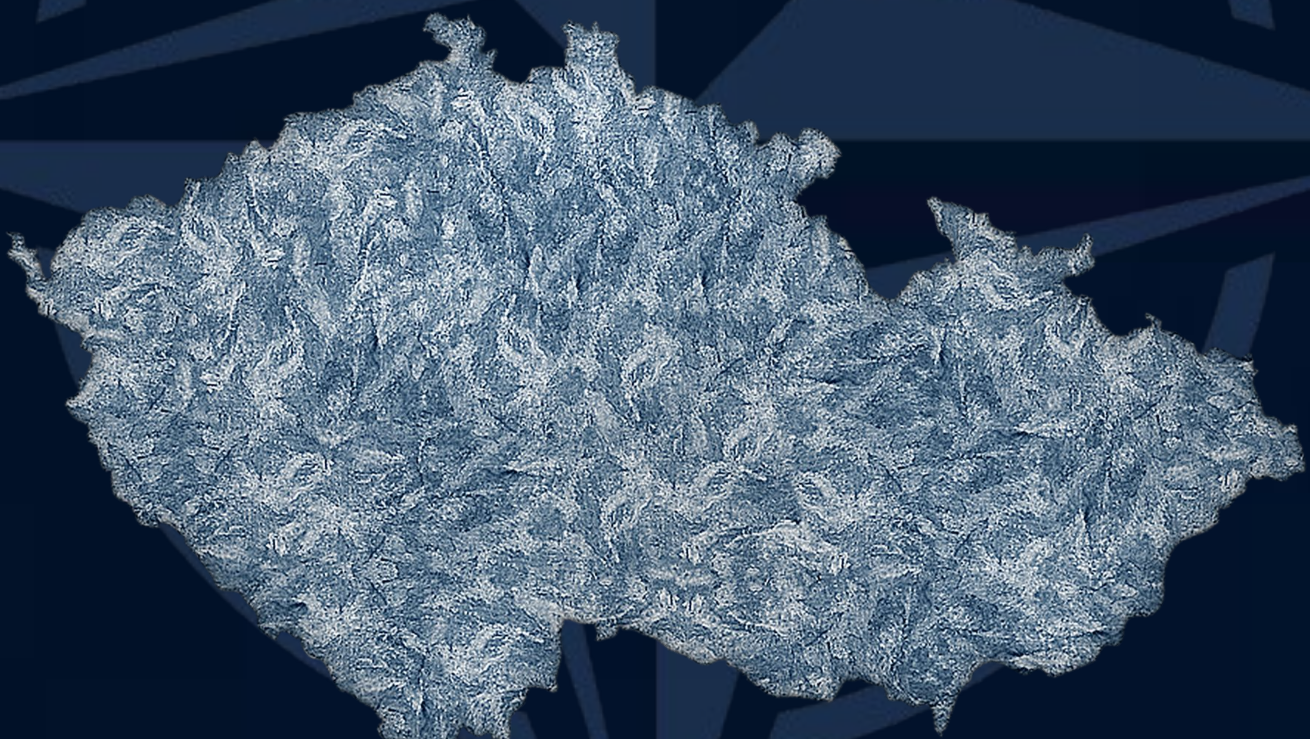
Czech Republic

NATO Country Assessment

—TIER TWO—

ARMING EUROPE • CONFRONTING CCP • CHEATING ON DEFENSE



JULY 2026

TIER 2

Average Ally

AT A GLANCE

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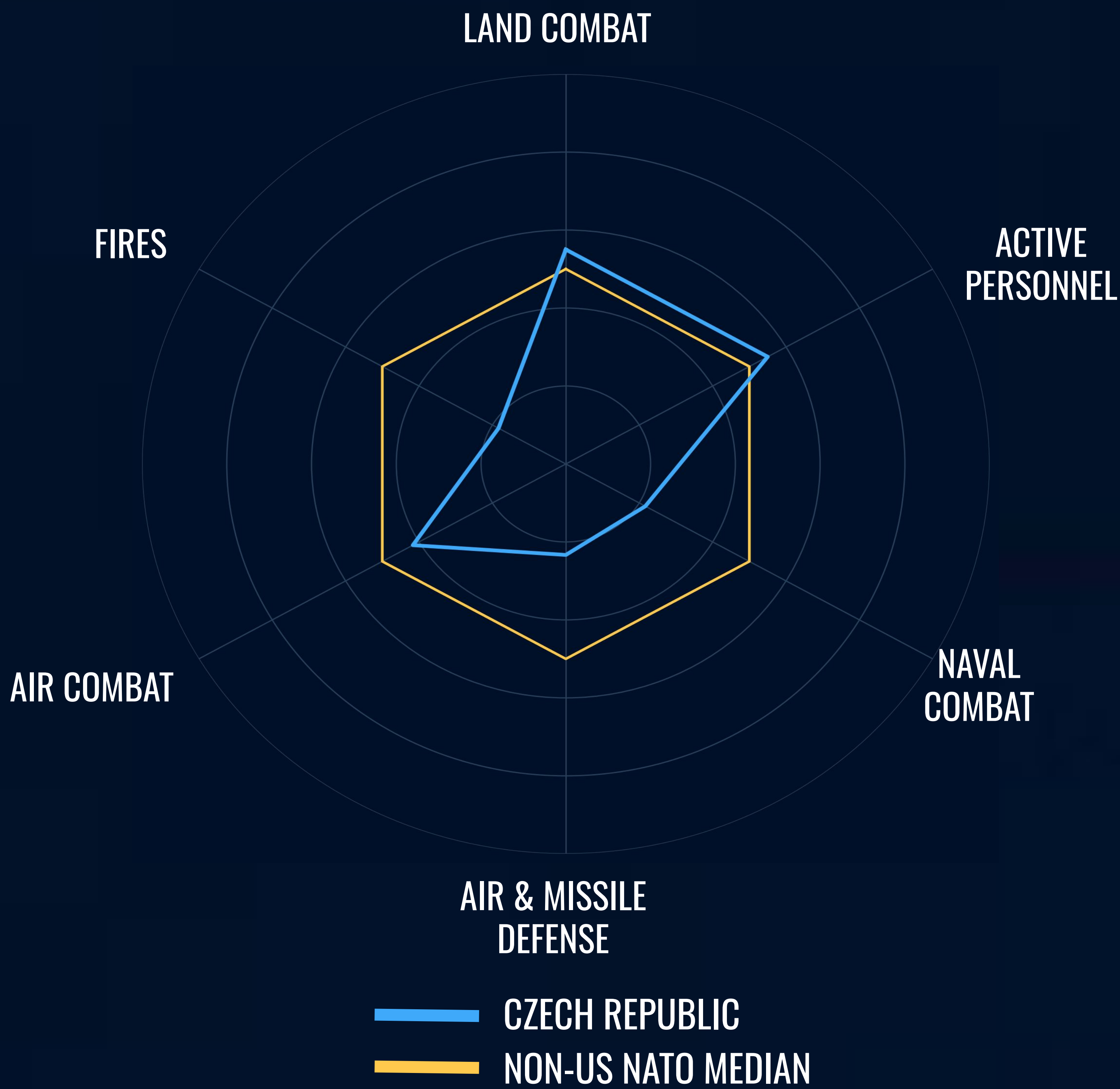
- **Arming Europe for a New Age:** The Czech Ammunition Initiative is the single most consequential industrial contribution any small or mid-sized NATO ally has made during the war with roughly 4.4 million large-caliber rounds delivered by early 2026, credited with shifting the Russia-Ukraine artillery exchange ratio from 10:1 to roughly 2:1.
- **President Pavel Stands on Principle and Takes on China:** he was the first elected European head of state to call Taiwan's president, met the Dalai Lama in July 2025, and serves as a strong counterweight to domestic leaders trying to undermine NATO vision for a strong Europe.
- **Cheating on Defense Commitments**: The Babiš government is gaming NATO's defense accounting, claiming 2.06% of GDP while NATO's own figures put the real number closer to 1.78%, a credibility problem that US officials and President Pavel have called out publicly.

