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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.

July 2026 highlighted how this engagement is increasingly extending beyond traditional bilateral relations towards wider strategic networks connecting Europe, the Gulf and beyond. From the maritime corridor linking Hormuz and Bab el-Mandeb to investment partnerships across the African continent and the rapid expansion of artificial intelligence infrastructure, recent developments point to a growing convergence of European and Gulf interests. Italy is playing a particularly visible role in this process, combining its Mediterranean position with expanding partnerships in maritime security, development finance and critical technologies.

This month's report examines three dimensions of this emerging architecture. The first explores the growing convergence between European and Gulf maritime security initiatives, as the proposed Hormuz coalition, EUNAVFOR ASPIDES and the new Saudi-led maritime alliance increasingly reflect a shared understanding of the strategic corridor stretching from the Gulf to the Red Sea. The second examines how Italy's Mattei Plan is evolving into a platform for triangular cooperation, bringing European instruments and Gulf investment together around African priorities. Finally, the report looks at the emergence of a Europe–GCC strategic technology partnership, with recent initiatives involving France, Italy, the UAE and Saudi Arabia showing how AI, computing infrastructure, energy and technological sovereignty are becoming increasingly important components of the relationship.



Chapter 1 – Europe and the Gulf’s Maritime Security Partnership: From Hormuz to Bab el-Mandeb

The Iran war has accelerated a shift in how Europe and the Gulf approach maritime security. For years, instability in the Strait of Hormuz, the Red Sea and the Gulf of Aden was largely addressed through separate diplomatic and military frameworks. The disruption generated by the conflict has increasingly blurred these geographical distinctions. Hormuz and Bab el-Mandeb are now emerging as interconnected components of the same strategic corridor linking Gulf energy producers with European and Asian markets.

This interdependence became particularly evident following the disruption of commercial traffic through the Strait of Hormuz. As negotiations between Iran, Oman and the United States continued over the future of the waterway in June and July 2026, France and the United Kingdom promoted the establishment of a separate multinational naval coalition capable of supporting its eventual reopening. By early July, Italy, Germany, Greece, Denmark and the Netherlands had also signalled their willingness to contribute vessels, personnel or specialised capabilities.⁽¹⁾ The initiative was primarily conceived as a defensive operation focused on mine clearance, maritime surveillance and the restoration of confidence among commercial operators rather

than participation in military operations against Iran.⁽²⁾ European navies retain relevant mine-countermeasure capabilities,⁽³⁾ complemented by operational experience accumulated through successive European missions across the wider maritime region, from EUNAVFOR ATALANTA,⁽⁴⁾ to EMASoH/Agenor,⁽⁵⁾ and EUNAVFOR ASPIDES.⁽⁶⁾ Together, these missions have established a European maritime security presence extending from the Gulf of Oman to the southern Red Sea.



1. Francesco Salesio Schiavi, “Anchoring the peace: Can Europe secure the Strait of Hormuz?”, The New Arab, July, 2026, 6, <https://www.newarab.com/analysis/anchoring-peace-can-europe-secure-strait-hormuz>

2. “Fear of mines alone could disrupt Strait of Hormuz shipping, warns French admiral,” Radio France Internationale (RFI), June 2026, 25, <https://www.rfi.fr/en/international/20260625-fear-of-mines-alone-can-disrupt-strait-of-hormuz-shipping-warns-french-admiral-iran>

