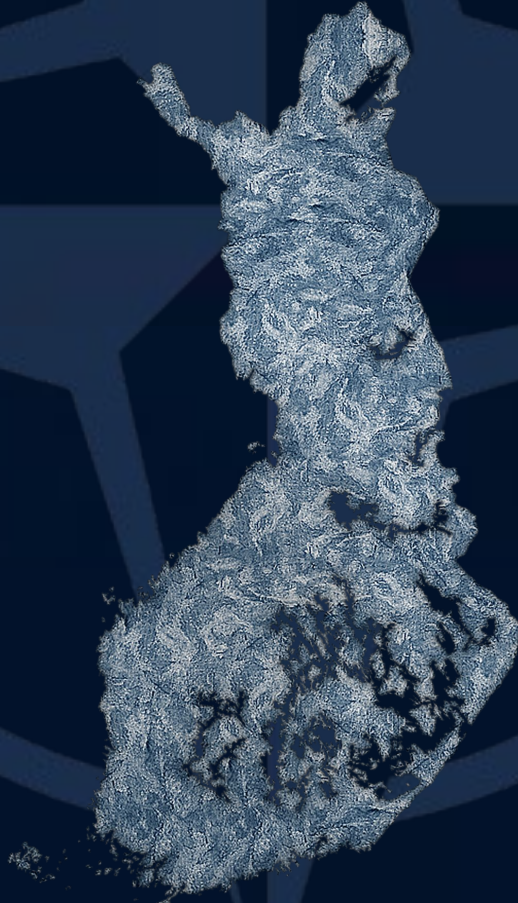




FINLAND

NATO Country Assessment — *TIER ONE* —

DEFENSE SPENDING • POWER PROJECTION • AIR DOMINANCE



JULY 2026



TIER 1

Model Ally



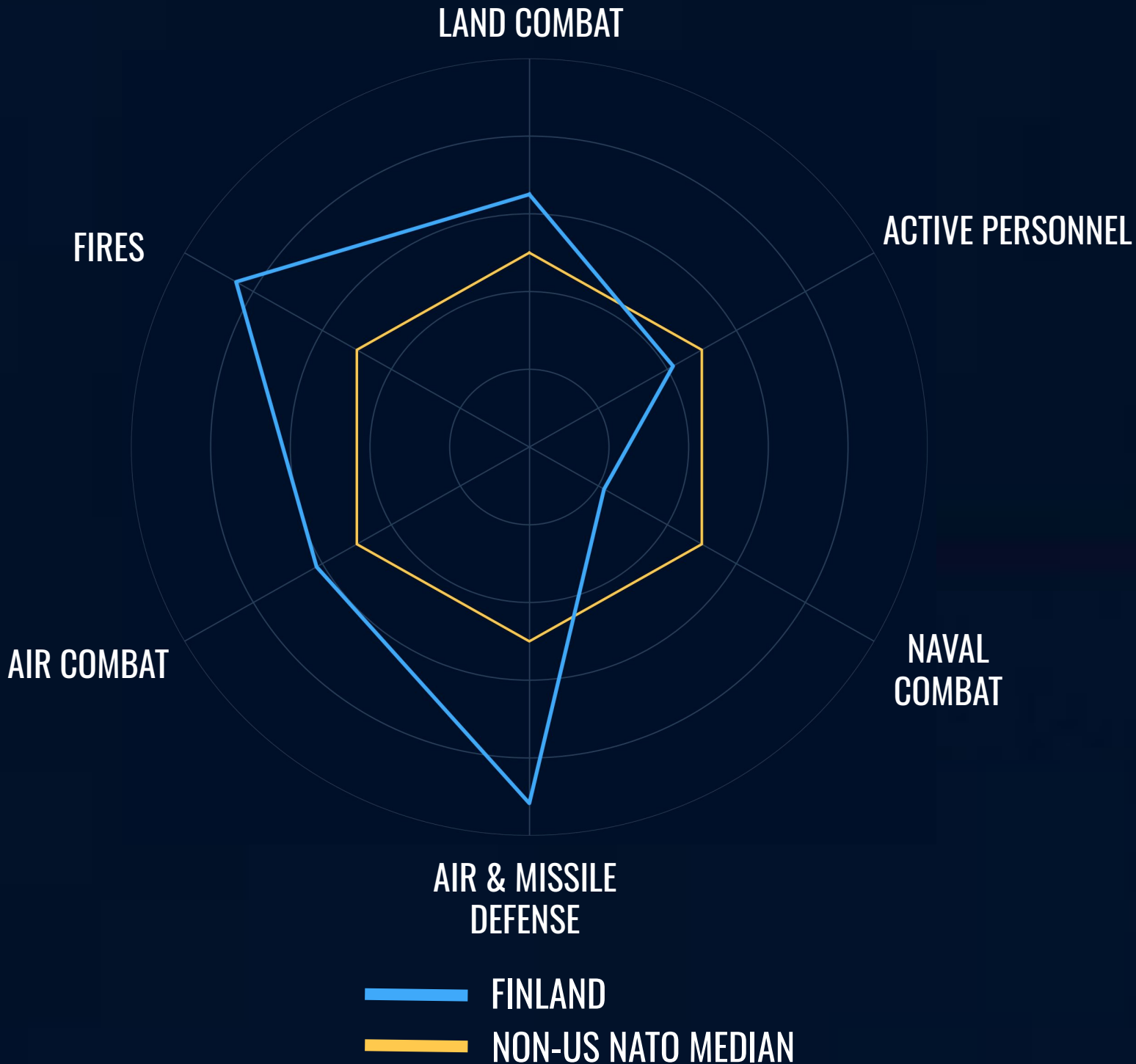
AT A GLANCE

Toplines

- **Committing to Tomorrow's Defense:** from 1.67% of GDP in 2022 to 2.77% in 2025, with a commitment to 3% by 2029, Finland is accelerating defense spending.
- **Strong Partner for American Power Projection:** granting unimpeded US access to 15 facilities, including five near the Russian border, authorized by astounding unanimous parliamentary vote.
- **64 F-35As Under a \$10B Contract with AGM-158 JASSM Cruise Missiles:** the largest fighter fleet in Northern Europe when complete and a rare European standoff deep-strike capability.



