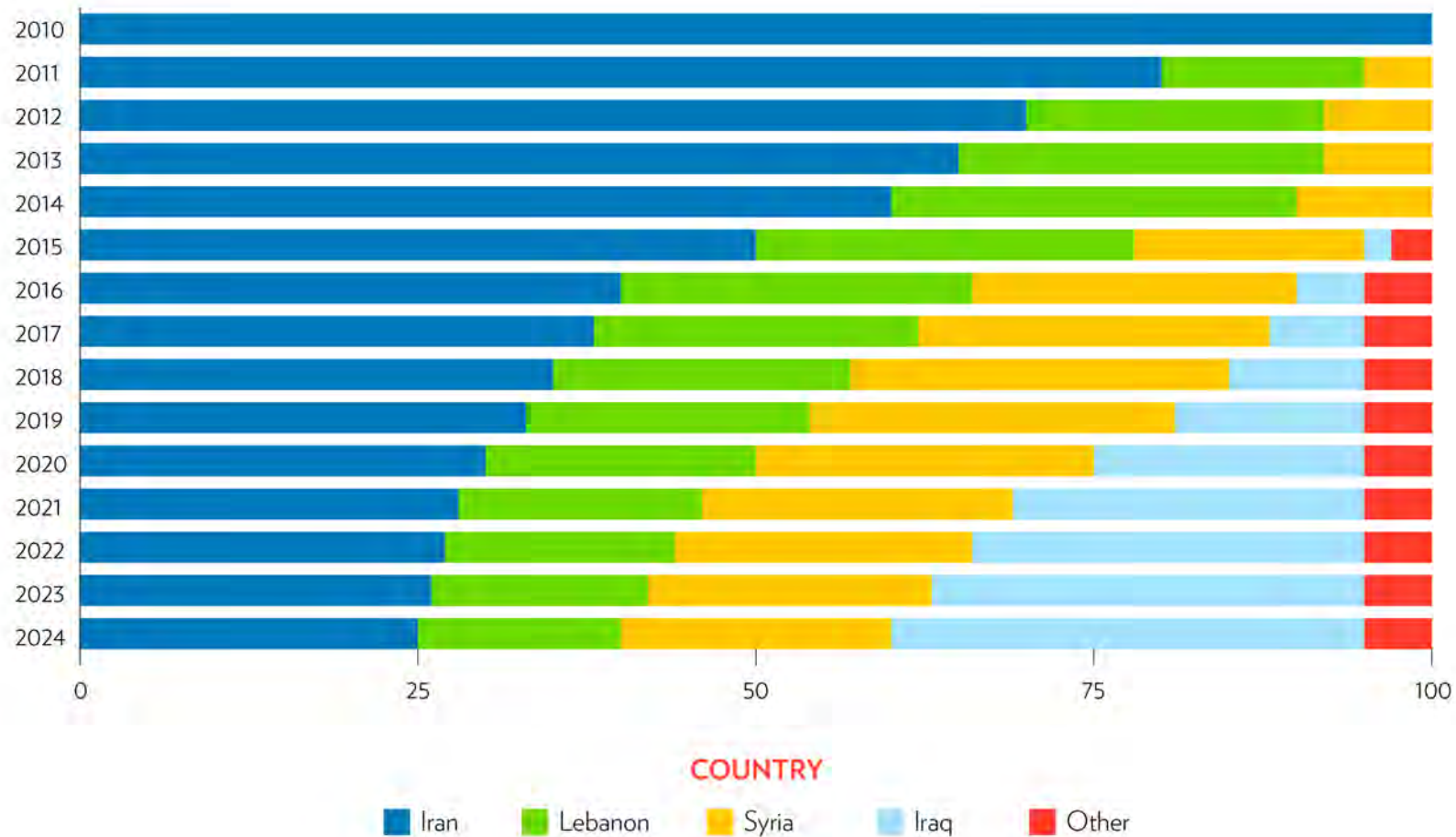


To Build a Drone

- Hezbollah pioneered the use of drones by nonstate actors but was constrained by its reliance on Iranian supplies and knowhow.
- It built a dedicated drone unit, 127, to build and deploy UAVs made from Iranian supplies and imported parts.
- Building drones required procurement specialists, logistics operators, and commercial infrastructure its founding circle of fighters and clerics could not provide.

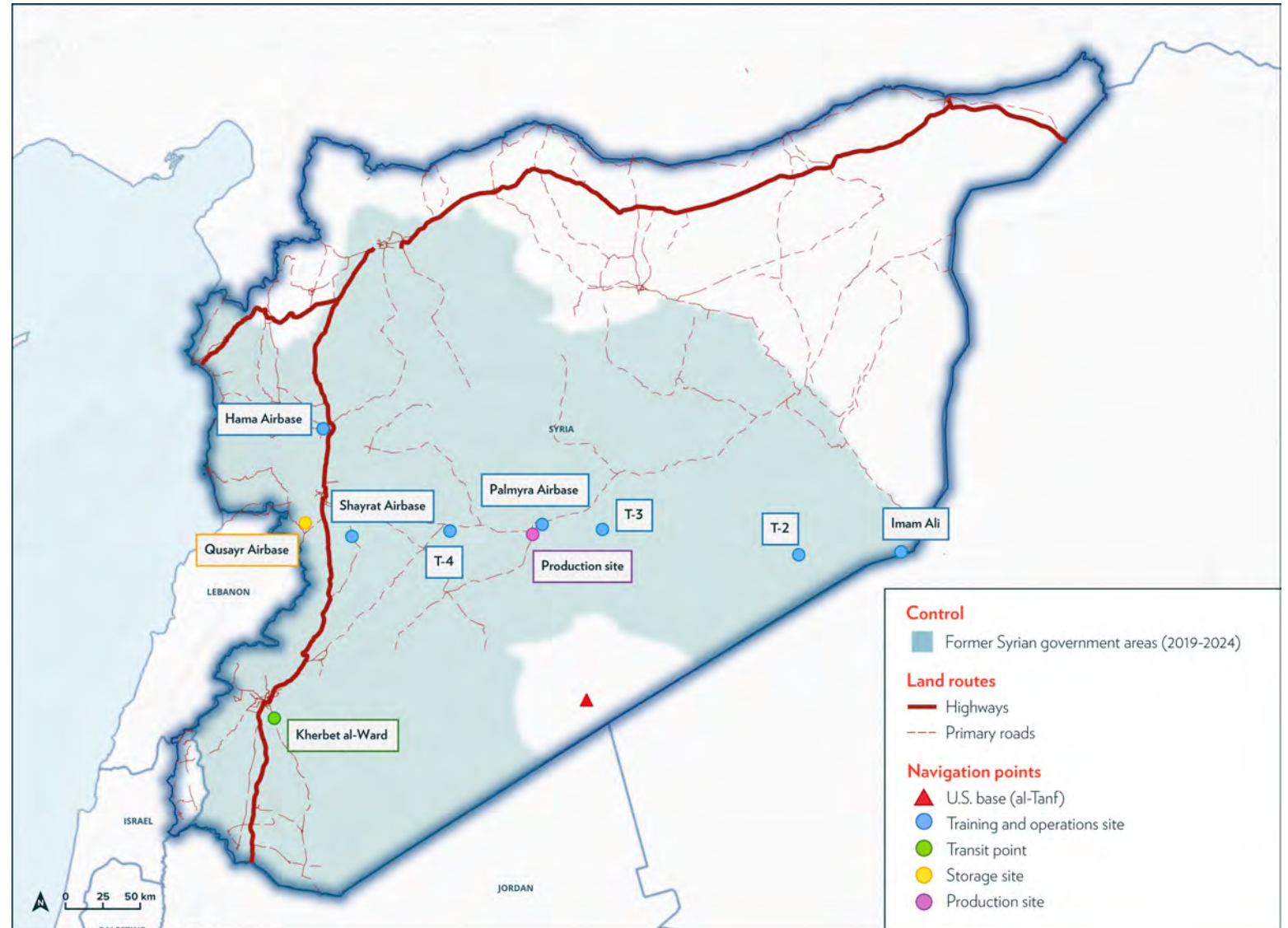


Training the Trainers: UAV Training Events by Location 2010-2024



Syria Convergence

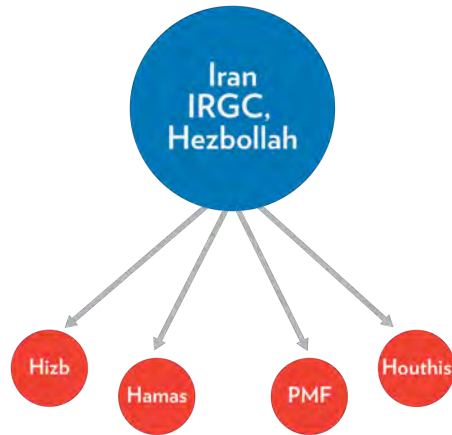
- **2017–2024:**
Axis groups collocated at overlapping training and production sites.
- Quds Force and Hezbollah experts trained the Syrian military and multiple Axis groups
- **The end result:**
UAV field-testing, a more capable Axis, and horizontal ties between groups that endured when Assad fell.