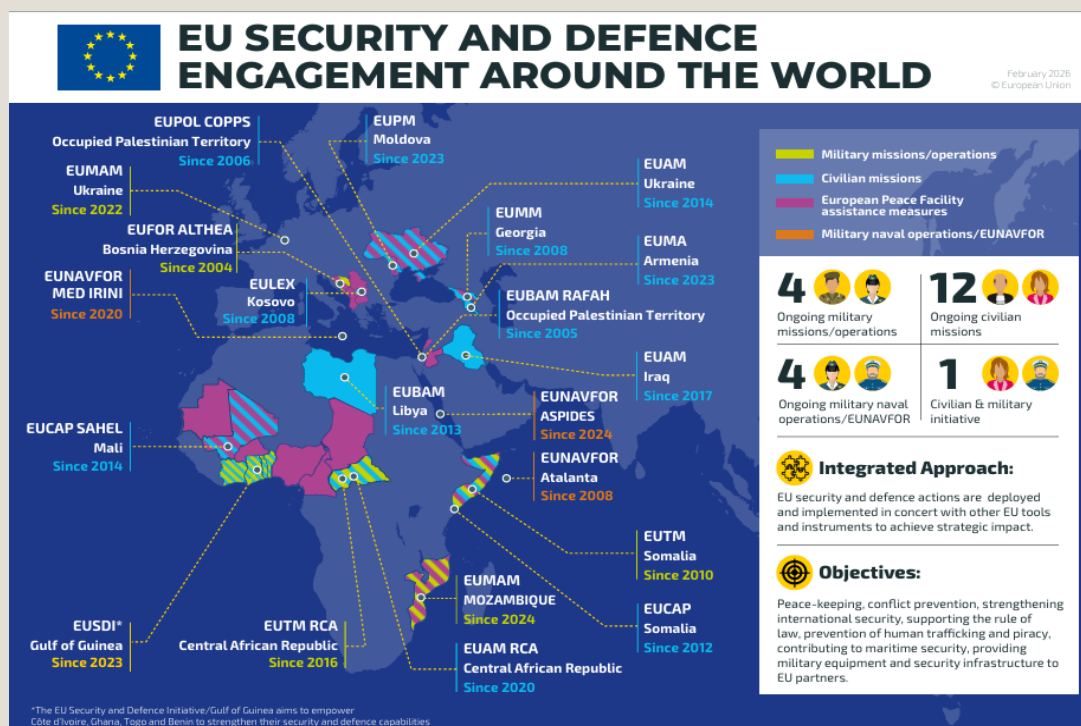
3. Sidney E. Dean, “Mine countermeasures vessels,” European Security and Defence, November 2024, 8, <https://euro-sd.com/2024/11/articles/41407/mine-countermeasures-vessels/>

4. “European Union Naval Force Operation ATALANTA – EUNAVFOR ATALANTA,” <https://eunavfor.eu/>

5. “EMASOH – AGENOR,” Marina Militare, <https://www.marina.difesa.it/cosa-facciamo/per-la-difesa-sicurezza/operazioni-in-corso/Pagine/EMASOH.aspx>

6. “EUNAVFOR Operation ASPIDES,” European Union – EEAS, https://www.eeas.europa.eu/eunavfor-aspides_en?s=410381

Figure 1 – 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)

Yet renewed regional instability has complicated plans for a dedicated Hormuz deployment. With political conditions preventing the prospective coalition from becoming operational, European attention increasingly returned to the Red Sea in July. On 16–17 July 2026, during a visit to Djibouti and to personnel serving aboard vessels assigned to ASPIDES and ATALANTA, EU High Representative Kaja Kallas openly raised the possibility that naval assets originally pledged to the Hormuz coalition could temporarily reinforce ASPIDES. She also indicated that discussions were underway over potentially expanding the operation's mandate to include mine-clearing activities.⁽⁷⁾

The logic reflects the growing interdependence between the two waterways. Approximately 10–15% of global maritime trade transits Bab el-Mandeb, while disruption would force vessels travelling between Asia and Europe to divert around the Cape of Good Hope. At the same time, the Red Sea has become increasingly important for Gulf energy producers seeking alternatives to Hormuz. Saudi Arabia's East-West pipeline can redirect oil exports from the Gulf towards Yanbu, reducing exposure to Hormuz but simultaneously increasing the strategic importance of secure navigation through the Red Sea and Bab el-Mandeb.

The renewed Houthi campaign against Saudi targets reinforced this connection during July. Following attacks against Saudi infrastructure and threats against Saudi-flagged shipping, Riyadh moved from seeking broader international support for Red Sea security towards establishing its own multinational framework. A technical meeting was held in Riyadh on 28 July, followed on 30 July 2026 by a meeting of military chiefs to advance the creation of a Multinational Maritime Defense Alliance focused on the Red Sea, Bab el-Mandeb and Gulf of Aden.⁽⁸⁾ Representatives from a much broader group of partner countries participated in the consultations, while an initial group of states expressed support for the initiative and its stated objective of protecting freedom of navigation and international trade.