FORCE STRUCTURE AT A GLANCE

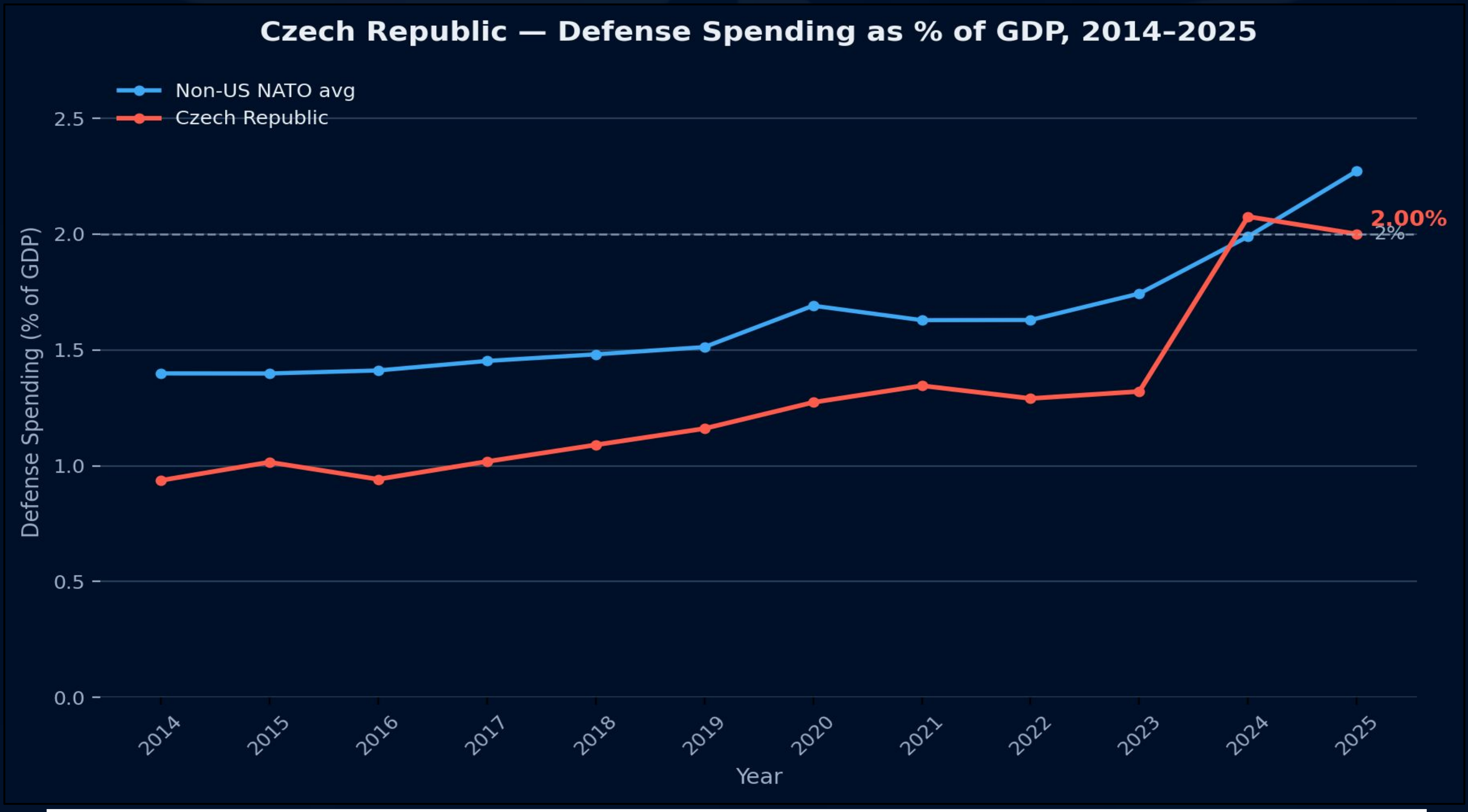


This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

MILITARY CONTRIBUTIONS

Defense Spending Level

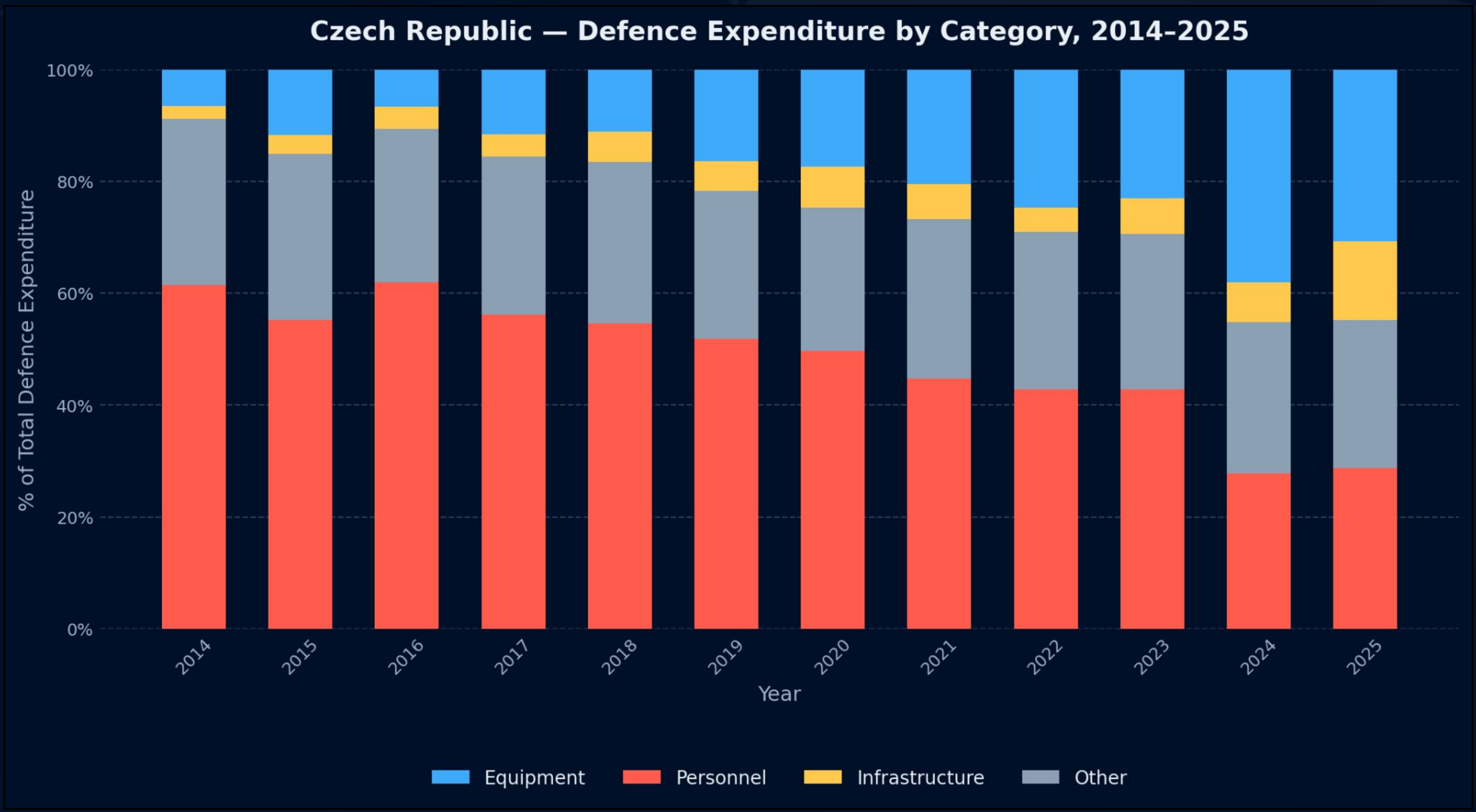
The Czech Republic reached NATO's 2% floor in 2024 for the first time in twenty years. The chart shows the trajectory clearly: spending tracked well below the non-US NATO average for most of the past decade before a very sharp acceleration in 2024 due to a new statutory requirement. The Fiala government committed to 3% by 2030, and Defense Minister Černochová stated publicly that 2% is insufficient given the Russian threat. The new Babiš government has inflated the defense budget on paper by counting spending that NATO doesn't recognize as defense—meaning Prague claims 2.06% of GDP but NATO's own accounting puts the real figure closer to 1.78%, below the Czech Republic's own legally mandated floor. President Pavel and US officials have publicly called this out. The law requiring 2% still exists and Babiš can't easily repeal it, but he appears to be gaming the accounting rather than meeting the spirit of the commitment.



