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## › Italy, Europe and the Iran-US Confrontation: Managing Escalation without Illusions\*

- › The Israeli-American war on Iran has had more severe implications for Italy and Europe than previous episodes of escalation.
- › Brussels and Rome have to deal with a fractured transatlantic bond, limited capacity to craft a new Iran policy and the need to reaffirm a credible image in the Middle East and with Gulf partners.
- › Italy is also exposed to potential spillover effects affecting its partners in Africa, adding an additional layer of policy implications for Rome. The activism of the Italian government, especially in terms of energy access, shows willingness to deal with immediate problems, but addressing the long-term effects of the crisis may exceed a single member state's capacity.



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### The crisis is testing Europe's place in the Gulf and Italy's claim to act as a bridge

The new phase of the decades-long US-Iran confrontation, opened at the end of February 2026, has brought the Gulf back to the centre of European strategic concerns. The combination of US and Israeli military action, Iranian retaliation and the disruption of maritime flows has turned a regional confrontation into a crisis with direct consequences for Europe's economy, energy security and political room for manoeuvre. In the Italian case, effects of the crisis may reach Rome through the Mediterranean, through its relations with Gulf partners and through the African dimension of its foreign policy.<sup>1</sup> Italy and Europe face the very difficult test to keep a capacity to shape events around a crisis whose military core remains outside their control.

Italy has generally followed the European consensus on Iran, but Rome's long-established and never disavowed diplomatic relationship with Tehran has

<sup>1</sup> The two issues are connected, as some countries, such as the UAE, which are included in financing facilities linked to the Mattei Plan. See, for instance: Cassa Depositi e Prestiti, *Support for Business, Renewables and Water: Three New Agreements with the United Arab Emirates*, 25 February 2025, [https://www.cdp.it/sitointernet/page/en/support\\_for\\_business\\_renewables\\_and\\_water\\_three\\_new\\_agreements\\_with\\_the\\_united\\_arab\\_emirates?contentId=PRG50147](https://www.cdp.it/sitointernet/page/en/support_for_business_renewables_and_water_three_new_agreements_with_the_united_arab_emirates?contentId=PRG50147).

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encouraged a generally cautious tone.<sup>2</sup> For more than two decades, Europe's Iran policy relied on nuclear diplomacy through sanctions and verification, the informal Anglo-French-German E3 format and transatlantic coordination, all of which were central to the negotiation and signing of the Joint Comprehensive Plan of Action (JCPOA), the 2015 nuclear deal.<sup>3</sup> That framework had already weakened after the United States left the deal during the first Trump administration, and the present crisis has further reduced Europe's political clout. Its room for action now lies less in reviving the old Iran policy than in protecting what remains of it. Nuclear verification is still the main point of continuity with the pre-JCPOA phase. The fact that Italy was not an active contributor to the old framework can be a relative advantage, as it does not carry the baggage of deep mistrust that Iran has developed toward the E3. Its good relations with Gulf capitals and its Mediterranean exposure give it an opening for some form of diplomatic engagement.

## The crisis beyond the nuclear issue

Despite hitting some highly sensitive targets, the military operation that the United States and Israel started on 28 February 2026 did not achieve the goal of regime change or even replicate a Venezuela-like scenario in which leadership decapitation would lead to policy change. The strikes transformed the Islamic Republic of Iran from a religiously based system into a similarly authoritarian but military-led one, with the new leadership taking the confrontation beyond previous boundaries: direct attacks on US regional bases; retaliatory operations hitting Gulf states, harming their hard-earned image of security and prosperity havens in a war-torn region; and closure of the Strait of Hormuz, where 20 per cent of global oil and liquefied natural gas transit.

The nuclear dimension remains central, but with new caveats. The International Atomic Energy Agency had not had access to Iran's nuclear facilities after Israel and the United States bombed them during the June 2025 12-day war. Consequently, it could no longer determine the size of Iran's uranium stockpile, especially the 450 kg of uranium enriched to 60 per cent (for which there is no civilian application), at affected nuclear facilities.<sup>4</sup> Attempts to degrade Iran's nuclear infrastructure have therefore weakened the international oversight on which any future diplomatic track would depend.