7. Toby Gregory, "Euronews aboard EU warships in the Red Sea: Europe eyes wider mandate as Houthi threat grows," Euronews, July 2026, 17, <https://www.euronews.com/2026/07/17/eu-bolsters-red-sea-mission-amid-reports-houthis-may-shut-bab-el-mandeb>

8. "Saudi Arabia unveils plans for multinational maritime defence coalition," Reuters, July 2026, 30, <https://www.reuters.com/world/middle-east/saudi-arabia-unveils-plans-multinational-maritime-defence-coalition-2026-07-30/>

Figure 2 – Multinational Maritime Defense Alliance Members by July 30, 2026

MULTINATIONAL MARITIME DEFENSE ALLIANCE MEMBERS			
	Saudi Arabia		Jordan
	Kuwait		Yemen
	Bahrain		Bangladesh
	Qatar		Nigeria
	Pakistan		Sudan
	Türkiye		Djibouti
	Egypt		Somalia

Sources: Arab News; https://www.arabnews.jp/en/middle-east/article_175929/

By mid-August, the initiative had moved rapidly towards institutionalisation. Saudi Arabia appointed Rear Admiral Abdullah bin Salem Al-Shehri as commander on 6 August,⁽⁹⁾ while the 13 August Jeddah meeting brought together representatives from 39 countries.⁽¹⁰⁾ Thirteen states had formally joined the coalition, which is intended to facilitate information sharing, operational planning, exercises and eventually coordinated naval operations.⁽¹¹⁾

The emergence of the Saudi-led coalition is particularly significant because it places regional actors themselves at the centre of maritime security

coordination. Bahrain, Kuwait and Qatar are among the Gulf participants, alongside Egypt, Jordan, Pakistan, Türkiye and several states bordering the Red Sea and Gulf of Aden. Türkiye's participation also developed incrementally: Ankara joined the 28 and 30 July meetings before moving towards formal accession to the coalition charter in mid-August. Rather than replacing existing Western or European missions, the initiative could gradually add a regional layer to an already dense maritime security architecture.⁽¹²⁾

Europe appears increasingly receptive to such cooperation. Italy provides perhaps the clearest example. During Saudi Foreign Minister Prince Faisal bin Farhan's visit to Rome on 22 July 2026, Italy and Saudi Arabia adopted a joint declaration explicitly linking freedom of navigation in the Strait of Hormuz, the Red Sea, Bab el-Mandeb and the Gulf of Aden within the same strategic framework.⁽¹³⁾ Rome also highlighted the contribution of EUNAVFOR ASPIDES and ATALANTA to regional maritime security. On 10–11 August, Foreign Minister Antonio Tajani went further, describing Saudi Arabia's proposed maritime defence alliance as reflecting the growing international focus on maritime security and freedom of navigation, objectives that Italy fully shares.⁽¹⁴⁾

The EU is simultaneously strengthening the diplomatic and logistical infrastructure underpinning its wider maritime presence. During Kallas's visit to Djibouti on 16 July, the EU and Djibouti signed a new Status of Forces Agreement supporting European naval operations in the region.⁽¹⁵⁾ Djibouti already serves as a central logistical hub for both ASPIDES and ATALANTA, providing European vessels with access to fuel, supplies and other support at the southern entrance of the Red Sea.

9. "Ministry of Defense Announces Appointment of Commander of Multinational Maritime Defense Coalition," Saudi Press Agency (SPA), August 2026, 6, <https://www.spa.gov.sa/en/N2648564>

10. "Saudi-led maritime defense coalition moves to activate multinational command structure," Arab News, August 2026, 13, <https://www.arab-news.com/node/2654589/saudi-arabia>

11. "Saudi Arabia announces 13 countries have formally joined maritime defence alliance," Middle East Monitor, August 2026, 14, <https://www.middleeastmonitor.com/20260814-saudi-arabia-announces-13-countries-have-formally-joined-maritime-defence-alliance/>

12. Amberin Zaman, "Turkey set to sign charter for Saudi-led Red Sea coalition on Friday," Al-Monitor, August 2026, 13, <https://www.al-monitor.com/originals/2026/08/turkey-set-to-sign-charter-saudi-led-red-sea-coalition-friday>

13. "Joint Declaration by the Ministers of Foreign Affairs of the Italian Republic and the Kingdom of Saudi Arabia," Italian Ministry of Foreign Affairs, July 2026, 29, https://www.esteri.it/en/sala_stampa/archivionotizie/comunicati/2026/07/dichiarazione-congiunta-dei-ministri-degli-affari-esteri-della-repubblica-italiana-e-del-regno-dellarabia-saudita-2/

14. "Italian Deputy Prime Minister: Saudi Arabia Is an Indispensable Partner in Regional Stability," Asharq Al-Awsat, August 2026, 11, <https://english.aawsat.com/gulf/5305354-italian-deputy-prime-minister-saudi-arabia-indispensable-partner-regional-stability>

