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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.

At the time of writing, the evolving confrontation involving Iran, the United States and Israel has introduced a new layer of volatility across the wider Middle East, with direct implications for both Gulf security and European strategic interests. While the trajectory of the conflict remains uncertain, its immediate impact has already been felt across key domains that underpin Europe–Gulf relations: energy flows, maritime routes, critical infrastructure and forward-deployed military assets.

In this context, the present edition examines how Europe—particularly Italy, France, and other Southern European actors—is recalibrating its engagement with Gulf partners in response to a rapidly shifting environment. What emerges is not a reactive or improvised posture, but the acceleration of a longer-term trend toward deeper strategic convergence, in which economic interdependence is increasingly complemented by security coordination, defence cooperation and institutional dialogue.

The report is structured around two interlinked dimensions of this shift. The first explores how European countries are contributing to the defence of Gulf partners and embedding themselves within a more integrated regional security architecture. The second focuses on the maritime domain, where the protection of sea lanes connecting the Gulf to European markets is becoming a shared strategic priority.

Chapter 1 – Europe–Gulf Security Cooperation in a Time of Regional Tensions

Europe–Gulf security cooperation is gaining renewed strategic relevance as the evolving security environment of the wider Middle East reshapes the priorities of both regions. What had increasingly been framed through economic interdependence and connectivity is now being redefined through operational realities, as developments in the Gulf directly affect European deployments, infrastructure security and strategic interests. In this context, the relationship is evolving from a primarily economic partnership into a more structured form of security interdependence, anchored in stability, resilience and the protection of shared systems.

The European response to the current crisis has unfolded along two parallel and mutually reinforcing tracks. On the one hand, European states moved rapidly to strengthen their military posture and contribute to the defence of Gulf partners under pressure. On the other, diplomatic coordination intensified in parallel, framing this engagement within a broader effort to stabilise the region and protect shared strategic interests.

The first dimension of this response emerged at the operational level in early March 2026. France was among the first to act. On 3 March, French Foreign Minister Jean-Noël Barrot confirmed that Rafale fighter jets stationed at Al Dhafra air base in the United Arab Emirates had been mobilised following drone incidents affecting military infrastructure.[1] These assets were deployed not only to secure French facilities, but also to contribute to the broader protection of Emirati airspace against incoming threats.

[1] "France deploys fighter jets over UAE to protect its military bases," Le Monde, March 2026, 3 https://www.lemonde.fr/en/france/article/2026/03/03/france-deploys-fighter-jets-over-uae-to-protect-its-military-bases_6751041_7.html

This posture reflects a broader and sustained French engagement in the region. As of mid-March, France maintained approximately 8,000 personnel across the Middle East, including permanent contingents in the UAE, Djibouti, Iraq, Lebanon and Jordan, supported by around 50 Rafale aircraft and multiple naval assets.[2] Despite the scale of this presence and reports of active interception of aerial threats, Paris has consistently framed its role as defensive, focused on protecting both its forces and regional partners while avoiding direct participation in offensive operations.

The United Kingdom adopted a similarly integrated approach. On 5 March, Prime Minister Keir Starmer announced the deployment of additional Typhoon fighter jets to Qatar to reinforce defensive operations across the region.[3] These aircraft are part of the UK–Qatar Joint Typhoon 12 Squadron, reflecting a high level of operational integration between British and Qatari forces.[4] Their role therefore extends beyond the protection of UK assets to include the defence of Qatari airspace and the strengthening of joint air capabilities. The deployment was complemented by anti-drone Wildcat helicopters to Cyprus and additional naval assets, underscoring the UK's contribution to a wider defensive architecture supporting both European interests and the defence of Gulf partners.

Southern European actors have also played a visible role in reinforcing defensive capabilities in the Gulf. Greece, in particular, has maintained a Patriot air-defence battery in Saudi Arabia since 2021, deployed under a bilateral agreement to support the protection of critical infrastructure and territorial airspace. This contribution highlights how Mediterranean European countries are not only politically aligned with Gulf partners but are also providing tangible military support on the ground.[5]

Italy has similarly sustained a forward military posture in the region. An Italian Air Task Force is deployed in Kuwait at Ali Al-Salem Air Base—an installation that has been targeted multiple times during recent attacks—comprising four Eurofighter Typhoon aircraft.[6] While primarily tasked with force protection and coalition support, these assets could also reinforce Kuwaiti airspace defence if required, further underscoring Italy's role within the broader European security architecture in the Gulf.

