



# Bulgaria

## NATO Country Assessment — *TIER TWO* —

BLACK SEA ACCESS • PRIORITY ALIGNMENT • WEAK SPENDING SUPPORT



JULY 2026



# TIER 2

Average Ally



---

# AT A GLANCE

---

## *Toplines*

- **Bulgaria's Black Sea Access Gives America Irreplaceable Value:** founding membership in the MCM Black Sea Task Group, the Port of Varna grain transit corridor, and its proposed Maritime Coordination Center at Varna position it as NATO's primary southeastern maritime anchor.
- **Aligning With NATO and American Priorities:** the 2025 National Defence Strategy formally designated Russia as Bulgaria's foremost threat, expelled Russian intelligence officers, and named China as a destabilizing actor.
- **Public Support for Collective Defense is Among the Weakest in the Alliance:** only 46% say Bulgaria should defend another ally if attacked and just 59% would vote to stay in NATO.



# FORCE STRUCTURE AT A GLANCE

## LAND COMBAT



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.

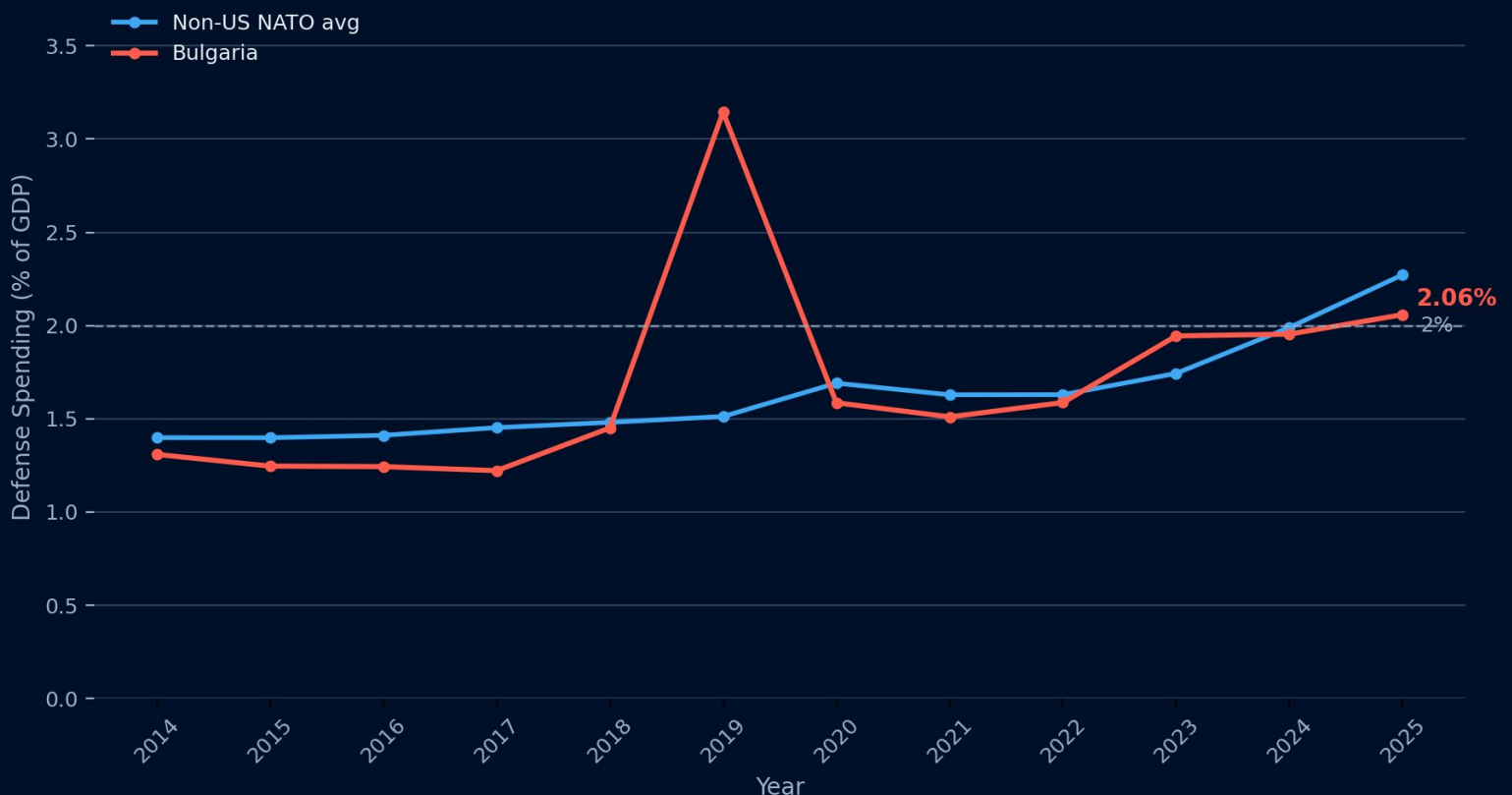


# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

Bulgaria's [defense spending](#) trajectory reflects a country that spent well below NATO's 2% floor for most of the post-Cold War era before a recent acceleration. NATO figures show Bulgaria clearing 2% of GDP in 2025, at roughly 2.06%, a year later than sometimes reported. The Radev government's May 2026 statement supporting Bulgaria's move toward the 5% Hague framework is a positive signal, but it comes from a prime minister who spent years opposing defense investment and Ukraine military support as president, making implementation the test. Sustaining the spending trajectory under coalition-budget pressures and a historically Russia-accommodating government creates meaningful risk.

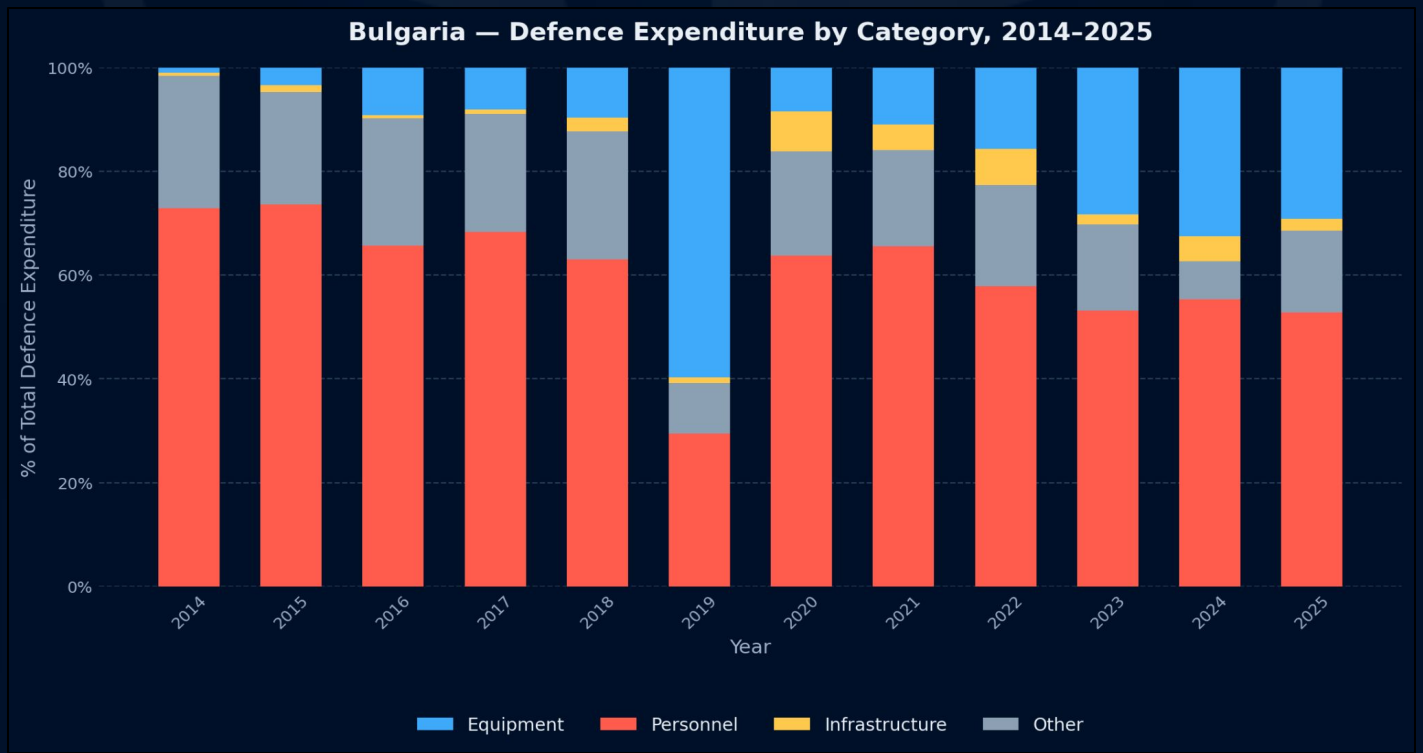
**Bulgaria — Defense Spending as % of GDP, 2014-2025**



