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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.

The opening months of 2026 have confirmed that Europe–Gulf relations are entering a more structured and multidimensional phase. No longer confined to energy trade or episodic investment announcements, the relationship is increasingly shaped by three intersecting vectors: technological infrastructure, geostrategic engagement beyond the immediate neighbourhood, and institutionalised political coordination.

Artificial intelligence and data infrastructure have emerged as a central axis of economic diplomacy, with Gulf capital flowing into hyperscale compute, digital corridors and industrial AI ecosystems across Europe. At the same time, both sides are reframing their engagement with Africa—not as a theatre of rivalry, but as a shared strategic space connecting Mediterranean logistics, Gulf finance and continental development agendas. Parallel to these economic and geoeconomic shifts, high-level diplomacy between European capitals and Gulf states has intensified, reinforcing stability narratives and embedding sectoral cooperation within structured political frameworks.

This edition of the Nexus examines three pillars of this evolving relationship. First, the AI and data infrastructure nexus as a driver of strategic interdependence. Second, Africa as the emerging third pillar of Europe–Gulf engagement. Third, the political infrastructure—presidential diplomacy, corridor envoys and defence-industrial alignment—that stabilises and enables these developments.

Together, these strands suggest that early 2026 may mark a transition from transactional engagement toward a more structured and institutionalised Europe–Gulf partnership.

Chapter 1 – AI, Data, and Strategic Capital: How the Gulf Is Reshaping Europe’s Technology Partnerships

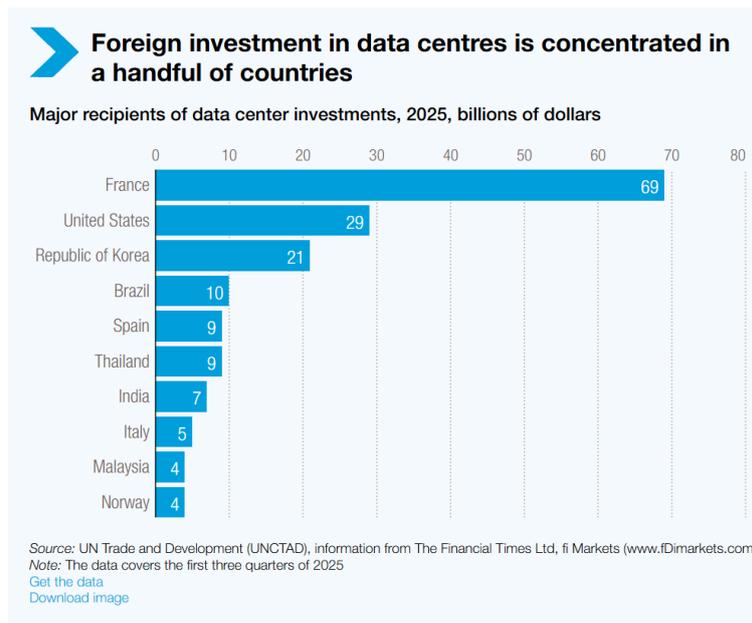
Artificial intelligence (AI) has rapidly emerged as a defining axis of Europe–Gulf economic engagement, with Gulf capital increasingly targeting data infrastructure, compute capacity and AI-enabled industries across Europe. Gulf actors are moving beyond portfolio investment toward strategic positioning inside Europe’s digital ecosystem: hyperscale data centres, energy-backed compute and upstream enablers — including chip access — that determine who can scale frontier models.¹ In 2025, UN Trade and Development (UNCTAD) reported that greenfield investment in data centres surpassed \$270 billion — more than one-fifth of global investment projects — underscoring how compute infrastructure has become a first-order geoeconomic variable rather than a niche technology trend.²

Figure 1 - Major recipients of data center investments, 2025 (USD billions)

¹ Kelsey Warner, “AI changes shape of foreign investment flows,” Semafor Gulf, January 2026, 27

https://www.semafor.com/article/01/27/2026/ai-changes-shape-of-foreign-investment-flows?utm_source=chatgpt.com

² UN Trade and Development (UNCTAD), “Data centres are reshaping the global investment landscape,” January 2026, 22
<https://unctad.org/news/data-centres-are-reshaping-global-investment-landscape>