15. "European External Action Service, "HR/VP Kaja Kallas Visits EUNAVFOR ASPIDES in Djibouti," July 17, 2026; e "Djibouti: Remarks by High Representative Kaja Kallas," July 2026, 17, https://www.eeas.europa.eu/eeas/djibouti-remarks-high-representative-kaja-kallas_en



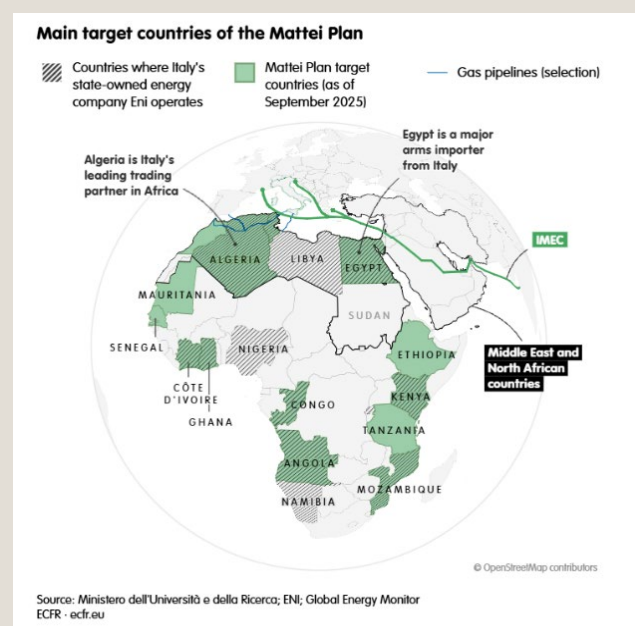
Five days later, Kallas and Omani Foreign Minister Sayyid Badr bin Hamad Al Busaidi signed the Establishment Agreement for a new permanent EU Delegation in Muscat.¹⁶ Situated directly outside the Strait of Hormuz and maintaining working relations with both Iran and Western partners, Muscat has played an important role in diplomatic efforts surrounding the Strait. The establishment of a permanent EU diplomatic presence therefore complements Europe's growing operational engagement with a stronger political footprint in one of the Gulf's most strategically important states.

Taken together, these developments point towards an increasingly connected Europe–Gulf maritime security architecture. Its institutional contours remain fragmented, and European and Gulf initiatives continue to operate through separate command structures. Yet their strategic objectives are becoming increasingly complementary. European partners can contribute specialised mine-countermeasure capabilities, naval escorts, maritime domain awareness and established operational structures, while Gulf and regional states provide local intelligence, logistical infrastructure and greater regional ownership. This creates potential for a practical division of labour without requiring the integration of the different coalitions into a single military framework. The challenge ahead will be turning this convergence of interests into practical coordination between the increasingly dense European and Gulf security frameworks operating across it.

Chapter 2 – Italy, the Gulf and Africa: The Emerging Triangular Partnership under the Mattei Plan

Italy's Mattei Plan is entering a new phase. Originally conceived as a national framework for reshaping relations with Africa,¹⁷ it is increasingly becoming a platform connecting European institutions, Gulf partners and African governments around common investment and infrastructure projects. Its integration with the EU's Global Gateway and growing cooperation with multilateral financial institutions have reinforced this international dimension. Recent developments suggest that this triangular dimension is moving from political ambition towards practical cooperation, particularly with the United Arab Emirates and Saudi Arabia.

Figure 3 – Main target countries of the Mattei Plan



Source: European Council of Foreign Relations (ECFR), October 2025, <https://ecfr.eu/publication/the-turtle-and-the-pilot-fish-how-the-eu-and-italy-can-help-each-other-in-the-mediterranean/>

European participation is also becoming more concrete. During a parliamentary hearing on 22 July 2026, Fabrizio Saggio, coordinator of the Mattei Plan's implementation structure, confirmed that Italy had launched a series of triangular partnerships in which Africa serves as the common focus for

16. European External Action Service, "European Union and Sultanate of Oman sign Establishment Agreement for EU Delegation in Muscat," July 2026, 21, https://www.eeas.europa.eu/eeas/european-union-and-sultanate-oman-sign-establishment-agreement-eu-delegation-muscat_en

17. Presidency of the Council of Ministers, "Mattei Plan for Africa," <https://www.governo.it/en/articolo/mattei-plan-africa/31297>

cooperation between Rome and third countries.⁽¹⁸⁾ France and Germany are already working with Italy on water infrastructure in Morocco under the Team Europe framework, while Denmark has joined the Mattei Plan and Rome Process Financing Facility established with the African Development Bank. These initiatives demonstrate how the Plan can function as a platform connecting national European strategies rather than simply financing Italian projects abroad.

