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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.

This edition examines the next phase of Europe–Gulf engagement at a moment when regional instability, the Iran crisis and the disruption of strategic corridors are accelerating patterns already underway. Across space, diplomacy and maritime security, relations are moving beyond transactional cooperation toward more structured forms of interdependence. Gulf states are no longer only markets or energy suppliers, while European actors—particularly Italy, France, Greece and the United Kingdom—are increasingly positioning themselves as partners in technology, crisis management, infrastructure protection and strategic connectivity.

The report is structured around three dimensions of this shift. The first explores how space cooperation is evolving from procurement to integrated technological ecosystems, linking European capabilities with Gulf ambitions in AI, data and dual-use applications. The second examines the renewed diplomatic push by Mediterranean European countries toward the GCC, with Italy, Greece and France playing distinct but complementary roles. The third focuses on freedom of navigation in the Strait of Hormuz, where Europe and Gulf partners are testing new forms of coordination to protect maritime routes and uphold international law.

Chapter 1

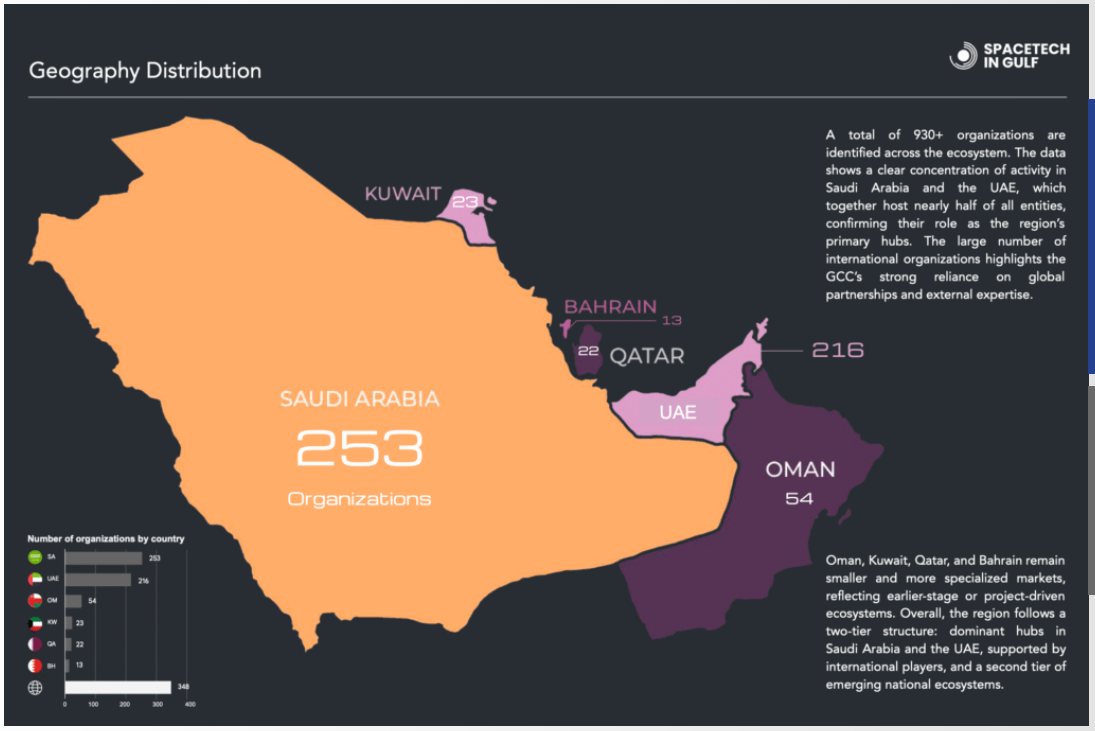
Europe–Gulf Space Cooperation: From Procurement to Integrated Technological Ecosystems

Since the EU stated in 2022 that it aims to strengthen cooperation with the GCC on space issues,[1] EU-GCC space engagement has continued to grow in political and industrial importance. The EU-GCC Summit in 2024 marked an important signal by describing "innovation and space" as part of the overall cooperation agenda in high-technology and connectivity.[2] What had long been characterised by procurement-driven exchanges, mission-specific partnerships and symbolic scientific collaboration is now evolving into a more structured model centred on co-development, data integration and downstream applications.

This shift unfolds against the backdrop of the rapid expansion of the global New Space economy, whose total value is expected to exceed $1 trillion by 2035, with estimates ranging between $944 billion and $1.8 trillion. The scale of this transformation has not gone unnoticed in the Gulf, where space is increasingly viewed as a strategic growth sector rather than a prestige-driven add-on[3]. In this context, space is no longer a discrete domain but an enabling layer for artificial intelligence (AI), connectivity, climate monitoring and strategic autonomy. The scale of this transformation is reflected in a rapidly expanding ecosystem of over 930 space- and defence-related organisations across the GCC.[4]

