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Welcome to a new edition of the **TRENDS Med-MENA Nexus Monthly Report,** the analytical platform from TRENDS Research & Advisory dedicated to unpacking how Italy and Southern Europe are reshaping their strategic engagement with the Mediterranean, the Gulf, and beyond.

As 2026 opens, the strategic space linking the Mediterranean, the Gulf and the wider Middle East is entering a phase defined less by announcements and more by execution. Over the past year, Southern Europe—and Italy in particular—has moved beyond reactive engagement, positioning itself as an active connector across energy, defense-industrial cooperation and advanced technology ecosystems. What is emerging is not a single grand strategy, but a set of converging pathways that tie European capabilities to Gulf capital, production depth and geopolitical reach.

Taking stock of Italy's recent strategic posture toward the Gulf, it is evident that traditional economic engagement has been complemented with more recent geopolitical outreach. In December 2025, Italian Prime Minister Giorgia Meloni's attendance at the 46th GCC Summit in Bahrain signaled a shift from primarily bilateral ties with individual Gulf states to a regional approach engaging the GCC as a whole. The two sides agreed to work towards the establishment of a comprehensive Italy – GCC strategic partnership aimed at enhancing their shared interests.[1]

Prime Minister Meloni advanced this shift by proposing to host a "GCC-MED" Summit to enhance dialogue between Gulf and Mediterranean Nations with a view to ultimately deepening trade, investment, and connectivity between the Gulf, the EU, and the Mediterranean.[2] This approach aligns closely with broader EU–GCC frameworks, strengthening coherence and European influence, while also responding to growing global competition in the Gulf. While Italy is expected to continue engaging with individual GCC states bilaterally, the proposal of the GCC-MED partnership also signifies a move toward systemic, long-term economic and geopolitical cooperation with the GCC.

Accordingly, this January edition brings together two domains where this transition is most visible. First, the green energy has become a strategic connector shaping the emerging GCC–Europe trade architecture, with the Mediterranean acting as a transmission belt between Gulf investment and European markets. Second, recent Europe–MENA unmanned-systems agreements signal that 2026 will be a year of manufacturing, certification and delivery rather than memoranda alone.

Taken together, these chapters show how Southern Europe is no longer merely adapting to global change but actively shaping a new Med–MENA strategic ecosystem grounded in industrial partnership and practical outcomes.

Chapter 1 – Energy as a Strategic Connector: How Italy, France, and Spain Are Driving a New Euro–Gulf Energy Nexus

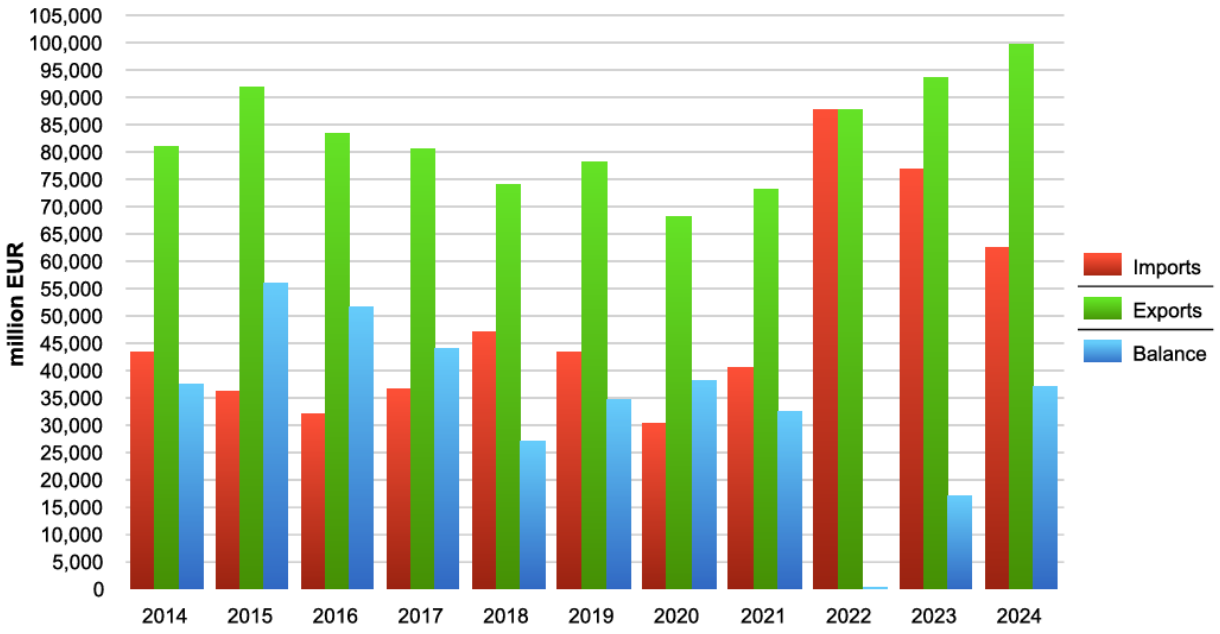
Trade growth between the EU and GCC have (Table 1) is characterized by steadily increasing trade over the decade, driven by the EU's strong export performance of industrial products and the GCC's traditionally