Sources: UN Trade and Development (UNCTAD), Financial Times Ltd, fDi Markets (www.fDimarkets.com).<https://unctad.org/news/data-centres-are-reshaping-global-investment-landscape>

This infrastructure turn explains the rise of “AI diplomacy” in Gulf–Europe high-level forums. The World Governments Summit in Dubai (3–5 February 2026), which gathered more than 35 heads of state and over 500 ministers, highlighted growing European–Gulf convergence around AI governance and digital transformation. UAE Minister of State for Artificial Intelligence Omar Al Olama framed AI as a governance and institutional reform challenge, while strong European participation signalled that AI cooperation is increasingly regulatory as well as financial.³

Davos 2026 further clarified the political economy of compute. Gulf-linked actors prioritised “hard” AI assets — land, power capacity and megawatt-scale data centres.⁴ Dubai-based DAMAC secured approximately \$12 billion in land and power capacity for AI-oriented data centres in the United States, as part of a broader \$20 billion investment ambition, illustrating how Gulf capital reads the AI race through infrastructure bottlenecks.⁵ During the same Davos window, Saudi Arabia’s AI company Humain — owned by the Public Investment Fund (PIF) — announced a financing agreement of up to \$1.2 billion with the National Infrastructure Fund (NIF) to support up to 250 megawatts of AI data-centre capacity, signalling Riyadh’s attempt to lock in domestic compute as a foundation for industrial AI and digital services.⁶ Meanwhile, Abu Dhabi’s G42 indicated that advanced chips and the first phase of its Stargate data-centre campus were expected to be delivered imminently.⁷

³ “Europe and Gulf countries strengthen ties at World Governments Summit in Dubai,” Euronews, February 2026, 4 <https://www.euronews.com/2026/02/04/europe-and-gulf-countries-strengthen-ties-at-world-governments-summit-in-dubai>

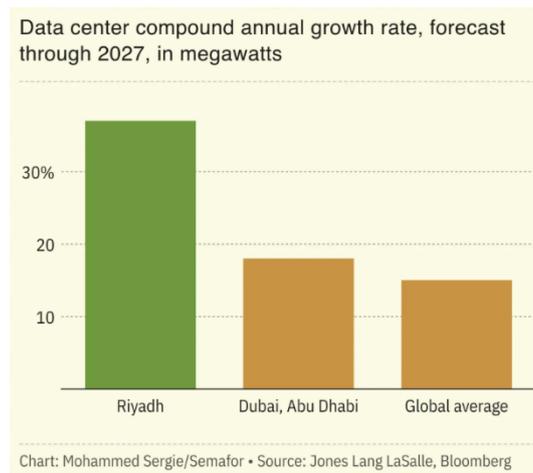
⁴ Kelsey Warner, “AI dominates Gulf deals in Davos,” Semafor Gulf, January 2026, 23 <https://www.semafor.com/article/01/23/2026/ai-dominates-gulf-deals-in-davos>

⁵ “Damac Secures \$12B U.S. AI Data Center Capacity,” Tribe Teachie, January 2026, 22 <https://tribeteachie.com/damac-secures-12b-capacity-for-us-ai-data-centers/>

⁶ “Saudi’s Humain secures up to \$1.2 bln to expand AI infrastructure,” Reuters, January 2026, 21 <https://www.reuters.com/world/middle-east/saudis-humain-secures-up-12-bln-expand-ai-infrastructure-2026-01-21/>

⁷ Charlotte Trueman, “G42 CEO says company will receive first AI chip shipments “within months” to support initial 200MW of capacity for planned Stargate cluster,” DataCenter Dynamics (DCD), News, January 2026, 21 <https://www.datacenterdynamics.com/en/news/g42-ceo-says-company-will-receive-first-ai-chip-shipments-within-months-to-support-initial-200mw-of-capacity-for-planned-stargate-cluster/>

Figure 2 – Data center compound annual growth rate, forecast through 2027 (MW)



Sources: Semafor; Jones Lang LaSalle, Bloomberg <https://www.semafor.com/article/01/23/2026/ai-dominates-gulf-deals-in-davos>

For Europe, this creates a dual opportunity-and-risk dynamic. Gulf capital can accelerate the physical layer of AI sovereignty — compute capacity, power-backed infrastructure and long-horizon financing. Yet dependence risks persist, as advanced semiconductors remain subject to US-led export controls. The key question is not whether Europe should engage the Gulf, but how to ensure European regulatory frameworks — data governance, safety, accountability and strategic autonomy — shape the architecture of AI cooperation.