From Network to Ecosystem

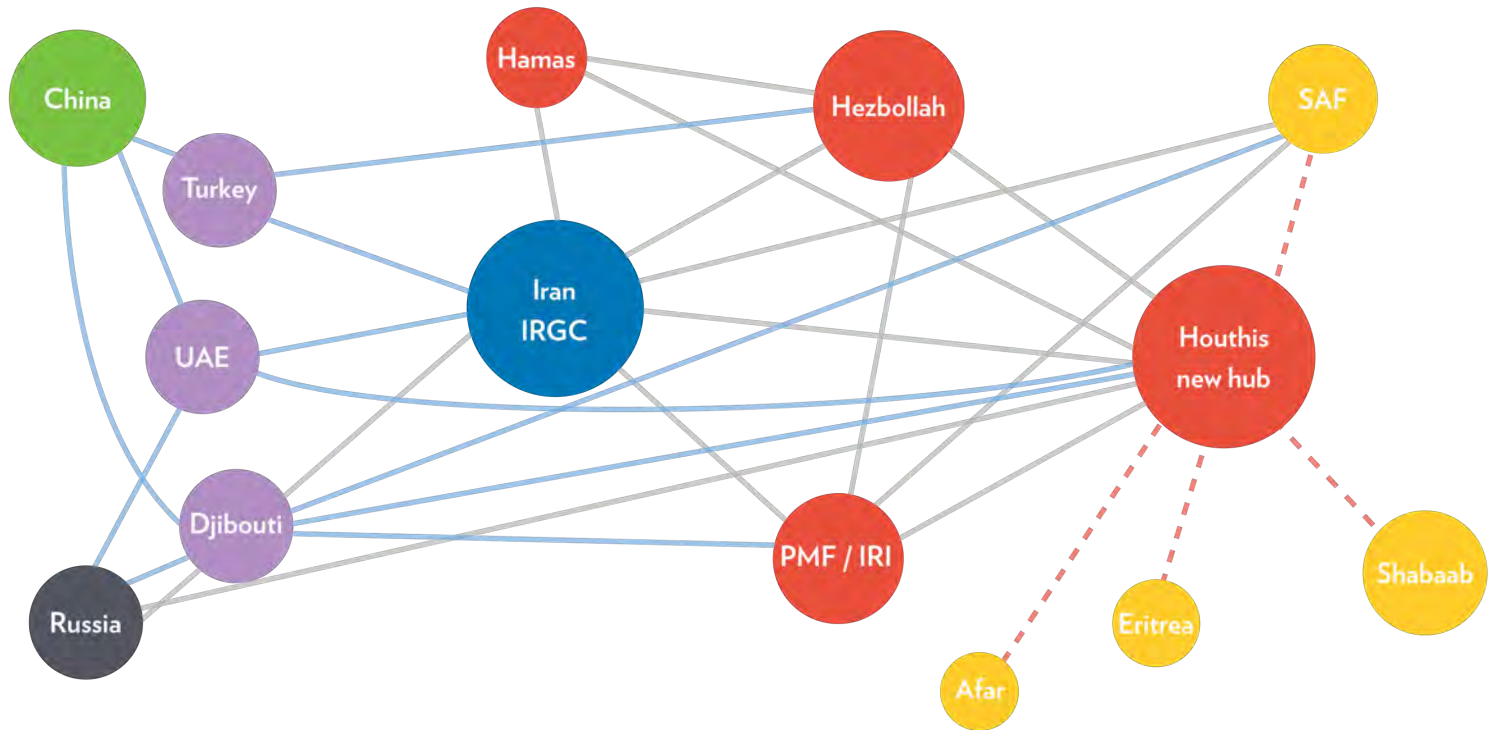
2000s

Iran as a central hub, linear ties to clients



2020s

Horizontal ties, Houthis bridge to Africa, groups plug into global economy via intermediary hubs



NETWORK TIES

- - - Houthi-cultivated Africa ties

— Procurement via intermediaries

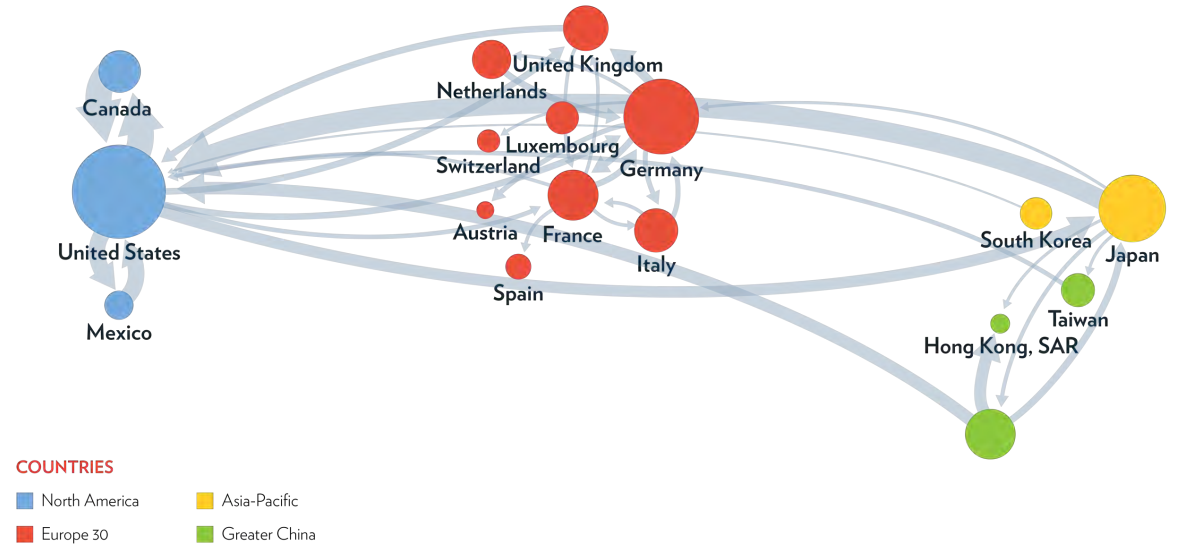
— Axis horizontal ties

2. Global Shifts, Smugglers and Supply Chains

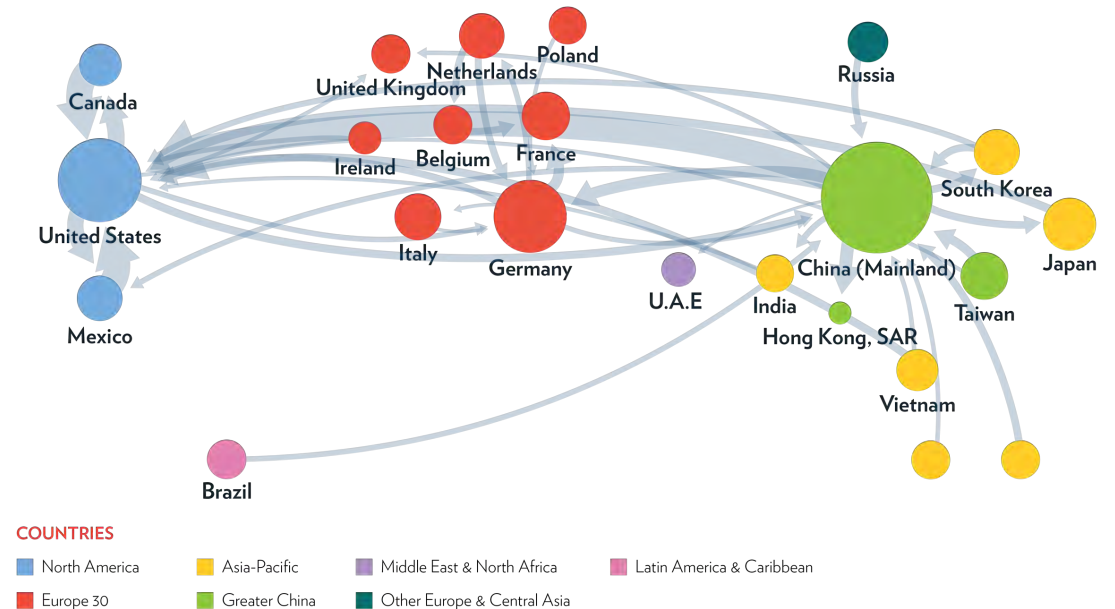
Global Shifts

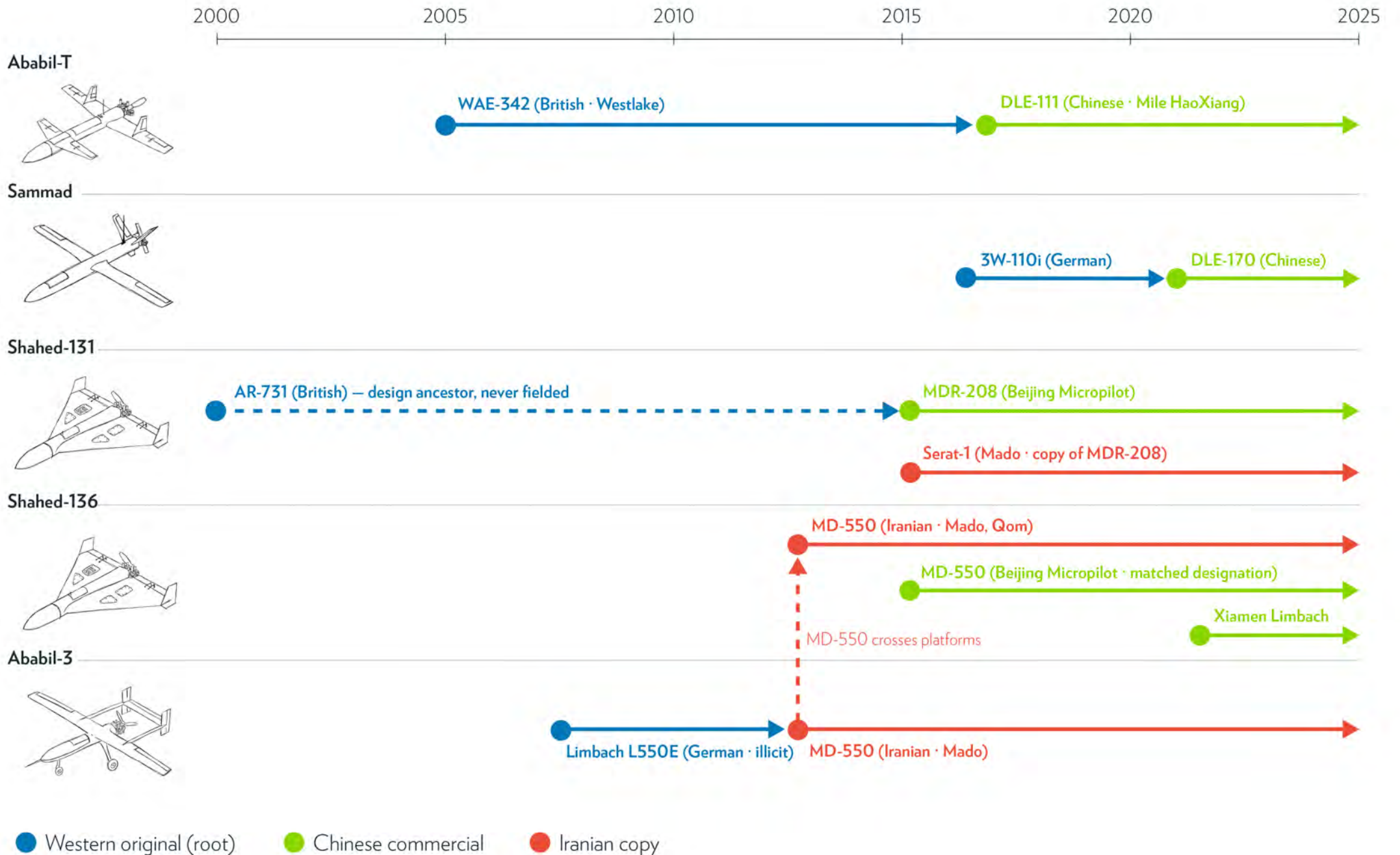
- In 2009, German authorities caught Iranian businessmen smuggling around sixty drone engines out of Germany labelled as “jet ski” parts
- Drone production was constrained by Western-controlled chokepoints.
- By 2026, Iranian and Chinese-made copies of the same engine were powering both Russia’s Shahed/Geran fleets and Iran’s strikes on its Gulf neighbours.
- China, not Europe, increasingly dominates manufacturing of the intermediate goods used to make drones.