[1] Gulf Cooperation Council, "Final Communiqué of the 46th GCC Summit," Manama, December 3–4, 2025. https://www.wam.ae/en/article/bn10bbz-final-communiqu%C3%A9-46th-gcc-summit-stresses-enhanced-cooperation-joint-action-on-regional-issues

[2] Government of Italy, "President Meloni's Speech at the Gulf Cooperation Council Summit," December 3, 2025. https://www.governo.it/en/articolo/president-meloni-s-speech-gulf-cooperation-council-summit/30494

robust exports of mineral products. Negotiations for an EU – GCC Free Trade Agreement (FTA) were announced in May 2025, with the first round of negotiations taking place in June 2025.[3] The EU is simultaneously pursuing quicker and more flexible economic agreements with bilateral partners such as the UAE with which negotiations for a Comprehensive Economic Partnership Agreement (CEPA) remain underway. The longstanding goods trade between the GCC and EU is evolving towards strategic economic relations of greater depth, enabling the emergence of energy, hydrogen and advanced fuels as practical vectors of convergence, and linking industrial policy, infrastructure development and long-term investment strategies across both sides.[4] Energy cooperation is no longer simply adjacent to trade diplomacy but is increasingly shaping the architecture within which broader GCC–EU relations are evolving.

Table 1: EU Trade with GCC 6 Total goods (2014 – 2024)



Source: European Union. 2025. Trade in Goods with GCC 6. Factsheet. European Commission, May 8, 2025. *https://webgate.ec.europa.eu/isdb_results/factsheets/region/details_gcc-6_en.pdf*

Over the past year, green energy cooperation has consolidated as one of the most structured and forward-moving pillars of engagement between the GCC and Europe. Energy cooperation between Southern Europe and the Gulf is entering a new phase—one defined less by standalone investments and more by infrastructure-led partnerships that anchor Gulf capital directly into European transition pathways. The World Future Energy Summit, which took place between 13–15 January 2026 in Abu Dhabi, offers a timely lens to assess this shift, as energy security, grid connectivity and clean infrastructure move to the center of EU–Gulf economic diplomacy.

[3] European Commission, *EU-United Arab Emirates agreement*, European Union — Trade Policy, July 4, 2025, https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/gulf-region/eu-united-arab-emirates-agreement_en

[4] Fatima Al Mahmoud, and Fareed Rahman, "UAE and EU begin talks on Strategic Partnership Agreement to deepen ties," The National News, December 11, 2025 https://www.thenationalnews.com/business/economy/2025/12/11/uae-and-eu-begin-talks-on-strategic-partnership-agreement-to-deepen-ties/

This trend became particularly visible during a dense cluster of energy and sustainability forums held in Abu Dhabi at the start of the year. Alongside the World Future Energy Summit, the UAE hosted Abu Dhabi Sustainability Week, which provided an umbrella for multiple parallel gatherings on clean energy, hydrogen and advanced fuels. Taken together, these events formed a coordinated diplomatic and industrial moment rather than a series of isolated summits, reinforcing the country's role as a convening hub for Europe's green transition—capable of bringing together EU institutions, leading European economies and Mediterranean partners around shared priorities.