Within Europe, France currently represents the most structured example of how Gulf capital is being integrated into a sovereign AI strategy. The agreement to develop a 1.4-gigawatt AI campus near Paris — backed by Emirati investment — illustrates a model in which foreign capital supports hyperscale infrastructure while governance remains firmly anchored within EU regulatory standards.⁸ Paris has simultaneously reinforced its domestic digital autonomy, including the decision to phase out non-European videoconferencing platforms across public administration by 2027.⁹ Rather than simply attracting Gulf investment, France is embedding it within a state-led industrial and regulatory framework aligned with European AI governance ambitions.

Italy's trajectory differs in scale but is strategically significant in structure. In early 2026, the \$1 billion "Colosseum" supercomputer project — originally backed in May 2025 — was reconfirmed as part of Italy's effort to position itself as a Mediterranean AI hub. The partnership between Abu Dhabi-based G42 and Italian AI firm iGenius, expected to be developed over five years, will operate under Italian and EU law while leveraging Gulf capital and US-manufactured advanced chips.¹⁰ Italian Industry Minister Adolfo Urso framed the initiative as a step toward strengthening Europe's technological sovereignty, linking regulatory oversight with external capital mobilisation.¹¹ Parallel discussions between Rome and Abu Dhabi have outlined the

⁸ Natalia El Hajj, "Gulf Builds the Servers. Washington Supplies Chips. What's Left for Brussels?," Inside Telecom, February 2026, 12

<https://insidetelecom.com/gulf-capital-will-support-sovereign-ai-in-europe-strategy/>

⁹ Pascale Davies, "France to ditch US platforms Microsoft Teams, Zoom for 'sovereign platform' citing security concerns," Euronews, January 2026, 27

<https://www.euronews.com/next/2026/01/27/france-to-ditch-us-platforms-microsoft-teams-zoom-for-sovereign-platform-amid-security-con>

¹⁰ Laura Cavestri, "Italy-Emirati: G42- iGenius agreement on AI supercomputer," IISole24Ore, May 2025, 16

<https://en.ilsole24ore.com/art/italy-emirates-agreement-g42-igenius-supercomputer-l-ai-AH2KOLn>

¹¹ "Italy shortlisted to host one of the EU's first strategic hubs for critical raw materials," Decode39, February 2026, 4 <https://decode39.com/13352/italy-shortlisted-to-host-one-of-the-eus-first-strategic-hubs-for-critical-raw-materials/>

contours of what Italian officials describe as an “intelligent corridor,” connecting European legal frameworks with the Gulf’s energy-backed compute capacity.¹²

The broader geopolitical dimension of this shift became clearer at the beginning of 2026, when Qatar and the UAE joined the US-led Pax Silica initiative — a coalition including Japan, Israel, Singapore and the United Kingdom aimed at reducing strategic dependencies in semiconductors, energy and data infrastructure.¹³ For Europe, this development complicates the sovereignty debate: while Gulf-backed infrastructure may operate on European soil, access to frontier semiconductors remains shaped by US geopolitical approval.

Concrete institutionalisation of this agenda is beginning to take shape. On 2 February 2026, a high-level seminar in Doha titled “Gulf, Nordic, and Europe – the New Strategic Partnership for Human Capital and Digital-Driven Future Economies” was co-organised by the EU Delegation to Qatar, the embassies of Finland and Sweden, UNESCO’s regional office and the European External Action Service. The meeting explicitly focused on digital transformation, artificial intelligence, education and green skills. The presence of four former European Commissioners — Margrethe Vestager, Jutta Urpilainen, Kadri Simson and Ylva Johansson — signalled that the AI dossier is no longer confined to bilateral investment channels but is increasingly embedded within EU-level strategic engagement with the Gulf.¹⁴

As 2026 unfolds, Europe–Gulf AI cooperation will hinge less on headline investments and more on whether regulatory alignment and institutional coordination can keep pace with technological deployment. What is emerging is not simply a capital-driven story, but a contest over governance and control of critical infrastructure. The AI nexus thus becomes a test case for a broader Europe–Gulf convergence, where infrastructure, sovereignty and geopolitical alignment increasingly intersect.