FORCE STRUCTURE AT A GLANCE



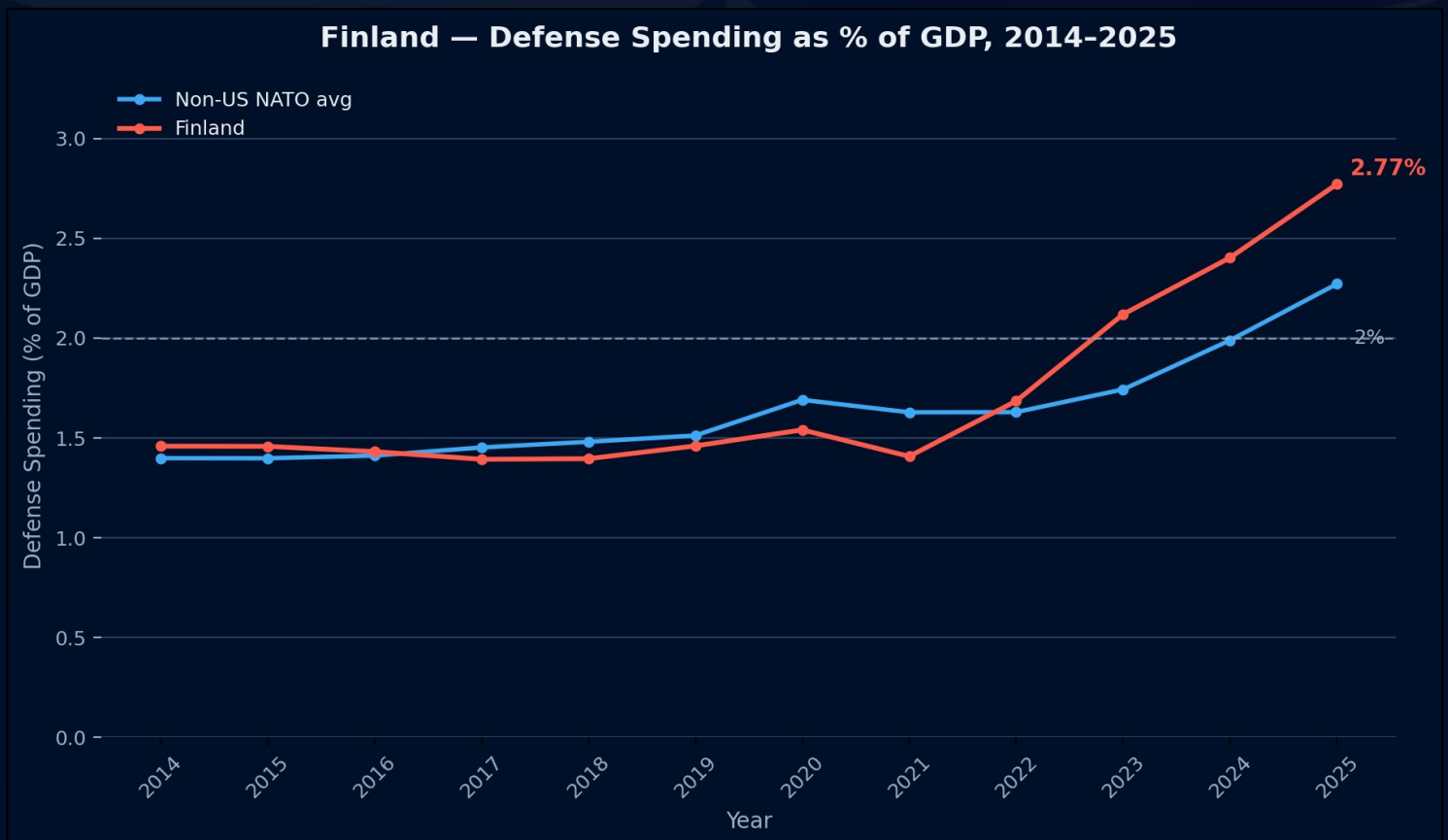
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (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

Finland's [defense spending](#) trajectory is among NATO's most serious. Finland's investment is roughly in line with the non-US NATO average since 2014, then breaking sharply higher in 2022: 1.67% in 2022, 2.11% in 2023, 2.41% in 2024, and 2.77% in 2025. The government has committed to [at least 3% by 2029](#) and accepted the Hague 3.5% core plus 1.5% framework by 2035. This comes from a country that never fully demilitarized after the Cold War and is now simultaneously pursuing NATO integration, F-35 transition, corvette construction, air defense layering, and ammunition stockpiling. Finland joins NATO with an already strong track record making them an important force multiplier to European deterrence.