Within this broader setting, the EU–GCC–MENA Hydrogen & Advanced Fuels Summit highlighted a substantive shift in how cooperation on clean energy is being framed between Europe and the Gulf. Rather than reiterating long-term climate ambitions, discussions focused on the practical conditions required to make hydrogen and advanced fuels commercially and strategically viable across regions. Central to the debate was the recognition that Europe's decarbonization pathways, especially in hard-to-abate sectors such as aviation, maritime transport and heavy industry, will increasingly depend on external supply chains that are reliable, scalable and governed by compatible regulatory frameworks.

The prominence given to certification standards, market design and investment de-risking reflected a growing awareness that hydrogen trade will not emerge organically from political declarations alone, requires deliberate alignment between producing regions like the Gulf and consuming markets in Europe, supported by shared rules, infrastructure planning and long-term offtake visibility. From a European perspective, the Summit underscored a pragmatic recalibration: hydrogen is no longer treated solely as a domestic transition tool, but as a pillar of external energy policy—one that necessitates structured partnerships with actors capable of delivering volume, cost competitiveness and logistical integration.[5]

This emphasis on implementation over ambition reflects a broader recalibration within European energy policy. As the EU confronts the limits of domestic decarbonization, particularly in sectors structurally resistant to electrification, external energy partnerships are increasingly treated as extensions of internal market design rather than adjunct foreign-policy initiatives. In this sense, hydrogen, advanced fuels and cross-border electricity infrastructure are emerging as functional precursors to deeper trade integration. By aligning regulatory frameworks, certification standards and infrastructure planning in advance, both sides are effectively reducing the transaction costs and political risks associated with a future CEPA and Strategic Partnership Agreement. Energy cooperation, therefore, is not waiting for trade diplomacy to mature; it is actively shaping the conditions under which it can succeed.

In parallel, Germany's engagement during the same week added an important EU anchor: on the margins of the sustainability forums, the Emirati German Energy Partnership convened its tenth high-level steering meeting, reviewing progress achieved over the previous year and setting priorities for 2026. Launched in 2017, the partnership has evolved into a mature framework combining strategic dialogue with concrete project delivery, spanning renewables, hydrogen, energy efficiency and regulatory cooperation. Officials framed the partnership as a model of results-oriented cooperation at a time when energy systems are under growing pressure from rising demand, rapid technological change and decarbonization targets.[6] Crucially, Berlin's presence reinforced the message that green-energy outreach is increasingly embedded within Europe's core policy debates, rather than operating at their periphery. From this EU-centered layer, the picture extends naturally into the Mediterranean and South-Eastern Europe, where strategic dialogue is

[5] "Hydrogen & Advanced Fuels Summit brings EU, GCC and MENA leaders together in Abu Dhabi," Press Release, Zawya, January 2026, 14
https://www.zawya.com/en/press-release/events-and-conferences/hydrogen-and-advanced-fuels-summit-brings-eu-gcc-and-mena-leaders-together-in-abu-dhabi-k12w2uzq

[6] "Emirati-German Energy Partnership holds 10th High-Level Steering Group Meeting in Abu Dhabi," Emirates News Agency – WAM, January 2026, 14
https://www.wam.ae/en/article/170t2po-emirati-german-energy-partnership-holds-10th

increasingly translated into infrastructure and production capacity. Albania provides a particularly illustrative case. During Abu Dhabi Sustainability Week, Prime Minister Edi Rama reiterated Tirana's ambition to reach full energy sovereignty by the end of the decade and to position the country as a supplier of green electricity to European markets.[7] Rama linked Albania's renewable endowment—long dominated by hydropower and now complemented by rapidly expanding solar and wind capacity—to regional export strategies.[8] This vision builds directly on the trilateral agreement signed in 2025 between Italy, Albania and the UAE to develop a subsea electricity interconnector across the Adriatic, enabling renewable power generated in Albania to flow into Italy and onward into the European grid.[9]

A similar logic is emerging in Montenegro. During the same week, Masdar and Montenegro's state-owned utility EPCG signed a framework agreement to explore a joint venture for large-scale renewable projects, spanning solar, wind, hydropower and battery storage.[10] Embedded in the broader strategic partnership launched in late 2025,[11] the initiative aims both to decarbonize Montenegro's domestic energy mix and to support renewable exports toward South-Eastern Europe—once again leveraging existing subsea interconnection with Italy. For Podgorica, the partnership accelerates coal phase-out and aligns the energy sector with forthcoming EU carbon-border requirements, while reinforcing the deployment of GCC capital and expertise along Mediterranean energy corridors with direct access to European markets.