# MILITARY CONTRIBUTIONS

## *Equipment Share*

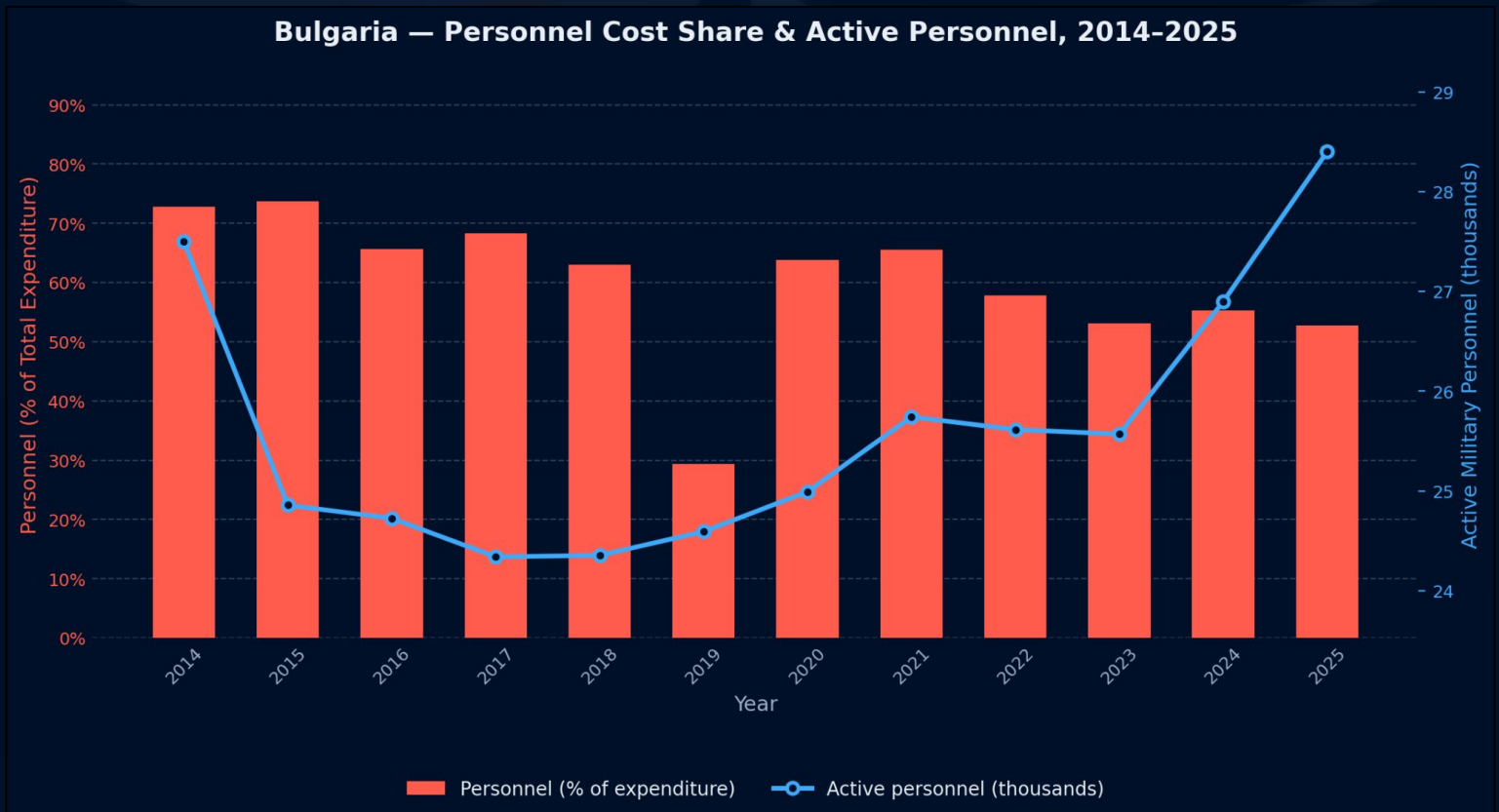
Bulgaria's [equipment share](#) tells a story of growing investment after decades of neglect. Personnel costs ran at roughly 60–75% of the defense budget through 2014–2018, leaving almost nothing for procurement. The 2019 spike in equipment share is due to major procurement decisions, primarily the F-16 Block 70 contract. Since 2020, equipment share collapsed back to single digits in 2020-2021 after the 2019 spike, then climbed steadily from 2022 onward, reaching a peak of 32.5% in 2024 before easing slightly to 29% in 2025. This is a genuine structural shift driven by the \$2B+ F-16 program, the \$1.37B Stryker contract, IRIS-T air defense, and MMPV corvette construction. Personnel costs have fallen to approximately 52–55% by 2025, still high but declining. Simultaneously, Bulgaria still maintains Soviet-era MiG-29 and Su-25 fleets alongside incoming F-16s, with legacy maintenance costs projected at \$68M in 2026 alone. The equipment share improvement is real but reflects compressed catch-up spending.