Chapter 2 – Africa as the Third Pillar: How Europe and the Gulf Are Reframing Their Strategic Engagement with the Continent

Africa is increasingly emerging as the third structural pillar of the evolving Europe–Gulf nexus. What was once characterised by fragmented bilateral initiatives is gradually being reframed into a more coordinated engagement model centred on connectivity, energy, logistics and human capital. Rather than competing spheres of influence, recent developments suggest a cautious convergence between European and Gulf approaches — driven by shared concerns over stability, supply chains, migration management and energy transition.

The World Governments Summit 2026 in Dubai provided a high-level snapshot of this shift, as it featured Africa-focused sessions that moved beyond traditional development rhetoric toward institutional reform, digital transformation and governance capacity. African leaders emphasised sovereignty, demographic advantage and industrialisation, while European and Gulf interlocutors framed Africa as a structural partner in global growth, connectivity and energy security. The emphasis was not on aid flows, but on infrastructure, regulatory alignment and long-term capital mobilisation.¹⁵

¹² Confindustria, “Italian officials describe as an “intelligent corridor,” connecting European legal frameworks with the Gulf’s energy-backed compute capacity,” *Comuniqué*, February 2025, 24 https://www.confindustria.it/en/press_communications/italy-united-arab-emirates-confindustria-strategic-partnership-on-innovation-and-sustainability-space-for-investment/

¹³ Nikola Zukalová, “AI Geopolitics in the Gulf: why Europe is at a Strategic Crossroads,” *L’Europeista*, February 2026, 9 <https://www.leuropeista.it/en/ai-geopolitics-in-the-gulf-why-europe-is-at-a-strategic-crossroads/>

¹⁴ “EU pushes deeper Gulf partnership on AI, education, green skills,” *The Brussels Times Newsroom*, February 2026, 2 <https://www.brusselstimes.com/1949537/eu-pushes-deeper-gulf-partnership-on-ai-education-green-skills>

¹⁵ “From Dialogue to Deals: What the 2026 World Government Summit means for Africa’s rise and Ghana’s strategic positioning,” *Investment Times*, February 2026, 16 <https://investmenttimesonline.com/2026/02/16/from-dialogue-to-deals-what-the-2026-world-government-summit-means-for-africas-rise-and-ghanas-strategic-positioning/>

The UAE's expanding footprint illustrates the scale of Gulf engagement. At the 39th African Union Summit in Addis Ababa in February 2026, Emirati officials confirmed that the UAE has committed more than \$110 billion in investments across Africa since 2019 — the highest level by any single country in that period. More than \$70 billion has been directed toward energy, green and renewable sectors. As reported by *The National* on 14 February 2026, the Emirates is expanding its diplomatic and economic presence through logistics infrastructure, renewable energy and digital services, including a \$1 billion commitment to expand AI infrastructure and AI-enabled services across Africa.¹⁶

Beyond renewables, DP World is expanding port operations, including a \$1 billion upgrade of Dar es Salaam port in Tanzania,¹⁷ while AD Ports has committed \$380 million over 20 years to modernise Luanda's multipurpose terminal in Angola.¹⁸ Nine Comprehensive Economic Partnership Agreements (CEPAs) signed with African countries — including Nigeria, Kenya and Angola — extend into digital trade, services and investment protection, signalling regulatory depth rather than transactional engagement.

