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NATO after Ankara

BUILDING THE EUROPEAN PILLAR



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Introduction

The July 2026 edition of EU in Focus by the TRENDS Belgium Virtual Office examines the future of the transatlantic alliance under the theme: “NATO after Ankara: Europe takes more responsibility.” Building on the 2025 Hague Summit’s pledge to increase defence spending, this report examines whether the Ankara Summit, dubbed a “delivery summit” by NATO Secretary General Mark Rutte¹, lived up to its label and how Allies translate their political commitments into real military capabilities.

¹ North Atlantic Treaty Organization. (2026, June 17). *NATO Secretary General previews Defence Ministers meeting: Building a stronger Europe in a stronger NATO*. <https://www.nato.int/en/news-and-events/articles/news/2026/06/17/nato-secretary-general-previews-defence-ministers-meeting-building-a-stronger-europe-in-a-stronger-nato>.



The summit unfolded against a difficult political backdrop. U.S. President Donald Trump criticized European allies that had declined to support the U.S. campaign against Iran, renewed pressure on Spain over defence spending and revived his demand for American control of Greenland. Ankara could therefore easily have exposed deep transatlantic divisions. Instead, the final declaration reaffirmed collective defence, identified Russia as a long-term threat to the Euro-Atlantic area and recognized Ukraine as a contributor to NATO’s security and stability.

The report first examines how Ankara preserved transatlantic unity despite the political tensions surrounding the summit. It then assesses whether the multinational procurement, industrial-financing and defence-production initiatives announced there can translate higher spending into deployable military capabilities. Finally, it considers how NATO 3.0 will reshape relations with Ukraine, Gulf partners and the Alliance’s Indo-Pacific partners, before identifying the key developments to watch, namely the Pentagon’s review of the American military posture in Europe and the newly established European Integrated Anti-Ballistic Missile Coalition.

I. Unity at last: transatlantic politics in Ankara

The journey to the NATO Summit in Ankara was far from smooth. In the days preceding and during the meeting, U.S. President Donald displayed on multiple occasions his frustration with European allies that had refused to support the United States' campaign against Iran by helping to reopen the Strait of Hormuz. Trump singled out Spain over both its low defence spending and its refusal to support the U.S. military operation, threatening to suspend trade with Madrid.² He also revived his demand that the United States take control of Greenland, despite ongoing trilateral talks with Nuuk and Copenhagen aimed at strengthening the island's security and NATO's launch of the Arctic Sentry operation.³

² Reuters. (2026, July 8). *Trump orders halt to U.S. trade with Spain over NATO spending and Iran*. <https://www.reuters.com/world/trump-says-he-ordered-cutting-off-all-trade-with-spain-2026-07-08/>.

³ Euronews. (2026, July 7). *Trump revives his call for US to 'control' Greenland*. <https://www.euronews.com/my-europe/2026/07/07/trump-revives-his-call-for-us-to-control-greenland>.



The summit could therefore easily have descended into another public demonstration of transatlantic division. Instead, through skillful political balancing by NATO Secretary General Mark Rutte, Trump's rhetoric had little effect on the substance of the summit. The Ankara Declaration consequently contained stronger language than many experts and commentators had expected. NATO members, including the United States, reaffirmed their commitment to collective defence under Article 5. Russia was identified as a long-term threat to Euro-Atlantic security and stability, while Ukraine was described not merely as a recipient of allied assistance but as a country that contributes to transatlantic security.⁴

Despite the political unity and strong language of the final declaration, it notably omitted any reference to the next summit, which had been expected to take place in Albania the following year. Regular meetings at the highest level remain important as Europe's security environment deteriorates, allowing allies to demonstrate unity and reinforce deterrence towards Moscow. At the same time, fewer summits could reduce the Alliance's exposure to short-term political pressures and create more space to focus on meeting capability targets and implementing agreed objectives.

⁴ North Atlantic Treaty Organization. (2026, July 8). *The Ankara Summit Declaration*. <https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2026/07/08/the-ankara-summit-declaration>.