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

Bulgaria's [personnel picture](#) is one of the more encouraging trends in its defense profile. Active military personnel bottomed out at roughly 24,000 in 2017–2018 and has since recovered to approximately 28,000 by 2025. Crucially, this force expansion is happening while personnel's share of the total defense budget is falling, from roughly 70–73% in 2014 to approximately 52% in 2025. This combination of more soldiers consuming a smaller share of the budget is exactly what a modernizing force should look like: defense spending is growing fast enough that equipment investment is expanding even as the headcount rises. The risk is the Radev government's budget posture over 2026–2027. If spending growth slows, the personnel rebuild and equipment surge will compete rather than complement each other, and the gains of the past three years could erode quickly.



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

Bulgaria's [modernization](#) is real with areas for improvement. The headline program is 16 F-16 Block 70s across two contracts. On the ground, the \$1.37B Stryker program delivers 183 AFVs replacing Soviet BMPs, with first arrivals in February 2026. Air defense is being addressed through a 2024 IRIS-T SLM contract with options for up to six total batteries by 2032, replacing legacy S-300 and S-200 systems. And a \$82.7M Javelin purchase in March 2025 adds modern anti-armor capability. Naval modernization includes two domestically built MMPV corvettes, plus seven Tripartite MCM vessels transferred from Belgium and the Netherlands. The key gaps include 155mm artillery replacement remains uncontracted, and short-range air defense beyond the first IRIS-T battery is unfilled. Every major program has experienced delays; the direction is right but execution lags.



