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South Yemen’s Near Moment of Independence: Hadramaut, Regional Anxiety and the Saudi Reset

In early January 2026, South Yemen came closer to independence than at any point since unification in 1990. A combination of rapid military advances, a constitutional declaration by the Southern Transitional Council (STC), and the collapse of effective government authority across much of the south appeared to set the stage for a decisive break. Yet regional intervention — particularly by Saudi Arabia, and concern from Oman — halted that trajectory and redirected events toward diplomacy.

On 1 January, the STC issued a landmark constitutional statement outlining a two-year transitional period leading to a southern referendum on self-determination. The declaration was framed as a legal and political roadmap for restoring the former South Yemeni state, citing decades of marginalisation since unification and the failure of successive peace processes to address the southern question.

The Hadramaut and al-Mahra Campaign

In the weeks preceding the declaration, STC-aligned forces launched a swift and coordinated military campaign across Hadramaut and al-Mahra, two vast eastern governorates that had largely escaped direct fighting for much of Yemen’s war. Moving rapidly through desert terrain, tribal routes and lightly defended towns, STC units succeeded in seizing key positions with minimal resistance — a strategy that surprised many political and military analysts.



Crowds gather in Hadramaut celebrating STC

The operation was widely interpreted as more than a tactical move. Control of Hadramaut — Yemen’s largest governorate and a major oil producer — and al-Mahra, with its long coastline and border access, would have provided the territorial backbone of a future southern state.

Internationally, the STC justified its advance by emphasising its campaign against Muslim Brotherhood-aligned factions and Al-Qaeda in the Arabian Peninsula (AQAP) — a narrative that initially found some acceptance, particularly given long-standing international concern over extremist groups operating in eastern Yemen.

Omani Alarm Over al-Mahra

While much attention focused on Saudi Arabia’s reaction, Oman was deeply unsettled by the STC’s move into al-Mahra, a governorate that directly borders Omani territory. Muscat has long regarded al-Mahra as a sensitive buffer zone and has pursued a policy of neutrality and quiet mediation in Yemen.



Muscat, reinforcing regional pressure to halt further escalation.

Analysts note that Oman views the expansion of armed actors near its border — whether Saudi-aligned forces, Islamist groups, or southern separatists — as a potential threat to stability and cross-border security. The STC’s sudden presence in al-Mahra therefore raised red flags in

Saudi Arabia Draws a Red Line

Saudi Arabia’s response proved decisive. Despite previous tactical tolerance of the STC, Riyadh concluded that a full STC victory — particularly one followed by an internationally supervised referendum — would effectively end the authority of the internationally recognised Yemeni government it supports, and with it Saudi Arabia’s long-term influence in southern Yemen.

From Riyadh’s perspective, the STC’s success threatened not only Yemen’s territorial integrity but also Saudi strategic depth along the Arabian Peninsula. In response, Saudi-backed government forces — supported by coalition air power — moved swiftly to push STC units back to their pre-offensive positions, retaking major centres including Mukalla. The episode also exposed growing tension between Saudi Arabia and the United Arab Emirates, the STC’s principal external supporter, highlighting divergent Gulf visions for Yemen’s future.

From Confrontation to Conference

Having reasserted its red lines militarily, Saudi Arabia moved quickly to shift the crisis into the political arena. Riyadh announced plans to host a “Southern Conference”, bringing together southern Yemeni political forces to address grievances and future governance arrangements through dialogue rather than force.

The invitation was extended to all southern factions, including the STC. In a significant gesture, STC President Aidarous al-Zubaidi accepted the invitation and travelled to Saudi Arabia, signalling a willingness to engage despite the recent confrontation.

Al-Zubaidi’s visit represents a critical moment. For the STC, the conference offers an opportunity to reset relations with Riyadh, gain broader regional legitimacy, and push its case for self-determination through political means rather than unilateral military action. For Saudi Arabia, the talks are a chance to reassert its role as the central broker in Yemen while containing separatist momentum within a managed process.