This dual function—force protection and host-nation support—illustrates how European deployments in the Gulf are increasingly embedded within the defence of partner countries themselves, reflecting a broader trend whereby European air-defence and aerial assets are integrated into the security architecture of Gulf states.

This first phase of the European response was therefore characterised by rapid operational adjustments that moved beyond asset protection toward the direct reinforcement of Gulf partners' defensive posture. The protection of bases, airspace and critical infrastructure increasingly took place within a shared operational environment, where European and Gulf security concerns overlap.

A second phase quickly followed, marked by a shift from immediate force protection to structured support for Gulf partners. Requests from countries including the UAE, Kuwait and Qatar prompted discussions in several European capitals on the provision of defensive systems and capabilities. Italy became a central actor in this phase. In early March, Prime Minister Giorgia Meloni stated that Italy intended, together with France,

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[2] Aleksander Olech, "France increases its military presence in the Middle East," Defence 24, March 2026, 18 https://defence24.com/geopolitics/france-increases-its-military-presence-in-the-middle-east

[3] Rory Elliott Armstrong, "UK says it will send fighter additional Typhoon fighter jets to Qatar and helicopters to Cyprus," Euronews, March 2026, 5 https://www.euronews.com/2026/03/05/uk-says-it-will-send-fighter-additional-typhoon-fighter-jets-to-qatar-and-helicopters-to-c

[4] "UK Joint Squadron deploys Typhoon jets to Qatar," Government of the United Kingdom, Press Release, March 2026, 5 https://www.gov.uk/government/news/uk-joint-squadron-deploys-typhoon-jets-to-qatar

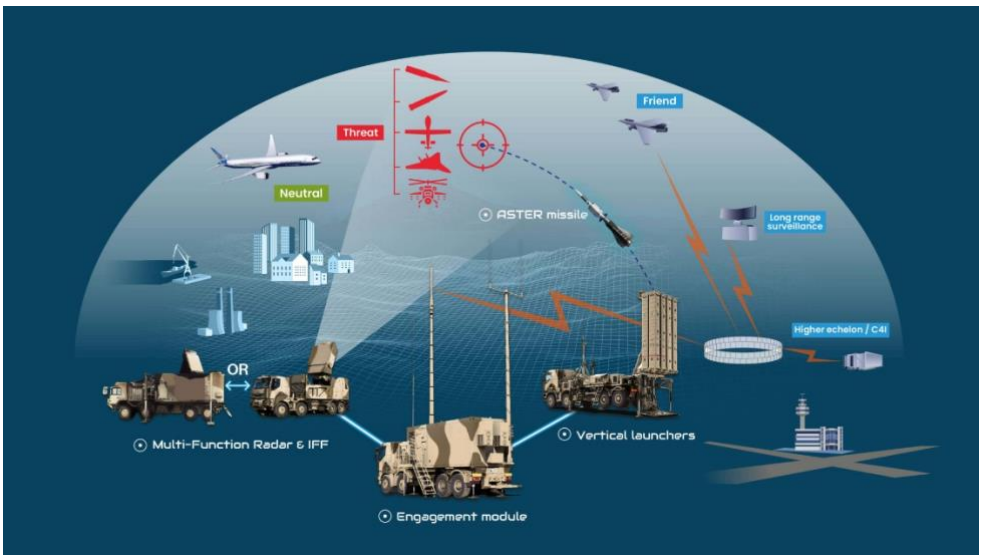
[5] "Greek-operated Patriot system downs Iranian missiles over Saudi Arabia," Reuters, March 2026 https://www.ynetnews.com/article/rymg5fc5be