# MILITARY CONTRIBUTIONS

## *Force Posture*

Bulgaria's force posture is anchored by hosting and Black Sea geography rather than large forward deployments. Bulgaria hosts the Italy-led NATO Multinational Battlegroup Bulgaria at Novo Selo, which achieved full operational capability in December 2022 and comprises over 1,000 personnel from NATO countries. In January 2026, Bulgaria signed an [agreement with Italy](#) for the joint construction and use of a permanent NATO military base to replace the current rotating presence, converting a temporary arrangement into enduring infrastructure. Bulgaria also maintains the [Graf Ignatievo Air Base](#) as a platform for allied air-policing rotations during the MiG-29 transition gap. On forward deployments, Bulgaria contributes troops to the NATO Multinational Brigade Latvia and KFOR Kosovo. Bulgaria's Black Sea positioning makes it a founding member of the [MCM Black Sea Task Group](#) with Romania and Turkey, and it has proposed hosting a multinational [Black Sea Maritime Coordination Center](#) at Varna.



# MILITARY CONTRIBUTIONS

## *Industrial Base*

Bulgaria's defense industrial base is primarily export-oriented in legacy sectors (small arms and ammunition) without domestic design or production capability for major platforms. The most strategically significant development is the domestic construction of two MMPV corvettes, helping restore local shipbuilding capacity. Bulgaria joined the EU 155mm [shell-production coalition](#) in 2023, a meaningful strategic direction shift. On raw materials, Bulgaria hosts several deposits of critical minerals: it holds copper deposits and has historically been a significant non-ferrous metals producer, with potential relevance to ammunition and electronics supply chains as the alliance scales industrial production. Overall, Bulgaria remains import-dependent for all significant modern platforms but the direction is toward greater NATO integration.



# STRATEGIC ALIGNMENT

## *Declared Posture*

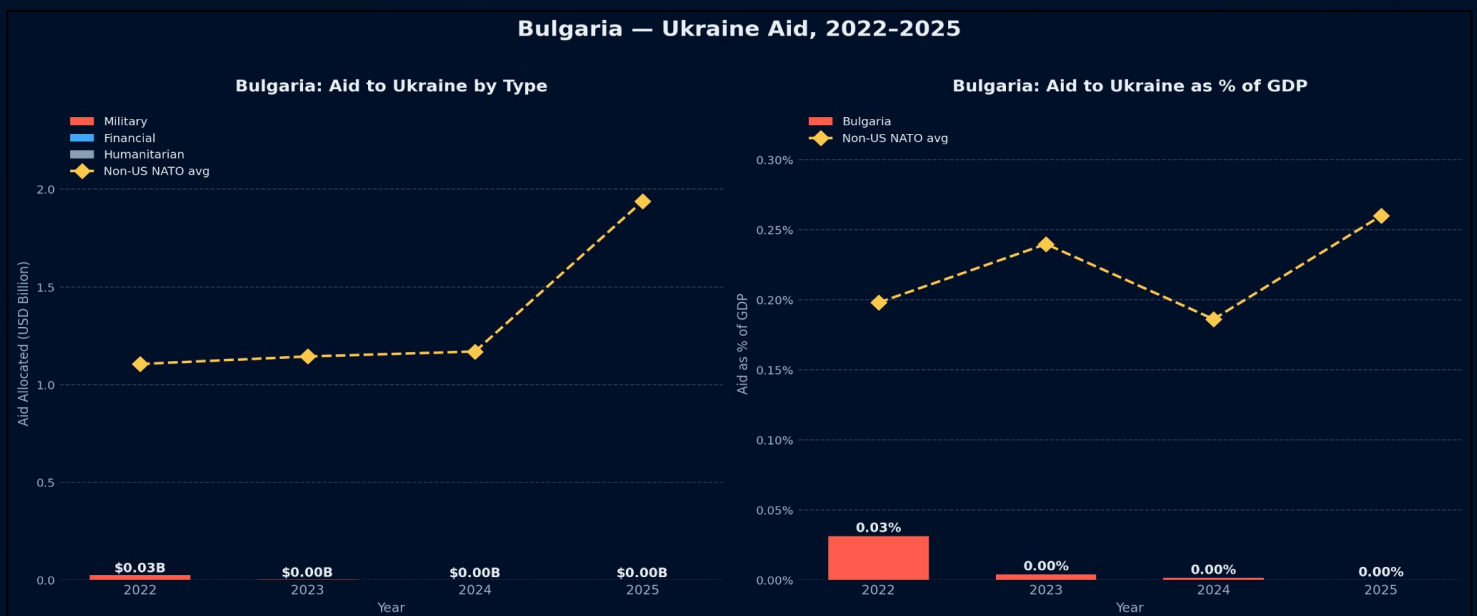
Bulgaria's declared posture underwent a significant transformation in March 2025 with the adoption of the [National Defence Strategy](#). For the first time Bulgaria designated Russia as the biggest threat to national security. The [State Agency for National Security](#) has identified Russia as the “main generator” of regional and global threats, and Bulgaria expelled two Russian intelligence officers and arrested a Bulgarian civil servant for [Russian espionage in 2024](#). On China, the 2025 strategy names China as an external actor sustaining Balkan instability, a meaningful escalation from prior policy. However, the April 2026 election of Rumen Radev undermines recent doctrine. Radev's prior record of Russia accommodation and active opposition to Ukraine military support creates a concerning gap between the 2025 doctrine's language and the likely policy instincts of the government now executing it.



