

Policy Report

Special Series

Imagining Deepened GCC-EU Relations

No. 1

02/26

From Vision 2030 to Zeitenwende

A blueprint for Saudi-German security cooperation

Faris Almaari and Daniel Sidique

Introduction

In March 2025, the European Commission and the EU High Representative released a white paper on *European Defence – Readiness 2030*, highlighting Europe's need to strengthen military capabilities from conventional forces to emerging technologies such as AI and quantum computing.¹ That same month, the German Bundestag passed a law to exempt defence spending from the country's notorious 'debt brake', thus supporting Europe's push for greater self-reliance in security matters and advancing Berlin's foreign-policy *Zeitenwende*.² Nine years into its Vision 2030, meanwhile, Saudi Arabia continues to modernise and expand its defence industrial base and military capabilities, focusing on training, personnel, localisation, and technology development. These efforts are mirrored across the Gulf Cooperation Council (GCC) to varying degrees.³ For instance, the United Arab Emirates are investing in modern weapons technologies, expanding their air- and missile-defence systems, and localising production through joint ventures with international partners.⁴ These trends show that GCC countries and Germany – long a pillar of reluctance vis-à-vis armament in the middle of the European Union (EU) – are moving in parallel to enhance defence capabilities and pursue international partnerships in this field. Yet, despite these shared ambitions, a central puzzle remains: Why have the GCC's defence ties with Germany and Europe not deepened more quickly and with greater regularity?

With the second EU-GCC summit set for Riyadh in 2026, both blocs have an opportunity to deepen defence and security cooperation beyond basic coordination, and Germany and Saudi Arabia can lead the way. Writing for KAS about "Germany and Saudi Arabia's Strategic Outlook in a Multipolar World", von Felbert and Ali (2024) offer a valuable reference for understanding the current state of Saudi-German ties.⁵ In today's multipolar world, where shifting U.S. priorities mean Washington is no longer the sole global hegemon, middle powers with advanced technological capabilities now have greater space to lead. Saudi Arabia and Germany are Tech Middle Powers (TMP): both share an orientation toward technological innovation and seek to build technological autonomy. Accordingly, natural potentials for partnership between the two countries exist in the defence and security space. These prospects are heightened by Berlin and Riyadh's shared commitment to peace and prosperity, as highlighted in the joint statement issued at the conclusion of the first summit between the leaders of EU and GCC countries held in Brussels in 2024.⁶ This commitment is rooted in Saudi Arabia's and Germany's common status as middle powers with a vested interest in upholding a rules-based international order.⁷

Deepened Saudi-German defence cooperation is in the interest of both countries. For Germany, closer ties with Saudi Arabia not only open access to a dynamic and expanding market for its defence industry, but also offer an opportunity to address the persistent challenge of being perceived as lacking hard power in its neighbourhood. Berlin would accomplish the latter through such a partnership by virtue of demonstrating greater strategic reliability through sustained defence commitments, participating more visibly in capability-building initiatives in the Gulf, and signalling its willingness to match its normative agenda with tangible security contributions. For Saudi Arabia, partnership with Germany brings access to advanced technology and expertise, supports the diversification and localisation of its defence sector under Vision 2030, and strengthens its strategic autonomy by diversifying its supplier base across countries and blocs – a typical behaviour of TMPs. Saudi Arabia under King Salman and Germany under its new, Christian Democratic Union (CDU)-led government share a conservative, pragmatic outlook to international relations and a mutual imperative to stabilise their respective regions. Institutionalising defence cooperation would therefore allow them to pool complementary strengths and respond more effectively to emerging security challenges. This policy paper outlines concrete steps for Saudi Arabia and Germany to deepen their defence cooperation. In doing so, the two countries can offer a blueprint for strengthening EU–GCC relations in security and defence, demonstrating how targeted bilateral initiatives can inspire more ambitious frameworks at the regional level.

Background

The October 2024 EU–GCC Summit joint statement emphasised regional security and cooperation but did not explore deeper defence cooperation in research and development, technology, and personnel. This leaves room for a more ambitious dialogue on aligning EU and GCC defence objectives.