MILITARY CONTRIBUTIONS

Equipment Share

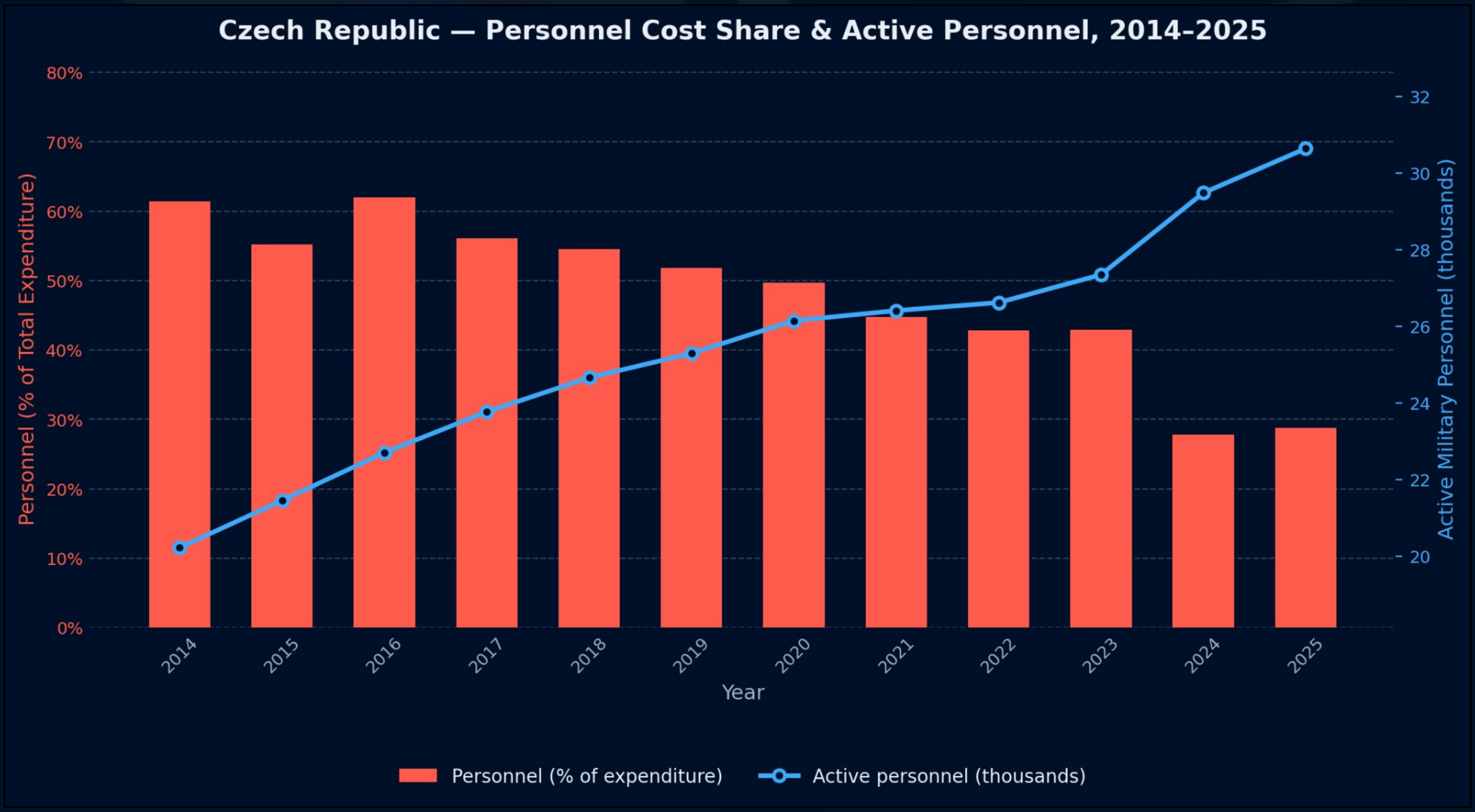
The Czech Republic's equipment share transformation is one of the most dramatic in the alliance. Personnel costs fell from roughly 62% in 2014 to approximately 29% in 2025—one of the steepest decline in NATO—while equipment share surged to roughly 40%+ by 2024–2025, well above NATO's 20% benchmark. The trend is clear: from 2021 onward, equipment investment accelerated sharply as the F-35A contract ($6.6B), CV90 MkIV IFV program ($2.2B, 207 vehicles), and Leopard 2A8 procurement (44 tanks) began registering in actual expenditure. The Czech Ammunition Initiative adds a further equipment-share dimension through defense-industrial throughput for Ukraine-bound artillery shells. If spending growth slows, the procurement pipeline funding the F-35, CV90, and Leopard programs through the decade comes under pressure.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