1998

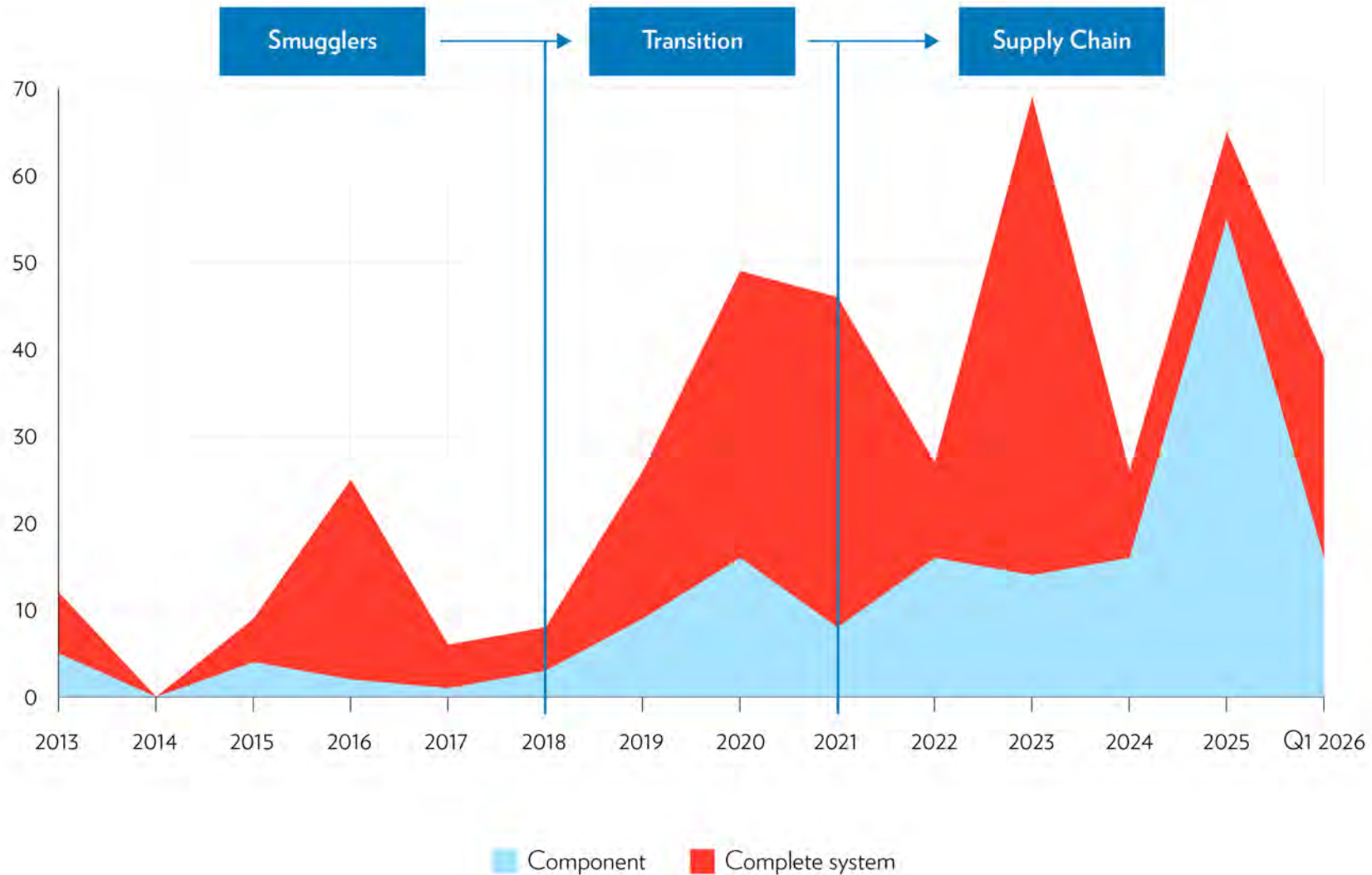


2023



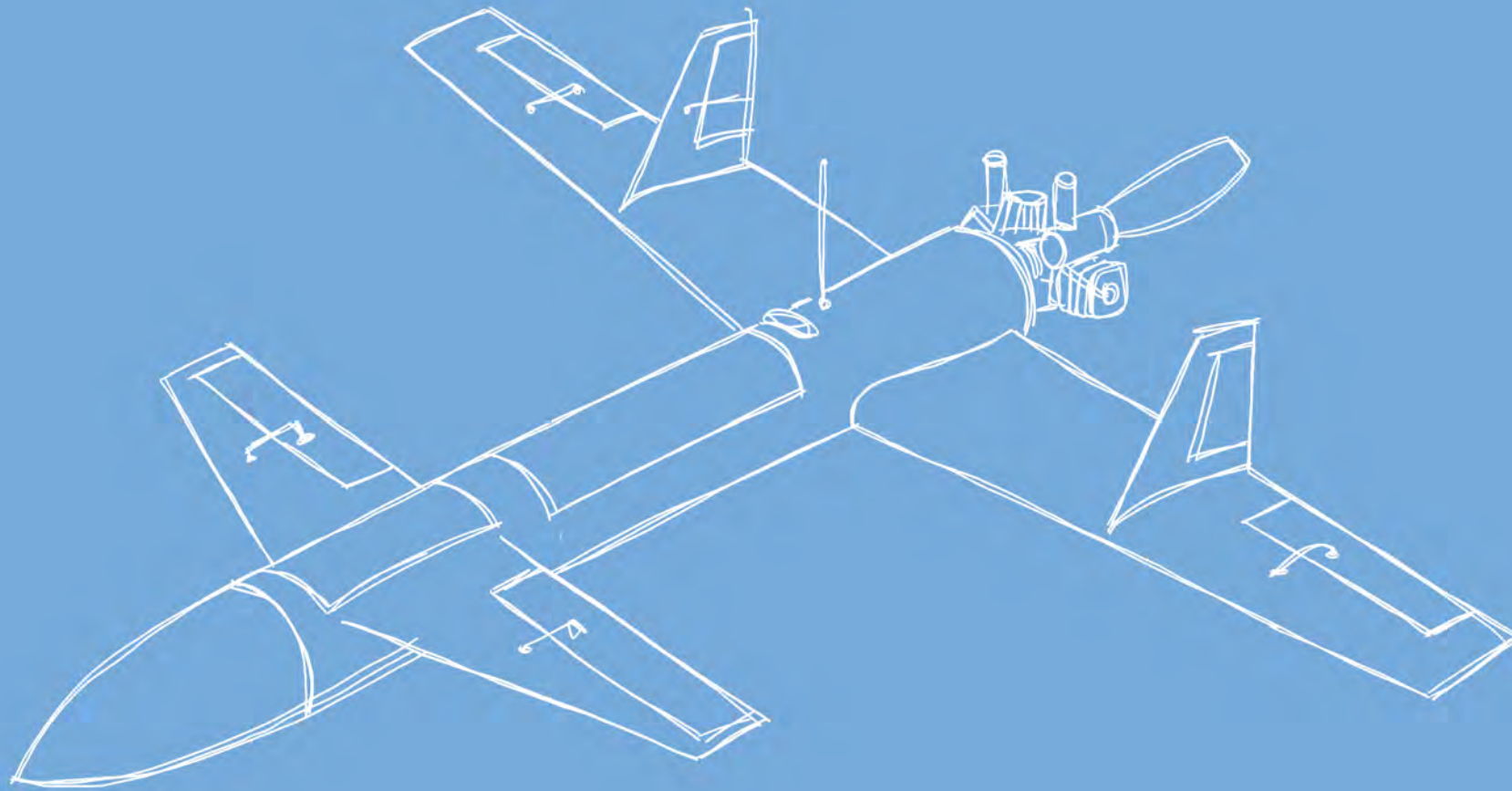


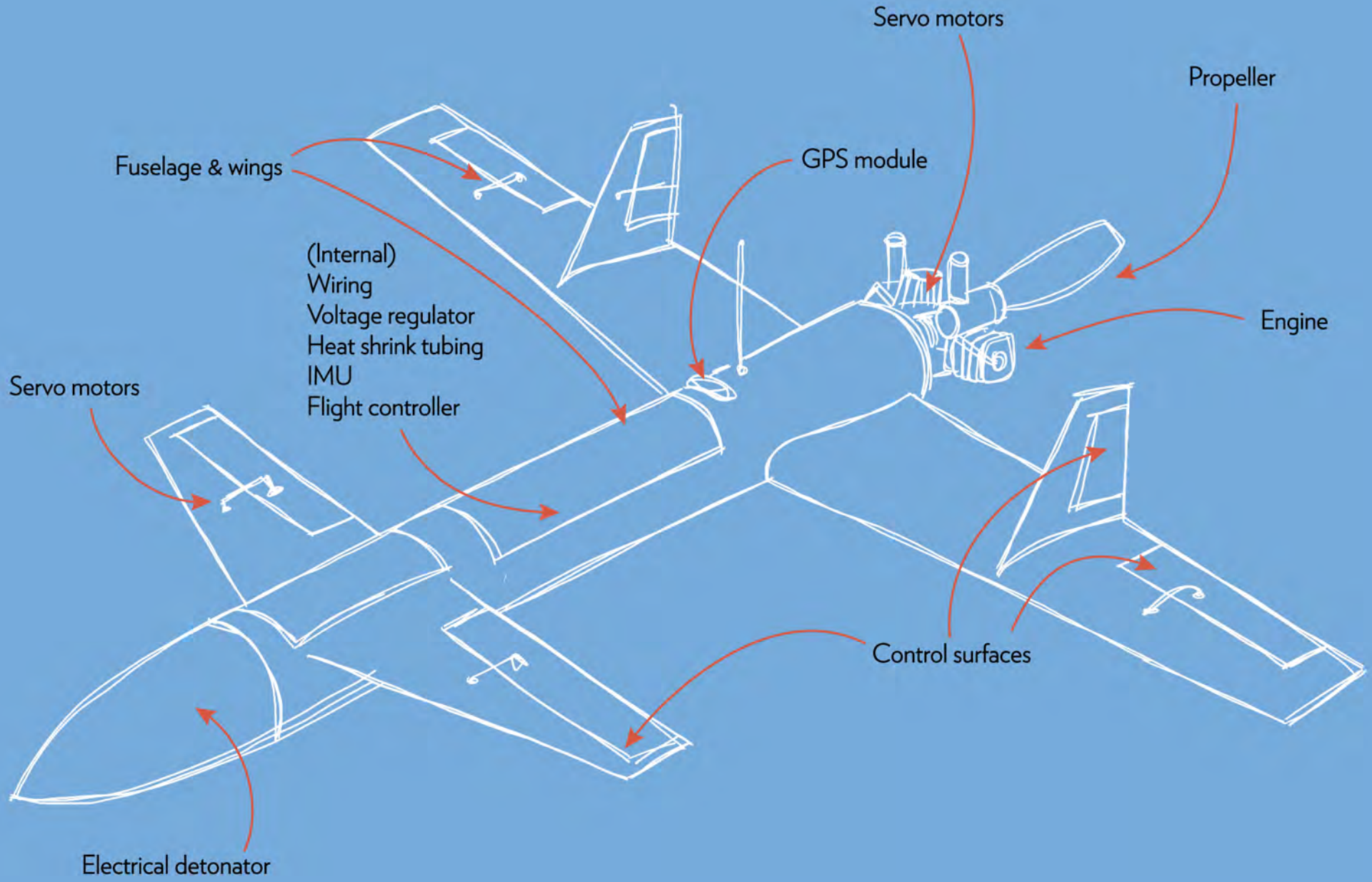
The Houthis: From Smugglers to Supply Chains