Yet the Gulf dimension could give this emerging European architecture considerably greater scale. Gulf interest in the Mattei Plan predates the latest phase of its implementation. By July 2025, the

sits alongside European partners such as France, Germany and Denmark and Asian economies including Japan and South Korea. The emerging model therefore places Italy in an intermediary position: African priorities provide the starting point, while Rome seeks to combine European technology and development instruments with Gulf financial capacity and increasingly global investment strategies.

The UAE provides the clearest indication that this interest is beginning to acquire an institutional dimension. Abu Dhabi has become the first Gulf partner to contribute directly to one of the Mattei Plan's multilateral financing mechanisms, providing



UAE, Saudi Arabia, Qatar and Bahrain had already expressed interest in developing triangular projects with Italy in Africa.⁽¹⁹⁾ A year later, Saggio specifically identified the UAE and Saudi Arabia among the partners with which Italy had initiated triangular cooperation centred on Africa.⁽²⁰⁾ Their participation

a \$25 million grant to the Rome Process/Mattei Plan Financing Facility established by Italy and the African Development Bank.⁽²¹⁾ Together with Italian and Danish resources, the facility is already supporting projects in Ethiopia, Angola, Mauritania and Kenya. This offers an early practical example

18. Fabrizio Saggio, "Attuazione del Piano Mattei: audizione in Commissioni congiunte 3a Senato con III Camera," hearing before the Foreign Affairs Committees of the Italian Parliament, July 2026, 22, <https://www.senato.it/attualita/archivio-notizie?nid=124932>

19. "Spotlight on Gulf Interest in Italy's Mattei Plan," Decode39, 31 July 2025, <https://decode39.com/11492/spotlight-on-gulf-interest-in-italys-mattei-plan/>

20. Saggio, "Attuazione del Piano Mattei: audizione in Commissioni congiunte 3a Senato con III Camera," July 2026, 22.

21. African Development Bank, "Mattei Plan Partnership: Advancing Africa's Development through Strategic Collaboration," February 2026, 13, https://www.afdb.org/en/news-and-events/mattei-plan-partnership-advancing-africas-development-through-strategic-collaboration-90869?utm_source=chatgpt.com

of the model envisaged by Rome: European and Gulf resources channelled through an African institution towards priorities identified with African partners.

Recent developments also show why the scope for further cooperation is growing. On 26–28 June 2026, Addis Ababa hosted the Hili UAE–Africa Dialogue, bringing Emirati and African policymakers and businesses together around agriculture, renewable energy, critical minerals, infrastructure and connectivity.⁽²²⁾ Ethiopia is simultaneously a major Mattei Plan partner, with Italian initiatives focused on water and agriculture. On 29 June, Saudi companies explored investments in Ethiopian manufacturing and agricultural value chains, including the direct sourcing of specialty coffee.⁽²³⁾ The convergence is particularly relevant because Italy and other European partners increasingly seek to support local processing and value-chain development rather than simply expand commodity trade.

A similar overlap is emerging in Mozambique. Italy is supporting electrification and agro-industrial development through the Mattei Plan, while the UAE has expanded engagement in energy, renewables and logistics. Following a first round of talks in March, UAE President Mohamed bin Zayed and Mozambican President Daniel Chapo discussed investment, renewable energy and sustainable development on 13 June 2026.⁽²⁴⁾ These parallel initiatives create opportunities for European industrial expertise and Gulf capital to reinforce projects already prioritised by African governments.



Other Mattei Plan countries illustrate the broader pattern. In Morocco, Italy, France and Germany are cooperating on water infrastructure through Team Europe, while Emirati investors are pursuing major projects in desalination, water transmission, renewable generation and electricity infrastructure. In Algeria, Italian agricultural initiatives coexist with Qata's approximately \$3.5 billion Baladna agro-industrial project, aimed at strengthening domestic dairy production and food security.⁽²⁵⁾ These projects are not formally integrated into the Mattei Plan, but their geographical and sectoral overlap demonstrates the potential pool from which future triangular partnerships could emerge.