However, Gulf engagement in Africa is no longer primarily Emirati. Saudi Arabia has significantly intensified its Africa strategy in early 2026, particularly along the Red Sea and East African corridor. In January 2026, Saudi-backed discussions on Red Sea maritime and port connectivity were revived within the framework of the Council of Arab and African States (CAAS),¹⁹ linking infrastructure investment with maritime governance and port connectivity agendas. Riyadh's outward-facing Vision 2030 agenda increasingly integrates Africa into its food-security, resources and logistics calculus. The Saudi Fund for Development has expanded financing for water, electricity and rural infrastructure projects across Sub-Saharan Africa, while Saudi-based ACWA Power continues renewable projects in countries such as Senegal, Egypt and South Africa.²⁰ This axis underscores Riyadh's attempt to couple economic investment with strategic maritime depth, positioning Saudi Arabia not only as a capital exporter but as a regional stabiliser across the Afro-Arab interface.

Qatar, for its part, has adopted a more selective but strategically targeted approach. Through the Qatar Investment Authority (QIA) and development partnerships, Doha has increased its engagement in logistics, agriculture and digital infrastructure across East and West Africa. In November 2025, Doha announced a \$1 billion commitment to expand AI infrastructure and AI-enabled services across Africa, framing digital capacity-building as part of long-term development alignment. Qatar's diplomatic mediation track in parts of the Horn of Africa complements this economic presence, reinforcing its profile as both investor and interlocutor.²¹ Taken together, Gulf engagement in Africa increasingly blends energy transition, logistics infrastructure, digital systems and human capital — embedding the continent into broader geoeconomic strategies linking the Gulf to Europe and Asia. Crucially, Gulf actors are presenting their engagement as

¹⁶ Vanessa Ghanem, "UAE deepens Africa investment push with focus on renewables and logistics," *The National News*, February, 2026, 14

<https://www.thenationalnews.com/news/uae/2026/02/14/uae-deepens-africa-investment-push-with-focus-on-renewables-and-logistics/>

¹⁷ "A Strategic Partnership transforming Dar es Salaam Port into an East African Powerhouse," *The East African, News*, November 2024, 24

<https://www.theeastafrican.co.ke/tea/partner-content/dp-world-strategic-partnership-dar-es-salaam-port-4840782/>

¹⁸ Gareth Havelock, "AD Ports Group breaks ground on new terminal at Angola's Luanda Port," *Baird Maritime*, September 2025, 22

<https://www.bairdmaritime.com/shipping/ports/ad-ports-group-breaks-ground-on-new-terminal-at-angolas-luanda-port/>

¹⁹ Viola Fahmy, "Arab-African alliance announced in Riyadh," *Anadolu Ajansı*, June 2020, 1

<https://www.aa.com.tr/en/middle-east/arab-african-alliance-announced-in-riyadh/1694211/>

²⁰ "ACWA Power Signs Landmark Agreements with Senegal Government for West Africa's Largest Seawater Desalination Project Powered by Renewable Energy," ACWA Power, Press Release, <https://acwapower.com/en/media-center/latest-news/acwa-power-signs-landmark-agreements-with-senegal-government-for-west-africas-largest-seawater-desalination-project-powered-by-renewable-energy/>

²¹ Nellie Peyton, "UAE announces \$1 billion initiative to expand AI in Africa," *Reuters*, November 2025, 22

<https://www.reuters.com/world/middle-east/uae-announces-1-billion-initiative-expand-ai-africa-2025-11-22/>

partnership-driven and employment-oriented, explicitly linking infrastructure investment to employment creation and long-term resilience objectives.

Europe's recalibration is unfolding in parallel, though through a different institutional architecture. Italy's decision to host the second Italy–Africa Summit in Addis Ababa on 13 February 2026 — aligned with the African Union Summit — marked a symbolic and structural shift. Holding the Summit on African soil, and on the eve of the AU Assembly, signalled a move away from Europe-centric diplomacy toward institutional alignment with African governance structures²².

Anchored in the Mattei Plan, Italy is positioning itself as a facilitator of structured, long-term partnerships focused on energy, infrastructure, water management, agriculture, health and education. Prime Minister Giorgia Meloni framed the Mattei Plan as “a pact among free nations,” distancing it from paternalistic development models.²³ According to reporting by AGI (16 February 2026), in 2025 alone Italy mobilised more than €1.3 billion through the Africa Fund and the Italian Climate Fund, expanding priority partner countries from nine to fourteen.²⁴