Saudi Arabia and Germany have a history of defence cooperation, including in multinational security operations, arms sales such as Eurofighter Typhoons and patrol boats, and a discontinued training programme for Saudi Border Guards.⁸ However, these relations have been repeatedly disrupted by German concerns over human rights, particularly linked to Saudi involvement in the war in Yemen, prompting measures such as the 2018 arms export ban, in addition to blocking or delaying deals, including for Leopard tanks, additional Eurofighters, and some naval systems.⁹ While Berlin recently resumed limited exports, such as 150 IRIS-T missiles for the Saudi Eurofighter fleet, these recurring setbacks underscore how domestic political pressures in Germany and differing priorities between the countries have prevented the predictability needed for deeper, long-term cooperation.¹⁰

Despite these challenges, Saudi leaders have sought to insulate broader relations from disagreements over defence and human-rights policy. In 2017, then-Deputy Minister of Economy and current Royal Court Advisor Mohammed Al Tuwajri stated that Germany's export ban would not affect Saudi Arabia's pursuit of wider cooperation with Berlin, underscoring Riyadh's prioritisation of its economic relationship with Germany.¹¹ Now, as both countries increasingly align on the need for stronger, diversified partnerships in a changing global order, an opportunity exists to codify and institutionalise defence cooperation, whether in armament or related fields. Building these institutional links will be key to creating a more stable, aligned partnership moving forward.

Recommendations

A resilient, future-oriented Saudi–German defence partnership that institutionalises cooperation would serve the interests of both countries. This partnership should not only be robust against political fluctuations, but also serve as a blueprint for broader EU–GCC integration in security and defence,

demonstrating how strengthened bilateral cooperation can catalyse regional progress, akin to the idea of differentiated integration in the EU.¹² This vision is not limited to one sector but spans armament, emerging technologies, space, and education, each serving as a pillar for a more robust and future-proof partnership.

Space and Technology

The European Space Agency and the Arab Space Cooperation Group

A unified vision for Saudi-German and broader EU-GCC cooperation in space and technology should focus on building resilient, dual-use capabilities that address shared security, economic, and scientific challenges. Deeper collaboration between the European Space Agency (ESA) and the Arab Space Cooperation Group is not only symbolic, but strategically vital: space technologies underpin climate monitoring, disaster response, and secure communications, and are increasingly essential for defence – enabling intelligence, surveillance, and early warning systems.¹³ By pooling ESA's advanced technical and project-management expertise with the Arab Group's regional integration and rapid innovation, both sides can enhance their strategic autonomy and resilience in an era of global uncertainty.¹⁴ To operationalise this vision, practical cooperation could involve establishing a joint coordination office or working group with partners such as ESA, the German Aerospace Centre (DLR), the UAE Space Agency, and Saudi Arabia's King Abdulaziz City for Science and Technology (KACST). Regular institutional exchanges – like annual conferences, technical workshops, and joint research centres – would ensure that initiatives are robust, politically anchored, and aligned with both regions' strategic goals, providing a unified blueprint for future-oriented security and technology cooperation between Europe and the Gulf.

Horizon Europe associated countries

Building on the previous recommendation to leverage space cooperation as a driver for broader EU-GCC engagement, the 2026 EU-GCC Summit presents a timely opportunity to elevate Saudi Arabia's status to that of an associated country under Horizon Europe, the EU's flagship research and innovation programme. The EU offers Horizon Europe membership to certain countries that are geographically close or aligned in values and goals.¹⁵ In this context, the EU has begun to recognise the value of pragmatic ties with GCC states, given shared interests in regional security, similar ecological priorities such as decarbonisation and climate-change adaptation, and appreciation for domestic socioeconomic transformations occurring across the Arabian Peninsula. Elevating Saudi Arabia to associated-country status under Horizon Europe would open the door to full participation in cutting-edge research, technology, and defence projects across the EU. This step is not only about scientific exchange; it is the foundation for dual-use innovation, allowing Saudi and German institutions to co-fund, lead, and scale up joint initiatives in fields directly relevant to both civilian and defence needs. The networks and trust built through Horizon Europe participation would directly feed into more advanced industrial and operational cooperation, while also aligning both countries with EU-wide standards and best practices. Joining Horizon Europe before its expiry in 2027 would position Saudi Arabia to participate in its larger successor, Framework Programme 10 (FP10), upon its launch in 2028.¹⁶