1. European Commission. A Strategic Partnership with the Gulf. Brussels: European Commission, 2022. https://www.eeas.europa.eu/eeas/strategic-partnership-gulf_en
2. Council of the European Union. "First EU-Gulf Cooperation Council Summit, 16 October 2024." Consilium.europa.eu, October 16 2024. https://www.consilium.europa.eu/en/meetings/international-summit/2024/10/16/
3. Francesco Rosazza Beneitin, "MENA Path to Space: Diverging Trajectories, Converging Goals," Commentary, ISPI, January 2026, 8 https://www.ispionline.it/en/publication/mena-path-to-space-diverging-trajectories-converging-goals-225887
4. "Space Industry in the GCC 2025: Current Trends and Perspectives," Report, SpaceTech in the Gulf, February 2026, 2, https://spacetech-gulf.com/2026/02/space-industry-in-the-gcc-2025/

Figure 1 – Number of Space Organizations by Country in the GCC



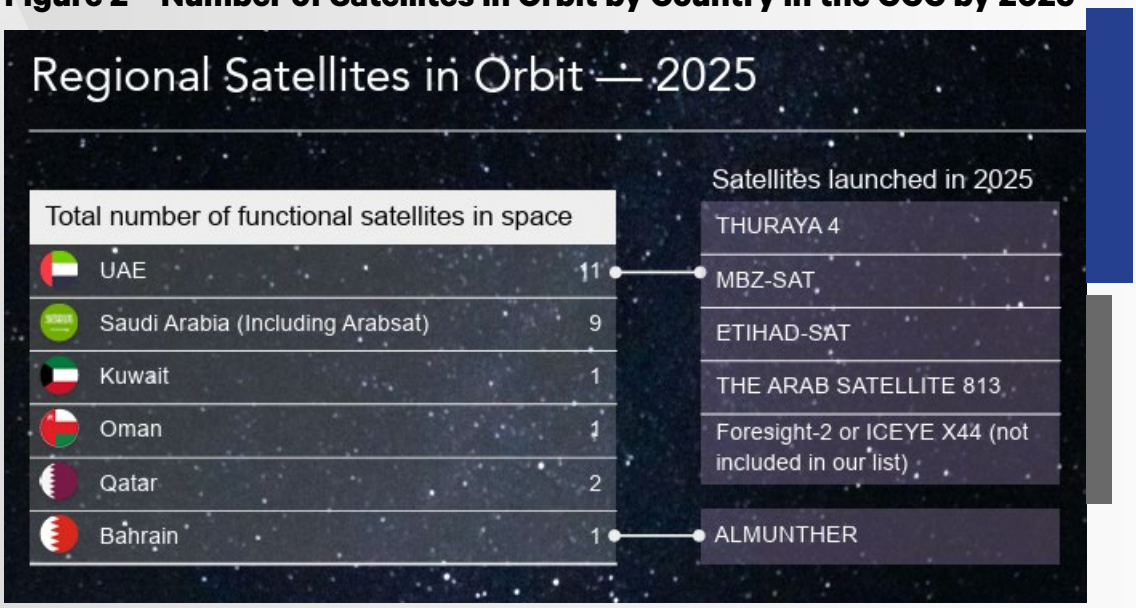
Source: SpaceTech in Gulf; KPMG Middle East (https://spacetech-gulf.com/2026/02/space-industry-in-the-gcc-2025/).

At the structural level, this transformation is producing a more diversified GCC space ecosystem, where activity spans satellite communications, geospatial analytics, advanced manufacturing and software platforms. While investments remain highly concentrated in the UAE [5] and Saudi Arabia,[6] the broader GCC landscape is likewise becoming more differentiated, with countries such as Oman,[7] Bahrain,[8] Qatar[9] and Kuwait[10] developing niche but strategically relevant roles across launch services, downstream applications, secure communications and institutional capacity-building.

5. "UAE Space Ambitions: Building the Space Industrial Base," Arab Gulf States Institute (AGSI), Event, March 2026, 25, https://agsi.org/events/uae-space-ambitions-building-the-space-industrial-base/
6. "Saudi Arabia positions space sector as pillar of knowledge economy," Arab News, December 2025, 30, https://www.arabnews.com/node/2627839/saudi-arabia
7. Raymond E. Karam, "Oman's Space Ambitions: A Pragmatic Gulf Model," Arab Gulf States Institute (AGSI), Commentary, February 2026, 11, https://agsi.org/analysis/omans-space-ambitions-a-pragmatic-gulf-model/
8. Sarwat Nasir, "Bahrain's Al Munther satellite: How the island nation is building its future in space," The National News, March 2025, 15, https://www.thenationalnews.com/future/space/2025/03/18/bahrain-al-munther-satellite/
9. "Qatar Invests $350M in Axiom Space Backing Space Exploration," ITP, February 2026, 16, https://www.itp.net/digital-culture/qatar-invests-350-million-axiom-space-exploration
10. "Kuwait's Journey to Space," Kuwait Direct Investment Promotion Authority (KDIPA), Insights, https://kdipa.gov.kw/invest-in-kuwait/insights/kuwaits-journey-to-space/

A key feature of this transition is the shift from demonstration missions to continuous operational capability. Recent satellite launches signal a move toward sustained activity and infrastructure-based growth.[11] This evolution is closely linked to national strategies such as Saudi Arabia's Vision 2030 and Oman's Vision 2040, which position space as a driver of economic diversification, technological sovereignty and security resilience. The region currently operates around 25 active satellites, with an increasing number of annual launches.