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/>

Flagship initiatives discussed in Addis Ababa included support for the Lobito Corridor — a strategic logistics axis linking Angola, Zambia and the Democratic Republic of Congo — as well as renewable interconnections, vocational training programmes and debt-suspension mechanisms for climate-affected countries. As detailed in the Prime Minister's full address, Rome has increasingly embedded the Mattei Plan within cooperation with the African Union, the European Union, the G7 and international financial institutions.²⁵

France and Germany reinforce the European dimension through sector-specific engagement. France continues to integrate renewable cooperation and industrial partnerships across North and West Africa

²² “Italy to host second Italy–Africa Summit in Ethiopia on Feb. 13,” Decode 39, January 2026, 27 <https://decode39.com/13265/italy-to-host-second-italy-africa-summit-in-ethiopia-on-feb-13/>

²³ Filippo Simonelli, “The Mattei Plan after the Addis Ababa Italy–Africa Summit,” IAI, Commentary, February 2026, 16 <https://www.iai.it/en/publications/c05/mattei-plan-after-addis-ababa-italy-africa-summit>

²⁴ “Meloni ad Addis Abeba Rilancia il Piano Mattei e Rafforza l'Italia-Africa,” AGI, February 2026, 16 <https://www.agi.it/politica/news/2026-02-16/meloni-addis-abeba-piano-mattei-italia-africa-25101232/>

²⁵ “PM Meloni in Addis Ababa: “A New Partnership of Equals between Italy and Africa,” Decode 39, February 2026, 13 <https://decode39.com/13512/pm-meloni-in-addis-ababa-a-new-partnership-of-equals-between-italy-and-africa/>

within its broader European strategic autonomy framework. Germany has intensified hydrogen partnerships and vocational training systems linked to green transition objectives, aligning them with the EU's Global Gateway strategy. The Global Gateway framework — which aims to mobilise up to €300 billion globally by 2027 for infrastructure, digital and energy projects — increasingly positions Africa as a core theatre of European external economic policy.²⁶ At EU level, Africa engagement is progressively embedded within supply-chain resilience, digital connectivity and energy security debates. This overlap with Gulf interests — particularly in ports, renewables and data infrastructure — is becoming structurally visible, even where coordination remains informal.

The Addis Ababa Summit further reinforced this institutional dimension. The AU declared 2026 the International Year of Water and Sustainable Sanitation within Agenda 2063, underscoring Africa's intention to shape regulatory and governance pathways in water, energy and infrastructure.²⁷ European and Gulf actors increasingly operate within these AU-defined priorities, indicating a shift toward multilateral alignment rather than purely transactional deal-making.

Taken together, recent summits in Dubai and Addis Ababa suggest that Africa is no longer treated as an external theatre of competition between Europe and the Gulf, but as a shared strategic space where infrastructure, energy, water, education and governance agendas intersect.

The consolidation of initiatives such as the UAE's renewable and logistics investments and Italy's Mattei Plan points toward a shift from fragmented projects to more coordinated engagement. Whether this Europe–Gulf–Africa triangle matures into genuine coordination will depend on sustained institutional follow-through and African agency.

Chapter 3 – The Mattarella Signal: Diplomacy, Stability, and the Political Infrastructure of Europe–Gulf Convergence

If AI infrastructure and Africa engagement represent the economic and geostrategic layers of the evolving Europe–Gulf nexus, high-level diplomacy increasingly provides its stabilising political architecture. In early 2026, a dense sequence of institutional exchanges between Italy and several Gulf states signalled that Europe–Gulf convergence is no longer driven solely by sectoral cooperation in energy, technology or trade, but is being consolidated through structured political alignment.

President Sergio Mattarella's January 2026 visit to the United Arab Emirates set the tone for this recalibration. Framed around stability, dialogue and long-term predictability at a time of wider regional volatility and elevated strategic uncertainty, the visit underscored the growing political depth of Italy's relations with the Gulf.²⁸ Discussions extended beyond economic engagement to encompass geopolitical coordination, technological partnership and cultural diplomacy — the latter functioning as what Italian officials increasingly describe as an "invisible infrastructure" underpinning economic and strategic ties.²⁹

The timing of the visit was significant. It coincided with renewed momentum in EU–UAE trade discussions and broader reflections within Brussels on upgrading relations with the Gulf into more institutionalised frameworks. In this context, Italy's presidential diplomacy complemented EU-level engagement, reinforcing