Source: Century International interdiction database

The Ababil-T a.k.a Qasef-2K





China

- Engine (DLE-110/111)
- Propeller (T-motor)
- Servo motors (generic)
- GPS (Navion/Bahar)
- Wiring + connectors
- Voltage regulators (MINMAX, STM)
- Flight controller (Arduino)

Yemen / China

- Fuselage + wings (made from Chinese fibreglass)

Iran

- Gyroscope (V10)
- Air data computer (ADC-PLS-002) (TBC)
- Control surfaces (TBC)

India

- Electric detonators

Western / Western Allies

South Korea

- Servo motors (Hitec HS-7955TG)

Switzerland

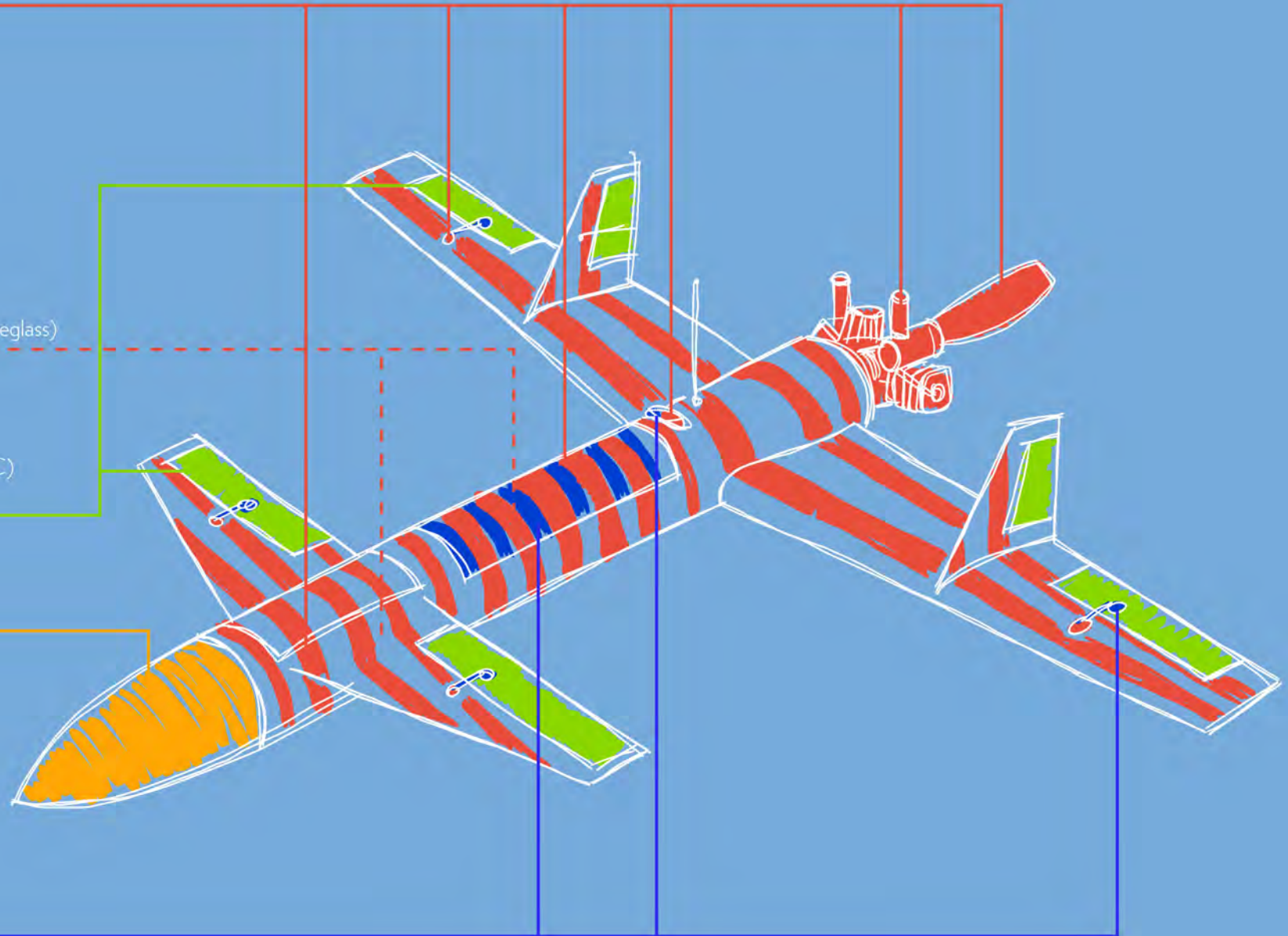
- GPS (u-blox NEO-M8N)

United States

- IMU (Analog Devices ADIS16488)

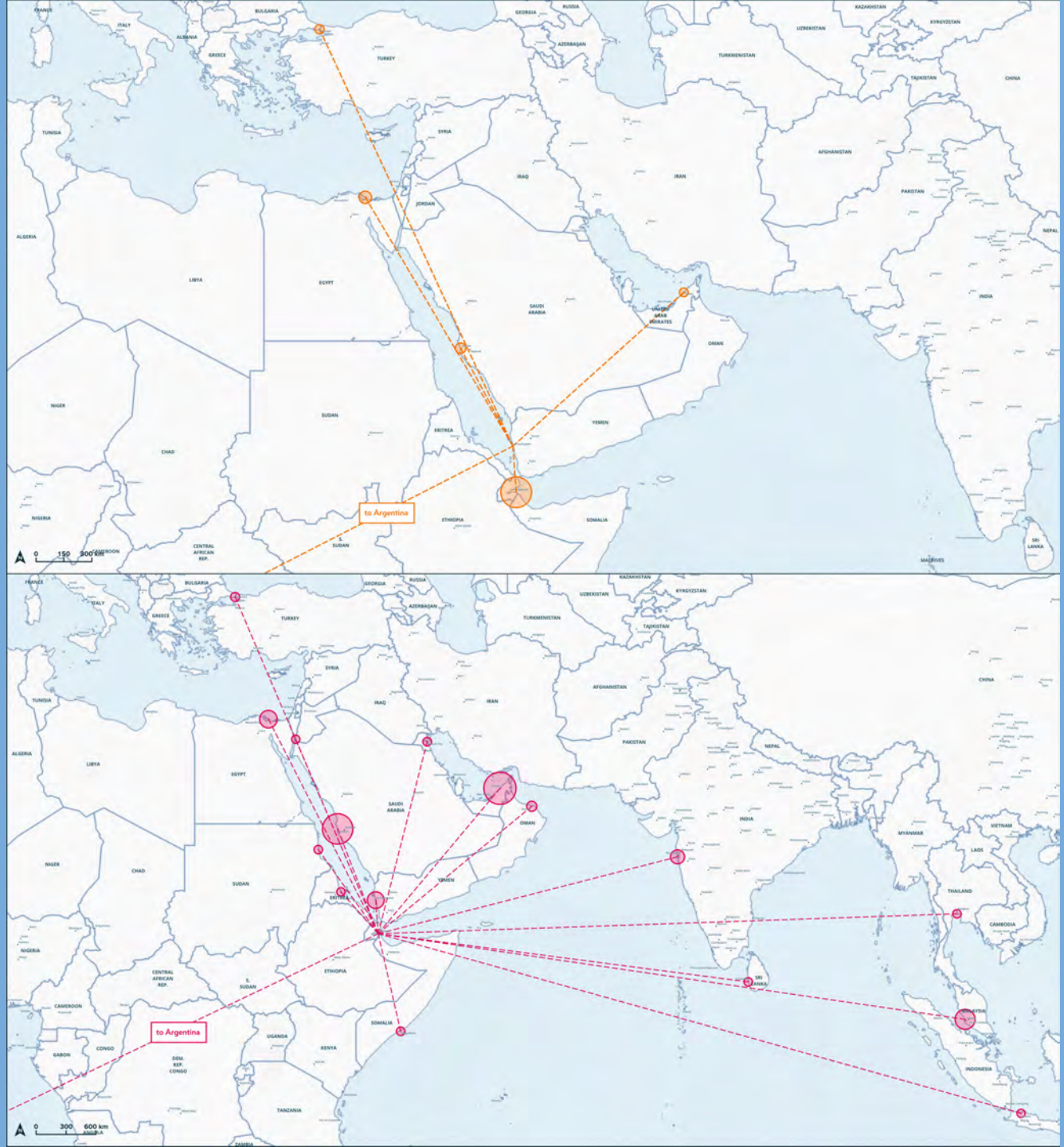
United Kingdom

- Flight controller (Raspberry Pi)

