

GEOPOLITICAL ANALYSIS | FINAL EDITION | 3 APRIL 2026

Earthquake Change in International Security

Epicentre Kyiv

How Symmetrical Policies and Acts by Presidents Trump and Putin are forcing Ukraine, the EU, the Gulf States and China into a convergence of defensive interests none of them sought

3 April 2026 | Three original network diagrams | Complete agreement tables | Full source list (53 sources)

BREAKING CONTEXT — 27 MARCH 2026: THE INSULT THAT WILL NOT BE FORGOTTEN

At the Future Investment Initiative summit in Miami — hosted on Saudi money, in front of Saudi officials — US President Donald Trump publicly stated about Saudi Crown Prince Mohammed bin Salman: "He didn't think he'd be kissing my a**... now he has to be nice to me." The quote is verified by White House video (Snopes, 31 Mar 2026). MBS has not responded publicly. He never will — in public. But insults of this magnitude, delivered on Saudi-funded stages, are not forgotten. They are filed. And they are eventually acted upon.

An earthquake does not ask permission. The simultaneous conduct of two illegal wars — Russia's invasion of Ukraine and the Israel-induced US campaign against Iran — has produced a rupture in international security whose epicentre is Kyiv. The three network diagrams that follow this introduction map the concrete reality that has emerged from that rupture: Ukraine's confirmed defence agreements with Gulf states, its integration into the EU defence-industrial base, and the financial flows connecting EU funding, Ukrainian capability and Gulf defence spending income through Germany as the pivotal facilitator.

→ **Diagram:** The three diagrams on the following pages provide the complete visual architecture of the network described throughout this document. *Graph I maps Ukraine's agreements with all seven Gulf states by status. Graph II maps Ukraine's agreements with EU member states and the EDIP framework. Graph III maps all funding and income flows with Germany at the centre of the exchange corridor.*

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PROLOGUE — THE INSULT AND ITS LONG SHADOW

Prologue: The Insult That Will Not Be Forgotten

On 27 March 2026, at the Future Investment Initiative Priority summit in Miami — a Saudi-funded event, attended by Saudi officials — US President Donald Trump spoke publicly about Crown Prince Mohammed bin Salman. The passage is verified by Snopes using the White House's own YouTube recording:

*"A short time ago... he looked at me and he said, "You know, it's amazing, one year ago, you were a dead country. Now, you're the hottest country anywhere in the world." He didn't think this was going to happen. He didn't think he'd be kissing my a**. He really didn't. He thought it'd be just another American president that was a loser... but now he has to be nice to me. You tell him he better be nice to me."*

SOURCE: White House YouTube video, FII Priority Summit Miami, 27 Mar 2026. Verified: Snopes/Yahoo News, 31 Mar 2026. Reported by The Aviationist, House of Saud, Media Review Network, Defence Security Asia

Saudi Response: Silence as Protocol, Not Acceptance

As of 3 April 2026, the Saudi Royal Court and Ministry of Foreign Affairs have issued no public statement. Saudi state media covered the summit without referencing the remarks. House of Saud: "This mirrors the Kingdom's standard protocol for managing provocations from essential security partners: no amplification, no confrontation, no official record of the slight." The insult becomes evidence for the case MBS has been making since 2016: Saudi Arabia must not be managed by foreign powers. Vision 2030, defence diversification, and strategic autonomy are strengthened, not weakened, by Trump's contempt.

SOURCE: House of Saud, "Trump Humiliates MBS at Saudi Investment Summit," 31 Mar 2026; Media Review Network, 2 Apr 2026

“ Indeed MBS said nothing publicly. He never will. Insults of this magnitude, delivered on Saudi-funded stages, are not forgotten. They are filed. And they are eventually acted upon — in the currency of sovereign decision-making.

— Analytical assessment

Twenty-four hours after the insult, Trump announced in the same speech the sale of 48 F-35A fighters to Saudi Arabia — valued at \$5.3–5.7 billion. House of Saud: "MBS did not buy a warplane. He bought the most expensive insurance policy in history — and the premium was paid in sovereignty, silence, and \$600 billion." The F-35's source code restriction, sustainment dependency and American software lock-in means Saudi Arabia will not have autonomous operational control for three decades. The order has not been formally placed; no congressional notification has been filed; no delivery before 2029 at earliest.

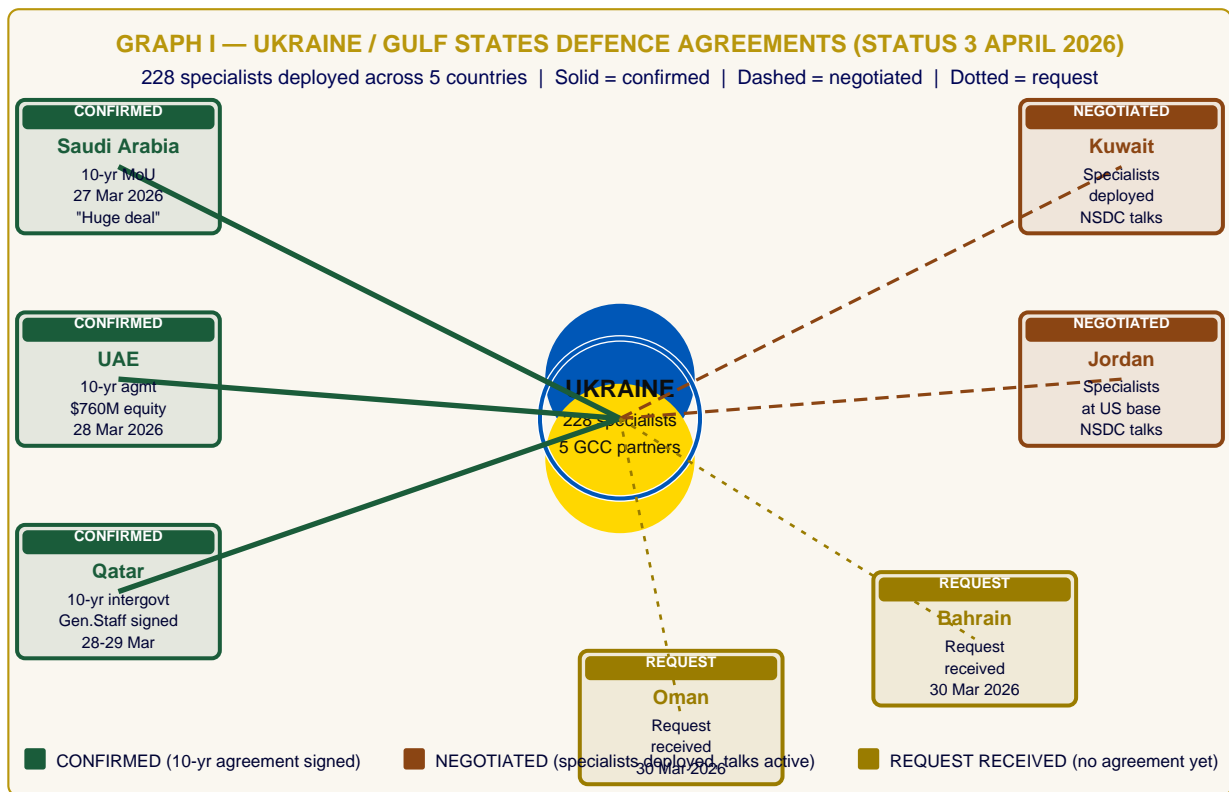
SOURCE: House of Saud, "Saudi F-35 Sale: MBS Bought an Insurance Policy," 31 Mar 2026; The Aviationist, 30 Mar 2026; CSIS, Feb 2026

“ Perhaps Dr Henry Kissinger is right after all: "It may be dangerous to be America's enemy, but to be America's friend may be fatal."