The Czech Republic's personnel picture is one of the strongest positive trends in its defense profile. Active military personnel has grown steadily and consistently from roughly 20,000 in 2014 to approximately 31,000 in 2025—a 50% increase over a decade—while personnel's share of the defense budget has fallen dramatically from roughly 62% to approximately 29% over the same period. The Czech Republic is simultaneously growing its headcount and freeing budget space for equipment. The sharp drop in personnel cost share in 2024–2025 reflects the procurement surge dominating the budget rather than any reduction in force size or salaries.



MILITARY CONTRIBUTIONS

Capability Modernization

The Czech Republic's modernization program is among the most comprehensive in Central Europe. The major procurement is a $6.6B contract for 24 F-35As signed January 2024 with deliveries 2029–2035 and Czech industry embedded in the global F-35 supply chain. Behind it: 246 CV90 MkIV IFVs ($2.2B, all delivered by 2030, 207 assembled domestically) replacing the entire Soviet BMP-2 fleet, and 44 Leopard 2A8 tanks approved in September 2025 with an option for up to 77 total by 2031. The critical unresolved gap is air defense: aging Soviet SA-6 and Strela systems with no signed replacement contract, leaving the Czech Republic without a credible modern air defense layer despite identifying it as a priority in the 2023 Security Strategy.

MILITARY CONTRIBUTIONS

Force Posture

The Czech Republic's force posture punches above its size through structural NATO integration rather than mass. The 4th Rapid Reaction Brigade is affiliated with Germany's 10th Armored Division, embedding Czech forces in German divisional logistics and fires they cannot generate independently. Eastern front deployments include a mechanized company in Slovakia, 100 troops in Lithuania, and specialist electronic warfare and SAM units in Latvia. The Czech Republic served as framework nation for NATO's Multinational Battlegroup Slovakia from April 2022 to July 2024. Regular Baltic and Iceland Air Policing rotations complete an active profile for an inland Central European state.

MILITARY CONTRIBUTIONS

Industrial Base

The Czech Republic has one of Central Europe's most capable defense industrial bases and has become a critical NATO supply chain node since 2022. Including the Excalibur Army for armored vehicle production, Tatra for military trucks, and multiple ammunition producers that have dramatically expanded output. The Czech Ammunition Initiative has delivered roughly 4.4 million artillery rounds through early 2026, the most significant industrial output of any small or mid-sized NATO ally during the war. VOP CZ will assemble 207 of 246 CV90 MkIV vehicles domestically, embedding Czech state industry in a NATO IFV program.