# STRATEGIC ALIGNMENT

## *Ukraine Support*

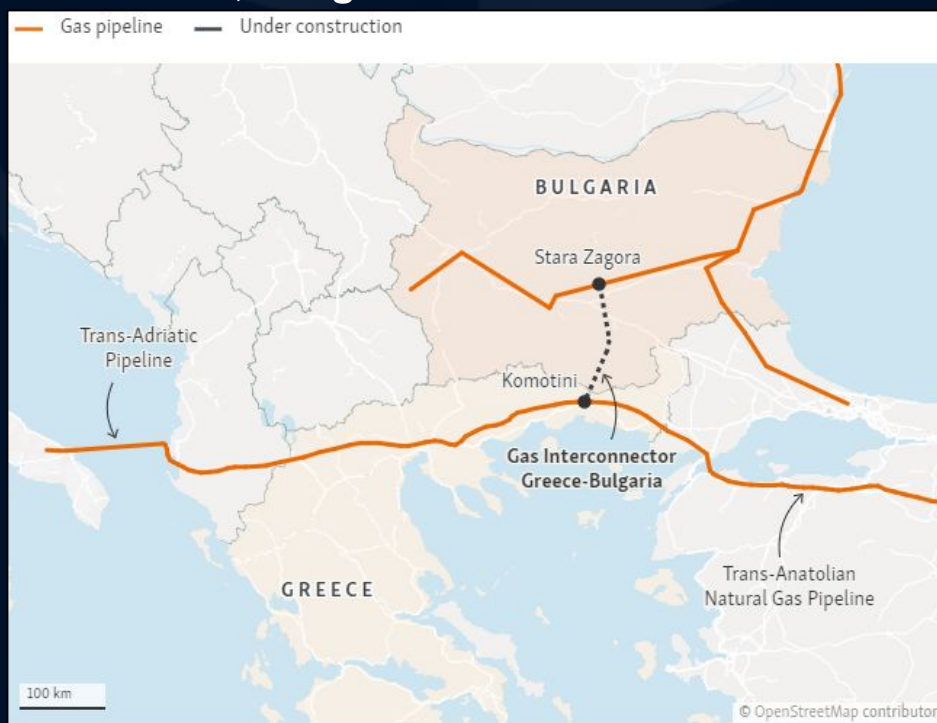
Bulgaria's [Ukraine support](#) doesn't show up in the formal Kiel Institute's tracking because most of it was done through intermediaries. Bulgaria [secretly supplied](#) roughly 30% of Ukraine's Soviet-caliber ammunition needs and up to 40% of diesel during the critical early months of the war. Formal aid packages continued through 2024, with a seventh package announced in December 2024; Bulgaria explicitly excluded S-300 and MiG-29 transfers, retaining those systems for its own defense needs. Bulgaria joined the EU 155mm shell-production coalition in 2023. The April 2026 [Radev victory](#) is the largest risk factor: Radev consistently and publicly opposed military support to Ukraine, and the covert early-war ammunition channel was built specifically to work around his resistance. Future military aid, shell-production commitments, and EU Ukraine-financing votes are now watch-list items. Bulgaria's geographic contribution (Black Sea mine countermeasures, Port of Varna grain transit, overland logistics routes) represents a structural Ukraine-support role that persists largely independent of government posture.