22. Hili UAE–Africa Dialogue, Addis Ababa, 26–28 June 2026, <https://www.amn.gov.et/en/hili-uae-africa-dialogue-conference-held-in-addis-ababa/>

23. "Ethiopia, Italy Sign €70 Million Concessional Budget Support Loan," Ethiopian News Agency, June 2026, 29, https://www.ena.et/web/eng/w/eng_9128715

24. UAE Presidency, "UAE and Mozambique Presidents discuss strengthening cooperation in phone call," UAE–Mozambique presidential meeting, WAM, June 2026, 13, <https://www.wam.ae/en/article/c0pdsis-uae-and-mozambique-presidents-discuss>

25. "Baladna Project: Yacine Oualid takes stock with Qatari partners," Algeria Eco, April 2026, 12, <https://algerie-eco.com/2026/04/02/projet-baladna-yacine-oualid-fait-le-point-avec-les-partenaires-qataris/>

The financial logic is equally important. The Mattei Plan's initial Italian allocation of approximately €5.5 billion cannot by itself match Africa's infrastructure requirements. Rome has therefore increasingly used guarantees, development finance and multilateral partnerships to mobilise additional capital. SACE has provided around €4 billion in guarantees connected to the Plan, helping mobilise an estimated €18.5 billion in private resources.⁽²⁶⁾ France's Africa Forward strategy follows a comparable approach, while Gulf investors already possess significant commercial experience across African energy, agriculture, ports and infrastructure. Combining Gulf financial capacity with European technology, industrial expertise and risk-mitigation instruments could consequently allow individual projects to reach considerably greater scale.

This complementarity is becoming more strategically important as Europe, the Gulf and Africa face increasingly interconnected economic vulnerabilities. The Iran war demonstrated how disruption around Hormuz can affect energy, shipping and fertiliser markets well beyond the Gulf, increasing pressure on African economies dependent on imported agricultural inputs.⁽²⁷⁾ Investment in food production, water, renewable energy, logistics and regional supply chains therefore serves resilience objectives shared across all three regions.

The Mattei Plan is consequently evolving beyond a national Italian Africa policy. Rome is seeking to turn it into an aggregation platform connecting European financial and technological instruments, Gulf investment capacity and African priorities. The growing overlap of Emirati, Saudi and Qatari activities with European initiatives across Mattei Plan countries demonstrates the wider potential. Most remain parallel rather than formally integrated, but the foundations for a more structured Europe–Gulf–Africa partnership are becoming increasingly visible.

Chapter 3 – Europe and the GCC's Emerging Strategic Technology Partnership

Artificial intelligence and critical technologies are becoming a new pillar of Europe–GCC relations. Cooperation between the two regions has traditionally centred on energy, trade and investment, but recent agreements increasingly encompass computing infrastructure, data centres, semiconductors, industrial AI and digital resilience. This shift is particularly visible in relations between Gulf states and Europe's largest economies, where investment partnerships are gradually developing into broader technology ecosystems.

France and the UAE provide one of the clearest examples of this evolution. Their bilateral technology partnership initially crystallised around the February 2025 Framework for Cooperation in Artificial Intelligence, which included plans to develop a 1-gigawatt AI infrastructure complex in France, combining data-centre capacity, advanced computing and related infrastructure.⁽²⁸⁾ Since then, cooperation has progressively expanded beyond investment in computing capacity. At the 18th UAE–France Strategic Dialogue, held in Abu Dhabi on 6 May 2026, the two countries identified artificial intelligence among the priority areas of their economic partnership, highlighting cooperation between MGX and G42 and Bpifrance and other French stakeholders on AI infrastructure. The dialogue also placed AI within a broader technology relationship encompassing advanced research, quantum technologies, space, intellectual property and potential cooperation in third markets.⁽²⁹⁾

This increasingly strategic dimension became more visible in June. At Eurosatory 2026 in Paris, three Abu Dhabi-based AI companies – TACTICA, SIRBAI and CENTAURE.AI – presented technologies developed from research by the UAE's Technology Innovation Institute (TII), covering operational decision

26. Procopio and Tisserand, ECFR, July 2026, 29.

27. UNCTAD, "Africa is attracting investment in strategic industries. The challenge is turning it into broader industrial development," July 2026, 7, <https://unctad.org/news/africa-attracting-investment-strategic-industries-challenge-turning-it-broader-industrial>

28. "France, UAE agree to develop 1 gigawatt AI data centre," Reuters, February 2025, 6, <https://www.reuters.com/technology/artificial-intelligence/france-uae-agree-develop-1-gigawatt-ai-data-centre-2025-02-06/>

29. Ministry of Foreign Affairs, United Arab Emirates, "UAE–France Strategic Dialogue reaffirms commitment to advancing shared priorities," Press release, May 2026, 6, <https://www.mofa.gov.ae/en/missions/paris/media-hub/embassy-news/4-6-2026-paris>

intelligence, coordinated autonomous systems and AI-enabled security operations.⁽³⁰⁾ Taken together, these initiatives suggest that the France–UAE relationship is evolving from investment in AI infrastructure towards a wider ecosystem linking computing capacity, research, autonomous systems, defence applications and technological sovereignty.