STRATEGIC ALIGNMENT

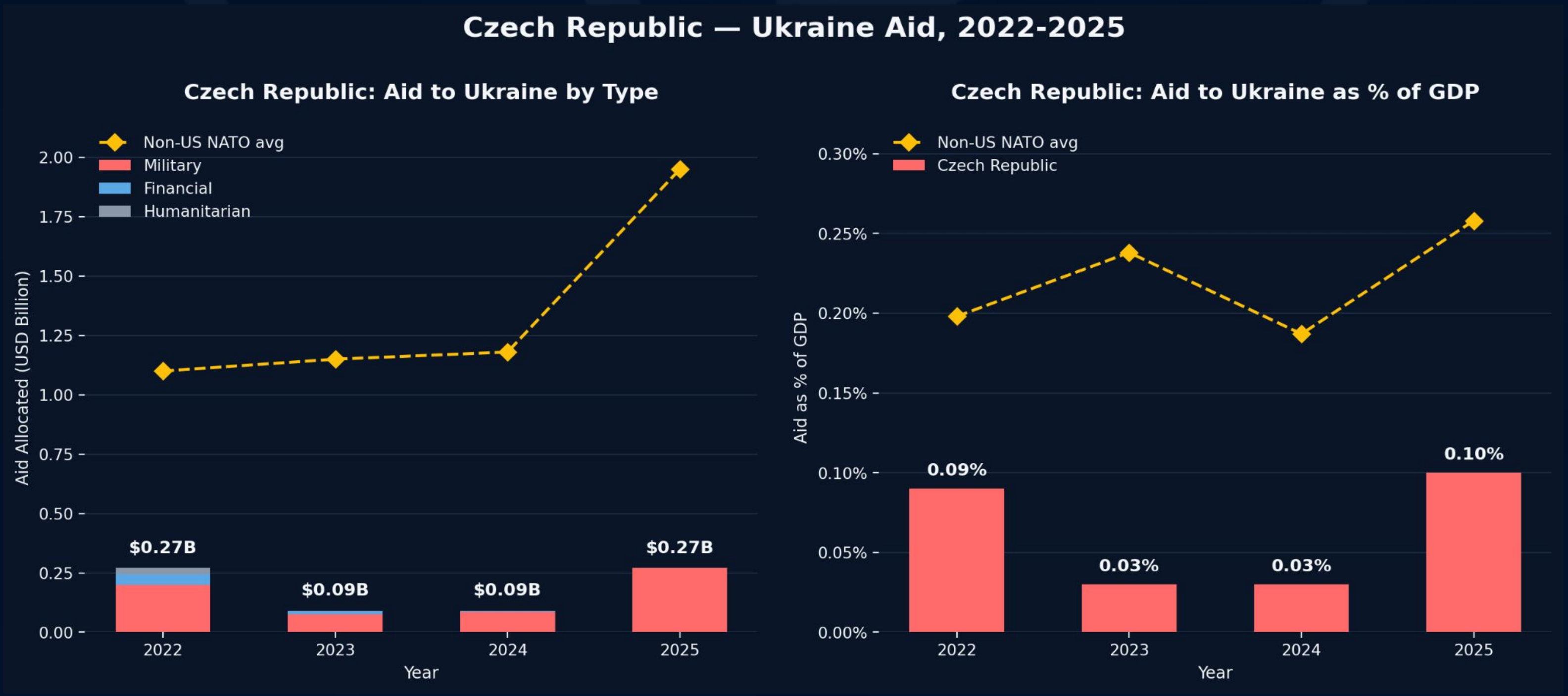
Declared Posture

The Czech Republic's 2023 Security and Defence Strategies are among the strongest strategy documents in Central Europe. Russia is explicitly named as the most serious threat, with language preparing for a possible protracted high-intensity war. On China, the 2023 Security Strategy identifies Beijing as a systemic challenge to the international order, backed by concrete action: APT31 cyberattack attribution in 2025, DeepSeek restrictions in high-risk public-sector contexts, and NÚKIB warnings on Chinese data transfers. The critical caveat is the December 2025 Babiš transition: the doctrine hasn't been rewritten and President Pavel remains a strong counterweight, but the governing coalition's proximity to the Orbán-linked Patriots for Europe bloc creates a growing gap between strong declared strategy and the government's actual political conduct.