Figure 2 – Number of Satellites in Orbit by Country in the GCC by 2025



Source: SpaceTech in Gulf; KPMG Middle East (https://spacetech-gulf.com/2026/02/space-industry-in-the-gcc-2025/).

At the same time, GCC states are pursuing more autonomous access to space, reflecting a broader emphasis on sovereignty across the value chain. Investments in launch infrastructure—such as Oman's Etlaq spaceport—and emerging reusable launch programmes illustrate efforts to reduce dependency on external providers. These developments are complemented by efforts to build end-to-end Earth observation (EO) capabilities combining satellite manufacturing, data processing and analytics.[12]

11. Alessandro Gili, Enrico Paolo Gioia, "Between Earth and Stars: MENA's Strategic Role in Space Competition," ISPI, Commentary, December 2024, 2, https://www.ispionline.it/en/publication/between-earth-and-stars-menas-strategic-role-in-space-competition-193305
12. Chris Moore, John-Patrick Walthuis, Arjun Sreekumar, "New frontiers, new influence: The GCC space playbook," KPMG Middle East, Sector insight, April 2026, 14, https://kpmg.com/sa/en/insights/sector-insights/new-frontiers-new-influence.html#:~:text=A%20new%20space%20age%20is,heavily%20to%20build%20domestic%20expertise

The integration of AI and advanced data capabilities represents a second major driver of change. Across the GCC, space systems are increasingly embedded within broader digital ecosystems linking satellite operations to data centres and analytics platforms.[13] This convergence enables applications such as predictive maintenance, autonomous satellite tasking and geospatial intelligence, while reinforcing the strategic value of space data for both civilian and security purposes. Importantly, this is a region-wide shift, with space increasingly integrated into sovereign digital infrastructures rather than confined to isolated national programmes.

This transformation is not limited to upstream capabilities. GCC strategies increasingly emphasise downstream applications, including geospatial services, climate monitoring and infrastructure management. Integrated EO value chains demonstrate how space is being leveraged as a source of economic value and policy-relevant insight.[14] This reflects a broader shift toward commercially sustainable and operationally relevant ecosystems, with growing implications for security domains such as maritime awareness and critical infrastructure protection.

This is where Europe's role becomes increasingly relevant. European actors are transitioning from technology providers to strategic partners, engaging in co-development, industrial localisation and ecosystem integration, while remaining central in upstream segments such as satellite manufacturing and systems engineering. Countries such as Italy and France are well positioned, given the depth and integration of their industrial capabilities.

13. E. Ardemagni, E. El-Ketbi, A. Alghashian, N. Janardhan, M. Baharoon, "Towards a Tech Exporting Gulf: How the AI Revolution Is Reshaping Defence and Politics in the GCC States," ISPI, Analysis, May 2025, 2, https://www.ispionline.it/en/publication/towards-a-tech-exporting-gulf-how-the-ai-revolution-is-reshaping-defence-and-politics-in-the-gcc-states-205613
14. Ashish Kumar, "GCC Satellite Imagery Services Market Size to Hit USD 437.54 Million by 2033," Market Pulse International, Market Overview, February 2026, 9, https://www.linkedin.com/pulse/gcc-satellite-imagery-services-market-size-hit-usd-43754-ashish-kumar-ilroc/

France provides a useful benchmark. Franco–Gulf cooperation, especially with the UAE, has increasingly focused on downstream data exploitation, industrial embedding and the integration of space capabilities with defence and digital systems. Over the second half of 2025, Franco–Emirati space cooperation consolidated along three vectors: downstream data exploitation and AI, industrial localisation, and space–defence–data integration.[15] Airbus Defence and Space intensified industrial dialogue with Emirati counterparts on satellite systems, payload integration and lifecycle support, increasingly positioning itself as a co-development partner rather than a platform supplier. At the institutional level, cooperation between CNES and Emirati entities shifted toward applied domains such as climate monitoring, space sustainability and the use of space data for public policy.[16] This trajectory was further reinforced at the 2025 Dubai Airshow in November, when Safran.AI and the Technology Innovation Institute announced a partnership to develop next-generation agentic AI platforms for geospatial intelligence.[17]

Beyond the UAE, Oman's November 2025 OmanSat-1 contract with Airbus Defence and Space is also particularly revealing in this regard: the satellite, based on Airbus' OneSat platform, is intended to strengthen digital sovereignty and communications resilience, while also signalling that European firms remain indispensable in the Gulf's move toward sovereigncapability.[18]

Similar dynamics are visible in Italy's engagement with GCC partners. Italy is a leading actor within the European space sector, with a diversified ecosystem centred on Leonardo, Thales Alenia Space, AVIO and Telespazio, and a dense network of specialised SMEs. [19] In parallel, Italy's own space activity in 2025 – including multiple launches of the IRIDE Earth-observation constellation – underscores its operational maturity, creating clear synergies with emergingGulfambitions.[20]