II. NATO 3.0: from burden-sharing to burden-shifting

By stating that “European Allies and Canada, working with the United States, are assuming greater responsibility for the Alliance’s defence,” the Ankara Declaration implicitly endorses the idea of “NATO 3.0.” Although the term has no formal place in NATO’s strategic documents, it provides a useful shorthand for the Alliance’s evolution. NATO 1.0 was the Cold War alliance created to deter a Soviet attack on allied territory. NATO 2.0 emerged after the Cold War, expanding geographically and undertaking crisis-management and expeditionary operations beyond the Euro-Atlantic area. NATO 3.0 marks a return to collective territorial defence, but with European allies expected to carry a substantially larger share of the conventional burden.

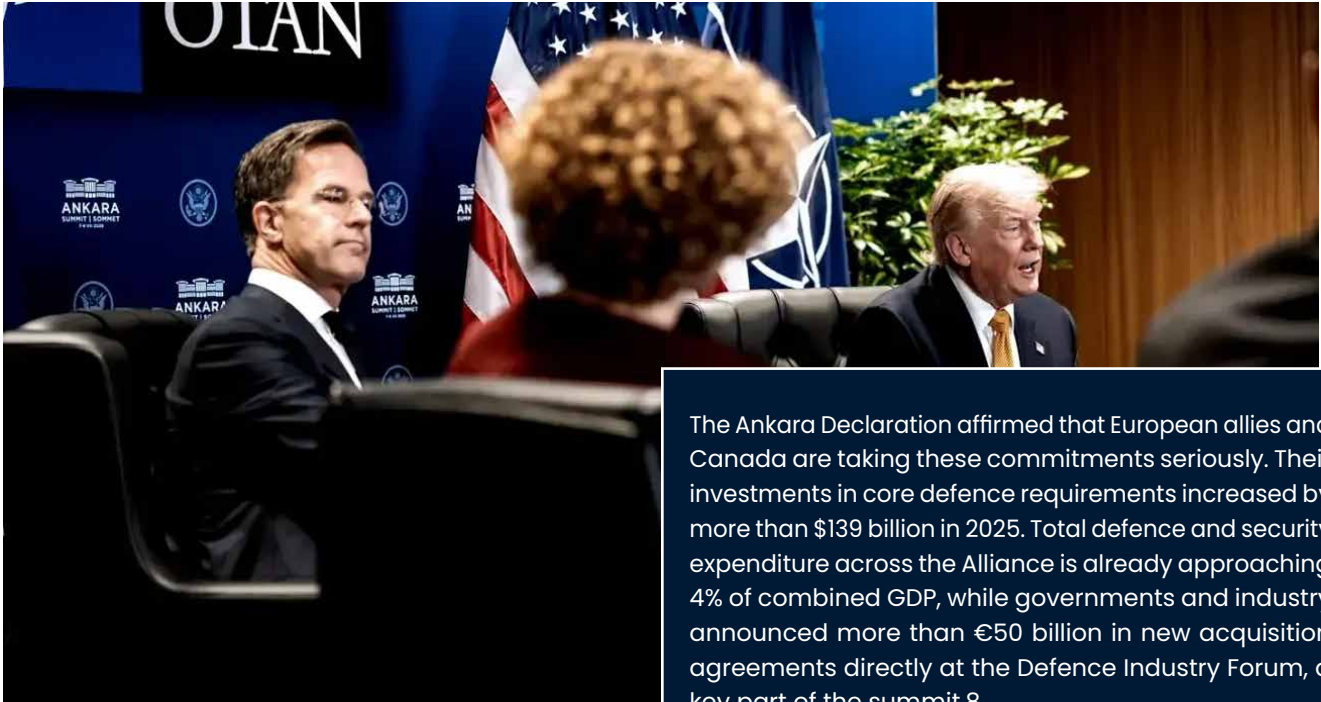
The concept of NATO 3.0 was introduced by U.S. Under Secretary of Defense for Policy Elbridge Colby at the February 2026 meeting of NATO defense ministers.⁵ It was also embraced by Rutte, who described the Ankara summit as evidence that the Alliance was “rebalancing our security for the better.”⁶

This rebalancing is both necessary and overdue. Europe cannot continue to depend disproportionately on the United States for its own conventional defence while Washington signals the urgency to focus on other theaters.