[6] Tommaso Massa, "In Kuwait con la Task Force Air dell'Aeronautica Militare," Rivista Italiana Difesa, News, https://www.rid.it/shownews/7271/in-kuwait-con-la-task-force-air-dell-aeronautica-militare

the United Kingdom and Germany, to provide air-defence support to Gulf countries targeted by attacks. She framed this assistance as strictly defensive, emphasising the need to protect both partner countries and the significant number of Italian citizens and troops present in the region. [7]

Discussions in Rome rapidly expanded to include the possible deployment of EUROSAM SAMP/T air-defence systems, anti-drone technologies and naval assets such as frigates capable of providing radar coverage and interception capabilities.[8] These measures were considered in coordination with European partners and in response to direct requests from Gulf states,[9] highlighting how security cooperation is increasingly demand-driven and operationally focused. Italy's approach reflects a dual-track logic: while ruling out direct participation in the conflict, Rome has positioned itself as both a provider of defensive capabilities and a diplomatic actor supporting de-escalation and coordination with Gulf partners.

Figure 1 – SAMP/T NG Air Defence System: Operational Architecture and Interception Process



Sources: EUROSAM (https://eurosam.com/ground-systems/)

The United Kingdom complemented this shift through an industrial and technological dimension. On 18 March, the UK Ministry of Defence convened representatives from 13 defence companies together with Gulf ambassadors and defence attachés from Saudi Arabia, Kuwait, Bahrain, Qatar and the UAE to accelerate the provision of air-defence, counter-drone and command-and-control systems. The initiative focused on rapidly aligning industrial output with operational needs, marking a significant evolution in which defence cooperation extends beyond deployments into capability transfer and industrial mobilisation.[10]

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[7] Stephen N R, "Italy to send air-defence aid to Gulf countries; What are SAMP/T missile shields and anti-drone systems?" The Gulf News, March 2026, 5 https://gulfnews.com/world/europe/italy-to-send-air-defence-aid-to-gulf-countries-what-are-sampt-missile-shields-and-anti-drone-systems-1.500464141

[8] "Not only Samp T, Italia will also send a frigate to the Gulf: here are the hypotheses in the field," Il Sole 24 Ore, News, March 2026, 5 https://en.ilsole24ore.com/art/not-only-samp-t-italy-will-also-send-a-frigate-to-the-gulf-heres-a-hypothesis-AIu9OZmB

[9] Sania Kozatskyi, "Gulf States Request Italy to Provide SAMP/T Air Defense Systems to Protect Against Iranian Attacks," Militarnyi, News, March 2026, 3 https://militarnyi.com/en/news/gulf-states-italy-to-samp-t-air-defense/

[10] "UK defence industry steps up support for Gulf partners facing Iranian attacks," Ministry of Defence, United Kingdom, Press release, March 2026, 18 https://www.gov.uk/government/news/uk-defence-industry-steps-up-support-for-gulf-partners-facing-iranian-attacks

In parallel, Italy's strategic posture remained anchored in diplomatic caution but operational engagement. On 13 March, Italy's Supreme Defence Council, chaired by President Sergio Mattarella, ruled out participation in the conflict while emphasising the importance of protecting national interests, supporting Gulf partners and coordinating with European allies. The Council highlighted risks to energy security, maritime routes and regional stability, reinforcing the idea that developments in the Gulf have direct implications for Europe.[11]

While these operational and support-oriented measures were unfolding, diplomatic engagement advanced in parallel, reinforcing and framing European action within a broader political and strategic context. On 5 March, the EU and GCC held an extraordinary ministerial meeting, issuing a joint statement condemning attacks against Gulf countries and emphasising de-escalation, coordination and the protection of navigation routes. This political signalling provided a framework within which military support and defence cooperation could be articulated and coordinated.[12]

This diplomatic layer was further reinforced on 18 March, when EU Special Representative for the Gulf Luigi Di Maio travelled to Riyadh and met Saudi Deputy Foreign Minister Waleed El-Khereiji and GCC Secretary General Jasem Al-Budaiwi. The visit was explicitly framed as a signal of European solidarity with Gulf partners under pressure and as an opportunity to deepen coordination.[13] Di Maio emphasised that European and Gulf security are increasingly interconnected across energy, trade, infrastructure and transport systems, and confirmed that the EU stands ready to expand cooperation, including in defence, intelligence and technological domains.[14]

At the EU level, this engagement has also translated into a growing willingness to support Gulf partners through practical means. European officials have highlighted the importance of sharing know-how in areas such as counter-drone capabilities and integrated air defence, drawing on experience developed in other theatres. This has contributed to the emergence of a more networked form of cooperation, in which European institutions act as coordinators alongside national governments.