15. Nicolas Niemtchinow, "The UAE and France are pioneering the future of AI," The National News, February 2025, 10
https://www.thenationalnews.com/opinion/comment/2025/02/10/the-uae-and-france-are-pioneering-the-future-of-ai/
16. "Opening of a representation office of the French space agency (CNES) in the United Arab Emirates," Embassy of France in the UAE, October 2018, 23
https://ae.ambafrance.org/Opening-of-a-representation-office-of-the-French-space-agency-CNES-in-the
17. "Dubai Airshow 2025 proves the future is here with next-generation aerospace technology and historic orders," Events News, November 2025, 20
https://www.dubaiairshow.aero/en/usefulinfo/info/news/dubai-airshow-proves-the-future-is-here.html
18. "Airbus-built OneSat selected for the first Omani satellite," Airbus, Press Release, November 2025, 24, https://www.airbus.com/en/newsroom/press-releases/2025-11-airbus-built-onesat-selected-for-the-first-omani-satellite
19. Agenzia Spaziale Italiana, Annual Report 2023 (Italian Space Agency, Annual Report, 2023), https://www.asi.it/wp-content/uploads/2025/02/ENG_Asi-Annual-Report_2023_DEF-PER-STAMPA.pdf
20. "Italy set to lead in Europe's space century, says EU Commissioner," Decode39, May 2025, 26
https://decode39.com/10875/italy-set-to-lead-in-europe-s-space-century-says-eu-commissioner/

These capabilities position Italy as a systems-level partner for GCC space sectors seeking to expand and consolidate capabilities without necessarily formalising governance arrangements at an early stage. By early 2026, Italy-GCC space cooperation had reached a more mature phase, increasingly embedded in AI-driven growth, connectivity and strategic autonomy.[21]

In this context, bilateral engagement between Italy and GCC states is growingly shaped by shared technological priorities rather than transactional procurement. Italy's comparative advantage lies in its ability to operate across the full value chain – linking satellite manufacturing, downstream services, mission operations, industrial training and dual-use applications.

This evolution is also reflected in the gradual geographic diversification of partnerships. Italy's engagement with GCC space ambitions has so far been primarily anchored in its cooperation with the UAE, which remains the most developed bilateral space partnership in the region. The launch of the first UAE–Italy bilateral forum on space sciences and astronomy in February 2026, co-organised by the Sharjah Academy for Astronomy, Space Sciences and Technology (SAASST) in collaboration with Italy's National Institute for Astrophysics (INAF) and the Italian Embassy in the UAE, opened a new chapter in scientific cooperation betweenthetwocountries.[22]

However, this engagement is now expanding beyond this core axis, particularly through a deepening strategic partnership with Saudi Arabia. In late 2025, discussions between Italian Chief of Defence General Luciano Portolano and his Saudi counterpart during the Italy–Saudi Joint Consultative Committee highlighted Riyadh's interest in broadening cooperation across all operational domains, with specific emphasis on space and cyber alongside defence-industrial collaboration. Framed within a wider security dialogue encompassing the Red Sea and regional stabilisation, space is increasingly viewed as a dual-use enabler supporting military resilience, maritime security and situational awareness.[23]

21. Valerio Francola, "Space Economy: the trillion in orbit and Italia's strategic crossroads," Il Sole 24 Ore, Interventions, March 2026, 14, https://en.ilsole24ore.com/art/space-economy-trillion-orbit-and-italias-strategic-crossroads-AIw3aGxB
22. Ali Aghaddir, "Sharjah launches first UAE–Italy forum on space science and astronomy," Gulf News, February 2026, 10, https://gulfnews.com/uae/sharjah-launches-first-uaeitaly-forum-on-space-science-and-astronomy-1.500438267
23. "Italy–Saudi defence ties deepen as Rome steps up Middle East engagement," Commentary, Decode39, December 2025, 18 https://decode39.com/12879/italy-saudi-defence-ties-deepen-as-rome-steps-up-middle-east-engagement/

As both Italy and GCC states expand their external economic and strategic outreach, these dynamics suggest a shift from bilateral supplier–customer relations toward more complex forms of engagement. Italy–GCC cooperation is increasingly aligned with broader initiatives such as Italy's outreach to Africa under the Mattei Plan and GCC ambitions to shape space-enabled markets across the Global South. By combining Italian engineering depth, regulatory maturity and mission experience with Gulf capital, manufacturing capacity and geopolitical reach, this cooperation can contribute to a more plural and resilient space economy.

Ultimately, the transformation of Europe–Gulf space cooperation reflects a deeper structural shift. As space becomes integrated with AI, data infrastructure and security architectures, partnerships are moving toward long-term ecosystem alignment. What is emerging is a model of structured interdependence, in which European actors provide upstream capabilities while GCC states shape downstream ecosystems and operational sovereignty. This rebalancing does not reduce interdependence, but redefines it within a more integrated and multi-domain framework.

