

Three principles to guide European-Gulf defense cooperation

Jean-Loup Samaan | September 2026

Bottom lines up front

- Defense cooperation should prioritize unmanned systems and early-warning capabilities
- European and Gulf companies should plan to co-produce in a partnership, not a client-provider model
- Individual states and companies should start collaborating now without waiting for regional multilateral organizations to strike a deal

Overview

In May 2026, senior leaders from across Europe and the Gulf convened in Greece for the inaugural Europe Gulf Forum, hosted by Antenna Group in partnership with the Atlantic Council. The meeting came at a moment when the Iran war's consequences transformed a longstanding partnership of convenience between the regions into one of strategic necessity.

Atlantic Council experts translated the insights from the gathering into policy briefs on four actionable tracks: (1) defense and technology, (2) energy and resources, (3) trade and connectivity, and (4) investment. The following policy brief identifies key opportunities for collaboration that the Europe Gulf Forum will continue to advance.

Though defense has always been part of the agenda between Europe and the Gulf (particularly at the bilateral level), the evolving security environment in both regions provides impetus for greater cooperation. In the past five years, both European and Gulf governments have witnessed major conflicts on their territories or in their vicinity. The Ukraine-Russia war starting in 2022 and the US-Israel-Iran conflict in 2026 have challenged long-entrenched assumptions about Europe or the Gulf's ability to avoid military escalation. In both cases, local governments faced a new way of war that integrated the latest technologies on the battlefield, be it artificial intelligence or unmanned systems. This has had dramatic consequences for the defense of European and Gulf territories: **Russian drones have flown far beyond Ukrainian borders** and threatened Germany, Denmark, the Netherlands, France and the United Kingdom. Meanwhile, Iran **fired thousands of its drones on Gulf capital cities**, damaging infrastructure and disrupting local aviation.

At the same time, Europe and the Gulf share a common aspiration toward strategic autonomy—meaning the ability to rely on their own capabilities to project power—that should elevate the defense industry as a key sector for their cooperation in the coming years. This aspiration should not be mistaken for a desire by the Gulf to substitute Europe for the United States, which remains a vital security guarantor and arms supplier for both regions. Rather, it points toward diversification and shared capability-building alongside that relationship.

Against that backdrop, defense cooperation should be pragmatic and driven by shared operational needs, such as co-developing unmanned systems or early-warning capabilities. Pragmatism explains why Gulf states are also deepening ties **with South Korea** or initiating new ones with **Ukraine** on air defense and unmanned systems: Europe is one node in a wider diversification strategy, not its sole beneficiary, and Europe's defense industry should calibrate its ambitions accordingly.

Background

A balanced partnership between European and Gulf defense industries implies the contribution of both sides at all steps of the process (design, development, production). This would follow a regional trend that **emerged in the 2010s**. For the past decade, Gulf states such as the United Arab Emirates (UAE), Saudi Arabia, and Qatar have revised their procurement policies to deepen their reliance on state-backed defense companies such as **EDGE** in Abu Dhabi, **SAMI** in Riyadh, and Barzan Holdings in Doha. If, for a long time, European industries acted as mere providers of military systems and platforms to their Gulf clients, over the last decade and a half the relationship has evolved into a new partnership. As strengthening local defense companies became a prominent goal of government strategies like **Saudi Vision 2030** or **Abu Dhabi Economic Vision 2030**, European companies had to adapt and engage with their Gulf counterparts on a more equal basis to support Emirati or Saudi industrial ambitions. This often took the form of joint ventures involving knowledge-transfer clauses. For instance, Abu Dhabi Ship Building (ADSB) initially relied on the **French shipyard Constructions Mécaniques de Normandie** to build its Baynunah-class corvettes. Eventually, ADSB built on that partnership to become an exporter in its own right, selling corvettes to **Angola** and **missile boats to Kuwait**.

This new dynamic in European-Gulf defense-industrial ties is evident in numerous projects: EDGE in the UAE is forming a **joint venture** with Italy's defense and aerospace giant Leonardo, to deliver advanced sensors, radars, combat-management systems, and airborne electronics. The UK announced it would refocus its defense cooperation with Gulf states on **joint drone development and advanced military technologies**. France is also rumored to **be in discussions with the UAE** to co-develop its future fighter jet following the recent collapse of efforts to build one with Germany.

Artificial intelligence could also represent a new domain of Europe-Gulf cooperation. So far, European countries lag behind the US and China in developing AI companies. The most promising Europe-based AI company, **Mistral**, may be growing fast, but its valuation is a tiny fraction of that of American giants like OpenAI or Anthropic. Meanwhile, Gulf states like the UAE and Saudi Arabia have made AI a priority of their investment strategies, both at home and abroad. For instance, in 2025, Abu Dhabi committed **more than \$30 billion to building data centers in France**. The combination of Gulf capital and the European engineering ecosystem could be mutually beneficial, and it could have direct military applications.

AI and other defense-related innovations could foster a new chapter in the Europe-Gulf partnership. The political incentives are obvious: Both European and Gulf governments see such initiatives as a means of strengthening their strategic autonomy. But this process should be carefully managed: An expanded defense-industrial partnership between Europe and the Gulf should not be about replacing the US. If political officials entertain this narrative, it risks creating unnecessary friction.

Gulf states do not see Europe as an alternative to their partnership with the US but rather as a complementary partner that can help them diversify their supply chains without creating the type of tensions that cooperation

with Russia or China would inevitably trigger with Washington. Moreover, the majority of European governments remain reluctant to portray their engagement with Middle Eastern states in opposition to the US. The US will also remain a key partner to Gulf states because of its lead over Europe in many aspects of defense innovation.

Recommendations

From that perspective, three principles ought to guide Gulf and European policymakers in deepening their defense partnership:

- **The needs of national armed forces should dictate priorities**, rather than the pace of the EU or the Gulf Cooperation Council. Multilateral frameworks can still build long-term diplomatic momentum, but bilateral programs driven by operational needs should be free to advance in parallel rather than depend on institutional consensus. Failing to allow both tracks to move at their own speed risks losing the industrial momentum currently underway.
- **Co-production should be a defining principle of the defense partnership**. In the new security environment, European and Gulf defense companies have both the ambition and the means to pursue a balanced partnership. Failing to acknowledge this new reality could derail cooperation.
- **Unmanned systems and early-warning capabilities should be the operational priority**. The record so far of Europe-Gulf joint ventures in the defense-industrial sector points to a partnership built on niche capabilities rather than advanced platforms like frigates or aircraft. This does not mean the partnership is of secondary importance. The wars in Ukraine and Iran show that the future of security in Europe and the Gulf will be shaped by the ability of local armed forces to produce and use unmanned systems and to operate efficient air defense. In those domains, European and Gulf governments have already forged strong ties that helped both sides meet their diversification goals. The task now is to ensure those joint industrial projects serve the national security interests of both European and Gulf states.

About the author

Jean-Loup Samaan is a nonresident senior fellow with the Atlantic Council's Scowcroft Middle East Security Initiative.

About the Europe Gulf Forum

Launched in September 2025, the Europe Gulf Forum is a platform bringing together the highest level of political and business leadership in Europe and the Gulf to advance greater strategic and economic engagement between the two regions.

EuropeGulfForum.com





Europe
Gulf
Forum

ANTENNA
GROUP



Atlantic Council