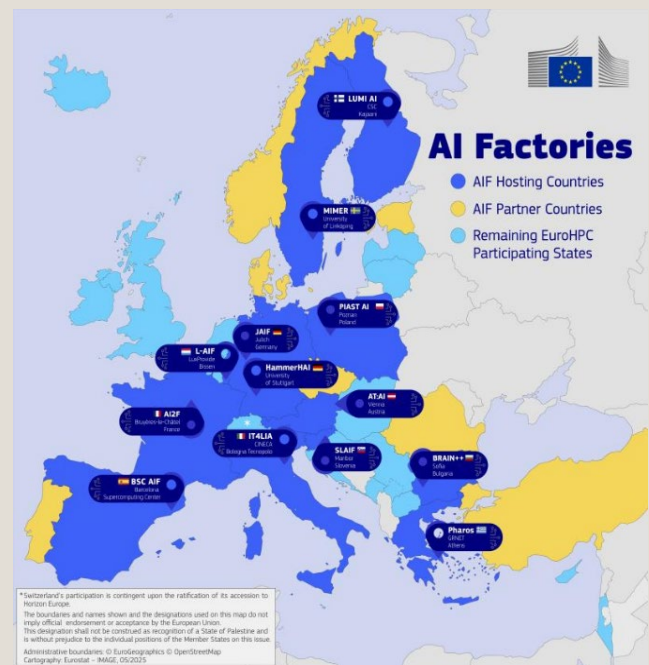
Italy is following a similar trajectory. Rome and Abu Dhabi have developed a broader strategic investment framework encompassing artificial intelligence, data infrastructure, energy and advanced industry. One component is the partnership between UAE-based G42 and Italian AI company iGenius to develop sovereign AI computing infrastructure in Italy, supporting applications across European industries and public institutions.⁽³¹⁾

More recently, cooperation has advanced on the physical infrastructure required to support this expansion. In August 2026, the European Commission approved the Eni–Khazna Data Centers joint venture, clearing the way for a partnership targeting up to 1 GW of IT capacity in Italy.⁽³²⁾ Its first major project is a 500 MW AI Data Centre Campus in Lombardy, combining Eni’s energy infrastructure with Khazna’s hyperscale expertise. The initiative embeds UAE investment within Italy’s rapidly expanding strategic data-centre ecosystem and links computing capacity directly with energy infrastructure and data sovereignty. The partnership therefore increasingly connects Gulf investment with European priorities around computing capacity, energy infrastructure and data sovereignty.

Energy is increasingly part of the same equation. AI data centres require large and reliable electricity supplies, linking digital infrastructure to renewable generation, grids and energy security. This convergence is particularly relevant to Europe–Gulf cooperation because Gulf states combine investment capital and rapidly expanding computing ambitions with growing renewable-energy portfolios, while European companies possess expertise in grid management, industrial efficiency and advanced energy systems.

Germany’s expanding technology relationship with Saudi Arabia illustrates this connection. Riyadh’s AI ambitions are increasingly tied to the development of large-scale data-centre capacity and the energy infrastructure required to sustain it. The Kingdom’s Public Investment Fund-owned AI company Humain aims to develop 1.9 gigawatts of computing capacity by 2030, with longer-term ambitions reaching 6 GW.⁽³³⁾ Germany and Saudi Arabia have consequently expanded discussions around digitalisation alongside renewable energy, green hydrogen and industrial transformation, areas where German technological capabilities complement Saudi investment and infrastructure ambitions.⁽³⁴⁾ Rather than treating AI as a standalone sector, the emerging relationship increasingly connects computing capacity with the industrial and energy systems required to support it.