The disruption of passage through the Strait of Hormuz has shown how Iran can widen the costs of confrontation without matching the United States militarily,<sup>5</sup> bringing the political message to Gulf Cooperation Council (GCC)

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<sup>2</sup> Fantappiè, Maria Luisa, "Limits and Strengths of Italy's Balancing Act in the Middle East", in *IAI Briefs*, No. 26 | 09 (February 2026), <https://www.iai.it/en/node/21630>.

<sup>3</sup> The E3 was a diplomatic format comprising France, United Kingdom and Germany. For a deeper focus on E3 Diplomacy, see among others Alcaro, Riccardo, "Weathering the Geopolitical Storms: The Ever-elusive Success of EU Policy towards Iran", in *The International Spectator*, Vol. 59, No. 1 (2024), p. 98-119, <https://doi.org/10.1080/03932729.2023.2273852>.

<sup>4</sup> International Atomic Energy Agency, *Implementation of the NPT Safeguards Agreement and relevant provisions of the United Nations Security Council resolutions in the Islamic Republic of Iran*, 17 February 2026, point 35, <https://www.iaea.org/sites/default/files/gov2026-8.pdf>.

<sup>5</sup> Hafezi, Parisa and Jacob Bogage, "Trump Says US Operation Will Aid Ships Stranded in Strait of Hormuz", in *Reuters*, updated 4 May 2026, <https://www.reuters.com/world/asia-pacific/iran-offers-strait-deal-trump-dissatisfied-prefers-non-military-path-2026-05-02>.



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countries that closeness to Washington does not remove their geographical vulnerability.<sup>6</sup>

The war has also exposed divisions within the GCC. Saudi Arabia supports the containment of Iran but does not want a regional order defined entirely by Israel or by an open-ended US-Iran confrontation. The memory of the 2019 attacks on Saudi oil facilities still weighs on Riyadh's calculations, as it showed the limits of American protection and encouraged the kingdom to widen its strategic options.<sup>7</sup> Other Gulf capitals read the crisis differently: Oman and Qatar,<sup>8</sup> despite being directly impacted, have preserved channels to Iran and kept greater distance from the conflict. Bahrain and the United Arab Emirates (UAE) have adopted a much harder line.

Energy governance is shifting concurrently. The UAE's exit from OPEC and OPEC+ signals a more fragmented Gulf energy landscape at a moment when Europe needs greater predictability from the region.<sup>9</sup>

Europe is now pulled between a weakened transatlantic anchor and a Gulf that expects more than declaratory support. Washington remains essential for deterrence, but its choices have become harder for European governments to read and support politically;<sup>10</sup> Gulf partners, meanwhile, are looking for security and diplomatic engagement that does not simply reproduce the US-Israeli line. This leaves Brussels and member states with a narrower, but more pressing, space for action.

### **The widening transatlantic rift and Europe's wider Middle Eastern problem**

The crisis has widened the distance between Washington and several European capitals. Requests linked to the use of American bases, threats of retaliation against European allies and the broader unpredictability of US policy under the second Trump administration have made transatlantic coordination on Iran severely weakened. The nuclear question remains one area where Europe and the United States share a basic concern, but the regional context around that concern has changed. European public opinion is increasingly critical of Israel's conduct in Gaza, and this affects the political language through which European governments can support deterrence against Iran.<sup>11</sup> Europe does

<sup>6</sup> The impact of the Hormuz showdown has hit way beyond Europe and GCC. This crisis has also produced significant impacts on other parts of the world: while it is not the main focus of this research, it is worth pointing as an example the impact it had up to the far East and sparking crises in countries such as the Philippines, which has had to eventually mediate with Tehran to obtain safe access for its ships through the strait in order to avoid a national oil shortage. See, for instance: Cabato, Luisa, "Marcos: PH Has Enough Crude Oil Supply until June 30", in *Inquirer.net*, 27 March 2026, <https://newsinfo.inquirer.net/2202216/marcos-on-crude-oil>.