²⁶ European Commission, "Global Gateway," Overview, https://international-partnerships.ec.europa.eu/policies/global-gateway/global-gateway-overview_en

²⁷ African Union, "A Call to Action for Safe Water and Sanitation to drive," Press Release, February 2026, 14 <https://au.int/en/pressreleases/20260214/au-theme-year-2026-call-action-safe-water-and-sanitation>

²⁸ "Italy's Mattarella heads to UAE as ties deepen," Decode 39, January 2026, 27 <https://decode39.com/13250/italys-mattarella-heads-to-uae-as-ties-deepen/>

²⁹ "UAE President receives Italian President during state visit to UAE," Emirates News Agency – WAM, January 2026, 28 <https://www.wam.ae/en/article/bygetv5-uae-president-receives-italian-president-during>

a narrative in which the Gulf is positioned not merely as a market or investor, but as a long-term strategic partner within Europe's neighbourhood strategy.³⁰ This narrative was reinforced when by the statement made at the 2026 World Government Summit by the Secretary General of the GCC, H.E. Jasem Mohamed Albudaiwi, that GCC – EU economic relations are shifting toward building integrated, long-term joint value chains. On 17 February 2026, Italy's Special Envoy for the India–Middle East–Europe Corridor (IMEC), Ambassador Francesco Maria Talò, concluded a mission to Saudi Arabia aimed at operationalising the Corridor's energy, digital and logistical dimensions. Meetings with Saudi ministries of Energy, Infrastructure and Communications, alongside representatives of the Gulf Cooperation Council and the King Abdullah Petroleum Studies and Research Center (KAPSARC), confirmed Riyadh's interest in integrating Euro-Mediterranean and Indo-Pacific value chains through IMEC.³¹ Italy positioned itself as a natural European landing point of the Corridor, leveraging its port network, multimodal connectivity and industrial base. The announcement of a dedicated IMEC-focused meeting in Trieste on 17 March — chaired by Foreign Minister Antonio Tajani — illustrated how corridor diplomacy is being translated into structured political coordination.

Defence diplomacy reinforced this trajectory. In February 2026, Italian Defence Minister Guido Crosetto travelled to Riyadh for the World Defence Show (WDS) 2026, engaging Saudi counterparts on localisation, industrial cooperation and long-term defence-industrial alignment within Saudi Vision 2030.³²

These agreements extend beyond commercial success. They signal deepening strategic trust, long-term interoperability and the embedding of Italian industry within Saudi Arabia's defence modernisation and localisation agenda. In this sense, WDS 2026 did not merely showcase platforms; it reinforced the defence-industrial pillar of Italy–Saudi relations as part of a broader Europe–Gulf political convergence.

A further layer of consolidation emerged at the Munich Security Conference 2026, where Foreign Minister Tajani met his Kuwaiti counterpart, Sheikh Jarrah Jaber Al Ahmad Al Sabah. Tajani expressed Italy's readiness to host the first bilateral Strategic Dialogue between Rome and Kuwait and signalled cooperation on a future Kuwaiti investment forum in Italy.³³ The meeting reaffirmed appreciation for Kuwait's balanced regional posture — particularly on regional de-escalation and dialogue tracks — and underscored growing collaboration in economic and defence domains, including Italy's contingent of approximately 300 military personnel deployed in Kuwait under the anti-Daesh coalition. The Munich exchange illustrates how multilateral security platforms are increasingly used to deepen structured Gulf–European engagement beyond headline summits.

