

Position Evaluation
October 2026

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Operation Dawn of Yemen: A Military Initiative to Restore the State and End the Houthi Coup

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Operation Dawn of Yemen, launched by the Yemeni Armed Forces on 5 October 2026, marks an important shift in the course of the war. The operation followed an announcement by Presidential Leadership Council Chairman Dr. Rashad al-Alimi on 4 October that the armed forces were moving from the stage of preparation and readiness to active military operations. The following day, on 5 October, al-Alimi announced the launch of Operation Dawn of Yemen, with the stated objectives of restoring state institutions, liberating Sana'a, and ending the Houthi coup.

Early developments suggest that the operation is not intended merely to improve the positions of the Yemeni army and Popular Resistance forces along existing frontlines. It also appears aimed at regaining the military initiative and establishing a new balance of power, beginning in the coastal areas and around Bab al-Mandab before extending to other fronts. The scale of the shift the operation may produce, however, will depend on the ability of the Yemeni Armed Forces and their allies to consolidate their gains, maintain cohesion across the various fronts, and sustain the offensive in pursuit of the objectives announced by President al-Alimi.

From Managing the Conflict to Reshaping the Balance of Power

In the years following the April 2022 truce, the conflict largely settled into a state of neither war nor peace, punctuated by varying levels of military violations and intermittent escalation. This pattern reached a peak in September 2026, when the Houthis launched major attacks and expanded their operations toward the western coast and the western and southwestern highlands of Taiz Governorate. They seized areas of strategic importance overlooking the coast and surrounding mountainous terrain, as well as islands around Bab al-Mandab. These advances coincided with an escalation in missile and drone attacks against civilian targets and oil facilities in the Kingdom of Saudi Arabia.

Bab al-Mandab as the Operational Center of Gravity

On the first day of Operation Dawn of Yemen, the Bab al-Mandab Strait and the surrounding coastal and mountainous areas emerged as the main center of gravity in the ongoing fighting. The Yemeni Armed Forces announced that they had seized a number of strategic positions, including Bab al-Mandab and Dhubab Airport, before advancing toward Mocha.

Fighting remained ongoing, while Houthi forces were reported to be retreating across the western and southwestern highlands of Taiz and along the coastal front toward Mocha, which came under the control of the Yemeni Armed Forces. The advance was supported by extensive air operations conducted by the Arab Coalition supporting the internationally recognized government.

The Coalition Command announced the participation of approximately 100 fighter aircraft, providing continuous air support to government forces as well as aerial protection over Bab al-Mandab. It also reported the destruction of 324 targets it described as “high-value.”

Saudi Arabia: From Containing the Houthi Threat to Targeting Its Sources

The shift in the position of Saudi Arabia, which leads the Coalition to Support Legitimacy, is difficult to understand without considering the changing nature of the Houthi threat itself. In recent months, the confrontation has moved beyond the boundaries of Yemen’s internal conflict to include direct attacks on Saudi territory and interests, alongside attacks on shipping linked to the Kingdom.

The clearest development in this direction came on 20 July 2026, when the Houthis announced what they described as a “naval blockade” against Saudi Arabia. They threatened vessels linked to Saudi ports and directly targeted some of them, while other Saudi commercial ships were forced to adopt alternative maritime routes instead of passing through Bab al-Mandab. These routes extended through the Suez Canal and the Mediterranean before continuing around the Cape of Good Hope in southern Africa, increasing both shipping and insurance costs.

Against this backdrop, the Saudi position can be understood as a shift from containing the Houthi threat toward attempting to remove one of its most immediate geographical sources. Retaking the western coast and Bab al-Mandab would therefore mean more than restoring Yemeni territory from Houthi control. It would also reduce Iran's ability to exploit Yemen's coastal geography through its Houthi ally as a means of exerting pressure simultaneously on Saudi Arabia and international shipping.

This also helps explain the focus on retaking Bab al-Mandab during the first day of Operation Dawn of Yemen. The objective can be viewed as an effort to prevent Houthi control of the strait from becoming an extension of the broader regional pressure associated with the Strait of Hormuz.

In strategic terms, therefore, one dimension of the operation is to prevent the emergence of a maritime equation linking Hormuz and Bab al-Mandab as a single operational theater—one that could give Iran and its Houthi ally the ability to exert simultaneous pressure over two of the most important maritime chokepoints surrounding the Arabian Gulf.

The Makkah Defense Alliance and the Expansion of the Deterrence Umbrella

Operation Dawn of Yemen coincides with an important development in the regional security architecture: the Makkah Joint Defense Agreement between Saudi Arabia, Türkiye, and Pakistan. The agreement has taken on greater significance following the Houthi attacks against Saudi Arabia.

On 5 October, the alliance's Strategic Political and Defense Committee met in Riyadh with the participation of Saudi, Turkish, and Pakistani officials. Türkiye said the meeting formed part of an institutional process aimed at developing the alliance and discussing regional developments.