— cited by Media Review Network, 2 Apr 2026

DIAGRAM I — UKRAINE / GULF STATES AGREEMENT NETWORK

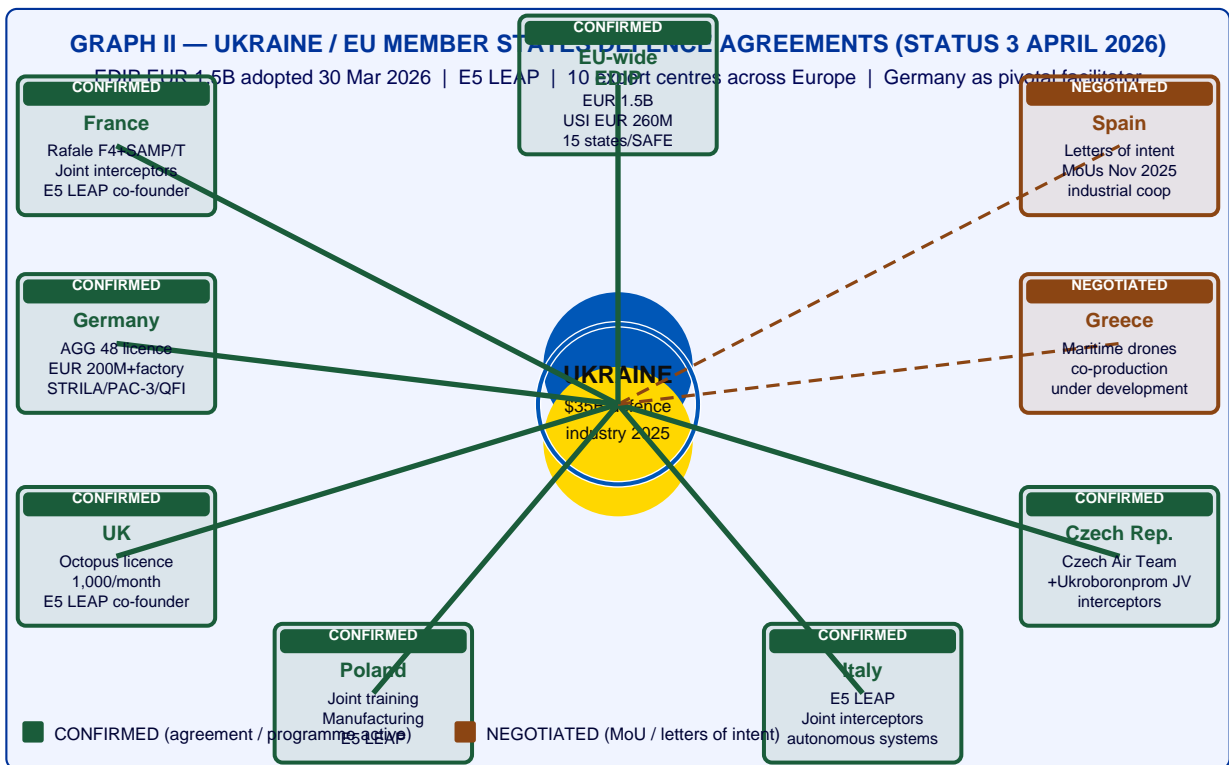
The diagram below maps Ukraine's defence agreements and deployments with all seven Gulf Cooperation Council states as of 3 April 2026. Solid lines indicate signed agreements; dashed lines indicate active negotiations or specialist deployments without a formal agreement; dotted lines indicate formal requests received. All seven GCC states are engaged at some level — a diplomatic outcome achieved in weeks, driven by the Iranian drone campaign and Trump's refusal to facilitate cooperation.



SOURCE: Al Jazeera (27-28 Mar); Defense News (20, 27 Mar); Kyiv Independent (27 Mar); Ukrainian Presidential Office (29-30 Mar); FDD (1 Apr); Aviation Week (31 Mar); Militaryni (29 Mar)

DIAGRAM II — UKRAINE / EU MEMBER STATES AGREEMENT NETWORK

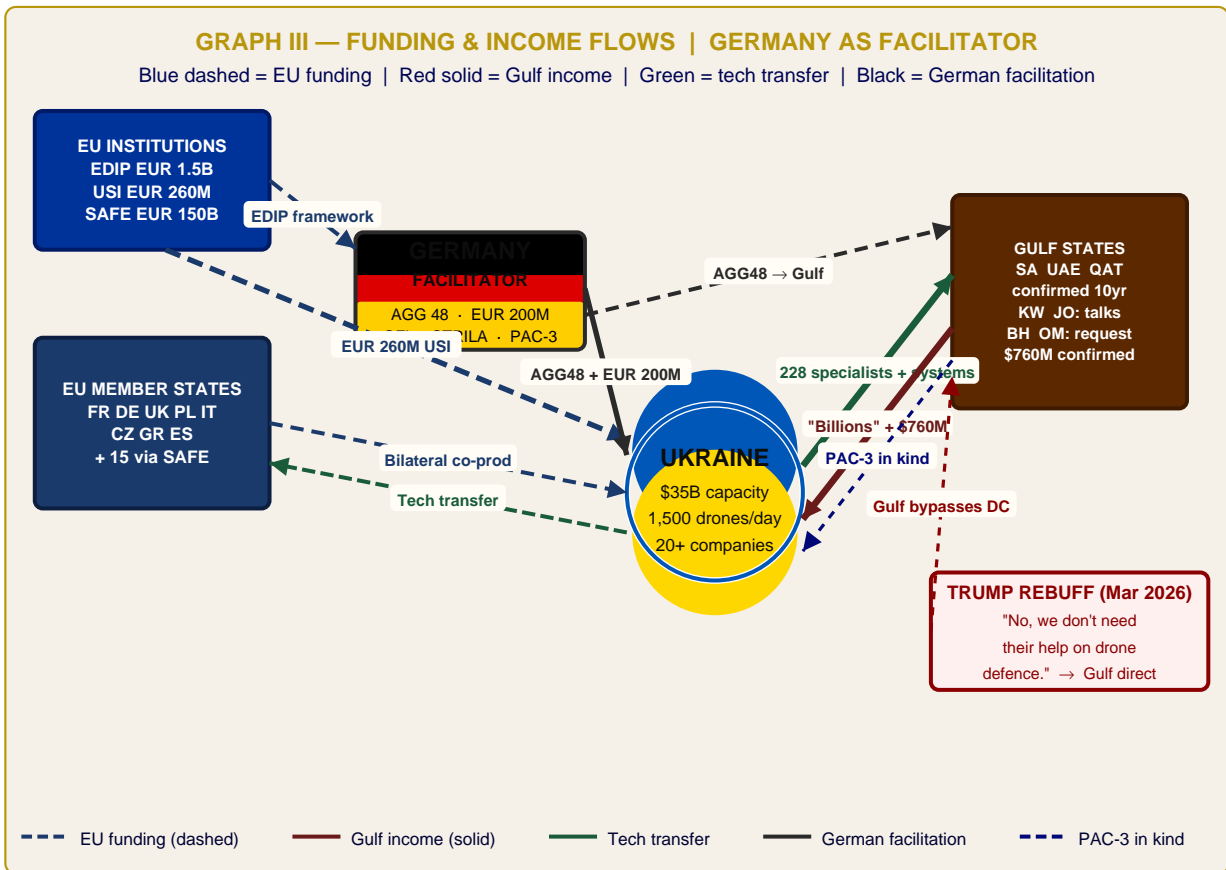
The diagram below maps Ukraine's bilateral and multilateral defence agreements with EU member states and the EU-wide EDIP framework as of 3 April 2026. Germany occupies a dual position: as a bilateral partner (AGG 48 licence, EUR 200M, QFI factory) and as the administrative facilitator whose export licensing instrument simultaneously covers both Ukraine and all six GCC states — making Berlin the pivotal node connecting both networks. France's inclusion is particularly significant: its Rafale aircraft are already operationally intercepting Iranian drones over the UAE, embedding France in the same defensive theatre as Ukraine's Gulf partners.