Nonetheless, problems might arise if NATO 3.0 results in an accelerated reduction of the U.S. conventional role before Europe has developed the capabilities required to replace it. The temptation in Washington is to compensate for a smaller American presence with repeated assurances that the United States will preserve or even reinforce its nuclear deterrence posture in Europe.

⁵ U.S. Department of War. (2026, February 12). *Remarks by Under Secretary of War for Policy Elbridge Colby at the NATO Defense Ministerial (as prepared)* [Speech]. <https://www.war.gov/News/Speeches/Speech/Article/4404801/remarks-by-under-secretary-of-war-for-policy-elbridge-colby-at-the-nato-defense/>.

⁶ North Atlantic Treaty Organization. (2026, July 8). *Press conference by NATO Secretary General Mark Rutte following the meeting of heads of state and government at the 2026 NATO Summit in Ankara* [Transcript]. <https://www.nato.int/en/news-and-events/events/transcripts/2026/07/08/press-conference-by-nato-secretary-general-mark-rutte-following-the-meeting-of-heads-of-state-and-government-at-the-2026-nato-summit-in-ankara>.



However, conventional and nuclear deterrence are interconnected. The credibility of nuclear deterrence depends partly on the existence of conventional forces capable of contesting aggression, signaling political commitment and preventing an adversary from creating a fait accompli below the nuclear threshold. An American policy that offers Europe primarily nuclear reassurance while substantially reducing conventional presence might risk weakening both forms of deterrence.

III. A delivery summit that delivered, but not yet enough

Mark Rutte presented Ankara as a “delivery summit”, a natural sequel to the 2025 meeting in The Hague, where allies agreed to invest 5% of GDP in defence and security by 2035, including 3.5% for core military requirements and 1.5% for broader security and resilience expenditure.⁷

⁷ North Atlantic Treaty Organization. (2025, June 25). *The Hague Summit Declaration*. <https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2025/06/25/the-hague-summit-declaration>.

The Ankara Declaration affirmed that European allies and Canada are taking these commitments seriously. Their investments in core defence requirements increased by more than \$139 billion in 2025. Total defence and security expenditure across the Alliance is already approaching 4% of combined GDP, while governments and industry announced more than €50 billion in new acquisition agreements directly at the Defence Industry Forum, a key part of the summit.⁸

Major capability announcements

The announcements included several major multinational projects in areas where Europe remains particularly dependent on the United States. Eleven allies agreed to jointly procure up to ten Saab GlobalEye airborne early-warning and control aircraft, replacing NATO’s ageing fleet of Boeing E-3A Sentry aircraft.⁹ The acquisition complements the planned purchase of MQ-4C Triton high-altitude surveillance drones.¹⁰

⁸ North Atlantic Treaty Organization. (2026, July 7). *Tens of billions in new procurements revealed at the NATO Summit Defence Industry Forum in Ankara*. <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/tens-of-billions-in-new-procurements-revealed-at-the-nato-summit-defence-industry-forum-in-ankara>.

⁹ North Atlantic Treaty Organization. (2026, July 7). *NATO’s new airborne warning and control system is announced*. <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/natos-new-airborne-warning-and-control-system-is-announced>.

¹⁰ North Atlantic Treaty Organization. (2026, July 7). *NATO expands its intelligence, surveillance and reconnaissance fleet with the purchase of Triton aircraft*. <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-expands-its-intelligence-surveillance-and-reconnaissance-fleet-with-the-purchase-of-triton-aircraft>.

Allies also announced plans for a multinational A400M strategic-airlift fleet and the further expansion of the multinational A330 air-to-air-refueling fleet.¹¹ Additional cooperation will focus on deep-precision-strike capabilities, air and missile defence, and the expansion of ammunition production. These are important capabilities. Airborne surveillance, strategic lift, refueling and long-range strike are essential for a European pillar capable of operating with less extensive American support. Joint procurement can also improve interoperability and reduce unnecessary duplication.