Cooperation also appears to have moved beyond the political level. Reuters reported that Pakistan sent four military cargo aircraft to Aden in September, carrying equipment that included air-defense systems, light artillery, drones, and counter-drone systems. The report also pointed to the presence of Pakistani military advisers working alongside their Saudi counterparts to support Yemeni forces. Its sources further indicated that Turkish-made drones purchased by Saudi Arabia before the war have been used in operations inside Yemen.

These developments suggest that cooperation is moving beyond a political framework for deterrence toward practical military support. A distinction, however, should be drawn between such support and direct participation in combat.

Available information does not indicate that Pakistan has decided to deploy combat troops to Yemen. Rather, it points to support for Yemeni forces through equipment and military advice, while Pakistani military deployments inside Saudi Arabia are focused on defending Saudi territory and intercepting missiles and drones.

The response to the Houthis has therefore become increasingly multilayered: the Yemeni Armed Forces conduct the ground operations; Saudi Arabia provides air support, command capabilities, and broader operational assistance; while Pakistan and Türkiye contribute military equipment and capabilities within the framework of the expanding defense alliance.

In a notable development, on the evening of 5 October, the Makkah Defense Alliance announced the immediate implementation of its mutual-defense commitments, including the provision and rapid deployment of forces and military capabilities to Saudi Arabia. The alliance stressed that the security of each of its three member states forms an integral part of their collective security.

This development points to a shift from political and defense coordination toward the activation of more operational mechanisms for deterrence and responding to threats. Its timing alongside Operation Dawn of Yemen also reflects the widening scope through which the Houthi threat is being addressed: no longer solely as a challenge within the Yemeni theater, but increasingly as part of a broader regional security equation.

The Strategic Offensive and the Test of Reaching Sana'a

On 5 October, Yemeni Armed Forces spokesman Majed al-Nuzaili announced on his X account that the armed forces had begun carrying out what he described as a “strategic offensive” toward Sana’a. He said the operation involved the use of “advanced capabilities” and stressed that “Operation Dawn of Yemen will continue until its operational objectives are achieved.” This language points to an operation whose scope extends beyond retaking limited positions along the western coast and toward applying pressure on key centers of Houthi control, in line with the objectives outlined by President al-Alimi.

Al-Nuzaili had earlier announced that the Yemeni Armed Forces had carried out 1,122 military operations targeting artillery and missile positions, fortifications, supply lines, and command centers across Saada, Al-Jawf, Taiz, and the western coast.

From an operational perspective, however, moving from the recapture of coastal areas to directly threatening the Houthis’ main center of control in Sana’a represents a major test. At this stage, the announcement of a “strategic offensive” should therefore be read primarily as an indication of the expanding scope and sustained nature of the operation, rather than as evidence that its ultimate objectives have already been achieved.

Potential Scenarios

Three main trajectories can be envisaged for the operation.

Scenario One: Consolidating Gains and Gradual Expansion

Under this scenario, the Yemeni Armed Forces and their allies would succeed in securing Bab al-Mandab before gradually expanding the offensive to other fronts, including the city of Hodeidah and its ports. This could be accompanied by the activation of additional battlefronts along the lines of contact with Houthi forces across different parts of Yemen.

Scenario Two: Mutual Attrition

This scenario would emerge if the Houthis are able to absorb the initial blow, regroup, and open parallel fronts, particularly if the intensity of air support declines. The conflict could then shift toward a prolonged phase of mutual attrition without a decisive breakthrough by either side.

Scenario Three: Converting Military Pressure into a Negotiating Track

A third possibility is that the military pressure creates a new opening for negotiations. If the balance of power is significantly reshaped, it could produce a negotiating environment different from previous rounds and allow talks to resume from a new strategic position. At this stage, it remains too early to determine which of these trajectories is most likely, as the operation is still in its initial phase.

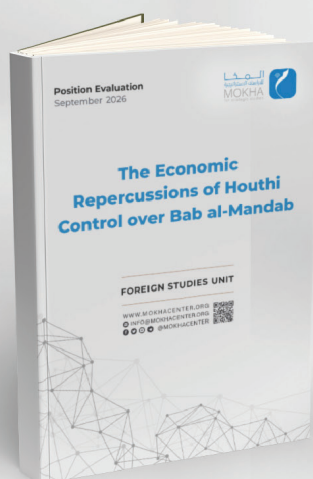
Conclusion

So far, Operation Dawn of Yemen appears to represent a broader attempt to change the way the war is being conducted, rather than simply another military campaign. Its significance lies in the convergence of three levels: a Yemeni initiative on the ground, extensive Saudi support, and a regional and international environment that increasingly views Bab al-Mandab as part of the wider regional security architecture rather than merely a Yemeni frontline.

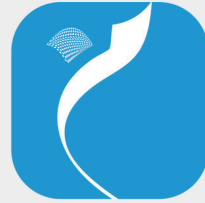
The central question, therefore, is not whether Operation Dawn of Yemen achieved military gains on its first day, but whether it can translate those gains into a lasting shift in the balance of power and ultimately advance the objectives announced by Presidential Leadership Council Chairman Dr. Rashad al-Alimi: restoring state institutions, liberating the capital Sana'a, and ending the Houthi coup.

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