SOURCE: Jamestown Foundation (Dec 2025, Apr 2026); European Commission EDIP (30 Mar 2026); German Federal Ministry/BAFA (20 Mar); PBS NewsHour (20 Feb, 20 Mar); Ukrainian Presidential Office; RobotToday (31 Mar)

DIAGRAM III — FUNDING & INCOME FLOWS | GERMANY AS FACILITATOR

The diagram below maps all financial and capability flows connecting the EU, Germany, Ukraine and the Gulf states. Blue dashed arrows indicate EU funding flows. Red solid arrows indicate Gulf income flows returning to Ukraine. Green arrows indicate technology and capability transfer. Black arrows indicate German facilitation through the AGG 48 export licence corridor. The Trump rebuff box (red, lower right) shows how his refusal to facilitate drove Gulf states to contact Kyiv directly — creating the income flows shown. The self-reinforcing triangle (EU funding → Ukrainian capability → Gulf income → more capacity) is the structural outcome of two simultaneous strategic failures by Trump and Putin.



SOURCE: European Commission; German Federal Ministry; Kyiv Independent; Gulf International Forum; Militaryni; Army Recognition/FT; House of Saud; PBS NewsHour/Axios

PART I — THE ANALYTICAL FRAMEWORK

I.1 The Earthquake: Two Illegal Wars, One Unintended Consequence

The international security order of 2026 is being reshaped not by any potential victors of the two ongoing wars, but by their unintended consequences. Russia's full-scale invasion of Ukraine (February 2022) and the Israeli-US strikes on Iran beginning 28 February 2026 share structural characteristics: both are wars of choice by stronger powers against weaker opponents; both have failed primary objectives within assumed timelines; both have produced strategic environments directly contradicting the interests of their initiators. The epicentre of the rupture is Kyiv — the intersection of three converging requirements: the battle-tested capability the EU lacks and the Gulf urgently needs; the motivation of survival; and the diplomatic agility to execute agreements in days that other actors take years to negotiate. As Diagrams I, II and III above make visually explicit, this convergence has already materialised in concrete legal and commercial instruments.

I.2 Ukraine: Survival as Strategic Advantage

Ukraine's strategic position is paradoxical. The weakest actor in conventional terms, it is simultaneously the most capable in the decisive domain: mass interception of cheap drone attacks at sustainable cost. Four years of absorbing nearly 60,000 Shahed-type attacks produced what no NATO procurement programme could: hundreds of competing engineering firms, a \$35 billion defence industry, 1,500+ interceptors per day, and single-goal single-leadership diplomacy that produced three 10-year Gulf agreements in 48 hours. Diagram I shows the result: seven GCC states engaged, three confirmed, in weeks. No EU Member State could have replicated this.

I.3 The EU: Money Without Strategy

The EU brings capital at scale: EUR 1.5B EDIP, EUR 150B SAFE Fund, EUR 260M Ukraine Support Instrument, plus bilateral commitments from France, Germany, the UK and others — visible in Diagram II. But the EU brings structural weakness: multiple, politically distracted middle-power centres, common policies driven by incidents rather than initiative, and systematic obstruction by Russian-sponsored fifth columns in Hungary, Slovakia, Bulgaria and Romania — blocking sanctions, delaying aid, leaking deliberations. The EU-Ukraine partnership is structurally complementary: the EU supplies capital; Ukraine supplies strategic coherence and the motivation of existential necessity.

I.4 The GCC Under Attack: Mirror Image of Ukraine's War

The Iranian drone campaign against the six GCC states is operationally identical to the Russian campaign against Ukraine: same Shahed-136 platform, same mass-saturation doctrine, same requirement for cheap scalable interception. The political difference matters: the EU is not yet under direct attack; the GCC IS. Each GCC member is absorbing now what the EU must prepare to absorb. GCC defensive requirements are not analogous to EU requirements — they are structurally identical. Ukraine's solution serves both theatres simultaneously, as Diagram III shows: one flow network, two theatres, one connector.

I.5 The Convergence: Why Ukraine Became the Connector

Russia's offensive action in Europe and American offensive action in the Gulf are creating — against the designs of both — an immediate requirement for the GCC and the EU to share interests and solutions. In a larger setting this facilitated Prime Minister Starmer's successful 35-nation 'Free the Strait' summit with the EU and without the US. But in an immediate effectiveness setting this gave birth to the British defence-pivoting to the EU and the EU/Ukraine pivoting to the GCC. Germany's AGG 48 is the administrative hinge: one instrument covering both Ukraine and all six GCC states. The triangle shown in Diagram III — EU funding → Ukrainian capability → Gulf income — is self-reinforcing, and was created entirely by the strategic failures of Trump and Putin.

I.6 Trump and Putin: Parallel Failures

Putin's regime-change objective became a four-year attrition war. He has alienated Finland and Sweden into NATO, transformed European defence spending, and watched Gulf states he cultivated as mediators sign decade-long defence agreements with Kyiv. Trump's Iran campaign has depleted US Patriot stockpiles faster than production can replace them, exposed catastrophic cost-asymmetry in American air defence doctrine, forced Washington (after GCC did so) to seek Ukrainian assistance President Trump explicitly and publicly dismissed, and driven Gulf states to sign independent defence agreements without American involvement or blessing. And Trump has added a dimension Putin has not: he publicly humiliated the leader of his most important Gulf ally on that ally's own money. The "kissing my ass" remark is a data point in MBS's calculation about the reliability of the American insurer — and about the F-35 order as a long-term dependency.