¹¹ North Atlantic Treaty Organization. (2026, July 7). *NATO Allies expand strategic airlift capacity*. <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-allies-expand-strategic-airlift-capacity>.



Although these capabilities are urgently needed, the announcements must be kept in perspective. Large and technologically complex platforms take years to manufacture, integrate and bring into operational service. Moreover, these high-visibility projects do not reflect the way most European defence procurement is conducted. Even after the recent increase in spending, only 24% of EU equipment procurement in 2025 was collaborative.¹² The majority of national defence budgets therefore continues to be spent through nationally organized programmes.

In this context, Europe's challenge is not just the amount of money being spent, but the speed and efficiency with which money is converted into usable military capability. European defence companies frequently report record order books, but fuller order books do not automatically mean proportionately higher output. In many cases, companies are delivering a larger volume of orders

through production systems that remain structured around peacetime assumptions.

The weaknesses are particularly visible lower down the industrial supply chain. Europe's largest defence companies depend on networks of Tier 2, Tier 3 and Tier 4 suppliers, many of which are relatively small or specialized businesses. These companies often have less visibility concerning future demand and more limited access to advance payments and affordable financing than the major prime contractors. According to a 2026 survey by GLOBSEC¹³ of 280 European defence companies, record orders at prime-contractor level coexist with shortages of skilled labor, machinery and critical inputs, fragmented certification regimes, regulatory delays and restricted advance payments for smaller suppliers.

¹² European Defence Agency. (2026, July 16). *EU defence spending: €418 billion in 2025, projected to €454 billion in 2026*. <https://eda.europa.eu/news-and-events/news/2026/07/16/eu-defence-spending---418-billion-in-2025--projected-to--454-billion-in-2026>.

¹³ GLOBSEC. (2026, May 18). *Stress-testing Europe's defence industrial scale-up: From demand signals to industrial delivery across European defence supply chains*.

<https://www.globsec.org/publication/european-defence-industrial-scale-up-report>.

This matters because a production line is only as scalable as its narrowest bottleneck. A prime contractor cannot rapidly increase the production of missiles, armored vehicles or aircraft when a specialized supplier producing a critical component cannot finance new machinery, recruit additional workers or obtain the necessary certification.

The European Union can help address these problems. Instruments such as the European Defence Industrial Programme (EDIP)¹⁴ or the Security Action for Europe instrument (SAFE)¹⁵ are aimed to support production capacity, facilitate financing and encourage common procurement.

Nevertheless, national procurement practices remain a major obstacle. Joint purchasing is still too often the exception rather than the rule, while governments continue to invoke the national-security exemption under Article 346 of the Treaty on the Functioning of the European Union to exclude defence contracts from normal single-market and competition procedures. Although this exemption can be justified in individual cases, its widespread use contributes to fragmented demand, smaller production runs and the preservation of parallel national systems.

¹⁴ European Commission, Directorate-General for Defence Industry and Space. (2026, March 30). *EDIP work programme adopted*. <https://defence-industry-space.ec.europa.eu/edip-work-programme-adopted-2026-03-30-en>.

¹⁵ Council of the European Union. (2025, May 27). *SAFE: Council adopts €150 billion boost for joint procurement on European security and defence*. <https://www.consilium.europa.eu/en/press/press-releases/2025/05/27/safe-council-adopts-150-billion-boost-for-joint-procurement-on-european-security-and-defence/>.

New tools for defence financing

Two of the most promising announcements associated with Ankara concerned defence financing.

The first was the Canada-led Defence, Security and Resilience Bank.¹⁶ Canada, Albania, Belgium, Greece, Latvia, Luxembourg, Romania, Türkiye and Ukraine declared their intention to establish the new institution, which is expected to begin operating as early as 2027. By using the combined credit strength of its members, the bank is intended to lower financing costs, mobilize private capital and support industrial-capacity expansion, including among smaller companies that struggle to obtain affordable long-term funding.