<sup>7</sup> This has forced combining reliance on the United States with ties to China, a cautious opening to Iran and deeper relations with actors such as Egypt, Pakistan and Turkey: see Fantappiè, Maria Luisa and Vali Nasr, "Can Saudi Arabia Keep Hedging?", in *Foreign Affairs*, 20 April 2026, <https://www.foreignaffairs.com/node/1134866>.

<sup>8</sup> The latter had suffered from the attacks even as part of the choreographic retaliation of June 2025.

<sup>9</sup> "UAE to Leave OPEC and OPEC+ Oil Producer Groups", in *Reuters*, 28 April 2026, <https://www.reuters.com/business/energy/view-uae-leave-pec-pec-oil-producer-groups-2026-04-28>.

<sup>10</sup> This is particularly true when support for the attacks against Iran is perceived as a support for Israel and therefore linked with the ongoing violence in Gaza and Lebanon. See later.

<sup>11</sup> Political science broadly explains that public opinion does not determine foreign policy, but it does, however, shape what governments can defend over time. A series of YouGov surveys



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not need to merge its Iran policy with the Palestinian question; it does need, however, to avoid treating Gaza as a separate moral exception.

Europe's commitment to Israel's security remains part of its regional posture, but it now carries a high political cost when it is not matched by a visible concern for Palestinian governance and humanitarian access in Gaza. This weakens Europe's ability to speak about restraint toward Iran without appearing selective in its own use of principles.<sup>12</sup>

Furthermore, weakening Iran's allies does not by itself produce a stable regional order. The old "axis of resistance" may be damaged militarily, but the social and political terrain that sustained Iranian influence has not disappeared.<sup>13</sup> Europe's Iran policy therefore must look beyond command structures and account for the conditions that allow Iranian influence to return through local actors.

### Italy's caution and its limits

Italy entered the crisis with energy and diplomatic vulnerabilities already exasperated by the war in Ukraine. Rome has since sought to diversify its energy partnerships, including through new agreements to increase gas supplies from Azerbaijan and Algeria, but the Strait of Hormuz crisis shows how exposed Rome is to shocks outside the Mediterranean. The war has also added pressure to Italy's relationship with Washington, especially after tensions over the use of US bases and Donald Trump's public attacks on Italian Prime Minister Giorgia Meloni after she stated that the war was not in Italy's interest and criticised Trump's spat with Pope Leo XIV.<sup>14</sup> Attempts to lower the tension, including through a visit by US Secretary of State Marco Rubio to the Vatican and Rome, suggest that neither side has an interest in letting the fracture become permanent.<sup>15</sup>

Rome's opportunities lie in its ability to keep channels open without presenting itself as a substitute for larger diplomatic formats. The attempt to create space

published from June 2025 found that favourable views of Israel had fallen to between 13 and 21 per cent across six Western European countries, while unfavourable views stood between 63 and 70 per cent. Italy's net favourability toward Israel was reported at minus 52, one of the lowest figures in the series. Smith, Matthew, "Net Favourability towards Israel Reaches New Lows in Key Western European Countries", in *YouGov Articles*, 3 June 2025, <https://yougov.com/en-gb/articles/52279>.

<sup>12</sup> Fantappiè, Maria Luisa, "Europe and the Syrian Crisis: Keep Calm and Clear-minded", in *IAI Commentaries*, No. 24 | 73 (December 2024), <https://www.iai.it/en/node/19289>.

<sup>13</sup> Fantappiè, Maria Luisa and Vali Nasr, "What Comes After the Axis of Resistance?", in *Foreign Affairs*, 10 December 2025, <https://www.foreignaffairs.com/node/1134268>.