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

Bulgaria's Russian decoupling record is more complicated. On gas, the Petkov government's rapid pivoting to the [Greece-Bulgaria interconnector](#) commissioned in October 2022, eliminated roughly 95% Russian gas dependence—a genuinely significant achievement. The harder case is oil. Bulgaria's [Russian-owned Burgas refinery](#) (processing 190,000 barrels per day and worth roughly 7–9% of Bulgarian GDP) actually increased its Russian crude share from 70% pre-war to 93% in 2023, generating an estimated €1.1B in Kremlin tax revenue before parliament banned Russian crude imports from March 2024. On nuclear, Bulgaria has replaced Russian fuel supplier TVEL at its Kozloduy plant with the American Westinghouse and planned future reactor expansions will use Westinghouse as well. On sanctions, Bulgaria supported every EU Russia sanctions package through the 20th without obstruction. The new Radev government introduces risk to enforcement, though no formal sanctions rollback has occurred.



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

Bulgaria presents an [interesting picture](#): 61% of Bulgarians favored increasing defense spending in 2024, the second highest in the alliance, yet only 59% said they would vote to stay in NATO, the second-lowest. Just 46% agreed Bulgaria should defend another NATO ally if attacked, and Ukraine support was among the weakest in the survey at around 47% combined. The mainstream GERB-led coalition is nominally pro-NATO but has a long history of accommodating Russian business interests, and the openly pro-Russia Vazrazhdane (Revival) party, polling above 10%, uses Ukraine policy as a voter mobilization tool. Russia favorability in Bulgaria runs higher than in virtually any other member state. The combination of relatively high defense spending appetite and simultaneously low collective defense intention makes Bulgaria one of the more domestically uncertain members of the Central European states.



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

Bulgaria's hedging behavior is cleaner than its domestic politics suggest. Zero adversary arms procurement, no high-level Moscow or Beijing visits by sitting government heads, no obstruction of Finnish or Swedish accession, and no meaningful Chinese critical infrastructure footprint. The primary vulnerability is the Lukoil Burgas refinery (Russian-owned, worth 7–9% of Bulgarian GDP) which remains unresolved despite the March 2024 crude import ban, representing the most significant Russian infrastructure footprint inside any NATO member. The April 2026 Radev election landslide is the largest near-term counter-alignment risk in Bulgaria's profile. Radev spent his presidential tenure opposing Ukraine military support, maintaining pro-Russian rhetoric, and resisting Western pressure on energy decoupling. Future aid decisions, sanctions enforcement intensity, and operational access are all more uncertain. Radev's May 2026 decision to limit US aircraft basing over a visa dispute signals he is willing to use operational access as a bargaining chip. Radev could create real friction.



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

Bulgaria has a strong track record of supporting US-led operations. It contributed forces to both [Iraq](#) and [Afghanistan](#) under US command, and has hosted US and NATO rotational forces at Novo Selo and Graf Ignatievo for years. The January 2026 agreement with Italy to convert the NATO Multinational Battlegroup Bulgaria into a permanent base locks in real commitments. Bulgaria is a founding member of the MCM Black Sea Task Group with Romania and Turkey, taking its first command rotation in January 2025—the most operationally consequential post-2022 Black Sea initiative. Graf Ignatievo continues to host allied air policing rotations. The 16 F-16 Block 70s and 198 Strykers lock Bulgarian air and land forces into US-origin platforms relying on NATO interoperability. Bulgaria did not participate in Operation Aspides, Operation Prosperity Guardian, or Operation Epic Fury, and [Radev's May 2026 basing dispute](#) is an early warning that operational access may become more transactional under the new government.