The second was the Multilateral Defence Mechanism being developed by the United Kingdom, the Netherlands, Finland and Poland.¹⁷ The mechanism is designed to aggregate demand, accelerate defence investment and support joint procurement of critical capabilities. Its sponsors are aiming to establish it by 2027 and expand participation to a broader coalition of like-minded states.

¹⁶ Government of Canada. (2026, July 7). *Declaration on the Defence, Security and Resilience Bank*. <https://www.pm.gc.ca/en/news/statements/2026/07/07/declaration-defence-security-and-resilience-bank>.

¹⁷ Government of the United Kingdom. (2026, July 7). *Joint statement from member countries of the Multilateral Defence Mechanism*. <https://www.gov.uk/government/news/joint-statement-from-member-countries-of-the-multilateral-defence-mechanism>.





Both initiatives address a genuine European problem. The countries with the most developed strategic cultures and the broadest military responsibilities, such as the United Kingdom and France, do not necessarily possess the greatest fiscal space. Conversely, countries capable of borrowing on more favorable terms, such as Germany, may lack equivalent experience in translating large budgets into strategic priorities and executable programmes.

Pooling financial credibility can help narrow this gap. It can also provide industry with clearer and more predictable demand, allowing companies to invest in factories, machinery and personnel before individual national orders are finalized.

However, the DSRB and the Multilateral Defence Mechanism will need to be complementary rather than competitive. Creating additional institutions will achieve little if they reproduce the fragmentation they were established to overcome. Their success should be assessed according to whether they lower financing costs, support smaller suppliers, generate joint orders and produce equipment more quickly.

IV. NATO's partners under NATO 3.0

A more balanced NATO will also have consequences for the Alliance's partners. As European allies take on greater responsibility for collective defence, NATO will need to define which partnerships directly strengthen its central mission and which risk dispersing already limited political and military resources.

Ukraine: contributor, partner, but still not a member

The Ankara Declaration used strong language on Ukraine. It recognized that Ukraine contributes to transatlantic security and committed allies to providing €70 billion in military equipment, assistance and training in 2026. Allies also made sovereign commitments to sustain at least equivalent levels of assistance in 2027.



This framing is important. Ukraine is no longer treated solely as a country requiring constant Western military assistance. Its armed forces possess unparalleled experience of contemporary high-intensity warfare, including the use of drones, electronic warfare, long-range strike and rapidly adapted battlefield technologies. Ukraine's defence industry and operational lessons can therefore contribute directly to Europe's future deterrence.

President Volodymyr Zelenskyy's participation, strengthened by Ukraine's successful campaign against critical Russian energy infrastructure, reinforced this message in Ankara. One of the summit's most consequential bilateral announcements was President Trump's pledge to pursue a licensing agreement that would allow Ukraine to produce Patriot air-defence interceptors domestically.¹⁸ The decision could eventually help Ukraine develop a more sustainable domestic air-defence capability, although establishing licensed production will be technically complicated and will take considerable time.

¹⁸ Reuters. (2026, July 9). *Zelenskiy says Patriot missile licences agreed with U.S. at political level*. <https://www.investing.com/news/world-news/zelenskiy-licenses-for-patriot-agreed-with-us-at-political-level-interceptors-to-be-delivered-4784828>.

Material support, however, was not accompanied by progress on membership. The Ankara Declaration contained no reference to Ukraine joining NATO. This contrasts with the 2024 Washington Summit, where allies declared that Ukraine was on an "irreversible path" towards full Euro-Atlantic integration, including NATO membership, and described the summit decisions as a "bridge" to future membership.¹⁹ Since Washington, NATO summit language has become increasingly silent on the membership question.

Türkiye and the Gulf: a more pragmatic southern partnership

Holding the summit in Ankara was itself strategically significant. Türkiye possesses NATO's second-largest military and occupies a central position between Europe, the Black Sea, the Caucasus and the Middle East. At the same time, its relationship with Washington has been burdened for years by Ankara's acquisition of the Russian S-400 air-defence system.