<sup>14</sup> In this context it is worth noting that Iranian official channels, mainly through embassy accounts, have tried reaching out to the Italian authorities and public on X by sharing support messages in a significant attempt at digital public diplomacy best practices. Some examples can be found in the following tweets, mentioning figures such as Enrico Mattei or culturally resonant themes, such as football or food and wine heritage as well: Iran Embassy in Italy, "Oggi è l'anniversario della nascita di Enrico Mattei", X post, 29 April 2026, <https://x.com/iraninitaly/status/2049467686623510758>; Iran Embassy in Thailand, "Why would we hurt Italy?", X post, 14 April 2026, <https://x.com/IranInThailand/status/2044058595286044676>; Iran Embassy in Italy, "Il calcio appartiene ai popoli, non ai politici", X post, 23 April 2026, <https://x.com/iraninitaly/status/2047260986625626461>; Iran Embassy in Ghana, "Dear Italy", X post, 24 April 2026, [https://x.com/IRAN\\_GHANA/status/2047571199878734020](https://x.com/IRAN_GHANA/status/2047571199878734020).

<sup>15</sup> It is likely, however, that parts of the American administration are already trying to mend this fracture, although not so explicitly, as Marco Rubio's trip to Rome in early May shows: Roberts, Hannah, "Rubio's Rome Challenge: Managing an Ally, Appealing to a Pope", in *Politico EU*, 6 May 2026, <https://www.politico.eu/?p=8389349>.



**>> Not being in the E3 gives Rome a renewed degree of flexibility under current conditions**

for direct contacts between American and Iranian representatives during the short-lived nuclear negotiations between the two in spring 2025 – with two sessions held in Rome – belongs to this framework.<sup>16</sup>

Still, Italy's access to Gulf and Mediterranean partners has greater weight when it feeds into a European position rather than remaining a national diplomatic initiative. As mentioned above, not being in the E3 gives Rome a renewed degree of flexibility under current conditions. The E3 still carries diplomatic memory and technical expertise, but it no longer structures the political field, so Rome can operate around that declining format if it does so with partners that Gulf capitals still regard as relevant.

The crisis also intersects with Italy's broader projection toward Africa. Rome has presented its Mattei Plan as a platform for cooperation with African countries, but its political meaning goes beyond project finance, reflecting Italy's attempt to make energy security part of a wider Mediterranean policy.<sup>17</sup> The Strait of Hormuz remains outside its typical geography, yet a disruption there would affect the African and Mediterranean spaces where Rome is trying to build influence.

The space for Rome's contribution is not so limited, as it can work with actors that still retain channels to Tehran, especially Oman and Qatar, while also engaging Saudi Arabia, the UAE and Turkey, to help identify the diplomatic tracks along which a long-term stabilisation of the Gulf region can be pursued incrementally. Attempts to build a new mediation format between the United States and Iran would likely be ineffective, but Rome should try to make a European position more tangible through access to, and agreement with, GCC countries. Europe's renewed Iran policy must also account for the political terrain in which Iranian influence takes root. In Lebanon and Iraq especially, pressure on Tehran will remain incomplete if it is not matched by efforts to reduce local dependence on armed actors connected with the "axis of resistance", and so a European line that takes Israeli military pressure as acceptable would miss the social and political conditions through which Iranian influence can return.

The Gulf is the channel through which this crisis reaches Italy and Europe's economy in general, impacts its southern neighbourhood and hits domestic politics with consequences yet to be seen. Any attempt to act as a bridge by the Union or member states will be under the spotlight, but its test should not be limited to the visibility of its diplomatic gestures, which are often seen by their counterparts as weak and ineffective. Rather, it will be whether relations with Gulf capitals, Washington and regional mediators can help Europe preserve a political track as the effects of the crisis continue to unfold.

<sup>16</sup> Fantappiè, Maria Luisa, "Limits and Strengths of Italy's Balancing Act in the Middle East", cit.  
<sup>17</sup> For a more detailed insight, see Italian Government website: *News on the Mattei Plan for Africa*, <https://www.governo.it/en/archivio-articoli-piano-mattei-en>. It is important to note how the Italian government has tried to engage also with Gulf actors to internationalise the Mattei Plan. See, for instance: Cassa Depositi e Prestiti, *Support for Business, Renewables and Water*, cit.

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