One of the most notable developments in this regard is the emerging triangular dynamic linking Europe, the Gulf and Ukraine. On 9 March, EU High Representative Kaja Kallas indicated that the EU was considering acting as a mediator between Ukraine's defence industry and Middle Eastern partners, particularly in the field of interceptor drones.[15] Ukrainian capabilities—developed in response to large-scale drone warfare—are now being positioned as a resource for Gulf defence.

President Volodymyr Zelenskyy confirmed on 17 March that Ukraine could supply large volumes of interceptor drones – such as the Wild Hornets STING – and that over 200 military specialists had already been deployed across the UAE, Saudi Arabia and Qatar, with additional teams expected in Kuwait.[16]

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[11] "Italy's top defence council warns of Middle East escalation, rules out participation in war," Decode39, March 2026, 13 https://decode39.com/13942/italys-top-defence-council-warns-of-middle-east-escalation-rules-out-participation-in-war/

[12] "Joint statement by GCC-EU Ministers' meeting on recent developments in the Middle East: Iran's attacks against GCC states," Ministry of Foreing Affairs and International Cooperation, Italy, Press release, March 2026, 13 https://www.esteri.it/en/sala_stampa/archivionotizie/approfondimenti/2026/03/dichiarazione-congiunta-della-riunione-dei-ministri-del-gcc-e-dellue-sugli-ultimi-sviluppi-in-medio-oriente-gli-attacchi-delliran-contro-gli-stati-del-gcc/

[13] Luigi Di Maio, European Union Special Representative for the Gulf region, LinkedIn, March 2026, 19 https://www.linkedin.com/feed/update/urn:li:activity:7440127074490691584/

[14] "'We condemn unjustifiable Iranian attacks on GCC countries,' EU Special Representative for the Gulf Luigi Di Maio tells Arab News," Arab News, Interview, March 2026, 18 https://www.arabnews.com/node/2636851/saudi-arabia

[15] Sunniva Rose, "EU seeks to play matchmaker between Gulf and Ukrainian makers of $1,000 drone killer," The National News, March 2026, 9 https://www.thenationalnews.com/news/europe/2026/03/09/eu-plays-matchmaker-between-gulf-states-and-ukrainian-drone-defence-experts/; and: "EU mediates Ukraine and Middle East over drone interceptors," Mezha News, March 2026, 9 https://mezha.net/eng/bukvy/eu_mediates_ukraine/

[16] "Ukraine sends 201 military experts to counter Iranian drones in the Gulf," Al-Jazzera, News, March 2026, 18 https://www.aljazeera.com/news/2026/3/18/over-200-ukrainian-military-experts-in-gulf-region-to-counter-irans-drones

Table 1 – Selected European military assistance to the Arab Gulf states since 28 February 2026

Supplier	Recipient	Details
France	UAE; Qatar	France has sent six *Rafale* fighter jets to the UAE, which join other *Rafales* already deployed there.
Italy	n.k.	Italy's parliament has approved a motion authorising the government to deploy air defences in the Gulf. Sources have said Italy will probably send SAMP/T batteries.
South Korea	UAE	A UAE Air Force C-17 has been seen loading what appear to be *Cheongung*-II interceptors at a South Korean air base.
Ukraine	Saudi Arabia; Qatar; UAE	Ukrainian anti-UAV specialists have been sent to Qatar, Saudi Arabia and the UAE.
United Kingdom	Qatar; UAE; Bahrain; n.k.	The UK has sent four *Typhoon* fighter jets to Qatar to support defensive operations, joining another four jets deployed there in January 2026. Operating from Qatar, the four additional aircraft are helping to defend Bahrain and the UAE. The UK has deployed counter-UAV specialists to the Middle East after requests from multiple countries.