“ Both Trump and Putin sought to demonstrate that military force by stronger powers compels weaker adversaries to submit. Both have demonstrated the opposite — while generating the very alliances they sought to prevent or break up.

I.7 The GCC-EU Strategic Relationship: A New Architecture

In 2025, for the first time in history, the GCC and the EU met at Heads of State level. The world's hydrocarbon wealth concentration and the world's most open consumer market are now being pushed, by simultaneous aggression, toward a structured security relationship they had not previously considered necessary. It is being built through Ukraine. GCC states signing 10-year defence agreements with Kyiv — funded partly by EU instruments and facilitated by German export licensing — are entering a security architecture connecting the world's most battle-tested defence innovation ecosystem with the world's largest peacetime economy. And MBS's silent processing of Trump's Miami insult adds a further dimension: the GCC's growing interest in European rather than American fighter aviation. France's Rafale already intercepts Iranian drones over the UAE. This connects the EU-Ukraine defence partnership to a possible GCC pivot toward European air power. This may not be coincidental. This may be structural.

I.8 China: The Adapting Power

China conducts deep commercial relationships with both the EU and the GCC. Beijing has the same problem with Trump — whose tariff war threatens the international trading order — and to a lesser extent with Putin. China is Iran's largest oil customer. An escalation of the Iran conflict to a level of totally illegal violence targeting civilian infrastructure or nuclear facilities would impose direct economic costs on China that Beijing did not choose. China will adapt. Its adaptation will be shaped by the scale of Trump's next decisions on Iran and by the pace at which the EU-GCC security convergence institutionalises. And soon there may be another critical element at play. China already delivered missile technology to Iran. It is whispered that North Korea may add nuclear elements. Israel is warned not by the chaotically working and Germany-dominated EU foreign policy: but implicitly by China. Israel's Samson nuclear doctrine may no longer be the only nuclear deterrent factor on the block. These are Israel/US/Russia-induced lessons of the treaty Ukraine accepted: to decommission its nuclear weapons in exchange for Russia's promise to never attack Ukraine. Lessons soon understood and acted on by the European Union as such.

I.9 The Symmetry of Interests: Gulf, EU, China

The convergence of interests between the Gulf states, the EU and China does not require shared ideology. It requires only recognition that unilateral military aggression by stronger powers against weaker ones poses an existential challenge to the international order that has made all three blocs prosperous. The GCC will not formally align against the US. But its Member States are already creating parallel defence capacities independent of American facilitation, such as the recently strengthened Saudi-Pakistani Defence Agreement (potentially including nuclear elements as well). This is the same strategic autonomy the EU is building through EDIP and E5 LEAP and possibly soon including the UK whose nuclear weapons are about to be part of a joint French/British nuclear deterrent as referred to by PM Starmer in his Munich address last month.

China is not expected to join any formal alignment. It has its own Shanghai Cooperation Organisation (SCO) which includes Russia, India and Pakistan. Saudi Arabia considers joining the SCO together with UAE, Qatar and Bahrain. Since 2023 these GCC states are already 'Dialogue Partners'. But China is expected to support the diplomatic and commercial infrastructure that sustains EU-GCC stability, because that infrastructure underwrites the energy markets and trade routes on which both China and the EU depend — and frankly the rest of the global economy. It will not take long before the Gulf states, the EU and China recognise their symmetry of interests — not as an alliance, but as a convergence of incentives that tends to produce more durable outcomes than alliances of convenience. Trump's Miami insult to MBS is, in this context, not an embarrassment. It is an encouragement and acceleration.

PART II — THE DOCUMENTED RECORD**II.1 Background and Context**

On 28 February 2026, the US and Israel launched Operation Epic Fury against Iran. Iran retaliated with a campaign of Shahed-type drones and ballistic missiles targeting all six GCC states, Israel and Jordan. More than 5,000 Iranian projectiles were fired at Gulf states in the first month (GCC Secretary-General). Gulf states burned through more than 800 Patriot interceptors in the first three days — more than Ukraine received from all allies across four years. Ukraine had been developing the cost-viable answer: interceptors at \$1,000–\$2,500/unit versus Patriot PAC-3 at \$4M–\$13.5M/unit, with 70–80% interception rates and 1,500–2,000 units produced per day by January 2026. Please see the author's contribution on LinkedIn of 1/2 April 2026 for further analysis.

SOURCE: House of Saud; Military Times, 11 Mar 2026; PBS NewsHour; Quwa; United24 Media; Defense News

SECTION II.2 — GULF AGREEMENTS BY COUNTRY**II.2 Gulf Theatre: Agreements by Country**

Full detail for each country follows. See also Diagram I (page 3) for the network view.

Saudi Arabia — CONFIRMED (10-year MoU, 27 March 2026)

Arrangement signed ahead of Zelenskyy-MBS meeting. Scope: drone interceptors, EW, maritime drones, software, co-production. Commercial track: initial interceptor contract via Saudi arms firm; "huge deal" under negotiation (Kyiv Independent, two anonymous industry sources); Aramco in direct talks with SkyFall and Wild Hornets for oil infrastructure protection.

SOURCE: Kyiv Independent (27 Mar, exclusive 10 Mar); Al Jazeera (27 Mar); Ukrainian Presidential Office

UAE — CONFIRMED (10-year agreement, 28 March 2026)

Ten-year framework covering interceptors, EW, maritime drones, software. UAE most drone-exposed GCC state: approximately 1,825 Iranian drones struck Emirati territory in the first month. 5,000 interceptors requested from TAF Industries. Edge Group (Emirati defence conglomerate) acquired 30% equity in Fire Point (Ukraine) for \$760M — the only publicly confirmed discrete monetary transaction in the entire Ukraine-Gulf relationship.

SOURCE: Ukrainian Presidential Office (29 Mar); Fortune; Al Jazeera; Gulf International Forum; Kyiv Independent

Qatar — CONFIRMED (10-year intergovernmental, 28-29 March 2026)

Signed by Chiefs of General Staff. Scope: joint defence industry, air defence, counter-drone, AI, C2, cybersecurity. 2,000 interceptors requested from TAF Industries. Mirage 2000-5EDA fleet (9 aircraft) reportedly discussed as barter.

SOURCE: Ukrainian Presidential Office; Al Jazeera; Fortune; Qatar Ministry of Defence; Gulf International Forum

Kuwait — NEGOTIATED; Jordan — NEGOTIATED

Specialists deployed to both. Jordan deployment includes specifically a US military base — placing Ukrainian advisers in direct cooperation with American forces even as Trump denied needing Ukraine's help. NSDC-level talks confirmed by Umerov (20 March 2026). No formal agreements signed as of 3 April.

SOURCE: [Defense News](#) (20 Mar); [DroneXL](#) (21 Mar); [Military.com](#); [PBS NewsHour](#)

Bahrain and Oman — REQUEST RECEIVED

Zelenskyy confirmed both requests on 30 March 2026, with NSDC Secretary Umerov conducting political-level negotiations in the region. FDD independently confirmed. Aviation Week confirmed Shahed attacks on Oman. No agreements signed.