Italy's role across these dynamics is best understood as that of a structural hinge rather than a headline actor. Rome remains central to the physical and regulatory connectivity linking the Gulf, the Mediterranean and the EU market. Italian infrastructure—subsea interconnectors, ports and grid integration—anchors GCC-backed renewable production in the Balkans to European demand centers. This operational centrality builds on Italy's political alignment with the region on energy transition and its broader ambition to shape Mediterranean connectivity as part of Europe's evolving green and trade architecture.[12]

This corridor-based approach was further reinforced only days later by Prime Minister Giorgia Meloni's official visit to Oman, which underscored Italy's intent to engage the Gulf beyond headline energy producers alone. In Muscat, Italy and Oman agreed to develop a 2026–2030 Action Plan aimed at strengthening cooperation in trade, industry, investment and public–private partnerships, while reaffirming shared interests in regional stability and infrastructure development[13]. Although not a primary energy exporter on the scale of the UAE or Saudi Arabia, Oman's geostrategic position at the gateway between the Arabian Sea and the Indian Ocean gives it growing relevance within Europe's external energy calculus—particularly in relation to maritime security, hydrogen shipping routes and Red Sea–Mediterranean connectivity. Read

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[7] Fabjona Pasho, ""Total energy independence by 2028" - Rama, in Abu Dhabi: The submarine cable project with Italy supplies Europe," SCAN, January 2026, 15
https://scantv.al/english/lajme/shqiperia/pavaresi-totale-energjetike-deri-ne-2028-en-rama-ne-adu-dhabi-pr-i28872

[8] "PM Rama: New milestones set for cooperation with United Arab Emirates," Albanian Telegraphic Agency, January 2026, 15
https://en.ata.gov.al/2026/01/15/pm-rama-new-milestones-set-for-cooperation-with-united-arab-emirates/

[9] Emanuele Rossi, "Unpacking Italy's trilateral energy pact with the UAE and Albania," Decode39, January 2025, 16
https://decode39.com/9809/italy-uae-albania-energy-pact/

[10] Antonis Pothitos, "Montenegro's EPCG and Masdar to explore joint venture for renewables," Reuters, January 2026, 14
https://www.reuters.com/sustainability/boards-policy-regulation/montenegros-epcg-masdar-explore-joint-venture-renewables-2026-01-14/

[11] "UAE, Montenegro establish strategic green energy partnership," Balkan Green Energy News, November 2025, 10
https://balkangreenenergynews.com/uae-montenegro-establish-strategic-green-energy-partnership/

[12] "Developing Emirati-Italian Ties: Charting an Ambitious Path Toward Gulf-Mediterranean Integration," GCC Research Unit, Emirates Policy Center, August 2025, 12
https://www.epc.ae/en/details/brief/developing-emirati-italian-ties-charting-an-ambitious-path-toward-gulf-mediterranean-integration

[13] "Oman-Italy: Strengthening economic cooperation at the heart of Meloni's visit to Muscat," Nova News, Agenzi Nova, January 2026, 14
https://www.agenzianova.com/en/news/Oman-and-Italy%3A-Strengthening-economic-cooperation-at-the-heart-of-Meloni%27s-visit-to-Muscat/

together with Italy's outreach at the GCC level, the Oman visit highlights Rome's effort to anchor its Gulf engagement within a diversified, corridor-based architecture rather than a narrow set of bilateral energy relationships.

This strategic positioning has been reinforced by the dense rhythm of high-level Italy–UAE political engagement at the start of 2026. President Sergio Mattarella's state visit to Abu Dhabi in January 27 has further consolidated momentum generated over the past year, following the UAE leadership's commitment to invest up to $40 billion in Italy across defense, energy transition, advanced manufacturing, space and cultural sectors.[14] Bilateral non-oil trade reached $7.9 billion in the first half of 2025, a 14.6 per cent year-on-year increase, while more than 680 Italian companies now operate in Abu Dhabi. Beyond symbolic diplomacy, these figures reflect the depth of economic interdependence underpinning Italy's role as a trusted Mediterranean gateway for Gulf capital and strategic projects.