Source: IISS (https://www.iiss.org/online-analysis/online-analysis/2026/03/defending-the-skies-of-the-arab-gulf-states/)

This evolving ecosystem illustrates a shift toward a more hybrid security architecture, in which operational support, industrial cooperation and technological exchange are increasingly intertwined. Gulf states—including Saudi Arabia, the UAE, Qatar, Kuwait and Bahrain—are not merely recipients of support but active participants in shaping these arrangements, engaging European partners across multiple levels simultaneously.

Beyond specific deployments and capabilities, the broader strategic implication is a redefinition of security within the Europe–Gulf relationship. European leaders have increasingly framed Gulf stability in terms of infrastructure protection, energy continuity and supply-chain resilience. The security of airspace, ports, logistics corridors and digital systems is now treated as a shared concern, reflecting the deep interdependence between the two regions.[17]

Taken together, the developments of March 2026 point to a clear trajectory. Europe–Gulf security cooperation is evolving into a structured, multi-layered framework in which military support and diplomatic coordination proceed in parallel. The initial focus on protecting European assets has expanded into a broader commitment to supporting Gulf partners, while diplomatic engagement has provided the political architecture necessary to sustain and legitimise this cooperation. In this sense, the Gulf is gradually being integrated into Europe's wider security perimeter. This integration is not formalised through treaties or alliances, but it is increasingly tangible through overlapping layers of military presence, defence support, industrial cooperation and political coordination. Stability, resilience and connectivity are emerging as the organising principles of this relationship, linking European and Gulf security in ways that are likely to persist beyond the current crisis and shape the future architecture of inter-regional cooperation.

[17] "Opening remarks by HRVP Kaja Kallas for the Structured Dialogue on the Commission Work Programme with the European Parliament's Committee on Foreign Affairs," EEAS Press Team, Press release, March 2026, 17 https://www.eeas.europa.eu/eeas/opening-remarks-hrvp-kaja-kallas-structured-dialogue-commission-work-programme-european-parliament%E2%80%99s_en

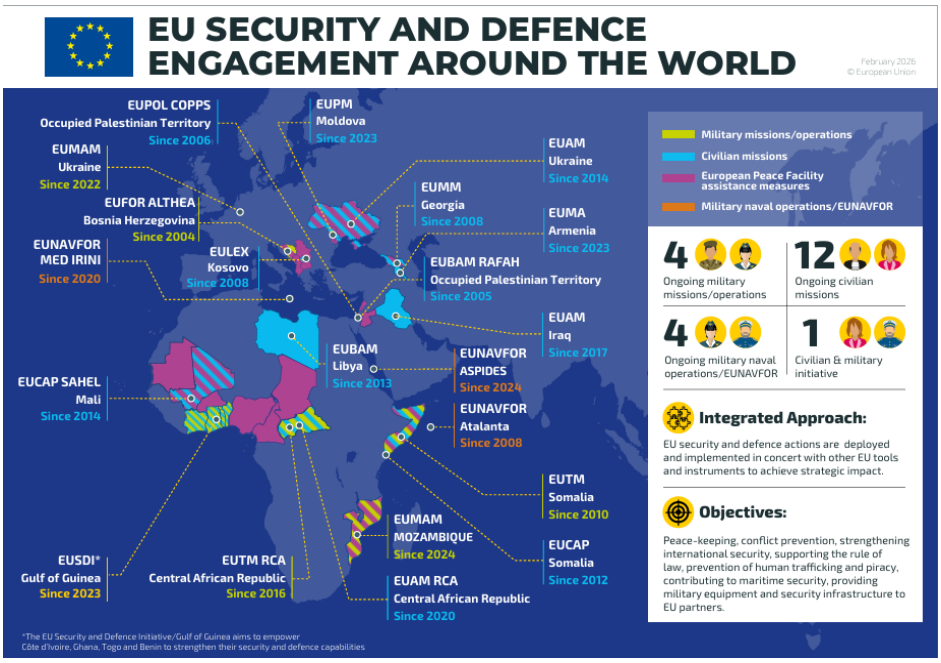
Chapter 2 – Maritime Security Across the Europe–Gulf Corridor

Maritime security has become a defining pillar of Europe–Gulf cooperation as regional tensions and disruptions to shipping routes highlight the vulnerability of the corridors linking the Gulf, the Red Sea and European markets. Previously framed through trade and energy, it is increasingly being understood in operational terms, as both regions recognise their shared exposure to disruptions across a single, interconnected maritime system.