STRATEGIC ALIGNMENT

Ukraine Support

Kiel's figures—peaking at $0.27B in 2022 and 2025 with a trough of $0.09B in between—consistently place the Czech Republic well below the non-US NATO average, but substantially undercount real contributions because Kiel tracks only formally declared government-to-government aid. Total Czech state expenditure on Ukraine reached roughly $3.65B through late 2025 when refugee hosting, development support, EU-channeled financing, and commercial defense-industry exports are included. The defining contribution is the Czech Ammunition Initiative: roughly 4.4 million large-caliber rounds delivered by early 2026, credited with shifting the Russia-Ukraine artillery ratio from 10:1 in Russia' favor in early 2024 to roughly 2:1 by 2025. The Babiš government's refusal to contribute new Czech budget funds to Ukraine is a serious concern.



STRATEGIC ALIGNMENT

Russian Decoupling

The Czech Republic has undergone one of NATO's most complete Russian energy decoupling programs. Pre-2022, roughly 50–58% of Czech crude came via the southern Druzhba pipeline. The TAL-PLUS pipeline upgrade doubled western import capacity to roughly 8 million tonnes annually, enabling Prague to halt Druzhba crude entirely in March 2025. On nuclear fuel, the American Westinghouse completed first deliveries to Temelín and Dukovany in June 2025, replacing Russian TVEL supply. On sanctions, the Czech Republic backed every EU package through the 20th and enacted a national Czech Sanctions Act in January 2023 allowing Prague to designate individuals beyond EU listings.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

In the 2024 NATO survey, 73% of Czechs said they would vote to stay in NATO, 57% agreed the Czech Republic should defend another ally if attacked, and 60% agreed NATO membership makes a foreign attack less likely, all near or slightly below the alliance median. Defense spending support was moderately low at 31% favoring an increase, below the survey average. The Fiala government has been among the most operationally committed members in Central Europe, providing substantial military aid to Ukraine and pushing spending toward 2%, and the full right-of-center coalition maintains strong support on NATO. The primary opposition risk is ANO (Babiš), the single largest party by vote share, which is nominally NATO-supportive but less enthusiastic on Ukraine aid. The SPD (Okamura), at roughly 5 to 8% of the electorate, is openly hostile to NATO's Ukraine posture but lacks governing leverage.

STRATEGIC ALIGNMENT

Hedging Behavior

The Czech Republic's hedging behavior record is strong but carries a transitional political risk under Babiš. On China, the Zeman-era investment push produced almost no lasting strategic dependence. President Pavel is the quintessential allied leader. His January 2023 call with Taiwan's president was the first by any elected European head of state, and his July 2025 Dalai Lama meeting triggered a Chinese diplomatic suspension—genuine independence at real political cost. The new Babiš government is now walking that back, stabilizing Beijing relations and retreating from Taiwan contacts. Arms procurement is entirely Western: F-35A, CV90 MkIV, Leopard 2A8, zero adversary procurement. The principal concern is Babiš's alignment with the Orbán-led Patriots for Europe political bloc which is the EU's most Russia-accommodating faction. There is no concrete policy divergence yet, but Slovakia's trajectory under Fico shows how quickly rhetoric can translate into active obstruction of sanctions, Ukraine aid, and alliance consensus.

STRATEGIC ALIGNMENT

Operational Cooperation

The Czech Republic has a strong track record of supporting US-led operations like contributing forces to Afghanistan under ISAF and Iraq coalition operations. The Czech-led NATO Multinational Battlegroup Slovakia from April 2022 to July 2024 was its largest sustained deployment since Afghanistan. Regular Baltic and Iceland Air Policing rotations demonstrate sustained airspace contribution from an inland state. On recent US operations, the Czech Republic imposed no obstruction—no access denials, no public statements against Operation Epic Fury or Red Sea operations—while also not participating directly.