Abaad Observatory for Early Warning and Strategic Indicators

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DAWN OF YEMEN:
The Test of Military Decisiveness and the Human Cost of War

Military, Sovereignty and Humanitarian Developments in Yemen

An Analytical Report for Decision-Makers

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About this report: An analytical assessment based on the October 2026 monitoring archive. Statements and reported events are attributed to their sources; the Observatory's assessments and forward-looking scenarios are presented separately.

01 Executive Summary

October 2026 marked a major shift in Yemen’s war with the launch of Operation Dawn of Yemen (Fajr al-Yemen) early in the month. The confrontation moved beyond general mobilization and reciprocal escalation into extensive military operations across the western coast, Taiz, Marib, Al-Jawf and Saada, involving government forces with support from the Saudi-led coalition, according to statements recorded in the monthly monitoring archive.

Three developments unfolded in parallel: the government sought to regain the military initiative and restore sovereignty over strategic territory and corridors; Houthi attacks on airports, civilian infrastructure and targets inside Saudi Arabia intensified; and the humanitarian cost of the conflict increased, particularly as the siege of Taiz tightened, displacement accelerated and essential services were disrupted.

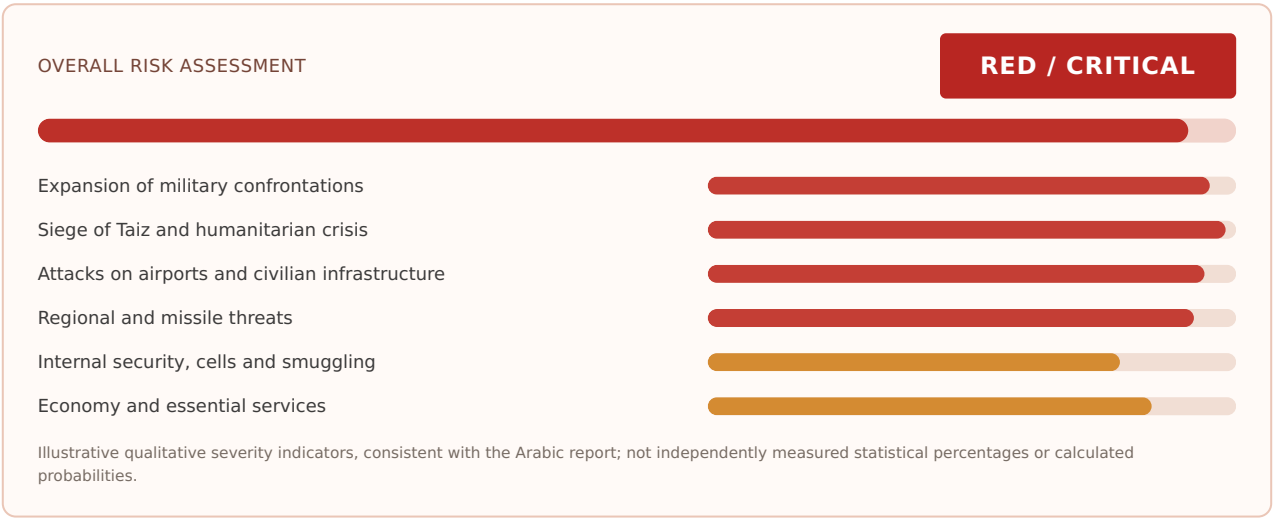
The central strategic question therefore changed. September had tested the state’s capacity to mobilize and prepare for war; October tested its ability to conduct that war and translate battlefield gains into restored institutions and civilian protection. Government forces announced the recovery of strategic positions along the western coast, including Mokha, Dhubab, Bab al-Mandab and Mayyun Island, as well as advances in Taiz and Marib. These are announced military outcomes, not independent verification of sustained territorial control.

The siege of Taiz emerged as a critical humanitarian warning. Reports repeatedly described impeded access to water, fuel, medicines and food, together with threats to hospital operations. By October 30, UN figures cited in the monitoring archive put displacement at more than 290,000 people since the beginning of August, not during October alone.

Overall assessment: RED / CRITICAL. The decisive measure of success will be whether military gains can be converted into security, functioning institutions and essential services, while preventing an extended war of attrition.