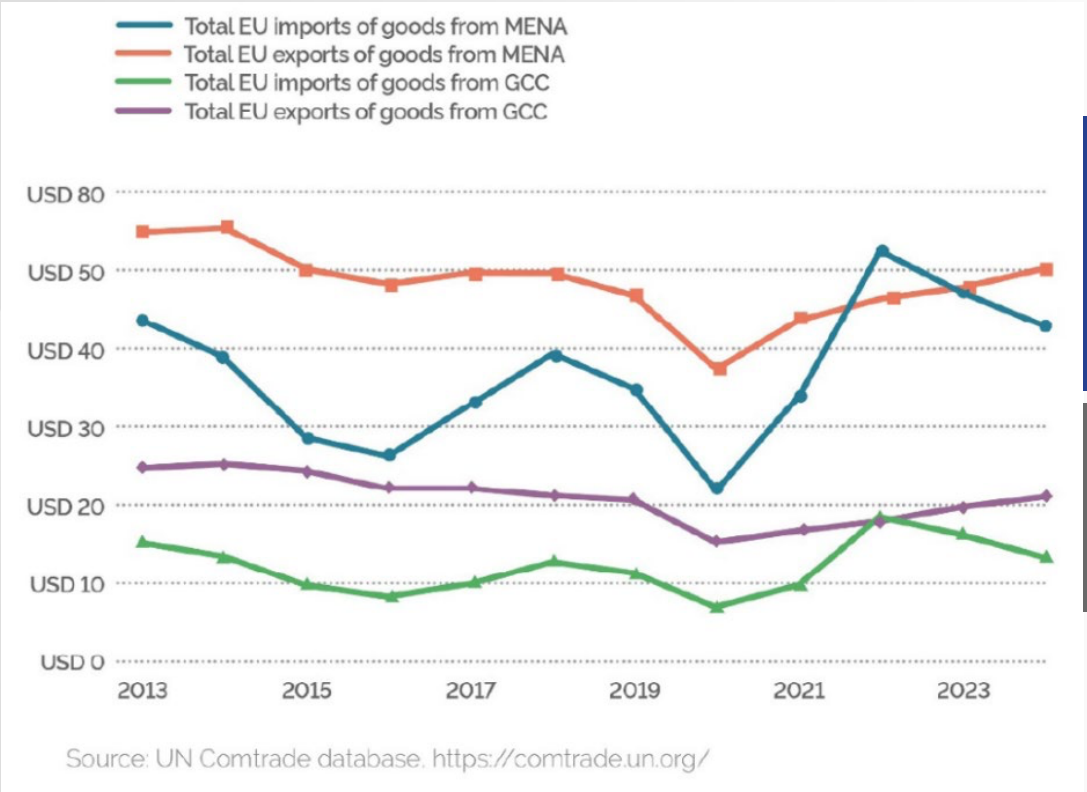
Chapter 2

Recalibrating Ties: Mediterranean Europe's Diplomatic Push toward the Gulf

Europe–Gulf diplomatic engagement 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, energy flows and connectivity is now being redefined through crisis diplomacy, defence coordination and the protection of shared strategic systems. In this context, Mediterranean European countries are playing a particularly visible role, positioning themselves as early interlocutors with Gulf partners at a moment of regional instability.

This renewed activism reflects two overlapping dynamics. The first is immediate crisis management: the need to preserve energy flows, support de-escalation, protect critical infrastructure and maintain freedom of navigation in the Strait of Hormuz. The second is more structural: a broader effort by Southern European states to consolidate long-term political, energy and security ties with Gulf partners. Italy, Greece and France illustrate three distinct but complementary models of this Mediterranean-led engagement.

Figure 3 – Total EU – MENA and EU – GCC Trade (2013 – 2024) US$ Billion



Sources: ISPI; UN Comtrade database (https://comtrade.un.org/)

Italy has emerged as one of the most proactive European actors in this phase. Prime Minister Giorgia Meloni's April 2026 tour of Saudi Arabia, Qatar and the UAE marked an important political signal, as Rome sought to position itself as an early Western interlocutor with Gulf capitals following the outbreak of the Iran war. The mission combined energy diplomacy, political reassurance and defence coordination, linking crisis response to longer-term positioning. Discussions focused on energy supply security, maritime routes, cooperation on critical infrastructure and defence ties, with the Strait of Hormuz emerging as a central concern.[24]

24. "Italy's Gulf push: Meloni's 48-hour blitz signals energy and security shift," Decode 39, April 2026, 3, https://decode39.com/14208/italys-gulf-push-melonis-48-hour-blitz-signals-energy-and-security-shift/

The significance of the visit lies not only in its timing, but in its strategic framing. Italy's Gulf engagement is increasingly shaped by the convergence of energy diversification, industrial cooperation and regional security. Rome had already strengthened its partnerships with key Gulf actors through agreements with Saudi Arabia on hydrogen, renewables and carbon capture,[25] and with the UAE on energy, technology, defence and industrial cooperation.[26]

This line was reinforced later in April by Defence Minister Guido Crosetto's three-stop tour of Saudi Arabia, the UAE and Qatar. In Saudi Arabia, talks addressed Iranian attacks, defensive military support, freedom of navigation in Hormuz and defence cooperation. In Abu Dhabi, Crosetto met President Sheikh Mohamed bin Zayed Al Nahyan, with a letter of intent to expand defence ties, while in Qatar discussions focused on political-military coordination and Doha's role in regional stability.[27]

Taken together, Meloni's and Crosetto's missions suggest that Italy is seeking a more structured role in Gulf security. The Gulf is increasingly linked to Rome's wider Mediterranean and Indo-Mediterranean outlook, where energy security, maritime routes, defence partnerships and political access overlap. This does not imply a substitution of larger actors, but a more assertive effort to convert diplomatic access into strategic relevance.