These sectoral developments are unfolding against a rapidly evolving institutional backdrop. In late 2025, the Emirates and the EU formally launched negotiations on a Strategic Partnership Agreement, complementing ongoing CEPA talks. Energy, green transition and connectivity feature prominently alongside trade, digital transformation and investment. These developments suggest that energy is functioning both as catalyst and testing ground for a deeper strategic relationship. Rather than waiting for trade agreements to define cooperation, GCC states and European partners are using green energy, hydrogen and infrastructure connectivity to build trust, align standards and generate mutual economic value. As 2026 unfolds, this energy-first approach is likely to shape not only the trajectory of CEPA and the Strategic Partnership Agreement, but also the practical geography of Europe's green transition—stretching from the Gulf to the Mediterranean, with Italy firmly at its core.

Chapter 2 – From MoUs to Manufacturing: What Europe–MENA Drone Deals Will Deliver in 2026

After a year of accelerated deal-making, Europe's unmanned-systems debate is no longer centered on whether the continent needs more drones, but on how quickly its defense-industrial base can translate recent partnerships into certified, scalable output. Over the past year—particularly in the second half of 2025—European primes have moved away from fragmented, purely indigenous UAV pathways and toward selective industrial integration with established producers in the MENA region. The result is not a retreat from strategic autonomy, but a recalibration of how it is pursued: through control of high-value segments such as certification, mission systems, sensors, electronic warfare, and lifecycle support, combined with access to proven airframes, rapid development cycles, and production depth from Turkey and the UAE.

What distinguishes 2026 from previous cycles of European unmanned-systems cooperation is the centrality of execution risk. The challenge facing European defense planners is no longer conceptual innovation or platform design, but the ability to deliver certified, interoperable and scalable systems at speed. Supply-chain bottlenecks, workforce shortages, certification timelines and export-control compliance have emerged as decisive constraints. Against this backdrop, partnerships with MENA producers are increasingly valued not simply for cost or availability, but for their capacity to compress development timelines and de-risk production ramp-up. The shift from memoranda to manufacturing thus reflects a broader recognition that industrial resilience in the unmanned domain depends on diversified, transregional production ecosystems rather than purely national solutions.

The first concrete marker of this shift arrived immediately in January 2026. On 13 January 2026, Spain's Indra Group and the UAE's EDGE Group formalized their agreement to establish a new manufacturing entity in

[14] "Italian President to make state visit to UAE on Tuesday," The National News, January 2026, 26 https://www.thenationalnews.com/news/uae/2026/01/26/italian-president-to-make-state-visit-to-uae-on-tuesday/

Spain dedicated to loitering munitions and smart weapons for Spanish and European defense programs.[15] Announced in Abu Dhabi and Madrid and witnessed by senior Spanish and Emirati officials, the deal moves beyond memoranda toward in-country production, with Indra committing €15–20 million to a dedicated drone manufacturing facility in León.[16] For 2026, the deliverables are clear: site development, workforce build-up, and the localization of EDGE's HUNTER-series loitering munitions under European sovereignty and export-control frameworks. Strategically, the partnership addresses one of Europe's most acute gaps—mass-producible, combat-proven loitering munitions—while positioning Spain as a manufacturing node ahead of larger EU procurement programs expected under the European Defence Industry Programme (EDIP).[17]

Beyond Spain, the Indra–EDGE model illustrates a broader European recalibration toward in-country production paired with non-European design and operational experience. By anchoring manufacturing within EU territory while retaining access to combat-proven systems, European states are seeking to reconcile urgent operational needs with longer-term sovereignty objectives. León's emerging role as a loitering-munitions hub also highlights how southern European states are positioning themselves as early movers in areas where demand is outpacing indigenous supply, thereby shaping future EU-level procurement baselines rather than reacting to them.

