

Situation Assessment: The Doctrine of Zeroing Out Gray Areas - Saudi Arabia's New Strategy to Reassert Influence in Southern Yemen

حمزة حسن | January 3, 2026



The Yemeni arena, particularly in the south of the country, is witnessing a notable strategic shift following the Saudi airstrike that targeted a military shipment in the port of Mukalla several days ago, along with the subsequent public accusation by Saudi Arabia against the UAE of supporting the Southern Transitional Council and the demand for the

UAE to withdraw from Yemen and cease any military support outside the framework of the legitimate government.

In the aftermath, the Transitional Council announced a "transitional phase" and issued what it termed a "constitutional declaration for the Arab South," in a move that represents a clear departure from previous understandings, raising the political and security challenge to an unprecedented level.

In this context, Saudi Arabia called for a comprehensive southern dialogue, not as a typical political initiative, but as part of a package of measures aimed at containing a trajectory that has begun to exceed the boundaries of political management and is moving towards imposing a new sovereign reality in southern Yemen.

The Shift in Saudi Behavior

The current shift in the Saudi position can be described as a transition from a **strategy of managing contradictions** to a **strategy of re-imposing rules**. For years, since the beginning of the Arab coalition's battle in Yemen, Riyadh accepted the presence of extensive Emirati influence in the south and dealt with the Transitional Council as a troublesome but containable local actor.

However, according to Saudi Arabia, the recent operations and the unjustified support for the Transitional Council, along with the uncoordinated military movements in Hadramaut and Mukalla, have redefined the threat from being a political dispute to a disruption of the regional security equation for Saudi Arabia.

The bombing of Mukalla came as a result and an example of a shift in the Saudi approach to dealing with the increasing Emirati influence in the south; it carried a clear indication that Saudi Arabia now sees control over the southern ports and supply lines as a sovereign matter that does not accept grey partnerships, especially when managed independently of it.

From here, the call for dialogue is no longer a tool for settlement but a means

to rearrange the southern political field under a clear Saudi ceiling.

Assessment of the Internal Southern Situation

The secessionist project assumes a homogeneous southern bloc behind the Transitional Council, yet recent developments have revealed the fragility of this assumption. Hadramaut, with its geographical, economic, and tribal weight, represents a strategic knot against any central southern state project. The positions of the Hadramaut tribes alliance and the local authority, along with their support for the Saudi role, indicate an implicit rejection of turning the governorate into a battleground for influence or a base for a secession project that lacks local consensus.

This structural disparity within the south provides Saudi Arabia with a strategic opportunity to dismantle the narrative of exclusive representation that the Transitional Council claimed in its recent statement, as well as an opportunity to transform the southern issue from a sovereign project into a political file that can be renegotiated and fragmented.

Possible Scenarios

Scenario One : Recalibration through Forced Containment (Most Likely)

Saudi Arabia succeeds in imposing an expanded dialogue path that includes multiple southern components, leading to the marginalization of the Transitional Council and freezing its secessionist project. In this scenario, the southern issue is redefined within the framework of expanded local governance, with any sovereign discussion postponed, potentially resulting in the integration of the Transitional Council into the new Saudi framework.

Scenario Two : Internal Southern Erosion (High Risk)

The dialogue fails or is emptied of its substance, leading to internal clashes between competing southern forces in addition to the legitimate government, and in light of a relative Emirati withdrawal and indirect Saudi intervention, this scenario could open the door to long-term security chaos that exacerbates the Yemeni wound and disturbs Saudi Arabia.

Scenario Three : Imposing a Secessionist Reality (Low Probability)

The Transitional Council may activate the constitutional declaration by force and proceed unilaterally on this file relying on Emirati support. However, the absence of regional and international cover, along with the division in the south, may render this scenario costly and unsustainable amid the UAE's engagement in other arenas.

Conclusion

The current data indicates that Saudi Arabia is not seeking to produce a final solution to the southern issue as much as it aims to **prevent the formation of a southern entity outside its strategic control, while confirming that Saudi Arabia has decided to deal with the grey files in Yemen**. The call for dialogue represents the complementary political tool to the limited use of force, within a strategy aimed at returning the center of southern decision-making to Riyadh and dismantling any sovereign project that does not align with its security and regional priorities.

Thus, southern Yemen stands at a stage of reconfiguration rather than settlement. A stage where the boundaries of what is possible and forbidden are drawn, not the future of the Yemeni state. Any local actor who ignores this shift risks moving from a problematic partner position to a political and security target.

This is an AI-generated English translation. The original text is in Arabic.