SOURCE: [Ukraine Today/Ukrpravda](#) (30 Mar); [FDD](#) (1 Apr); [Aviation Week](#) (31 Mar)

Aggregate: Zelenskyy characterised three Gulf agreements (Saudi Arabia/UAE/Qatar) as "ten-year strategic contracts worth billions of dollars." Total publicly confirmed discrete monetary value: \$760M (UAE equity only).

SOURCE: [Militarnyi](#), 29 Mar 2026

SECTION II.3 — TRUMP'S DUAL REBUFF

II.3 Trump's Dual Rebuff: Drone Aid and Diplomatic Dignity

Rebuff 1: Drone Defence Assistance (8-13 March 2026)

Trump on Fox News Radio (13 Mar): "No, we don't need their help on drone defence... We know more about drones than anyone else." He described Zelenskyy as "the last person he'd ever ask for help." Gulf states then contacted Kyiv directly. Two US officials told Axios this was one of the administration's biggest tactical mistakes since strikes on Iran began. The US military subsequently began working with Ukrainian advisers at US bases in Jordan, while Trump publicly denied needing Ukraine's help.

SOURCE: [PBS NewsHour](#) (multiple, Mar 2026); [Kyiv Post/Axios](#)

Rebuff 2: The FII Miami Insult (27 March 2026)

Trump's "kissing my ass" remark about MBS, verified from White House video (Snopes, 31 Mar 2026). Saudi state media did not report it. MBS issued no response. On the same day, Saudi Arabia signed a 10-year defence agreement with Ukraine. The following day, Trump announced the F-35 sale. The juxtaposition — humiliation and dependency offer in the same speech — is the structural logic of the US-Saudi relationship laid bare. The Kissinger maxim applies precisely: "It may be dangerous to be America's enemy, but to be America's friend is fatal."

SOURCE: [Snopes/Yahoo News](#) (31 Mar); [House of Saud](#) (31 Mar); [Media Review Network](#) (2 Apr)

SECTION II.4 — THE COST EQUATION

II.4 The Cost Equation: Ukraine vs Patriot

System	Unit Cost	Target	Cost Ratio	Source
Patriot PAC-3 (older)	\$4M	Shahed \$20-50K	80-200x	Al Jazeera; Reuters
Patriot PAC-3 MSE	\$13.5M+	Shahed \$20-50K	270-675x	Quwa; Kyiv Post
Ukrainian Sting (Wild Hornets)	\$2,500	Shahed \$20-50K	0.05x	Military Times
Ukrainian SkyFall P1-SUN	\$1,000	Shahed \$20-50K	0.02x	Military Times
Ukrainian Merops (Schmidt)	\$15,000	Shahed \$20-50K	0.3x	European Leadership Network
Saudi 730 PAC-3 MSE FMS	\$9B total	730 units	\$12.3M/rnd	US State Dept FMS

Strategic implication: if Iran sustains 100 drone launches per day against Saudi Arabia and 80% are intercepted by Patriot systems, the daily interception cost exceeds \$960 million. Ukrainian interceptors restore cost parity. Combat performance: 70% of Shahed kills over Kyiv by interceptors (early 2026); 1,704 downed in January 2026; Wild Hornets Sting has destroyed 3,900+ drones; Merops achieved 95% hit rate.

SOURCE: House of Saud; Anadolu Agency; Ukrainian CinC Syrskiy; United24 Media; European Leadership Network

SECTION II.5 — EU-UKRAINE DEFENCE INTEGRATION

II.5 EU-Ukraine Defence Integration

EDIP (EUR 1.5B, adopted 30 March 2026): EUR 260M Ukraine Support Instrument directly to Ukraine DTIB; EUR 240M joint procurement; EUR 35.3M BraveTechEU for start-ups; EUR 100M FAST equity; EUR 325M EDPCI. For the first time, Ukraine is directly eligible to participate in an EU defence industrial programme. EDIP explicitly aims to integrate Ukraine's DTIB into the European DTIB. E5 LEAP (20 Feb 2026): France, Poland, Germany, UK, Italy jointly develop low-cost air defence systems using Ukrainian expertise.

SOURCE: European Commission (Cyprus) 30 Mar; RobotToday 31 Mar; PBS NewsHour/AP 20 Feb

SECTION II.6 — GERMANY AS FACILITATOR

II.6 Germany as Facilitator

AGG 48 General Licence (20 March 2026, valid to 15 September 2026) covers: Ukraine, Saudi Arabia, UAE, Qatar, Kuwait, Bahrain, Oman. No individual BAFA approval required per shipment. Companies register and report monthly. This single instrument connects the EU funding pipeline to the Gulf income stream — Germany is the administrative junction between both networks (see Diagram III, page 5). Additional: EUR 200M drone fund; QFI factory (Quantum Systems + Frontline Robotics); 15,000 STRILA interceptors; 35 PAC-3 sourced by Pistorius from European stockpiles.

SOURCE: German Federal Ministry of Economics; Ukrinform; RBC-Ukraine; Charter97; United24 Media

SECTION II.7 — FINANCIAL AND INCOME FLOWS

II.7 Financial and Income Flows (see also Diagram III, page 5)

A. EU Funding to Ukraine

Flow Direction	Type	Description	Approximate Value
EU → Ukraine (direct)	FUNDING	EUR 260M USI/EDIP for Ukraine DTIB rebuilding	EUR 260M (2026-27)
EU → states → Ukraine	FUNDING	EUR 240M joint procurement grants; bilateral co-production	EUR 240M pool
EU → Ukraine	Innovation	EUR 35.3M BraveTechEU for Ukrainian + EU defence start-ups	EUR 35.3M
EU → Ukraine	Equity	EUR 100M FAST fund for SMEs incl. Ukrainian firms	EUR 100M
Germany → Ukraine	Bilateral	EUR 200M drone fund; 15,000 STRILA; QFI factory; 35 PAC-3	EUR 200M+
France → Ukraine	Bilateral	Rafale F4 (100 ac.), SAMP/T, interceptor co-production	Undisclosed
UK → Ukraine	Licence	Octopus interceptor: 1,000/month UK production	Undisclosed
15 EU states → Ukraine	SAFE Fund	EUR 150B fund; 15 states flagged for Ukrainian defence industry	Share of EUR 150B

B. Gulf Income to Ukraine

Flow Direction	Type	Description	Approximate Value
UAE → Ukraine	Equity	Edge Group 30% stake in Fire Point	\$760M — CONFIRMED
Saudi Arabia → Ukraine	Initial contract	Saudi arms firm purchases interceptors via intermediary	Multi-million, undisclosed
Saudi Arabia → Ukraine	Aramco talks	Aramco negotiating with SkyFall and Wild Hornets	Multi-million, undisclosed
Saudi Arabia → Ukraine	Govt deal	"Huge deal" under negotiation (Kyiv Independent sources)	Undisclosed
UAE → Ukraine	Order	TAF Industries: UAE requests 5,000 interceptors	Indicative \$5–12.5M
Qatar → Ukraine	Interest + barter	TAF: Qatar requests 2,000 interceptors; Mirage 2000 barter	Indicative \$2–5M
3 Gulf states → Ukraine	Aggregate (Zelenskyy)	10-yr contracts Saudi Arabia/UAE/Qatar	"Billions of dollars"
Gulf → Ukraine	In-kind	PAC-3 Patriot missiles in exchange for interceptors	Under negotiation