The purchase led the United States to remove Türkiye from the F-35 program and impose sanctions under the Countering America's Adversaries Through Sanctions Act. At the summit, Trump announced that he intended to lift the sanctions and said that a decision would be made on a possible F-35 sale.²⁰ However, U.S. legislation continues to require Türkiye to end its possession of the S-400 system before it can return to the program.

¹⁹ North Atlantic Treaty Organization. (2024, July 10). *Washington Summit Declaration*. <https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2024/07/10/washington-summit-declaration>.

²⁰ Defense News. (2026, July 7). *US will lift sanctions on Turkey, possibly sell F-35 fighter jets, Trump says*. <https://www.defensenews.com/global/europe/2026/07/07/us-will-lift-sanctions-on-turkey-possibly-sell-f-35-fighter-jets-trump-says/>.



Discussions are consequently continuing over how the S-400 problem could be resolved. One option reportedly under consideration is transferring the systems to a third country in the Gulf.²¹ A transfer would solve Türkiye's formal possession problem only by relocating the underlying strategic contradiction.²² A Gulf country operating Russian air-defence technology could face similar difficulties in obtaining the most advanced U.S. aircraft and associated systems in the future.

The Ankara summit nevertheless produced more constructive developments in NATO's relations with the Gulf. Allied foreign ministers met representatives of Bahrain, Kuwait, Qatar and the United Arab Emirates and launched a series of flagship cooperation projects under the Istanbul Cooperation Initiative.²³ These projects will focus on maritime security, countering uncrewed aerial systems, protection against chemical, biological, radiological and nuclear threats, and counterterrorism.

The initiative offers a pragmatic model of partnership. It is clear that NATO is not seeking to become a direct security actor in the Gulf. It is rather focusing on clearly defined areas where cooperation can strengthen the security of both Alliance members and Gulf partners.

²¹ Military Watch Magazine. (2026, July 12). *United Arab Emirates purchases Russian S-400 long-range air defences: How will they strengthen its forces against Iran?* <https://militarywatchmagazine.com/article/emirates-purchases-russian-s400-air-defence-iran>.

²² Chattell, T. (2026, July 28). *Turkey's S-400 saga shows the hard realities of defence procurement*. Chatham House. <https://www.chathamhouse.org/2026/07/turkeys-s-400-saga-shows-hard-realities-defence-procurement>.

²³ North Atlantic Treaty Organization. (2026, July 10). *NATO deepens security cooperation with Gulf countries through the launch of flagship projects*. <https://www.nato.int/en/news-and-events/articles/news/2026/07/10/nato-deepens-security-cooperation-with-gulf-countries-through-the-launch-of-flagship-projects>.

The Indo-Pacific: cooperation without going “out of area”

Leaders and ministers from NATO’s four Indo-Pacific partners, Australia, Japan, New Zealand and the Republic of Korea, also participated in meetings surrounding the summit. For the first time, the defence ministers of all four partners were invited to Ankara summit events, including the Defence Industry Forum.²⁴

²⁴ Ministry of Foreign Affairs of Japan. (2026, July 7). Meeting between *NATO Secretary General Rutte and Indo-Pacific partners* (overview). https://www.mofa.go.jp/erp/ep/pageite_000001_00011.html.



Their presence confirmed that NATO’s interest in the Indo-Pacific has not disappeared. Russia’s military cooperation with North Korea, China’s support for the Russian economy and defence industry, vulnerabilities in critical supply chains, and the global nature of cyber and technological competition all connect the Euro-Atlantic and Indo-Pacific theatres.

However, NATO 3.0 is unlikely to involve the Alliance assuming extensive operational responsibilities in the Indo-Pacific. The principal American objective is for European allies to take greater responsibility in Europe so that the United States can concentrate more resources on the Indo-Pacific theatre, not for European NATO forces to follow the United States into the region.

NATO and the Indo-Pacific partners can work together on defence-industrial production, technological standards, cyber defence, resilience, maritime awareness, critical infrastructure, supply-chain security and the lessons emerging from Ukraine. Such cooperation can increase interoperability without requiring NATO be active outside the Euro-Atlantic area.