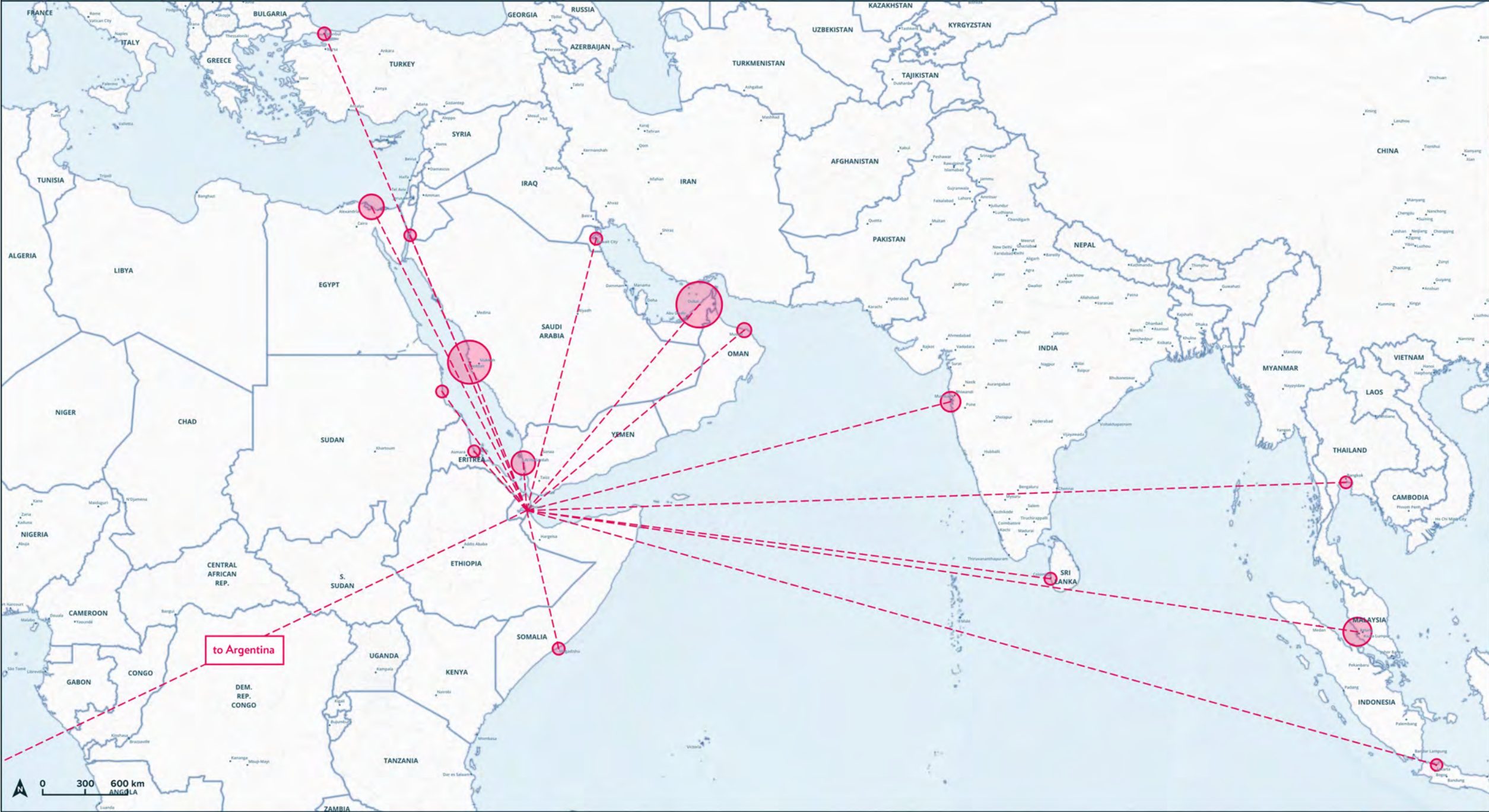


Bridges, Shadow Fleets and Shells

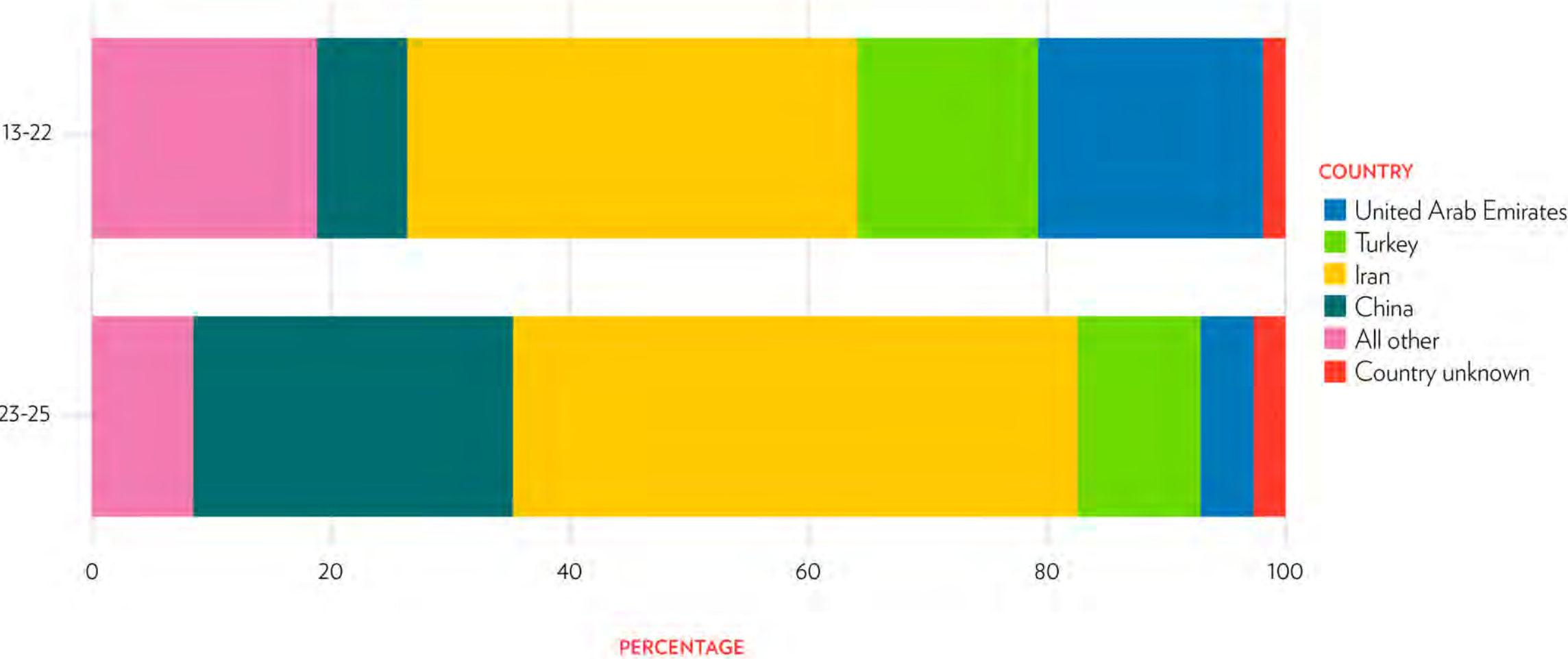
- Intermediate goods move between producers and end-users via multiple channels, often without touching sanctions-sensitive jurisdictions.
- Axis groups cloak activities in layers of concealment including shell companies and shadow fleets.