Figure 4 - AI Factories in the European Union



Source: EU Perspectives, 10 October 2025, <https://euperspectives.eu/2025/10/eu-ai-factories-inside-brussels-bet-on-sovereignty/>

30. Mark Forker, “UAE deepens ties with France on AI,” Arabian Business, June 2026, 20, <https://www.arabianbusiness.com/business/technology/uae-france-ai-startups>

31. Elvira Pollina, “UAE partners with Italian startup for AI supercomputer,” Reuters, May 2025, 16, <https://www.reuters.com/world/middle-east/italy-uae-announce-deal-artificial-intelligence-hub-2025-05-16/>

32. Gianluca Brazzioli, “Data centres: EU gives the green light to the Eni–Khazna joint venture. Lombardy hub set to accelerate,” Il Sole24Ore, August 2026, 10, <https://en.ilssole24ore.com/art/data-centre-eu-gives-green-light-to-eni-khazna-joint-venture-lombardy-hub-to-be-accelerated-AI-27c7>

33. “Saudi Arabia’s Data Center Capacity, Measured: 467MW Live Against a 1.5GW National Target,” Saudi Vision 2030, July 2026, 31, <https://vision2030.ai/analysis/saudi-data-centre-capacity-megawatts/>

34. Federal Ministry of Economic Affairs and Energy, “Saudi–German Energy Partnership,” <https://energiepartnerschaften.org/partner/saudi-german-energy-dialogue/>

Artificial intelligence is also exposing the vulnerabilities accompanying the Gulf's technological ambitions. The UAE, Saudi Arabia and Qatar collectively plan several gigawatts of AI-related computing capacity, positioning the region among the world's emerging centres for advanced digital infrastructure.^[5] Yet the 2026 Iran war demonstrated that data centres and cloud infrastructure are increasingly strategic assets. Disruptions during the conflict highlighted the importance of energy security, geographic redundancy and resilient computing capacity, encouraging Gulf states to diversify their digital infrastructure beyond their own territory.

The UAE has already moved in this direction through projects such as G42's Condor Galaxy infrastructure in India.⁽³⁵⁾ Europe offers another potential destination for this diversification. For Gulf investors, European projects provide access to geographically distributed computing infrastructure, advanced research ecosystems and stable regulatory environments. Europe has complementary incentives: expanding AI capacity requires substantial investment, while European governments are simultaneously seeking to strengthen domestic computing infrastructure and reduce technological dependencies. Gulf sovereign funds and technology companies can provide capital at scale, while European partners contribute industrial capabilities, research institutions, regulation and access to a large market.

This complementarity increasingly intersects with the wider debate over technological sovereignty. Advanced semiconductors, foundation models and cloud architectures remain concentrated among a limited number of predominantly American companies. Gulf states have sought greater autonomy while maintaining links with both Western and Chinese technology ecosystems, but access to the most advanced chips remains shaped by export controls and geopolitical alignment. US authorisations for advanced Nvidia processors to reach the UAE and Saudi Arabia illustrate how Gulf AI strategies remain dependent on external technological decisions despite their considerable financial resources.⁽³⁶⁾

Europe faces a related challenge. Technological sovereignty increasingly requires access to the entire AI stack – semiconductors, compute, energy, data, connectivity and skills. Europe–GCC cooperation can therefore extend beyond investment towards building more resilient technological ecosystems. France–UAE and Italy–UAE initiatives already combine several elements of this infrastructure, while Saudi partnerships increasingly connect AI with energy and industrial transformation.

At the interregional level, these bilateral developments complement the EU–GCC Dialogue on Economic Diversification, which already addresses digital transformation and advanced industries.⁽³⁷⁾ Future EU–GCC engagement could increasingly incorporate secure infrastructure, standards, AI governance and technological resilience. Europe and the Gulf approach these issues from different starting points, but their interests are converging: Europe needs investment and computing capacity, while Gulf states seek expertise, geographic diversification and greater technological autonomy. AI could therefore become an increasingly important pillar connecting Europe's industrial strategy with the Gulf's economic transformation.

35. Neesha Salian, "G42, Indian govt formalise framework for deployment of AI supercomputer," Gulf Business, May 2026, 16, <https://gulfbusiness.com/en/2026/tech/g42-indian-govt-formalise-framework-for-deployment-of-ai-supercomputer/>

36. Karen Freifeld, "US makes it easier to export Nvidia AI chips and military equipment to the UAE," Reuters, July 2026, 10, <https://www.reuters.com/world/middle-east/us-makes-it-easier-export-certain-military-items-ai-chips-commercial-satellites-2026-07-10/>

37. European Union External Action, "The EU–GCC Dialogue on Economic Diversification Project," https://www.eeas.europa.eu/eeas/EUintheGCC_en



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