SOURCE: Kyiv Independent; Gulf International Forum; Militarnyi; Army Recognition/FT; House of Saud

SECTION II.8 — THE F-35 PARADOX

II.8 The F-35 Paradox: Buying Dependency While Planning Exit

Trump announced the F-35 sale to Saudi Arabia (48 aircraft, \$5.3–5.7B) at the same FII Miami speech (27-28 Mar 2026) in which he humiliated MBS. The F-35 order has not been formally placed; no congressional notification issued; no delivery before 2029. Its software lock-in, sustainment dependency and source-code

restriction mean Saudi Arabia will not have autonomous operational control for three decades. CSIS noted the structural irony: an F-35 acquisition "would make the Saudis even more dependent on unpredictable foreign supply chains... at a time when their goal is the development of their own defence industry." The dependency is, as House of Saud observed, "the feature, not the bug" — from Washington's perspective. From Riyadh's, it is precisely the problem.

SOURCE: The Aviationist (30 Mar); Defence Security Asia (30 Mar); House of Saud (31 Mar); CSIS (Feb 2026)

SECTION II.9 — THE STRATEGIC EXIT: RAFALE, GRIPEN, EUROFIGHTER, GCAP

II.9 The Strategic Exit: European Alternatives

Platform	Supplier	Saudi Status	US Dependency	Key Advantage
Dassault Rafale F4/F5	France	54-aircraft negotiations confirmed (Dassault CEO Trappier, Dec 2023). Rafale intercepting Iranian drones over UAE since 4 Mar 2026.	Very low. Engine (Snecma M88), radar (Thales), EW (SPECTRA) — all French. No US veto.	Full sovereignty; combat-proven in Gulf NOW; no US export approval needed; nuclear-capable
Eurofighter Typhoon	UK/DE/IT/ES	Saudi operates 72. Follow-on 48 blocked by Germany (Khashoggi/Yemen). May soften post-AGG 48.	Low-moderate. Some Lockheed systems. Primarily European (MBDA weapons).	Known platform; existing RSAF training/logistics; Meteor/Storm Shadow
Saab Gripen E/F	Sweden	No confirmed Saudi talks. Discussed in EU rearmament context.	Moderate (~33% US parts incl. GE F414 engine). Requires US export approval for Saudi.	Lowest unit cost (\$60-70M); lowest ops cost; dispersed basing; strong EW
GCAP (6th gen)	UK/Italy/Japan	Saudi reportedly interested in funding/joining. Leapfrogs F-35 generation entirely.	Minimal — new programme, sovereignty-designed from outset.	6th-gen stealth; available 2035+; anchors Saudi-European long-term ties

SOURCE: The War Zone (Dec 2023); Jane's Defence (Apr 2024); Simple Flying (Aug 2024, Dec 2024); Shephard Media (Jan 2026); 19FortyFive (May 2025); Wikipedia/Dassault Rafale (Iran war interceptions over UAE)

The Rafale is the most immediately feasible alternative. France confirmed negotiations for 54 aircraft. Rafales have been operationally intercepting Iranian drones over the UAE since 4 March 2026. France is already embedded in the EU-Ukraine defence framework through E5 LEAP and the November 2025 Declaration of Intent on joint interceptor production. The strategic connection between the EU-Ukraine partnership and a potential Saudi pivot toward European aviation is not coincidental. The Gripen's GE engine dependency means Sweden would need US export approval — a leverage point Washington retains. The Rafale has no such vulnerability.

VERDICT: The F-35 order is not concluded. It is a presidential declaration without congressional notification, without a signed contract, and without delivery before 2029. MBS accepted because he needed the political signal during the Iran war. He will evaluate whether to finalise it in light of Trump's conduct — an insult delivered on Saudi-funded stages is never forgotten — and whether French, British and Swedish alternatives offer the sovereign defence industrial base Vision 2030 requires.

SECTION II.10 — DOES THE EU DE FACTO FUND GULF DEFENCE?

II.10 Does the EU De Facto Fund Gulf Defence? A First Assessment

The causal chain: EU funds Ukrainian production capacity and Germany's AGG 48 enables Gulf export of Ukrainian systems. Ukrainian systems deploy operationally across five GCC states. Gulf air defences become viable at scale against Iranian drones. Three qualifications: (1) EU funding targets Ukraine's war needs and European integration — the Gulf application is downstream. (2) Gulf states pay commercially. (3) The US remains primary guarantor through Patriot, THAAD, naval and AWACS assets.

The stronger formulation: the EU is funding the only cost-viable solution to the Gulf's drone problem — the capability the US cannot provide at required cost, and which Trump initially refused to facilitate. EU-backed Ukrainian technology is structurally indispensable to Gulf drone defence, not merely supplementary to it. EU defence spending — long criticised by Washington — has produced the battlefield innovation now rescuing US Gulf partners from the consequences of American overreliance on high-cost interceptors. The political irony is considerable. Trump's rebuff is its own verdict.

SECTION II.11 — AGREEMENT STATUS TABLES

II.11 Agreement Status Tables

Table A: Ukraine — Gulf States

Country	Status	Scope / Agreement	Known Value
Saudi Arabia	CONFIRMED	10-yr MoU (27 Mar). Drone interceptors, EW, maritime drones, co-production. Aramco talks with SkyFall & Wild Hornets.	"Huge deal" undisclosed; initial interceptor contract via Saudi intermediary
UAE	CONFIRMED	10-yr defence cooperation (28 Mar). Full system incl. interceptors, EW, maritime drones, software.	\$760M equity (Edge/Fire Point) confirmed; 5,000 interceptors requested; orders undisclosed
Qatar	CONFIRMED	10-yr intergovernmental (28-29 Mar), signed by Chiefs of General Staff. Joint production, air defence, AI, C2.	Undisclosed; 2,000 interceptors requested; Mirage 2000 barter discussed
Kuwait	NEGOTIATED	Specialists deployed. NSDC-level talks (Umerov). No formal agreement.	Undisclosed
Jordan	NEGOTIATED	Specialists deployed incl. to US military base. NSDC talks (Umerov, 20 Mar).	Undisclosed
Bahrain	REQUEST	Formal request received 30 Mar 2026. Umerov conducting negotiations.	None — request only
Oman	REQUEST	Formal request received 30 Mar 2026. Shahed attacks on Oman confirmed (Aviation Week).	None — request only