This convergence is not entirely new. Over time, both the EU and the GCC have developed significant maritime security profiles across the Red Sea, the Gulf, and Western Indian Ocean, contributing to a dense and evolving architecture of operations, coordination mechanisms and information-sharing platforms. Strategic chokepoints such as the Strait of Hormuz, the Bab al-Mandab and the Suez Canal have long been central to this shared space, given their role in global trade, energy flows and digital connectivity. As a result, Europe–Gulf maritime cooperation has gradually taken shape as part of a broader regional security patchwork, rather than as a response to a single contingency.

Within this framework, European maritime engagement has developed through a set of overlapping missions and initiatives. Operation EUNAVFOR Atalanta, launched in 2008, established a long-term European presence in the western Indian Ocean, initially focused on counter-piracy but progressively integrated into a wider maritime security architecture. This was complemented by the launch of the European Maritime Awareness in the Strait of Hormuz (EMASoH) initiative in 2020, combining surveillance and diplomatic engagement to support de-escalation and freedom of navigation in the Gulf.[18]

Figure 2 – Map of EU active military naval operations / EUNAVFOR



Sources: European Union External Action (EEAS; https://www.eeas.europa.eu/eeas/eu-missions-and-operations_en)

More recently, Operation ASPIDES, introduced in 2024, has provided a defensive framework for protecting commercial shipping in the Red Sea and surrounding waters. Together, these instruments have gradually

[18] Cinzia Bianco, Matteo Moretti, "Europe's role in Gulf maritime security," Middle East Institute, Analysis, May 2022, 5 https://mei.edu/publication/europes-role-gulf-maritime-security/

connected the Gulf, the Red Sea and the eastern Mediterranean into a more coherent operational corridor, effectively anchoring a permanent—albeit flexible—European maritime security presence across the full Europe–Gulf connectivity chain.[19]

Against this background, the current phase of instability has acted as an accelerator rather than a rupture. Developments affecting maritime traffic—particularly around the Strait of Hormuz—have reinforced European awareness of vulnerabilities related to energy security, supply chains and economic resilience. At the same time, the situation has remained fluid and operationally complex, prompting a calibrated response that combines operational adjustments with strategic caution.

The initial European reaction unfolded at the operational level, focusing on the eastern Mediterranean and the area around Cyprus. Following attacks affecting military infrastructure on the island, several European countries moved rapidly to deploy naval and air assets. France, Greece, Spain, Germany, Italy and the Netherlands coordinated the dispatch of naval units,[20] while additional air and missile defence capabilities were positioned to reinforce the island's security.[21] This response, not limited to the protection of a single member state, reflected the recognition that the eastern Mediterranean constitutes the western end of the same strategic corridor linking Gulf exports to European markets. Securing Cyprus and its surrounding waters therefore became part of a wider effort to stabilise the corridor as a whole.[22]

As the situation evolved, attention increasingly shifted toward the closure of the Strait of Hormuz and its implications for global trade and energy flows. The effective disruption of maritime traffic through this chokepoint triggered a broader strategic debate within Europe on how to ensure freedom of navigation while avoiding escalation. At the political level, European leaders hardened their language, emphasising the need to protect maritime routes, safeguard commercial shipping and uphold international law. The European Council, in its conclusions of 19 March 2026, explicitly highlighted the importance of maritime security and freedom of navigation, condemned actions threatening shipping and called for reinforcing existing European naval operations, particularly ASPIDES and ATALANTA.[23]

So far, this political convergence has not translated into a fully defined operational shift. Rather than launching a new mission in the Strait of Hormuz, European discussions have focused on whether and how to adapt existing instruments.[24] The possibility of strengthening ASPIDES—either in terms of assets or geographical scope—has been actively considered, alongside broader efforts to enhance coordination between European navies and partners in the region. At the same time, several member states have expressed caution about extending mandates or engaging in direct escort operations in Hormuz, reflecting concerns about escalation and the limits of European consensus.[25]