Italy's unmanned trajectory for 2026 is anchored in the Leonardo–Baykar joint venture, announced at the Paris Air Show in June 2025 and progressively detailed.[18] By November 2025, Leonardo CEO Roberto Cingolani had disclosed the industrial geography of the new entity, LBA Systems, outlining how production, integration, and certification would be distributed across Italian sites.[19] Under the plan, Bayraktar TB3 final assembly and systems integration will take place at Ronchi dei Legionari; TB2 and Akıncı production will be hosted at Piaggio Aerospace's Villanova d'Albenga facility—acquired by Baykar in mid-2025—while the jet-powered Kızılelma unmanned fighter will be manufactured at Grottaglie, a plant traditionally dedicated to composite aerostructures for civil aviation. Engineering, certification, and multi-domain integration are concentrated in Turin and Rome.[20]

What makes 2026 pivotal is the transition from regulatory clearance to output. Leonardo has framed the venture around a clear industrial logic—"Baykar's platforms, Leonardo's systems"—with European payloads such as LEOSS-T EO/IR sensors, Osprey AESA radars, BriteStorm electronic-warfare systems, and secure C4I architectures embedded into combat-proven Turkish airframes. For the European market, certification under Italian and EU defense regulations is decisive, effectively positioning Italy as Baykar's gateway into NATO and EU procurement ecosystems. Looking ahead through 2026, the objectives are explicit: begin serial production, deliver the first jointly integrated platforms, and scale exports under a strong "Made in Italy"

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[15] "Indra Group and EDGE agree to establish a new defence manufacturing entity in Spain for European defence programmes," European Defence Review (EDR), January 2026, 13
https://www.edrmagazine.eu/%E2%96%BA-indra-group-and-edge-agree-to-establish-a-new-defence-manufacturing-entity-in-spain-for-european-defence-programmes

[16] Robert Wall, "Edge Agrees To Spanish Loitering Munitions Production Plan With Indra," January 2026, 13
https://aviationweek.com/defense/supply-chain/edge-agrees-spanish-loitering-munitions-production-plan-indra

[17] "EDIP: A Dedicated Programme for Defence," European Commission, Defence Industry and Space
https://defence-industry-space.ec.europa.eu/eu-defence-industry/edip-dedicated-programme-defence_en

[18] "Leonardo and Baykar establish joint venture for unmanned technologies," Press release, Leonardo, June 2025, 16
https://www.leonardo.com/en/press-release-detail/-/detail/16-06-2025-leonardo-and-baykar-establish-joint-venture-for-unmanned-technologies

[19] 3Q/9M 2025 Results Presentation, Leonardo, Trimestral Report, November 2025, 5
https://www.leonardo.com/documents/15646808/30043445/3Q_25_LEONARDO_PRESENTATION.pdf/176bea0d-1dc1-cc4f-ecbf-4501818ba1b1?t=1762359474203

[20] Parth Satam, "LBA Systems to Build TB2, TB3, Akinci and Kizilelma UCAVs in Italy," The Aviationist, November 2025, 9
https://theaviationist.com/2025/11/09/lba-systems-to-build-ucavs-in-italy/

label. Strategically, Rome is also evaluating the *Kızılelma* UAS as a potential loyal wingman[21] within the GCAP ecosystem, linking the unmanned partnership directly to Europe's sixth-generation combat-air ambitions.[22]

Figure 1: LBA Systems Industrial Footprint

Source: Leonardo, 3Q/9M 2025 Results Presentation, https://www.leonardo.com/documents/15646808/30043445/3Q_25_LEONARDO_PRESENTATION.pdf/176bea0d-1dc1-cc4f-ecbf-4501818ba1b1?t=1762359474203

Gulf actors beyond the UAE are also embedding themselves more deeply into European unmanned-industrial ecosystems. At the DIMDEX 2026 exhibition in Doha, Croatia's drone manufacturer Orqa signed a cooperation agreement with Qatar's Barzan Holdings to explore localized production of unmanned systems. Framed as part of Orqa's Global Manufacturing Partnership Programme, the initiative aims to scale production capacity while supporting Qatar's ambition to expand domestic defense-industrial capabilities.[23]Although at an earlier stage than the Spanish or Italian cases, the agreement highlights how GCC partners are increasingly engaging European SMEs and mid-sized manufacturers—not only primes—as vehicles for technology transfer, industrial scaling and export diversification.