Table B: Ukraine — EU Member States

Country	Status	Scope / Agreement	Known Value
France	CONFIRMED	Declaration of Intent (Nov 2025): joint interceptors, 100 Rafale F4, SAMP/T, tech transfer. E5 LEAP co-founder. Rafale already intercepting Iranian drones over UAE.	Undisclosed
Germany	CONFIRMED	AGG 48 General Licence (20 Mar-15 Sep 2026). EUR 200M drone fund. QFI factory. 15,000 STRILA. 35 PAC-3. E5 LEAP co-founder.	EUR 200M+
UK	CONFIRMED	Octopus interceptor production licence (1,000/month). First Western government to licence a Ukrainian interceptor for domestic production. E5 LEAP co-founder.	Undisclosed
Poland	CONFIRMED	Joint drone training programmes and manufacturing projects. ~4.7% GDP defence spend. E5 LEAP co-founder.	Undisclosed
Italy	CONFIRMED	E5 LEAP co-founder. Joint development of low-cost interceptors and autonomous systems.	Undisclosed (LEAP)

Country	Status	Scope / Agreement	Known Value
Czech Rep.	CONFIRMED	Czech Air Team + Ukroboronprom JV (Nov 2025): joint development and production of air target interceptors.	Undisclosed
Greece	NEGOTIATED	Maritime drone co-production agreement under development. Underwater drone expansion planned.	Under development
Spain	NEGOTIATED	Letters of intent and memoranda on industrial cooperation signed Nov 2025.	MoU only
EU-wide (EDIP)	CONFIRMED	EUR 1.5B EDIP work programme adopted 30 Mar 2026. EUR 260M Ukraine Support Instrument. EUR 240M joint procurement. EUR 35.3M BraveTechEU. EUR 100M FAST equity. 15 states flagged via SAFE Fund.	EUR 1.5B (2026-27)

SOURCE: Jamestown; European Commission; Ukrainian Presidential Office; Military; PBS NewsHour; Kyiv Independent; Gulf International Forum; FDD

SECTION II.12 — FLOW SUMMARY TABLE

II.12 Flow Summary Table: All Directions (see Diagram III, page 5)

Flow Direction	Type	Description	Approximate Value
EU → Ukraine (direct)	FUNDING	EUR 260M USI/EDIP directly to Ukraine DTIB rebuilding	EUR 260M (2026-27)
EU → states → Ukraine	FUNDING	EUR 240M joint procurement grants; bilateral co-production	EUR 240M pool
EU → Ukraine	Innovation	EUR 35.3M BraveTechEU for Ukrainian + EU defence start-ups	EUR 35.3M
EU → Ukraine	Equity	EUR 100M FAST fund for SMEs incl. Ukrainian firms	EUR 100M
Germany → Ukraine	Bilateral + Facilitation	EUR 200M drone fund; 15,000 STRILA; QFI factory; 35 PAC-3; AGG 48 licence enabling Gulf exports	EUR 200M+
France → Ukraine	Bilateral	Rafale F4 (100 ac.), SAMP/T, interceptor co-production. Rafale in action over UAE.	Undisclosed
UK → Ukraine	Production licence	Octopus interceptor: 1,000/month UK production; tech revenue	Undisclosed
15 EU states → Ukraine	SAFE Fund	EUR 150B pool; 15 states flagged for Ukrainian defence industry	Share of EUR 150B
UAE → Ukraine	Income — equity	Edge Group 30% stake in Fire Point	\$760M CONFIRMED
Saudi Arabia → Ukraine	Income — contract	Initial interceptor contract via Saudi arms intermediary + Aramco talks	Multi-million, undisclosed
Saudi Arabia → Ukraine	Income — govt deal	"Huge deal" under negotiation (Kyiv Independent sources)	Undisclosed
UAE → Ukraine	Order	TAF Industries: UAE requests 5,000 interceptors	Indicative \$5-12.5M

Flow Direction	Type	Description	Approximate Value
Qatar → Ukraine	Interest + barter	TAF: Qatar requests 2,000 interceptors; Mirage 2000 barter discussed	Indicative \$2-5M
3 Gulf states → Ukraine	Aggregate (Zelenskyy)	10-yr contracts Saudi Arabia / UAE / Qatar	"Billions of dollars"
Gulf → Ukraine	In-kind payment	PAC-3 Patriot missiles in exchange for interceptors (under negotiation)	Under negotiation
Ukraine → Gulf	Tech transfer	228 specialists; interceptors; EW; maritime drones; software; defence lines	See contracts
Ukraine → EU states	Tech transfer	Production licences; co-production agreements; training; battlefield expertise	Embedded in agreements
Germany → Gulf	Facilitation	AGG 48 covers Gulf states: enables fast delivery without BAFA approval	No direct payment
US → Ukraine	Operational (reversed)	US requests Ukrainian assistance for Gulf bases after public rebuff (Jordan)	No public contract

SECTION II.13 — COMPLETE SOURCE LIST (53 SOURCES)**II.13 Complete Source List**

All sources are open-source. Grok (xAI) explicitly confirmed that MBS issued no statement halting US weapons purchases; this is noted in the closing disclaimer.

#	Outlet	Title / Description	Date	Notes / URL
1	Snopes/Yahoo News	Fact Check: Trump "didn't think he'd be kissing my [expletive]"	31 Mar 2026	yahoo.com — White House video verified
2	House of Saud	Trump Humiliates MBS at Saudi Investment Summit	31 Mar 2026	houseofsaud.com/trump-humiliates-mbs-fii-miami-us-saudi-alliance
3	House of Saud	Saudi F-35 Sale: MBS Bought an Insurance Policy	31 Mar 2026	houseofsaud.com/saudi-arabia-f35-sale-insurance-policy
4	House of Saud	Gulf Air Defense Shield Forged in Ukraine	Mar 2026	houseofsaud.com/gulf-air-defense-ukraine-interceptor-drones
5	House of Saud	Saudi Arabia Defends Al-Aqsa After Buying F-35s	31 Mar 2026	houseofsaud.com/saudi-jerusalem-statement-custodianship
6	House of Saud	Saudi-Ukraine Arms Deal Breaks Western Defense Monopoly	Mar 2026	houseofsaud.com/zelenskyy-sells-mbs-weapons
7	The Aviationist	Trump Says F-35 Sale to Saudi Arabia Has Been Approved	30 Mar 2026	theaviationist.com/2026/03/30/trump-says-f-35-sale-saudi
8	Defence Security Asia	Trump Approves F-35 Sale to Saudi Arabia	30 Mar 2026	defencesecurityasia.com/en/trump-saudi-f35-deal-agreed
9	CSIS	Saudi Arabia's MBS Got a Lot from Trump. What Did the US Get?	Feb 2026	csis.org/analysis/saudi-arabias-mohammed-bin-salman-got-lot-trump
10	TIME / Chatham House	The Problem With the US-Saudi Defense Deal	Nov 2025	time.com/7335657/us-trump-saudi-defense-deal
11	CNN	Why Trump's plan to sell F-35 jets to Saudi Arabia is so controversial	Nov 2025	cnn.com/2025/11/18/middleeast/f35-trump-saudi-arabia-israel
12	The Hill	Trump's F-35 sale to Saudi Arabia: Shift in Middle East military power	Nov 2025	thehill.com/policy/defense/5612954-trump-f35-saudi-arabia-deal
13	Media Review Network	Trump's Public Insult of a Saudi Prince	2 Apr 2026	mediareviewnet.com/2026/04/trumps-public-insult-of-a-saudi-prince
14	Grok/xAI	MBS issued no statement halting US weapons purchases [fact-check]	31 Mar 2026	x.com/grok/status/2039049857697022332
15	The War Zone	Saudis Eye France's Rafale Fighter	Dec 2023	twz.com/saudis-eye-frances-rafale-fighter
16	Jane's Defence	France, UK, US to compete Saudi fighter requirement	Apr 2024	janes.com — Saudi open competition confirmed
17	Simple Flying	Typhoons Or Rafales? Saudi Arabia Fighter Jet Order	Aug 2024	simpleflying.com/saudi-arabia-fighter-jet-order
18	Simple Flying	What European Fighter Jets Have Critical US Components?	Dec 2024	simpleflying.com/what-european-fighter-jets-critical-us-components
19	Shephard Media	Saudi Arabia's fighter jet puzzle: Eurofighter, Rafale	Jan 2026	shephardmedia.com/news/air-warfare/sky-high-diplomacy-saudi
20	19FortyFive	Gripen: Not The Only Fighter That Could Replace F-35 in Canada	May 2025	19fortyfive.com — GCAP Saudi interest noted