Greece represents a different model of engagement, centred less on diplomatic symbolism and more on operational contribution. Athens has maintained a Patriot air-defence battery in Saudi Arabia since 2021, deployed under a bilateral arrangement to support the protection of critical energy infrastructure. The system's recent use against Iranian-origin drones has reinforced the strategic relevance of this deployment and revived debate in Greece over the costs, risks and benefits of the mission.[28]

Defence Minister Nikos Dendias' visit to Saudi Arabia in early April highlighted how Athens views this engagement. The Greek government has framed the deployment as defensive, aimed at protecting Saudi refineries and helping stabilise global energy markets, while avoiding direct involvement in the broader conflict. At the same time, Greek officials have openly underlined the operational value of the mission, particularly the experience gained from using advanced air-defence systems in real-world conditions.[29]

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25. Mohammed Al-Kinani, "Saudi Arabia, Italy deal opens door for Kingdom to supply green hydrogen to Europe," Arab News, January 2025, 15, https://www.arabnews.com/node/2586539/%7B%7B#:~:text=2025%2016:03-,Saudi%20Arabia%2C%20Italy%20deal%20opens%20door%20for%20Kingdom%20to%20supply,alternatives%20in%20the%20North%20Sea.%E2%80%9D
26. "Italy and the United Arab Emirates, a strategic partnership," Italian Ministry of Foreing Affairs, February 2025, 24, https://www.esteri.it/en/sala_stampa/archivionotizie/approfondimenti/2025/02/lintervento-italia-ed-emirati-arabi-uniti-una-partnership-strategica/#:~:text=The%20relationship%20between%20Italy%20and%20the%20UAE,two%20countries%20are%20deepening%20cooperation%20in%20these
27. "Minister Crosetto's Gulf tour signals Italy's strategic push in the region," Decode 39, April 2026, 23, https://decode39.com/14461/minister-crosettos-gulf-tour-signals-italys-strategic-push-in-a-volatile-region/
28. Vladyslav Khomenko, "Greece Modernizes Six Patriot Air Defense Batteries to PAC-3 Standard," Militarnyi, April 2026, 24, https://militarnyi.com/en/news/greece-modernizes-patriot-pac-3-standard/
29. Pietro Guastamacchia, "Athens balances 'indispensable' experience with political costs of its Saudi mission," Euractiv News, April 2026, 7, https://www.euractiv.com/news/athens-balances-indispensable-experience-with-political-costs-of-its-saudi-mission/

The Greek case is important because it reflects a wider evolution in Athens' foreign and defence policy. Greece is no longer acting simply as a passive bridge between Europe and the Middle East, but as a more active Mediterranean security actor. Its relationship with Saudi Arabia complements earlier defence cooperation with the UAE, including the 2020 Greece–UAE strategic agreement and Emirati deployments to Crete during periods of EasternMediterraneantension.[30]

For Gulf states, Greece offers a capable Mediterranean partner with EU and NATO credentials. For Greece, the Gulf provides investment, diplomatic support and operational depth beyond slower European consensus mechanisms. This makes Athens' engagement especially relevant to the broader Europe–Gulf relationship: it shows how Mediterranean European states can create practical security partnerships with Gulf actors while remaining formally embedded in wider European and transatlantic structures.

France, by contrast, represents the most mature and institutionalised model of European engagement in the Gulf. Paris has long treated the region as part of its extended security perimeter, linking the Gulf to French interests in the Indian Ocean, the Red Sea, the Eastern Mediterranean and Africa. Recent developments have reinforced this posture. In March 2026, French Minister of the Armed Forces Catherine Vautrin met UAE President Sheikh Mohamed bin Zayed Al Nahyan in Abu Dhabi, with discussions focused on defence cooperation, regional escalation and the implications of the crisis for international security.[31]

France's engagement has been framed around strategic partnership and reassurance. Paris reaffirmed its support for the UAE and condemned attacks targeting Gulf countries, while continuing to emphasise defence coordination within the framework of the France–UAE Strategic Partnership. Unlike Italy, which is seeking to consolidate a more visible Gulf role, or Greece, which is deepening a more operational security axis, France is consolidating an already established position, where continuity – political access, defence dialogue and presence – remains its core asset.