V. What comes next?

The U.S. force-posture review in Europe

The key issue to watch is Washington’s review of its military posture in Europe. This process is not starting from scratch. In June 2026, NATO acknowledged that the United States had reduced its pledged contribution to the NATO Force Model, the pool of national forces and capabilities assigned to support the Alliance’s defense plans in a crisis or conflict.²⁵ European allies subsequently increased their commitments, and NATO’s Supreme Allied Commander Europe reported on 1 July that they had filled most, though not all, of the resulting gaps.²⁶

²⁵ North Atlantic Treaty Organization. (2026, June 17). *Pre-ministerial press conference ahead of the meeting of NATO ministers of defence*. <https://www.nato.int/en/news-and-events/events/transcripts/2026/06/17/pre-ministerial-press-conference-ahead-of-the-meeting-of-nato-ministers-of-defence>.

²⁶ Reuters. (2026, July 1). *Europeans fill most gaps left by US in NATO defence plans, top commander says*. <https://www.reuters.com/business/aerospace-defense/europeans-fill-almost-all-gaps-left-by-us-nato-defence-plans-source-says-2026-07-01/>.

On 18 June, U.S. Defense Secretary Pete Hegseth announced a broader assessment of the American force posture and military footprint in Europe.²⁷ The Pentagon formally launched the six-month review on 28 July.²⁸ It will examine the size and distribution of the U.S. presence, its alignment with Washington's wider global priorities and the extent to which European allies can assume responsibilities currently carried by the United States.

²⁷ POLITICO. (2026, July 28). *US kicks off Europe force posture review*. <https://www.politico.eu/article/us-kicks-off-europe-force-posture-review/>.

²⁸ U.S. Department of War. (2026, July 28). *War Department review to ensure "NATO 3.0" becomes Europe-led defense alliance*. <https://www.war.gov/News/News-Stories/Article/Article/4521330/war-department-review-to-ensure-nato-30-becomes-europe-led-defense-alliance/>.



The review's outcome, potentially emerging by early 2027, will constitute a practical test of NATO 3.0. A transparent and coordinated adjustment, tied to measurable growth in European capabilities and carefully sequenced to prevent capability gaps, could strengthen the Alliance. However, sudden or withdrawals would instead disrupt defence planning and deepen doubts about American credibility.

European Integrated Anti-Ballistic Missile Coalition

The second initiative to watch is Europe's newly announced Integrated Anti-Ballistic Missile Coalition. On 13 July 2026, Ukraine and nine European countries, Denmark, France, Germany, Italy, the Netherlands, Norway, Spain, Sweden and the United Kingdom, launched the coalition in Paris.²⁹ Its flagship project, FREYJA, is intended to combine Ukrainian wartime innovation with European radar, sensor, guidance and industrial capabilities to create a scalable and more affordable defence against ballistic missiles.

²⁹ Office of the President of Ukraine. (2026, July 13). *First meeting on implementing the FREYJA anti-ballistic missile program took place in Paris*. <https://www.president.gov.ua/en/news/u-parizhi-vidbulasya-persha-zustrich-prisvyachena-realizaciy-105405>.

The project is rather ambitious with plans for the prototype to be ready by mid-2027, with Ukraine's Fire Point expected to lead development of the launcher and interceptor and Germany's Hensoldt contributing radar technology. The proposed open architecture could allow additional European companies and national systems to be incorporated as the program develops.

The project nevertheless remains at an early stage. The issues to watch are whether participating governments can secure stable financing, agree on common operational requirements and industrial responsibilities, integrate different national technologies, and move rapidly from testing to serial production. Its relationship with NATO's existing ballistic-missile-defence architecture will also require careful coordination.

There are also legitimate grounds for skepticism. The recent collapse of the Franco-German Future Combat Air System (FCAS) after prolonged disputes over industrial leadership and work-sharing, together with the continuing uncertainty surrounding the Franco-German Main Ground Combat System (MGCS), illustrates how even promising multinational defence projects can be derailed by industrial rivalries and political misalignment among participating governments.

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