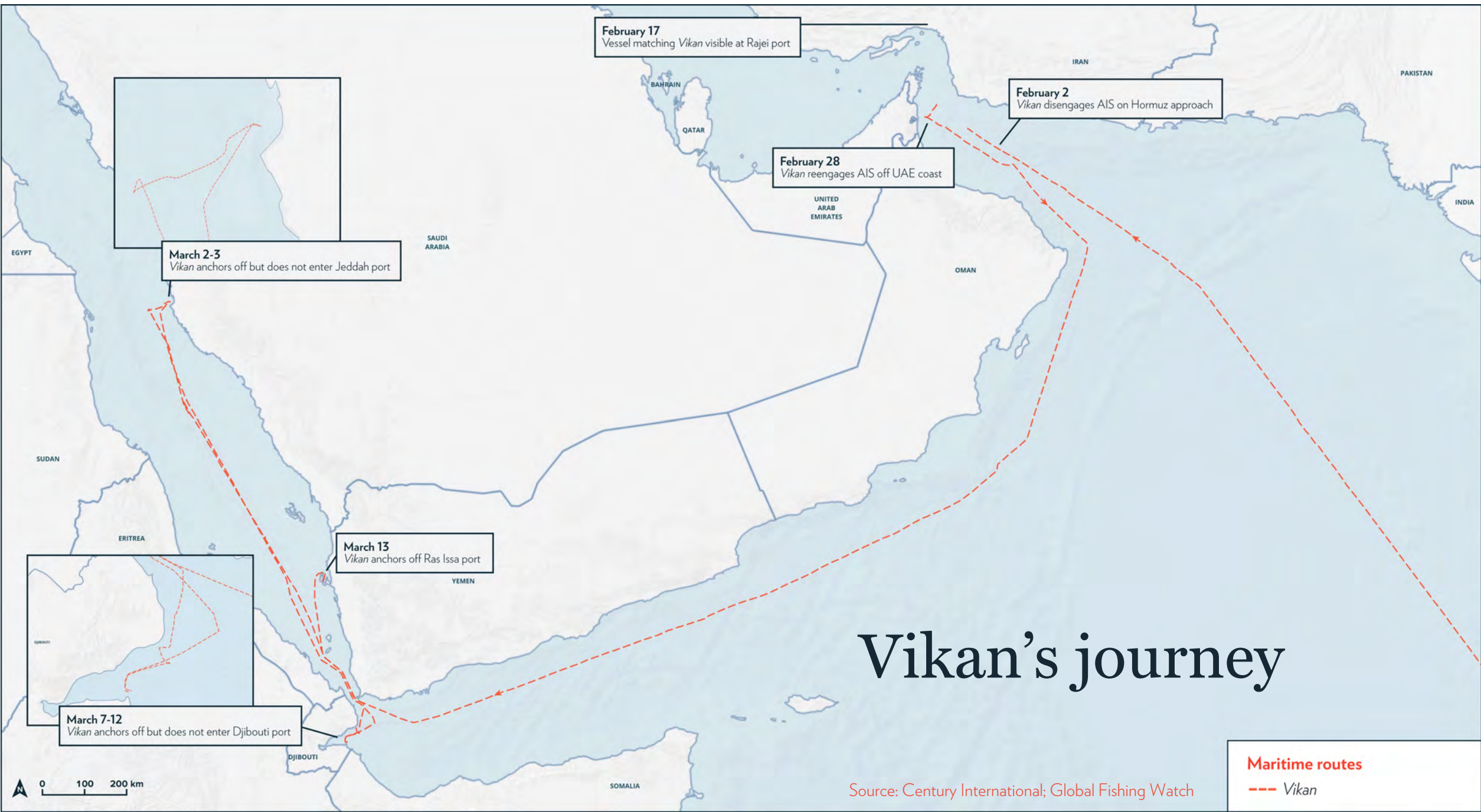




Bridging the Gap



Source: Century International; OFAC



February 17
Vessel matching *Vikan* visible at Rajei port

February 2
Vikan disengages AIS on Hormuz approach

February 28
Vikan reengages AIS off UAE coast

March 2-3
Vikan anchors off but does not enter Jeddah port

March 13
Vikan anchors off Ras Issa port

March 7-12
Vikan anchors off but does not enter Djibouti port

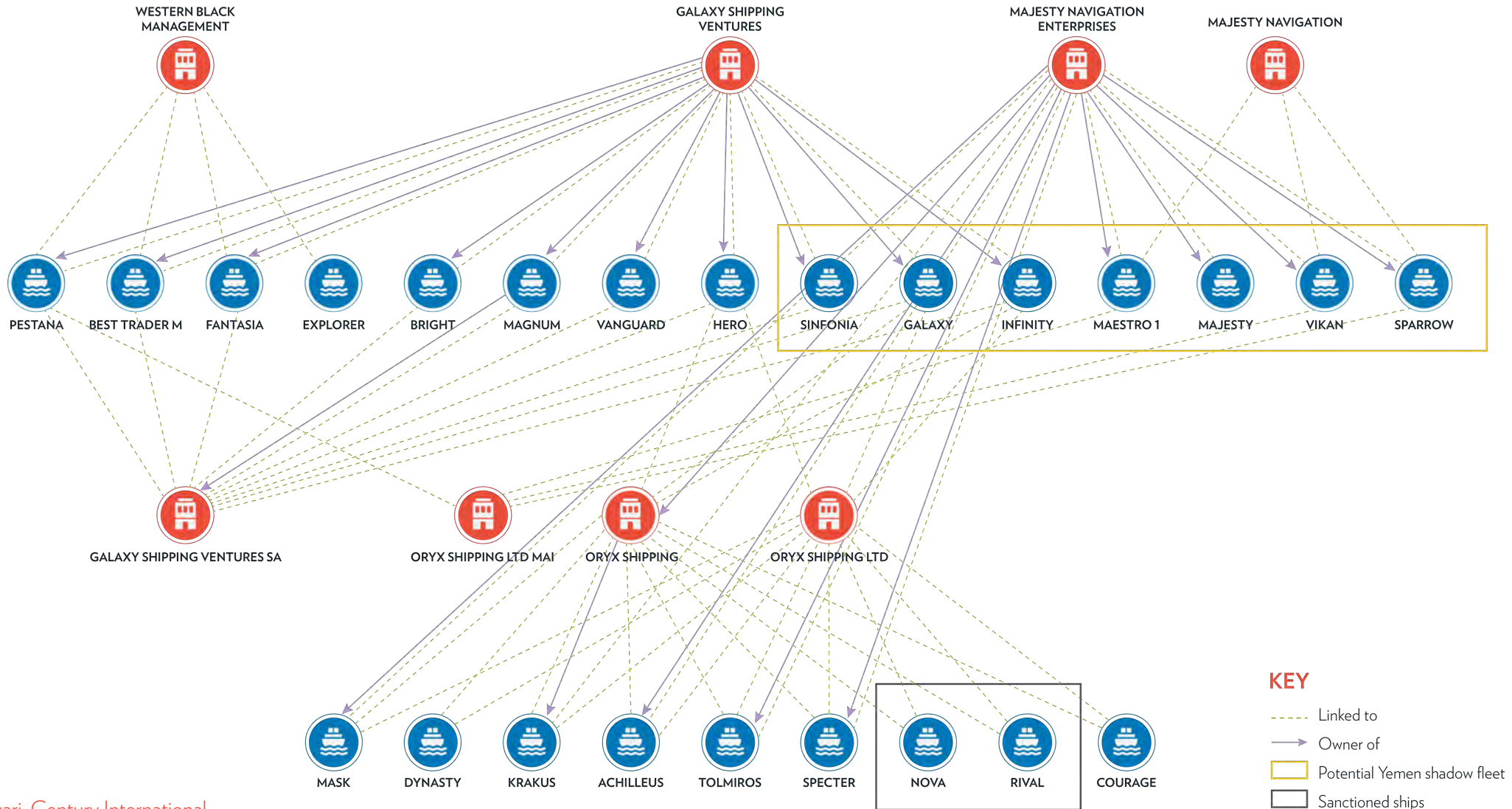
Vikan's journey

Maritime routes
--- *Vikan*

Source: Century International; Global Fishing Watch

0 100 200 km

The Majesty Network



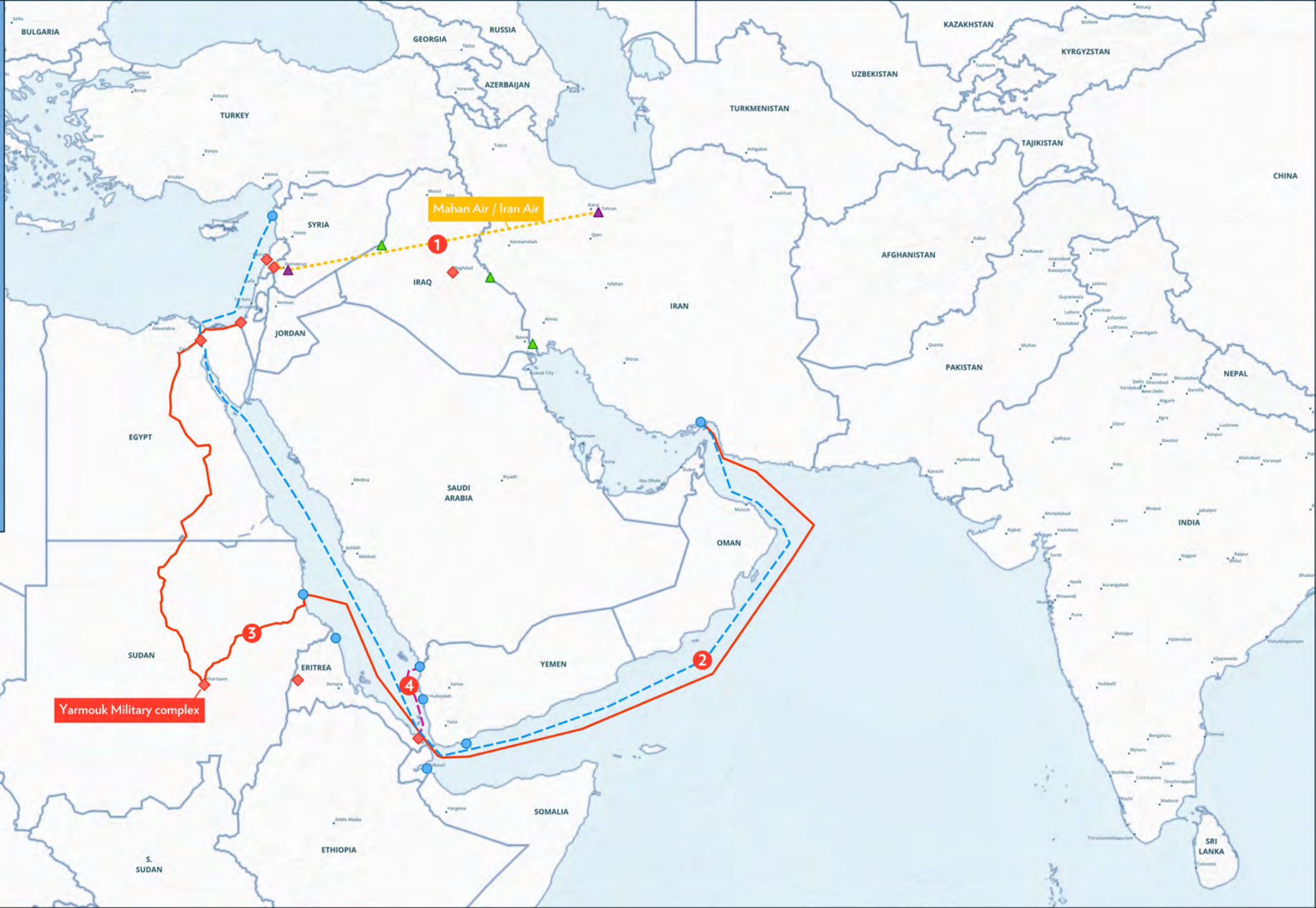
PANEL 1: 2000-2006

Points of interest

- ◆ Key locations
- Ports
- ▲ Crossings/key routes
- ▲ Airports

Networks

- Iran**
 - 1 Damascus airlift
 - 2 IRISL maritime
 - 3 Sudan pipeline
- Yemen**
 - 4 Early Houthi-Eritrea contact



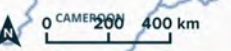
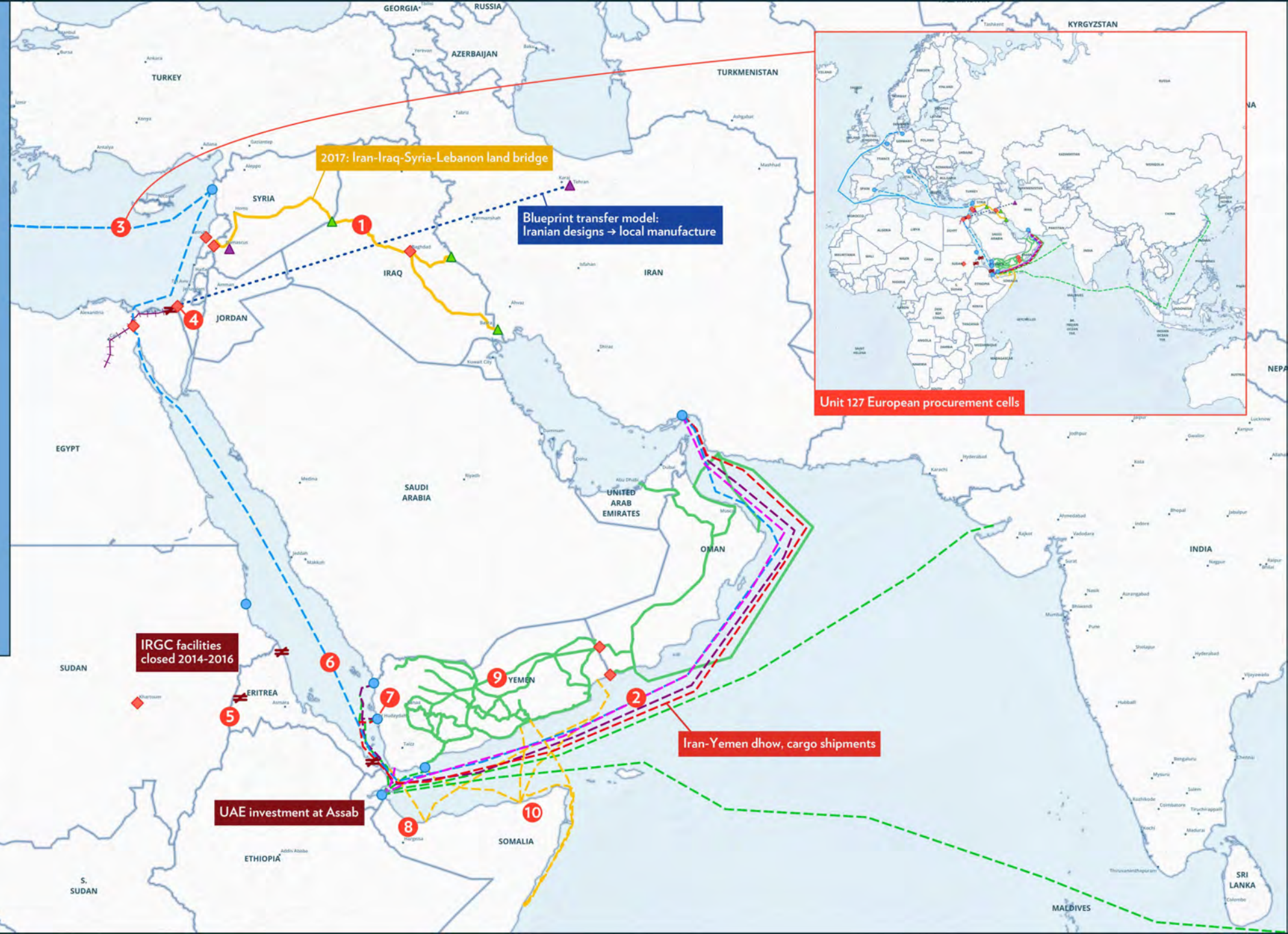
PANEL 3: 2012-19

Points of interest

- ◆ Key locations
- Ports
- ▲ Crossings/key routes
- ▲ Airports

Networks

- Iran**
 - 1 Iraq-Syria-Lebanon land bridge
 - 2 Iran-Yemen direct cargo (experimental)
 - 3 European procurement network
 - 4 Gaza domestic manufacture
- Yemen**
 - 5 Eritrea & Sudan closed
 - 6 Arabian sea dhow channel
 - 7 Coalition Holding Area transfers
 - 8 Horn of Africa transshipment (emerging)
 - 9 Gulf overland channel via Oman
 - 10 Houthi-al-Shabaab



CENTRAL AFRICAN REP.