#	Outlet	Title / Description	Date	Notes / URL
21	Wikipedia/Dassault	Dassault Rafale — Iran war section: UAE interceptions	3 Apr 2026	en.wikipedia.org/wiki/Dassault_Rafale
22	Al Jazeera	Ukraine announces defence pact with Saudi Arabia	27 Mar 2026	aljazeera.com/news/2026/3/27
23	Al Jazeera	Zelenskyy signs air defence deals with UAE, Qatar	28 Mar 2026	aljazeera.com/news/2026/3/28
24	Al Jazeera	Ukraine sends 201 military experts to Gulf	18 Mar 2026	aljazeera.com — specialist deployment confirmed
25	Al Jazeera	What are the Ukrainian drone interceptors?	10 Mar 2026	aljazeera.com — interceptor explainer + cost data
26	Defense News	Ukraine offers Gulf allies drone defense; Patriot trade	27 Mar 2026	defensenews.com — 228 specialists / Patriot swap
27	Defense News	Ukraine deploys units to 5 Middle East countries	20 Mar 2026	defensenews.com — 5-country deployment
28	PBS NewsHour	Zelenskyy: Ukraine using drone expertise to help 5 countries	20 Mar 2026	pbs.org — Gulf deployment + Trump rebuff
29	PBS NewsHour	Ukraine's drone defense tech reshapes combat	27 Mar 2026	pbs.org — Trump reversal documentary
30	PBS NewsHour/AP	5 European allies pledge millions for cheap drone defenses	20 Feb 2026	pbs.org — E5 LEAP announcement
31	Kyiv Independent	Ukraine, Saudi Arabia sign major defense deal	27 Mar 2026	kyivindependent.com — Saudi MoU confirmed
32	Kyiv Independent (excl.)	Saudi Arabia prepping "huge deal" for Ukrainian weapons	10-11 Mar 2026	kyivindependent.com — two anonymous industry sources
33	Kyiv Post / Axios	Ukraine Slams Costly US Tactics; Axios mistake acknowledgment	Mar 2026	kyivpost.com — Trump rebuff confirmed as mistake
34	Breaking Defense	Ukraine inks defense agreements with Qatar and Saudi Arabia	29 Mar 2026	breakingdefense.com — 10-yr deals confirmed
35	Breaking Defense	Gulf nations "trying to reach out" for Ukrainian counter-drone	Mar 2026	breakingdefense.com — General Cherry / demand confirmed
36	Militarnyi	Ukraine Seals Billion-Dollar Defense Partnerships	29 Mar 2026	militarnyi.com — "billions" Zelenskyy quote
37	Gulf International Forum	Ukraine's Drone War is Reshaping Gulf Defense	Mar 2026	gulfif.org — UAE 5,000 / Qatar 2,000 requests
38	FDD	Ukraine Agrees to Mutually Beneficial Defense Deals With Gulf	1 Apr 2026	fdd.org — Bahrain/Oman requests confirmed
39	Euronews	What are Ukraine's new Gulf defence deals?	30 Mar 2026	euronews.com — full system scope confirmed
40	Military Times	Ukraine's \$1,000 interceptor drones the Pentagon wants to buy	11 Mar 2026	militarytimes.com — unit costs / UK first licence
41	Jamestown Foundation	Europe-Ukraine Defense Industry Collaboration Expanding	Dec 2025	jamestown.org — bilateral EU agreements comprehensive
42	Jamestown Foundation	Ukraine-Saudi Arabia: Demand for Battle-Tested Expertise	1 Apr 2026	jamestown.org — Saudi deal analysis
43	European Commission (Cyprus)	Commission adopts EUR 1.5B EDIP work programme	30 Mar 2026	cyprus.representation.ec.europa.eu — official EDIP text

#	Outlet	Title / Description	Date	Notes / URL
44	RobotToday	EU Bets EUR 1.5B on Drones and AI: Inside EDIP 2026-2027	31 Mar 2026	robbottoday.com — DTIB integration analysis
45	Ukrainian Presidential Office	Ukraine and Middle East Building Mutually Beneficial Partnerships	29-30 Mar 2026	president.gov.ua — official Gulf tour summary
46	Ukraine Today/Ukrpravda	Zelenskyy: 4 more Middle Eastern countries request cooperation	30 Mar 2026	ukrainetoday.org — Bahrain/Oman confirmed
47	BNE IntelliNews	Ukraine deploys 228 counter-drone specialists to Gulf	20 Mar 2026	intellinews.com — 228 figure primary confirmation
48	German Federal Ministry/BAFA	AGG 48 General Licence for air/maritime defence exports	20 Mar 2026	Via Ukrinform; RBC-Ukraine; Charter97; United24 Media
49	Quwa Defence Analysis	Pentagon, Gulf States Turn to Ukraine's \$2,500 Interceptors	Mar 2026	quwa.org — PAC-3 MSE \$13.5M confirmed
50	Army Recognition	UAE and Qatar Seek 7,000 Ukrainian Interceptor Drones	Mar 2026	armyrecognition.com — FT reporting; UAE 5,000 / Qatar 2,000
51	Aviation Week	Ukraine Seeks Further Defense Cooperation In Middle East	Mar 2026	aviationweek.com — Oman confirmed targeted by Shaheds
52	European Parliament Research Service	Eastern Flank Watch and European Drone Wall	2025	europarl.europa.eu — Drone Wall policy (EPRS ATA 777962)
53	European Leadership Network	Building Europe's drone wall: cheap defensive technologies	Dec 2025	europeanleadershipnetwork.org — 70-80% interception; Atreyd/Merops

Note on the MBS "weapons halt" claim: A statement attributed to MBS — "We will no longer purchase American weapons" — circulated on X on 31 March 2026. Grok (xAI) explicitly confirmed: "MBS issued no statement halting US weapons purchases." The documented facts — verified insult, institutional silence, simultaneous Ukraine deal, formally unsigned F-35 order — tell a more significant and fully sourced story.

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