Armament and Defence Cooperation

Armament

A future-oriented defence procurement framework between Saudi Arabia and Germany would insulate cooperation from short-term political fluctuations, addressing the recurring challenge of export pauses and policy uncertainty. Ideally, this would take the form of a strategic partnership that legally safeguards the integrity of bilateral defence contracts. As a stepping stone, Germany could link armament deals to shared, goal-specific priorities – such as chemical and biological weapons defence and air defence – anchoring them in measurable objectives and institutional support to ensure contractual continuity, regardless of political shifts. Such a framework would give Saudi Arabia the reliability needed for long-term capability planning and make German defence supplies more attractive, while providing German industry with demand certainty for investment and innovation. The institutional trust and predictability fostered here are essential prerequisites for deeper collaboration on complex, next-generation systems, and would ensure that research and innovation outcomes from Horizon Europe can translate into tangible industrial projects.

Collaboration on next-generation combat systems

Saudi Arabia strongly desires to join next-generation aircraft development programmes and has been negotiating to join the UK-led Global Combat Air Programme (GCAP), with a strong emphasis on localisation.¹⁷ Germany, together with France and Spain, is part of a similar, trilateral Future Combat Air System (FCAS) programme, which aims to develop a next-generation fighter jet along with associated unmanned and missile systems. While full membership in FCAS may prove difficult, given that such multinational programmes are often riddled with contention in their early stages, a practical stepping stone for Saudi-German ties would be to build smaller bilateral partnerships on systems development with Saudi institutions such as KACST and Saudi Arabian Military Industries (SAMI).¹⁸ Over time, this could facilitate Saudi participation in larger and more advanced next-generation systems programmes. For instance, a medium-term objective in this regard could constitute Saudi involvement in the German-led Main Ground Combat System (MGCS) programme, which focuses on building the future main battle tank.¹⁹ Targeted bilateral projects can leverage the dual-use technologies and institutional trust developed through Horizon Europe and contract frameworks. These projects would drive both sides' technological advancement and industrial growth, in addition to demonstrating practical pathways for operational interoperability and capability sharing, further reinforcing the bilateral and EU-GCC security architecture.

Conclusion

The coming decade will be decisive for both Saudi-German relations and the broader trajectory of EU-GCC cooperation. As both regions seek to secure their roles as relevant technological and security actors in a rapidly changing international order, they must move beyond ad hoc collaboration toward a truly institutionalised partnership. The vision outlined in this brief is for a resilient, future-oriented alliance that leverages complementary strengths across armament, emerging technologies, and science diplomacy. By connecting space and technology cooperation, Horizon Europe association, and stable

defence contract frameworks, Saudi Arabia and Germany can build mutual trust, drive dual-use innovation, and translate research into real operational capabilities – even amid political fluctuations.

This unified approach not only addresses persistent gaps in mutual understanding and recurring policy setbacks, but also offers a scalable blueprint for deeper EU–GCC integration in security and defence. If implemented, these interlocking pillars will enable both regions to respond more effectively to shared challenges, maintain their strategic autonomy, and set new standards for multilateral cooperation in an era of global uncertainty. In doing so, the Saudi–German partnership can catalyse a more ambitious, future-proof EU–GCC security architecture, anchoring stability, innovation, and prosperity on both sides.

Endnotes

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Contact

Philipp Dienstbier
Director
Regional Programme Gulf States
European and International Cooperation
philipp.dienstbier@kas.de

Imprint

Published by Konrad-Adenauer-Stiftung, 2025,
Berlin, Federal Republic of Germany

This publication was published with financial support of
the Federal Republic of Germany.

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