02 Overall Risk Indicator

The overall risk level is critical because military operations across several fronts coincided with cross-border attacks, strikes affecting airports and civilian infrastructure, worsening displacement and restrictions on access to Taiz. Together these pressures threaten markets, essential services and the delivery of humanitarian assistance.



Principal risk drivers

- The widening scope of government military operations and fighting in Taiz, Marib and the western coastal region.
- The possibility of essential supplies and public services collapsing under the siege of Taiz.
- Repeated attacks on Aden and Riyan airports, civilian infrastructure and targets in Saudi Arabia.
- Persistent threats to security around Bab al-Mandab and to maritime and aviation routes.
- Smuggling, clandestine cells and security penetration in government-administered governorates.
- Landmines, disease among displaced populations and reports of suspected toxic agents requiring technical investigation.

03 Major Developments in October

1. From mobilization to large-scale military operations

The launch of Operation Dawn of Yemen marked a transition from preparation to sustained operations. Government forces sought to operate on several fronts simultaneously, increasing pressure on Houthi fighting capacity and supply networks. Some official daily briefings reported more than 2,000 targeting operations. These announcements should not be added mechanically into a cumulative total without checking their reporting periods and possible overlap.

Operational success should be assessed not simply by the volume of strikes, but by whether control over recovered areas can be maintained, supply routes secured, and civilian administration, courts, policing and public services restored.

2. The western coast, Bab al-Mandab and Taiz

The army announced the recovery of Mokha, Dhubab, Bab al-Mandab and Mayyun Island, while fighting continued across parts of Taiz, notably its southern and western fronts. These developments suggest that geographical control of the strait alone cannot guarantee maritime security while missile and drone capabilities and adjacent high ground remain able to threaten coastal routes and shipping.

3. Airports and critical infrastructure become targets

The archive records repeated attacks attributed to the Houthis on Aden International Airport, as well as attacks on Riyan Airport and the government headquarters at Maashiq. It also records the interception of missiles and drones directed toward Saudi Arabia. This pattern increases the risk of disruptions to civil aviation, medical transport, humanitarian logistics and commerce. Protecting critical civilian infrastructure has consequently become an immediate national-security requirement.

4. Restoring the state as the framework for war and politics

Government statements linked Operation Dawn of Yemen to restoring state institutions, concentrating weapons and decisions over war and peace within constitutional authorities, and resuming public services. Diplomatic appeals accompanied the military campaign, calling for stronger enforcement of the arms embargo and accountability for attacks on civilians. The credibility of this framework, however, depends on tangible institutional results rather than political declarations alone.

5. Taiz under siege: an acute humanitarian emergency

Reports throughout October described road closures and restrictions on basic goods, alongside warnings about dwindling water, fuel, oxygen and medicines in hospitals. An analysis by the Mokha Center estimated that approximately 2.8 million people in Taiz and surrounding areas were exposed to humanitarian risk. Population estimates from different reports cover different geographical areas and should not be combined or treated as interchangeable.

6. Economic pressure and the contest over supply routes

Road closures around Taiz and the disruption of household gas deliveries placed additional pressure on communities and markets. Meanwhile, reports from Houthi-held areas described continued levies and rising water and electricity costs. These developments highlight how restoring transport links, trade and essential services is central to social resilience, not a secondary concern.

7. Smuggling, information security and suspected toxic materials

Authorities in Shabwa reported arresting a 13-member Houthi-linked cell and seizing a shipment of weapons smuggled by sea. The Ministry of Telecommunications also accused the Houthis of exploiting civilian communications infrastructure for surveillance and intelligence purposes. In Taiz, local authorities requested a technical investigation into projectiles suspected of containing toxic substances. These reports do not establish chemical-weapons use. Independent laboratory testing, evidence preservation and medical assessment are essential before any such conclusion is reached.

04 Implications for Decision-Makers

The state now faces a test more demanding than regaining battlefield initiative. Managing the consequences of military action, reactivating institutions, securing roads and borders, and protecting the population are central criteria for success. Military advances without civilian governance risk remaining temporary or generating new instability.