PANEL 4: 2020–Present

Points of interest

- ◆ Key locations
- Ports
- ▲ Crossings/key routes
- ▲ Airports

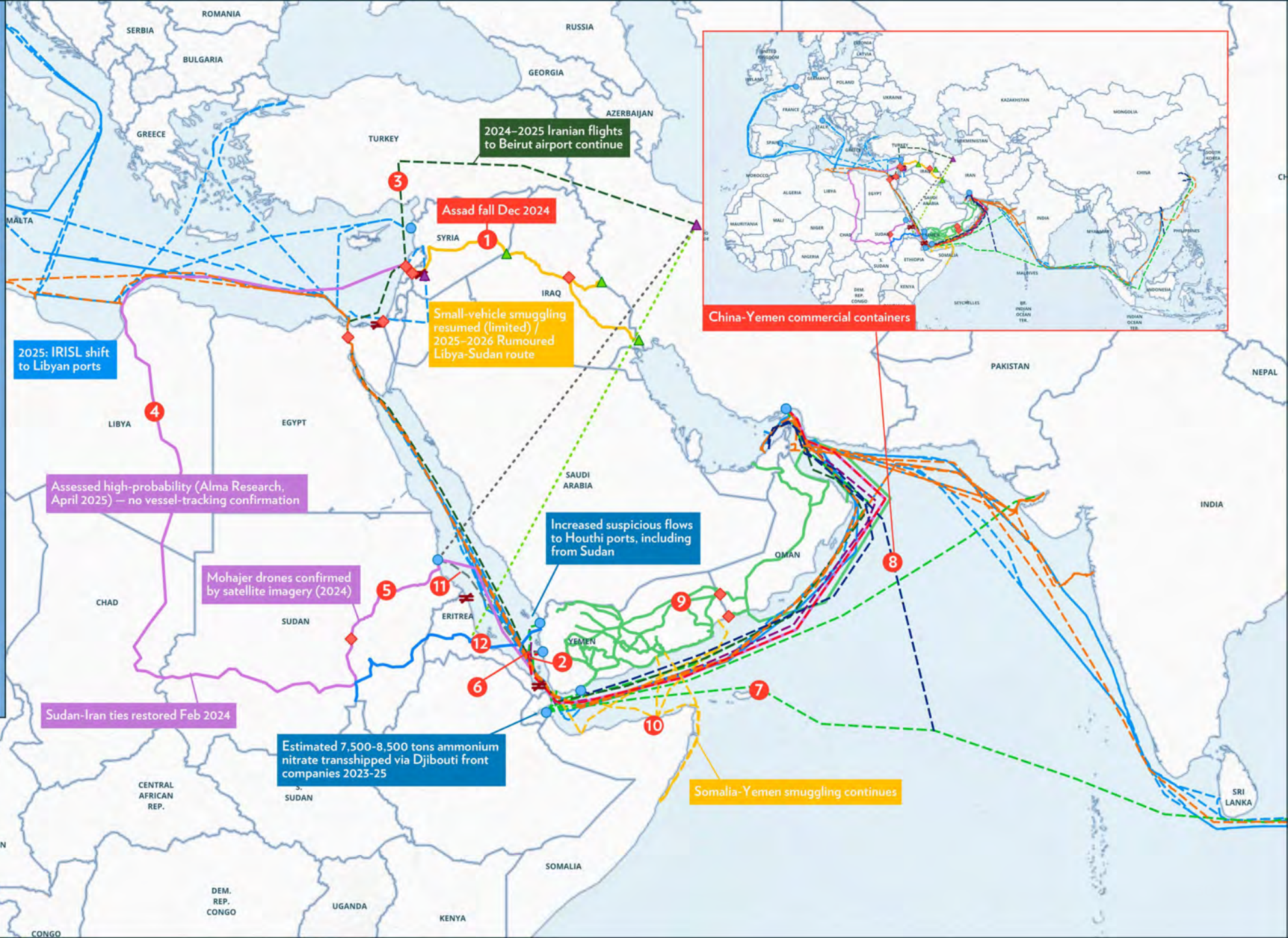
Networks

Iran

- 1 Land Bridge severed December 2024
- 2 Iran-Yemen direct cargo
- 3 Post-Syria maritime alternatives
- 4 Libya Mediterranean transshipment
- 5 Iran-Sudan arms supply

Yemen

- 6 Arabian sea dhow channel
- 7 Horn of Africa transshipment
- 8 China-Yemen commercial containers
- 9 Gulf overland channel via Oman
- 10 Houthi-al-Shabaab
- 11 Houthi-Sudan weapons transfers
- 12 Eritrea reopens



2024–2025 Iranian flights to Beirut airport continue

Assad fall Dec 2024

Small-vehicle smuggling resumed (limited) / 2025–2026 Rumoured Libya-Sudan route

China-Yemen commercial containers

2025: IRISL shift to Libyan ports

Assessed high-probability (Alma Research, April 2025) — no vessel-tracking confirmation

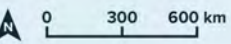
Mohajer drones confirmed by satellite imagery (2024)

Increased suspicious flows to Houthi ports, including from Sudan

Sudan-Iran ties restored Feb 2024

Estimated 7,500-8,500 tons ammonium nitrate transhipped via Djibouti front companies 2023-25

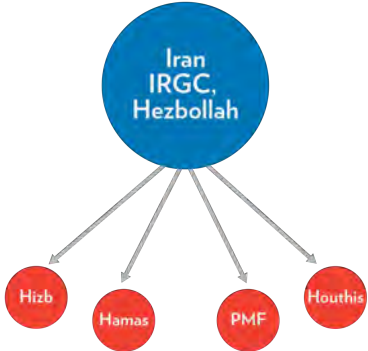
Somalia-Yemen smuggling continues



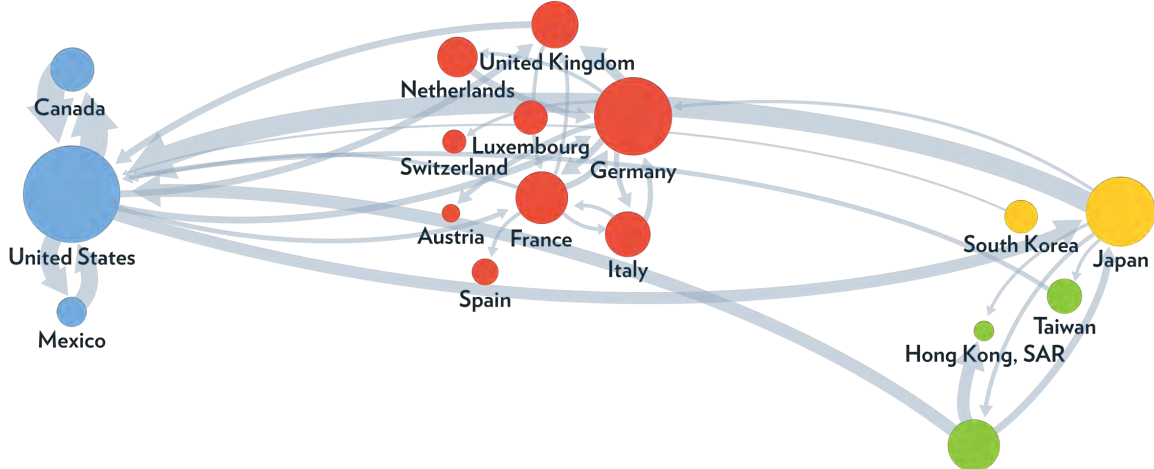
3. Ecosystem Expansion: The Houthis in Africa

The Axis of Resistance

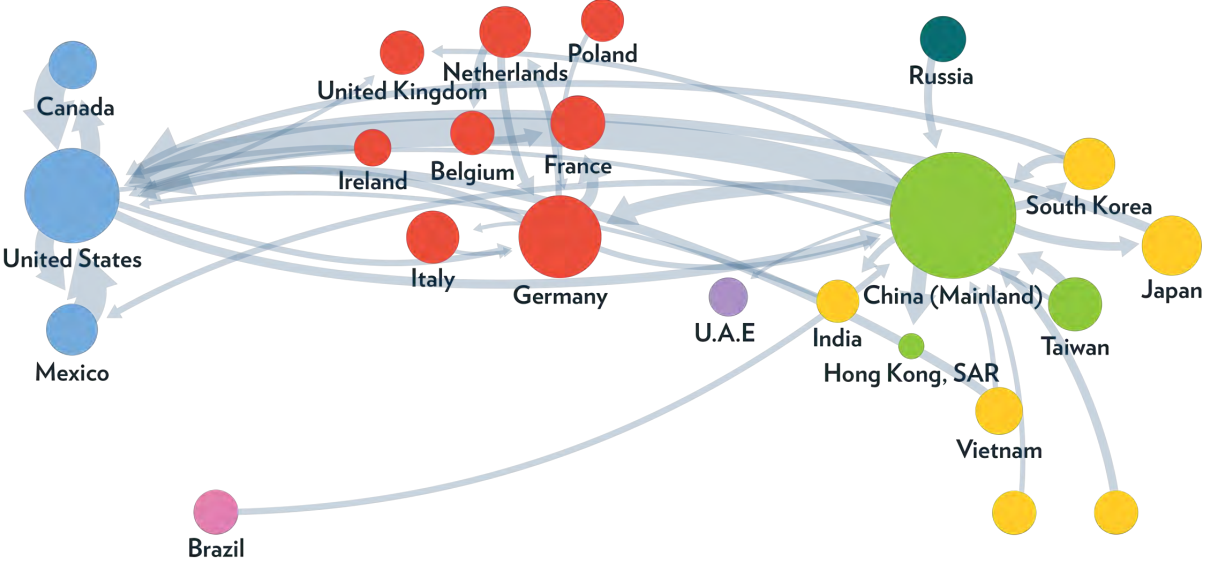
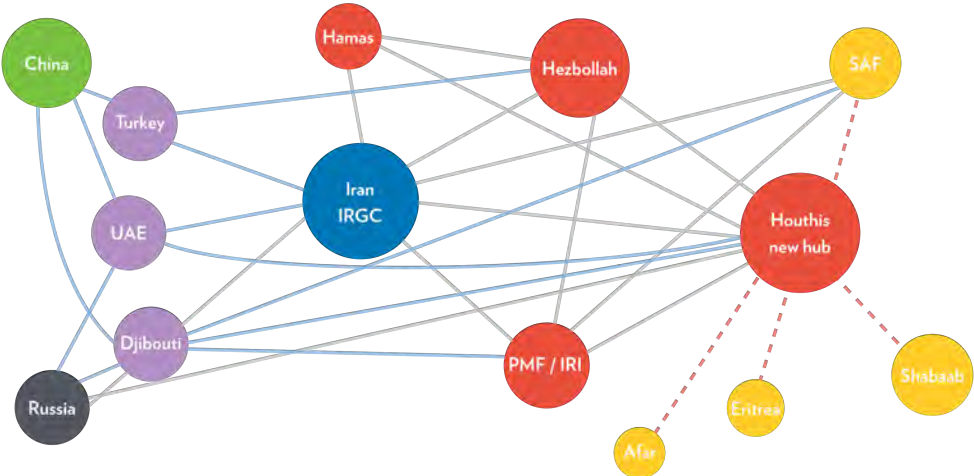
2000