30. Bill Giannopoulos, "Greece boosts UAE air defence capabilities amid deepening strategic ties," Greek City Times, April 2026, 1, https://greekcitytimes.com/2026/04/01/greece-uae-air-defence-cooperation/
31. "UAE President Receives French Minister of the Armed Forces," Al-Defaya, March 2026, 25, https://www.defaiya.com/news/Regional%20News/UAE/2026/03/25/uae-president-receives-french-minister-of-the-armed-forces

These national initiatives are increasingly complemented by a broader EU-level diplomatic track. High Representative Kaja Kallas' April visit to Saudi Arabia, following the temporary US–Iran ceasefire, signalled the EU's effort to support de-escalation and engage Gulf counterparts at a moment of heightened uncertainty. Her meetings with Saudi Foreign Minister Faisal bin Farhan and GCC Secretary-General Jasem Al-Budaiwi reflected the EU's intention to remain diplomatically present in the post-ceasefire environment.[32]

This was reinforced by European Council President António Costa's Gulf tour, which included the UAE, Saudi Arabia and Qatar. In Doha, Costa praised Qatar's mediation role and described the country as a reliable partner for global energy security. In the UAE, he underlined European solidarity and linked EU–Gulf cooperation to the protection of shared interests, including freedom of navigation in the Strait of Hormuz and safe passage around the Arabian Peninsula.[33]

Taken together, these developments point to a more structured pattern of Europe–Gulf diplomatic engagement. Mediterranean European countries are acting as key drivers of this shift, each through a different channel. At the EU level, this activism is being framed within a broader agenda of de-escalation, energy security and maritime stability.

The broader implication is that the Gulf is increasingly being integrated into Europe's wider security and connectivity perimeter. This integration is not taking the form of a formal alliance or treaty-based framework. Rather, it is emerging through overlapping layers of diplomatic engagement, defence coordination, energy interdependence and crisis-management mechanisms. Stability, resilience and strategic connectivity are thus becoming the organising principles of the relationship.

32. "Media Advisory: HR/VP Kallas travels to Saudi Arabia," EEAS Press Team, April 2026, 8, https://www.eeas.europa.eu/eeas/media-advisory-hrvp-kallas-travels-saudi-arabia_en
33. "European Council chief in Qatar on Gulf support tour," The National News, April 2026, 15, https://www.thenationalnews.com/news/gulf/2026/04/15/european-council-chief-in-qatar-on-gulf-support-tour/

Chapter 3

Europe–Gulf Coordination on Freedom of Navigation

Europe–Gulf coordination on freedom of navigation has increasingly emerged as a central dimension of inter-regional cooperation, as disruptions in the Strait of Hormuz have transformed maritime security into a shared strategic priority. What had traditionally been treated as a regional security concern is now progressively framed as a global public good, with direct implications for energy markets, supply chains and economic stability. This framing has been explicitly reflected in European discourse, where the Strait is increasingly understood as part of a wider interconnected maritime system, rather than a geographically bounded chokepoint.

The current phase of cooperation reflects a convergence of interests between European and Gulf actors. Sustained disruptions caused by the Iran conflict – including attacks on commercial shipping and the effective slowdown of maritime traffic – have underscored the vulnerability of global trade routes. In response, both regions have moved to coordinate diplomatic initiatives aimed at safeguarding navigation, while avoiding direct military escalation in a highly contested operational environment.

A first layer of this coordination has taken shape through UK-led diplomatic initiatives. On 2 April 2026, British Prime Minister Keir Starmer convened an international meeting bringing together around 40 countries, including key European actors such as Italy, France and Germany, alongside Gulf partners such as the UAE and Bahrain.[34] Italy aligned closely with this approach. During a phone call with Starmer, Prime Minister Giorgia Meloni emphasised the "international community's interest in safeguarding freedom of navigation" and agreed to maintain close coordination on de-escalation initiatives. This position was further reinforced by Foreign Minister Antonio Tajani, who reiterated Rome's support for multilateral mechanisms – provided they are anchored in a clear United Nations mandate – and framed Italy's approach around three core principles: de-escalation, diplomatic engagement and coordination with European and international partners.[35]

34. "UK's Starmer heads to the Gulf to discuss reopening the Strait of Hormuz," Al-Monitor, April 2026, 8, https://www.al-monitor.com/originals/2026/04/uks-starmer-heads-gulf-discuss-reopening-strait-hormuz
35. "Hormuz, shared security and de-escalation. The message from London," Decode39, April 2026, 2, https://decode39.com/14186/hormuz-shared-security-and-de-escalation-the-message-from-london/

This line was echoed at the operational–strategic level during Defence Minister Guido Crosetto's late-April tour of Saudi Arabia, the United Arab Emirates and Qatar, where he indicated that, once hostilities subside, existing European maritime frameworks such as Operation ASPIDES (EU maritime security mission in the Red Sea and surrounding waters) could potentially be expanded toward the Strait of Hormuz. This signals an emerging effort to build on already deployed EU naval architectures rather than creating entirely new mechanisms fromscratch.[36]

Figure 4 - Operation EUNAVFOR ASPIDES in Numbers (by April 2026)

Source: EUNAVFOR ASPIDES (https://x.com/EUNAVFORASPIDES/status/2042181463311847478)

This diplomatic track reflects a broader strategic calculation. While the coalition assembled by the United Kingdom is geographically and politically broad, it is characterised by a deliberate reluctance to pursue immediate military solutions. None of the participating states has signalled willingness to forcibly reopen the Strait under conditions of active hostilities, particularly given Iran's demonstrated anti-access and area denial capabilities, including anti-ship missiles, naval mines and drone systems. As a result, the initiative has focused primarily on post-conflict planning, aiming to establish a framework for maritime security once conditions allow.