Taiz has become a dual test: militarily, through fighting on its surrounding fronts; and humanitarily, through the siege and interruptions to vital services. Bab al-Mandab presents another test: how to combine national sovereignty with regional and international cooperation on maritime security without marginalizing Yemeni institutions.

> **Three governing priorities: sustain battlefield gains; reduce the civilian cost of war; and ensure that recovering territory also means restoring the institutions of the state.**

05 Emerging Risks

- A protracted war of attrition in which expanding operations do not produce proportionate institutional gains.
- The deterioration or collapse of health, water and food services in Taiz as supply restrictions persist.
- Further attacks on airports and civilian facilities, disrupting commercial and humanitarian movement.
- Regional escalation through additional missile and drone attacks against Saudi Arabia.
- Security vacuums in government-held areas exploited by clandestine cells, smuggling and armed disorder.

- Unverified allegations concerning toxic substances becoming harder to investigate as evidence and witnesses are lost.
- Rising displacement and disease amid insufficient resources for basic services and humanitarian response.

06 Strategic Opportunities

- Turn recovered territory into demonstrable examples of functioning civilian administration, justice and public services.
- Develop an integrated Yemeni maritime-security strategy for Bab al-Mandab, the Coast Guard and ports.
- Use increased regional and international attention to strengthen protection for civil aviation and shipping.
- Establish an urgent humanitarian arrangement to reopen Taiz's roads and protect access to medical supplies and facilities.
- Connect international assistance to local recovery and practical administrative and institutional reform.
- Create an integrated national early-warning framework linking security, economic, public-service and human-rights indicators.

07 Possible Scenarios

Protracted mutual attrition, with limited changes along the frontlines	**High**
Military gains followed by gradual restoration of state institutions	**Medium**
Wider regional escalation driven by missile and drone attacks	**Medium**
A worsening humanitarian emergency in Taiz and displacement areas	**High**
A slowdown in fighting accompanied by renewed diplomatic openings	**Low to medium**

These are qualitative judgments drawn from the trends in the monitoring archive, not statistically calculated probabilities.

08 Recommendations for Decision-Makers

- Link military operations to an institutional transition plan for recovered areas, under the authority of the state and its civilian, judicial and security bodies.
- Prioritize immediate humanitarian access to Taiz, ensuring the delivery of water, food, fuel and medicines and protecting hospitals and ambulances.
- Adopt a Yemeni strategy for Bab al-Mandab that integrates the Coast Guard, maritime and security agencies, civilian authorities and relevant partners.
- Strengthen preventive protection, emergency planning and business continuity at airports and other critical facilities.
- Establish a unified system to scrutinize reported military figures and territorial gains, alongside indicators of civilian safety, services and local stability.
- Commission an independent technical investigation into allegations involving toxic materials, using scientific and legal standards and avoiding premature conclusions.
- Direct international support toward reopening roads, mine clearance, healthcare, education and displacement management.

- Improve government public communication through timely, accurate reporting while safeguarding sensitive operational information.

09 Concluding Strategic Assessment

The October 2026 monitoring indicates that Yemen has moved beyond the phase of mobilization and the attempt to regain initiative toward a test of whether military action can deliver sustainable political and institutional outcomes. Operation Dawn of Yemen was the month's defining development, accompanied by the expansion of government operations and continued Houthi attacks on cities, airports and civilian infrastructure.

The critical danger lies in the overlap between wider combat and an increasingly severe humanitarian toll. Taiz has become an acute warning point as displacement rises and the health system and supply networks face growing stress. Recovering territory alone is insufficient: it must be followed by security, justice, essential services and accountable administration.

> **Bottom line for decision-makers: the success of Operation Dawn of Yemen should not be measured solely by the number of strikes or positions recovered. It should be measured by the state's ability to protect civilians, reopen roads, safeguard navigation, restore institutions and prevent the war from becoming a prolonged cycle of attrition that deepens Yemenis' suffering.**

Primary source: Yemen News Monitoring Archive, 1-31 October 2026, supplied to the Abaad Observatory. Military and human-rights figures are attributed to their reporting organizations and have not been independently verified by the Observatory.