The Global Economy

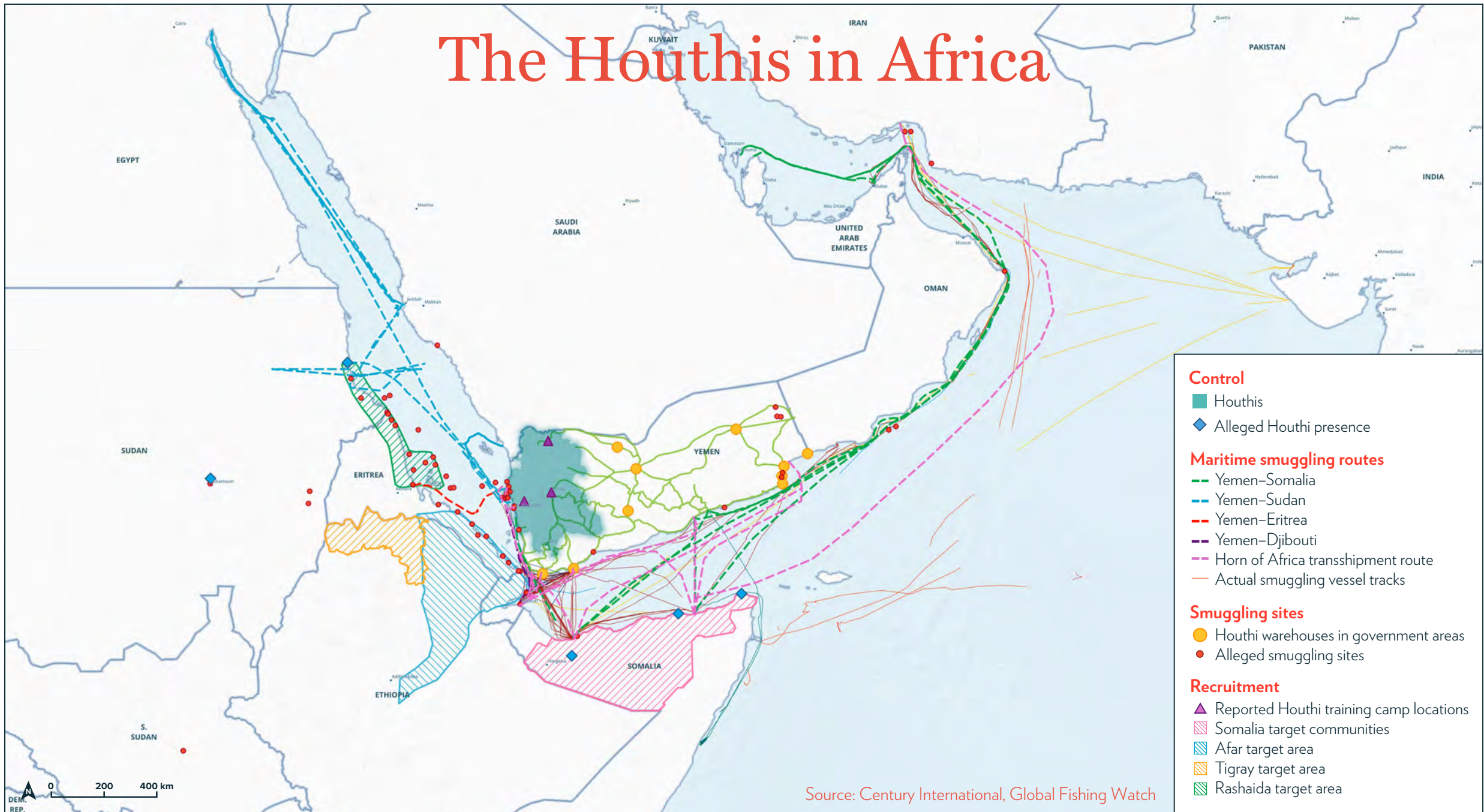


2025



Source: Century International, McKinsey Global Institute

The Houthis in Africa



Source: Century International, Global Fishing Watch

Capability Breakout in Sudan?



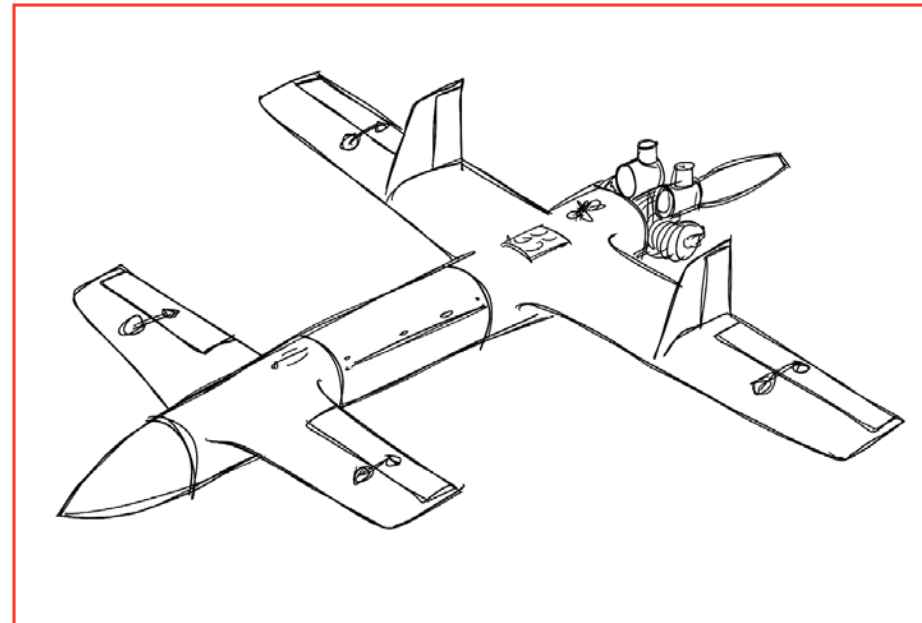
SUDAN - KHARTOUM
 10783
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 +249 185 338 080
 +249 123 600 100
 +249 123 009 647

SAFAROOG

Product Description:
 SAFAROOG is a single-engine one-way attack unmanned aerial vehicle (OWA-UAV) also referred to as a kamikaze or suicide drone. It is designed to handle ground targets with high precision and effectiveness.

SAFAROOG

LENGTH	2.88 m
WINGSPAN	3.30 m
ENGINE	~25 hp piston, pusher
CONSTRUCTION	Composite
WARHEAD	20-40 kg



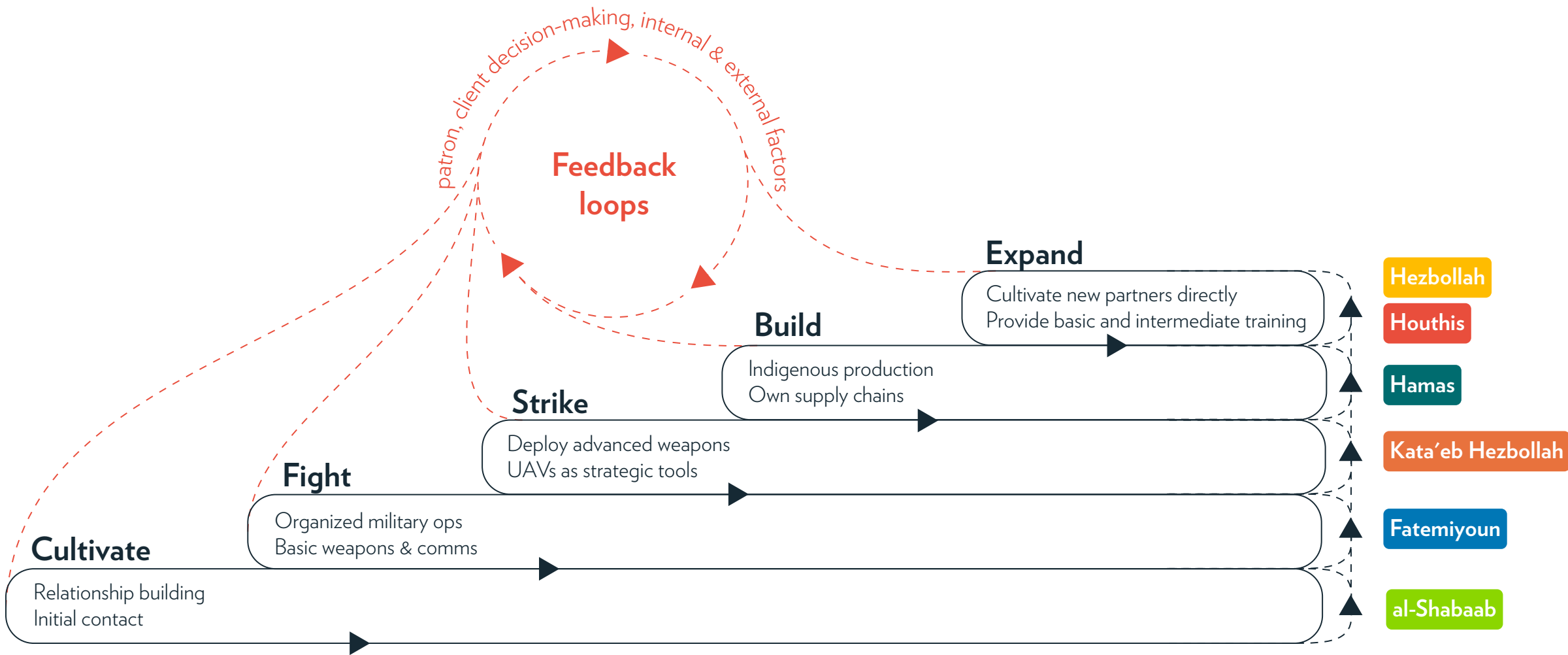
ABABIL-T / QASEF

LENGTH	2.90 m
WINGSPAN	3.25-3.30 m
ENGINE	~25 hp piston, pusher
CONSTRUCTION	Fiberglass composite
WARHEAD	30-40 kg

4. The Policy Puzzle

Thinking in Ecosystems

- **The Axis is now an ecosystem:** a dense, self-reproducing mesh that absorbed the fall of Assad, the decimation of Hamas, and direct war with Iran without breaking.
- **Critical-node logic doesn't work:** even if Iran collapsed, the capabilities embedded across the ecosystem — above all building long-range drones from imported parts — would outlast it.
- **Finding a way in:** use drones as a tracer, sort groups by where they sit on the capability ladder, and make it harder everywhere to build weapons from off-the-shelf parts.



	1. Cultivate	2. Fight	3. Strike	4. Build	5. Expand
Hezbollah					
Houthis					
Hamas					
Kata'eb Hezbollah					
al-Shabaab	Houthi cultivation since ~2024	WATCH FOR EFP use; improved drone capability; anti-aircraft capability			
SAF Islamist Faction	Iran ties rekindled ~2024	WATCH FOR Houthi-trained units conducting independent drone operations	Mojaher 6 received from Iran (2024)	WATCH FOR Safaroug deployed in combat; component tracing to identify suppliers	
Afar	DORMANT Relationship brokers watch for resumed cooperation				

capability breakout

Q&A

Thank You