36. Abdulhadi Habtor, "Italy Discussing Expanding EU Aspides Mission to Include Strait of Hormuz, Defense Minister Says," Asharq al Awsat, April 2026, 20, https://english.aawsat.com/world/5264417-italy-discussing-expanding-eu-aspides-mission-include-strait-hormuz-defense-minister

European approach has progressively evolved into a more structured multilateral effort. On 17 April 2026, the UK and France co-chaired an international summit in Paris bringing together over 50 countries, alongside the European Union and the International Maritime Organization (IMO). In contrast to the earlier London-format discussions, Gulf participation broadened to include additional key actors such as Saudi Arabia and Qatar, signalling a more consolidated regional engagement alongside the UAE and Bahrain. The meeting called for the "unconditional, unrestricted and immediate reopening" of the Strait and reaffirmed the centrality of international law, particularly the principles governing transit passage under the law of the sea.[37]

The Paris summit marked a qualitative step forward. Beyond diplomatic signalling, it confirmed the intention to establish a strictly defensive multinational mission aimed at protecting commercial shipping, reassuring maritime operators and supporting mine-clearance operations once a sustainable ceasefire is in place.[4] This initiative reflects an attempt to translate political consensus into operational planning, while maintaining a clear distinction from ongoing military hostilities.

Follow-up meetings have further reinforced this trajectory. On 22 April, the United Kingdom hosted military planners from over 30 countries to advance detailed planning for such a mission.[38] These discussions focused on command-and-control structures, force generation and the integration of multinational capabilities, signalling a gradual shift from diplomatic coordination toward potential implementation.

These parallel tracks are complemented by additional conceptual proposals. European actors have explored alternative models for maritime deconfliction, including mechanisms inspired by the Black Sea grain corridor established during the war in Ukraine. Such proposals envision negotiated arrangements allowing commercial shipping to transit under agreed conditions, potentially supported by international monitoring mechanisms. However, the applicability of these models remains limited. The Strait of Hormuz presents a higher level of military contestation, more complex regional dynamics and the absence of a clear mediating framework comparable to that of the Black Sea. As a result, these ideas remain at an exploratory stage rather than constituting operational solutions.

37. "France-UK joint statement on the Strait of Hormuz," France in the United Kingdom, Press release, April 2026, 21, https://uk.diplomatie.gouv.fr/en/france-uk-joint-statement-strait-hormuz
38. United Kingdom Ministry of Defence, "UK and France to lead multinational Strait of Hormuz military planning conference," Press release, April 2026, 22, https://www.gov.uk/government/news/uk-and-france-to-lead-multinational-strait-of-hormuz-military-planning-conference

A broader European diplomatic layer has also reinforced this evolving framework. EU High Representative Kaja Kallas has described the Strait of Hormuz as a "public good," reflecting an effort to frame maritime security within a global governance perspective. Similarly, European Council President António Costa's mid-April tour of the Gulf – covering the UAE, Saudi Arabia and Qatar – highlighted the EU's commitment to safeguarding freedom of navigation through diplomatic engagement and coordination with regional partners.[39]

Taken together, these developments point to the emergence of a multi-layered Europe–Gulf coordination framework on maritime security. Diplomatic initiatives, multilateral proposals and preliminary operational planning are increasingly interconnected, reflecting a gradual shift toward structured cooperation.

At the same time, the limitations of this framework remain evident. While there is broad consensus on the principle of freedom of navigation, translating diplomatic alignment into effective and enforceable mechanisms continues to represent a major challenge. Capability constraints, political sensitivities and the risk of escalation all act as limiting factors, particularly in the absence of direct U.S. involvement and in a context where Iran retains significant leverage over the Strait.

More fundamentally, the current phase of coordination reflects a structural transformation in how maritime security is conceived within Europe–Gulf relations. Rather than relying on external security guarantees or unilateral action, both regions are increasingly exploring hybrid arrangements combining diplomacy, multilateral legitimacy and, potentially, limited defensive deployments.

In this sense, the Strait of Hormuz is evolving from a crisis-driven chokepoint into a focal point for the development of new forms of inter-regional coordination. Freedom of navigation is no longer simply a legal principle, but a strategic domain in which Europe and the Gulf are jointly attempting to reconcile competing imperatives: stability, sovereignty and global economic interdependence.

Whether this emerging coordination can be consolidated into a durable framework remains uncertain. What is clear, however, is that maritime security in the Gulf has become a defining arena for Europe–Gulf relations, linking regional dynamics to global strategic outcomes and reshaping the contours of inter-regional cooperation.

39. "European Council chief in Qatar on Gulf support tour," The National News, April 2026, 15, https://www.thenationalnews.com/news/gulf/2026/04/15/european-council-chief-in-qatar-on-gulf-support-tour/