Oman has also emerged as a reinforcing node within this political infrastructure. In early 2026, Prime Minister Giorgia Meloni travelled to Muscat, where bilateral talks focused on strengthening economic coordination and translating political dialogue into structured commercial frameworks. During the visit, Muscat and Rome signalled a deepening of economic cooperation, with Omani–Italian trade exceeding €400 million and both sides committing to expand collaboration in logistics, energy transition, advanced manufacturing and investment mechanisms.³⁴ Prime Minister Meloni's visit reinforced Italy's Gulf-wide strategy and strengthened Italy's credibility as a sustained regional stakeholder. Less than a month after her visit — on 8th

³⁰ "Mattarella in the Emirates, Italy focuses on the Persian Gulf," *IlSole24Ore*, January 2026, 27
<https://en.ilsole24ore.com/art/mattarella-emirates-italy-targets-persian-gulf-AIY6jY4>

³¹ "The Italian envoy for IMEC Talò's mission to Riyadh has come to an end," ANSA News Agency, February 2026, 17
https://www.ansa.it/amp/english/news/news_from_embassies/2026/02/17/the-italian-envoy-for-imec-talos-mission-to-riyadh-has-come_58716e3d-01a8-4510-946d-a4189ccef61.html

³² Italian Ministry of Defence, "Official Visit of Minister Crosetto to Saudi Arabia," Press Release, February 2026, 10,
<https://www.difesa.it/eng/primo-piano/official-visit-of-minister-crosetto-to-saudi-arabia/88524.html>

³³ "Kuwait FM meets Italian counterpart on MSC sidelines," Kuwait News Agency (KUNA), February 2026, 14
<https://www.kuna.net.kw/ArticleDetails.aspx?id=3274920&Language=en>

³⁴ "Oman, Italy open new chapter in economic cooperation," GCC Business News, January 2026, 14
[https://www.gccbusinessnews.com/oman-italy-boost-economic-cooperation/#:~:text=Omani%2DItalian%2Orelations%2Ohave%2Oentered,million%20\(RO%20150.7%20million\).](https://www.gccbusinessnews.com/oman-italy-boost-economic-cooperation/#:~:text=Omani%2DItalian%2Orelations%2Ohave%2Oentered,million%20(RO%20150.7%20million).)

February 2026 – the Oman-Italy Business Forum was held in Muscat. At the forum, business stakeholders from both countries explored ways to expand economic and investment cooperation. The overall strategic aim was to integrate Italian technologies and firms into major infrastructure projects, including mobility and rail, as part of Oman’s Vision 2040.

Importantly, this diplomatic intensification has not been unilateral. Throughout 2025 and into early 2026, senior Gulf leaders and ministerial delegations have equally reinforced their institutional engagement with Italy. Abu Dhabi’s Department of Economic Development led a high-level delegation to Italy, culminating in the Abu Dhabi Investment Forum in Milan on 22 Jan 2026. The initiative frames Italy as a priority European economic partner and targets collaboration in high-growth sectors including advanced manufacturing, technology-driven industries, and energy transition industry. These and other reciprocal exchanges — complemented by sovereign fund delegations and sector-specific missions — indicate that Europe–Gulf convergence is increasingly sustained through continuous executive-level coordination rather than episodic summit diplomacy.

The broader regional environment further reinforces the rationale behind this diplomatic activism. The first months of 2026 have further underlined the strategic importance of infrastructure protection, route redundancy and supply-chain resilience for both Gulf and European actors. European partners, mindful of their structural exposure to logistics and energy shocks, have increasingly sought to anchor connectivity initiatives such as IMEC within stable political and institutional frameworks. In this context, ports, hydrogen corridors and digital connectivity are treated as strategic assets requiring sustained policy coordination.

In this sense, the “Mattarella signal” is less about a single visit and more about the consolidation of a layered diplomatic posture. Political engagement at presidential, ministerial and envoy level de-risks private-sector investment, aligns regulatory expectations and anchors economic cooperation within stable institutional channels. Italy’s approach — linking Mediterranean logistics, Indo-Pacific connectivity and Gulf partnerships — positions Rome as a structural hinge within Europe’s engagement with the region.

As 2026 unfolds, the durability of Europe–Gulf convergence will depend not only on capital flows or infrastructure projects, but on whether this political infrastructure matures into predictable and institutionalised frameworks. The sequence of engagements across the UAE, Saudi Arabia and Kuwait illustrates a shift from episodic diplomacy to sustained coordination. Political signalling, in this context, is not ornamental — it underpins investment, connectivity and security cooperation.

If AI represents the technological layer and Africa the geostrategic extension of Europe–Gulf engagement, diplomatic coordination forms its stabilising backbone. Together, these dimensions point to a more institutionalised and multidimensional partnership taking shape in early 2026.