Another vector shaping 2026 is emerging in the United Kingdom. In November 2025, BAE Systems and Turkish Aerospace Industries signed a memorandum of understanding to explore joint opportunities across

[21] The "loyal wingman" concept involves AI-powered, uncrewed air vehicles (UAVs) designed to fly alongside crewed combat platforms, acting as force multipliers, scouts, or decoys to extend the range, firepower, and survivability of manned aircraft at lower cost and risk. These Collaborative Combat Aircraft (CCAs - as referred by the United States Air Force) use advanced AI for autonomous decision-making, sensor technology, and secure communications to perform its missions, gather intelligence, or augment manned platforms in complex battlespaces.

[22] "Turkish Kızılelma Drone Considered for Role Alongside Italian UK Japanese Sixth-Gen Fighter," Army Recognition, June 2025, 20 https://www.armyrecognition.com/news/aerospace-news/2025/turkish-kizilelma-drone-considered-for-role-alongside-italian-uk-japanese-sixth-gen-fighter

[23] Jodesz Gavilan, "Croatia's Orqa Signs Drone Production Cooperation Deal With Qatar's Barzan," The Defense Post, January 2026, 21 https://thedefensepost.com/2026/01/21/croatia-orqa-qatar-barzan-drone/

uncrewed air systems, spanning fixed-wing, rotary, and hybrid platforms.[24] While less operationally defined than the Spanish or Italian cases, the MoU sets a clear direction for 2026: combining TAI's experience in UAV development and production with BAE's strengths in combat-system integration, electronic attack, and access to European and allied markets.[25] The cooperation aligns with broader UK efforts to field autonomous collaborative platforms capable of operating alongside future combat aircraft, including GCAP, and reflects London's recognition that unmanned innovation cycles increasingly lie outside Europe's traditional industrial core.

Parallel developments elsewhere in Europe reinforce this trend. In mid-January 2026, Turkish defense firm STM confirmed its first export of KARGU and ALPAGU loitering munitions to an unnamed NATO and EU member state. The contract goes beyond hardware delivery, encompassing integration onto armored vehicles and incorporation into existing battle-management and command-and-control architectures. Strategically, the deal is significant not only because it introduces Turkish AI-enabled loitering munitions into European land-force inventories, but because it positions STM as a systems integrator rather than a platform-only supplier. For the European customer (still to be announced), the agreement offers rapid access to man-portable precision-strike capabilities at a time when domestic production lines remain constrained by capacity and cost.[26] More broadly, the entry of Turkish loitering munitions into a NATO–EU force structure illustrates how demand for autonomous strike systems is currently outpacing Europe's ability to supply them independently. Taken together, these three tracks illustrate how 2026 is likely to unfold for Europe's unmanned sector. Rather than waiting for slow-moving, EU-only programs to mature, European states are operationalizing late-2025 agreements into manufacturing capacity, certification pipelines, and near-term deliveries. The model is consistent across cases: Europe retains ownership of sovereignty-critical layers—regulation, systems integration, secure data, and lifecycle support—while leveraging MENA partners for speed, scale, and combat-tested designs. If successful, this approach could reshape Europe's unmanned-industrial landscape well beyond the current cycle—establishing a precedent for how strategic autonomy is operationalized under conditions of sustained demand and geopolitical urgency.

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[24] "BAE Systems and Turkish Aerospace to collaborate on uncrewed air systems," Press release, BAE Systems, November 2025, 6 https://www.baesystems.com/en/article/bae-systems-and-turkish-aerospace-to-collaborate-on-uncrewed-air-systems

[25] Agnes Helou, "Turkey's TAI, UK's BAE Systems join forces for collaborative drone 'opportunities,' Breaking Defense, November 2025, 07 https://breakingdefense.com/2025/11/turkeys-tai-uks-bae-systems-join-forces-for-collaborative-drone-opportunities/

[26] Teoman S. Nicanci, "Türkiye's STM Delivers KARGU And ALPAGU Loitering Munitions To European NATO Country," Defense News Aerospace, Army Recognition Group, January 2026, 19 https://www.armyrecognition.com/news/aerospace-news/2026/tuerkiyes-stm-delivers-kargu-and-alpagu-loitering-munitions-to-european-nato-country