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[19] Francesco Salesio Schiavi, "As Gulf maritime threats persist, can EU's naval mission deter Houthis?" Al-Monitor, Analysis, June 2024, 6 https://www.al-monitor.com/originals/2024/07/gulf-maritime-threats-persist-can-eus-naval-mission-deter-houthis

[20] Ioannis Karagiorgas, "Spain, Italy and Netherlands join European naval deployment to Cyprus," Euronews, March 2026, 5 https://www.euronews.com/2026/03/05/spain-italy-and-netherlands-join-european-naval-deployment-to-cyprus

[21] Angelo Amante, Claudia Cristoferi and Inti Landauro, "European states move to secure Red Sea navigation, protect Cyprus," Reuters, March 2026, 5 https://www.reuters.com/business/aerospace-defense/italy-plans-send-air-defence-aid-gulf-states-after-iranian-strikes-meloni-says-2026-03-05/

[22] "Italy, Spain, France and others send naval vessels to protect Cyprus after Iranian strike," The Times of Israel, March 2026, 5 https://www.timesofisrael.com/italy-spain-france-and-others-send-naval-vessels-to-protect-cyprus-after-iranian-strike/

[23] European Council, "European Council conclusions on Middle East," Conclusions, March 2026, 19 https://www.consilium.europa.eu/en/press/press-releases/2026/03/19/european-council-conclusions-on-middle-east/

[24] Gabriel Gavin, Bartosz Brzeziński and Jacopo Barigazzi, "EU leaders soften call to send naval ships to Middle East," Politico EU, March 2026, 18 https://www.politico.eu/article/eu-leaders-soften-call-send-naval-ships-middle-east/

[25] "EU evaluates enhancement of Aspides maritime security mission in the Red Sea," Il Sole 24 Ore, March 2026, 16 https://en.ilsole24ore.com/art/iran-eu-considers-boosting-european-red-sea-routes-shield-aspides-AIbNTnyB?refresh_ce=1

In this context, the Red Sea and Bab al-Mandab area have remained the most operationally active theatre for European engagement. ASPIDES continues to operate in this space, protecting commercial vessels and contributing to the security of one of the main alternative routes connecting Gulf exports to European markets. This has ensured that, even in the absence of a direct European presence in Hormuz, the EU remains actively involved in safeguarding critical segments of the corridor, effectively securing alternative maritime routes and mitigating the impact of disruptions on Europe–Gulf energy and trade flows.[26]

Alongside operational considerations, diplomatic options have also been explored. European actors have emphasised the need for de-escalation, coordination with Gulf partners and the preservation of open maritime routes through multilateral frameworks.[27] This diplomatic track has aimed to stabilise the corridor while reinforcing the credibility of Europe's role as a maritime security provider.

Overall, these dynamics indicate a gradual but significant evolution. Maritime security is no longer a secondary dimension of Europe–Gulf relations, but an increasingly central one, linking energy, trade, infrastructure and security within a single strategic framework. The response to the current situation does not yet amount to a major operational transformation.

However, it does confirm a clear trajectory: Europe is progressively consolidating its role as a maritime security actor across the Gulf–Red Sea–Mediterranean corridor, combining naval deployments, the reinforcement of existing missions and sustained diplomatic engagement to safeguard critical supply chains, while maintaining a careful balance between engagement and restraint.

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[26] Christian Koch (March 2026). Europe's Response to the Closure of the Strait of Hormuz Risks Falling Short. Gulf Research Center, Insight Series, p. 16.
https://www.grc.net/documents/69bb2c2fb0c2cEuropeResponseClosureStraitHormuzRisksFallingShortcompressed.pdf

[27] Jorge Liboreiro & Maïa de la Baume, "EU summit: Leaders urge 'moratorium' on energy strikes in Middle East," Euronews, March 2026, 19 https://www.euronews.com/my-europe/2026/03/19/eu-summit-leaders-set-to-challenge-orbans-veto-on-90bn-ukraine-loan