President Aidarous Al-Zubaidi

Saudi officials have emphasised that dialogue must preserve Yemen’s unity, but they have also acknowledged that southern grievances require serious engagement – a balancing act that will define the conference’s outcome.

A Missed Moment – or a Strategic Pause?

The STC’s advance into Hadramaut and al-Mahra, followed by its constitutional declaration, marked the closest South Yemen has come to independence in decades.

Yet regional realities – Saudi strategic concerns and Omani border sensitivities – intervened decisively.

Whether the Riyadh conference leads to a genuine political breakthrough, a negotiated path toward self-determination, or merely postpones the southern question remains unclear. What is certain is that the events of late 2025 and early 2026 have irreversibly shifted the debate. South Yemen’s future is no longer a distant aspiration, but an urgent regional question – one now being contested as much in conference halls as on the battlefield.

As of the latest developments in South Yemen, the political and security situation remains highly volatile. The Saudi-backed National Security Forces (NSF) have solidified their control over the region, effectively taking over key areas of South Yemen. This shift comes at a time of heightened tensions between the Southern Transitional Council (STC) and

the Yemeni government, with some reports suggesting that the whereabouts of STC president Aidarous al-Zubaidi remain uncertain. His hometown of Dhalla, alongside the town of Zubaid, was recently hit by Saudi airstrikes, further intensifying the conflict. The Saudi-led coalition’s actions indicate an increased military presence and influence, despite the ongoing instability in the region.

At the same time, a delegation from the STC has travelled to Saudi Arabia to attend the “South-South Conference,” an event that has raised questions about the future of the Southern movement. While the STC has traditionally advocated for the independence of South Yemen, the growing Saudi influence casts uncertainty on this goal. The strategic importance of South Yemen has led to complex dynamics, with the Saudis appearing to assert full control over the area, leaving local factions and their leadership in limbo. The region is bracing for further developments, as the political landscape remains fluid, and the potential for escalation continues to loom large.

South Yemen at a Crossroads: Saudi Arabia’s Risky Political Gamble

Saudi Arabia’s growing dominance in southern Yemen follows the United Arab Emirates’ withdrawal, sidelining the influential Southern Transitional Council (STC) and risking local instability. This shift has fueled extremist activity and deepened southern grievances amid weak Western diplomatic engagement. Without inclusive dialogue and balanced international pressure, Yemen’s south faces escalating conflict and humanitarian decline. *(By AbdulGalil Shaif)*



President Aidarous Al-Zubaidi visits an injured soldier in hospital

Recent events in Yemen’s south reveal a rapidly shifting political and security landscape shaped by external intervention, internal mobilization and deep uncertainty over southern governance. At the center of these changes stands Saudi Arabia, which has increasingly taken the political initiative in the south – a role previously shared with the United Arab Emirates (UAE).

With the UAE withdrawing its forces and influence, Riyadh now faces the challenge of managing southern dynamics alone – and possibly misreading the consequences. The Southern Transitional Council (STC), long a potent southern political and military force, lost its most significant external backer after Abu Dhabi withdrew support following clashes and strategic disagreements with Saudi Arabia.

Earlier STC gains in Hadramaut and al-Mahra enjoyed notable local support and expanded its territorial control. Riyadh

viewed these advances as a direct threat to its security interests and responded with airpower and political pressure to compel a withdrawal.

Saudi Arabia then sought to “organize” southern political forces via a conference in Riyadh, presenting the exercise as an inclusive platform for southern voices. On paper, this was a bid to consolidate representation under a Saudi-managed umbrella. On the ground, however, it exposed the limitations of externally driven political engineering. Allegations that STC delegates were pressured — on foreign soil — to dissolve their own movement provoked widespread outrage in Aden and other southern centers. Large demonstrations underscored deep grassroots support for the STC and its leader, Aidarous al-Zubaidi, whose whereabouts remain ambiguous amid conflicting reports.

Despite claims from Saudi-backed elements that the STC “dissolved,” the council’s institutions — and popular base — remain potent political realities that cannot be erased by declarations signed abroad.

The security consequences of sidelining the STC are already emerging. Reports indicate rising activity by extremist groups such as Al-Qaeda in the Arabian Peninsula (AQAP) and other insurgent networks in parts of Aden and Abyan — areas where local STC-aligned forces had helped enforce relative stability. This dynamic raises critical questions about the wisdom of undermining actors who, despite political differences with Riyadh, have played significant roles in local security management.

Complicating all of this is the broader political context: The Presidential Leadership Council (PLC) recently dismissed key southern figures — including al-Zubaidi — effectively strengthening northern dominance within the state apparatus. Such moves fuel southern perceptions of marginalization and deepen distrust of both the PLC and Saudi intentions.

Western powers have largely been silent

Across Western capitals — particularly Washington and Brussels — there has been remarkably muted public engagement on these unfolding events. While major media outlets like The Guardian and The New York Times have covered the deepening Yemen crisis and the fracturing of the Saudi-UAE axis, there has been little visible Western diplomatic pressure on Riyadh regarding the southern question.

This quiet allows Saudi Arabia to take the Yemen file with limited external accountability, even as its decisions have potentially destabilizing consequences: exacerbating guerrillaization in the south, enlarging the humanitarian footprint and creating political vacuums that extremist actors can exploit. The relative lack of assertive Western diplomacy — beyond routine calls for restraint — suggests a strategic tolerance of Riyadh’s approach, even where it may undermine broader peace efforts.

A strategic misstep at a strategic juncture

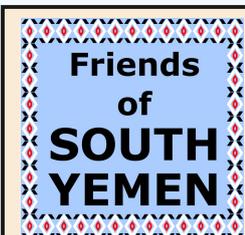
South Yemen now stands at a crossroads — caught between external political engineering, internal mobilization and the persistent threat of militant resurgence. Saudi Arabia’s attempt to marginalize the STC risks hollowing out local structures that had provided essential stability and governance. At the same time, the lack of robust Western engagement has handed Riyadh a freer hand to shape Yemen’s trajectory without meaningful checks or balanced mediation.

In light of these complexities, it is essential to develop a strategic approach that addresses the multifaceted challenges facing South Yemen. By recognizing the delicate balance between external influences and local dynamics, policymakers can craft effective interventions that foster stability and promote sustainable governance. In order to do this, the different parties must follow these policy recommendations:

1. Re-engage the STC as an essential stakeholder: Riyadh should recognize that any sustainable political arrangement in the south must include the STC as a legitimate representative of popular aspirations, not as a delegitimized remnant. Political dialogue should be internal to Yemen and free from the perception of external coercion.
2. Mobilize multilateral diplomatic pressure: Western powers — especially the United States, United Kingdom and EU member states — must move beyond rhetorical calls for restraint and actively encourage inclusive negotiations that include both southern and northern actors. Overt backing of Riyadh without balanced engagement risks deeper fragmentation.
3. Support local security architectures: Undermining southern security forces without a viable alternative creates vacuums that extremist groups can exploit. International partners should prioritize stabilization incentives tied to accountability and community protection, not just broad foreign policy aims.
4. Condition aid and political support on inclusive governance: Humanitarian and development assistance — currently under strain due to funding cuts — should be conditioned on progress toward inclusive political dialogue that respects southern voices and enhances civilian protection.

Saudi Arabia’s efforts to shape the future of Yemen’s south will not succeed if they undercut the very actors needed to maintain order and legitimacy. Without course correction — and without balanced Western diplomatic pressure — Yemen’s south may face increasingly entrenched instability, further humanitarian erosion and a broader regional spill over whose costs will extend far beyond its borders.

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