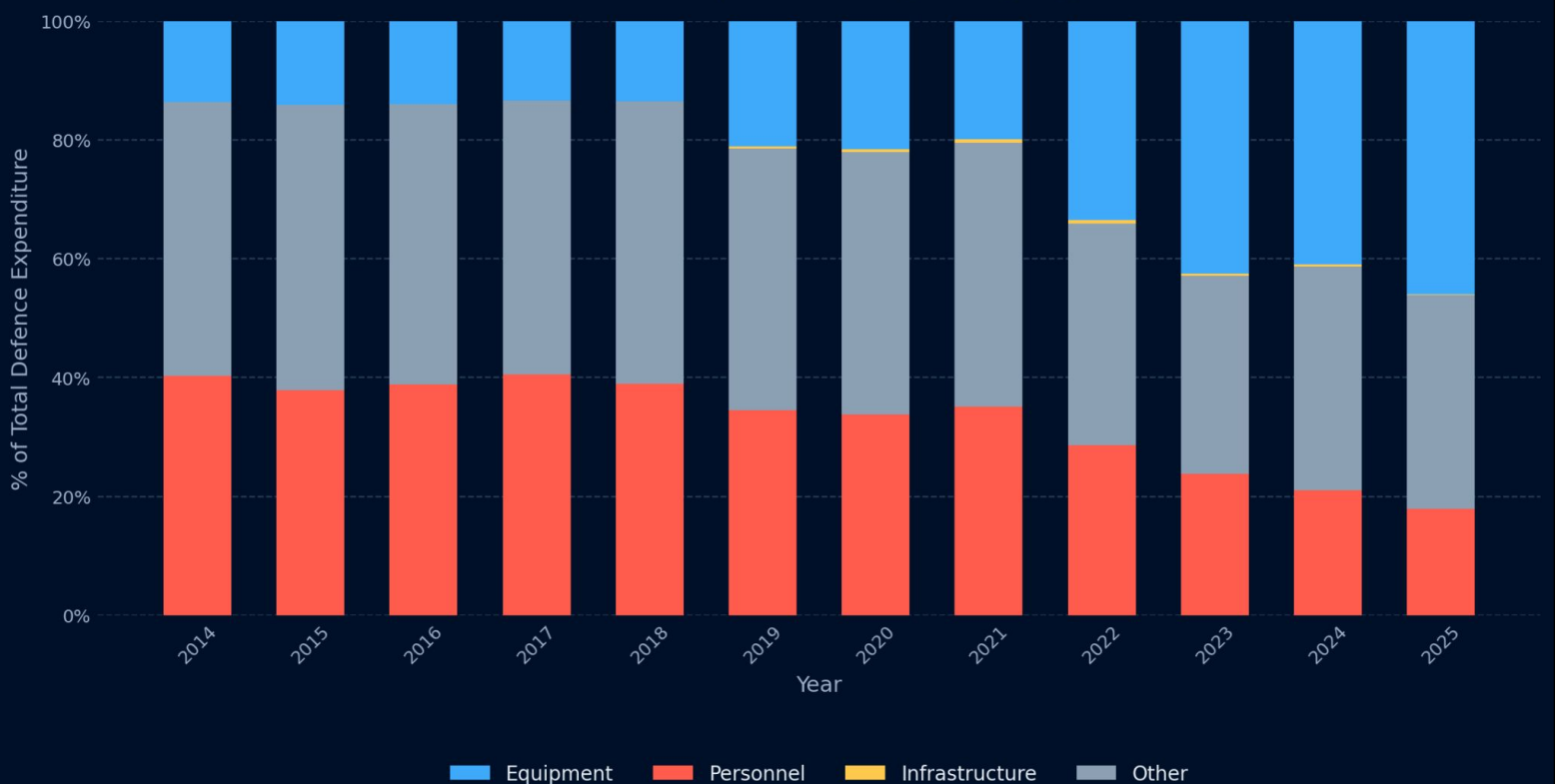


MILITARY CONTRIBUTIONS

Equipment Share

Finland's [equipment share](#) transformation is significant. Personnel costs fell from roughly 40% in 2014 to approximately 19% in 2025 while equipment surged to roughly 40%+ by 2024–2025, driven by the \$10B F-35A program, four Pohjanmaa-class corvettes, David's Sling air defense, and K9 Thunder howitzers all registering simultaneously. The "Other" procurement-adjacent category also remains substantial. Finland entered NATO with a higher equipment share than most Western European allies because it never fully hollowed out its territorial defense posture: the current surge is acceleration from an already serious baseline, not a recovery from neglect.

Finland — Defence Expenditure by Category, 2014-2025

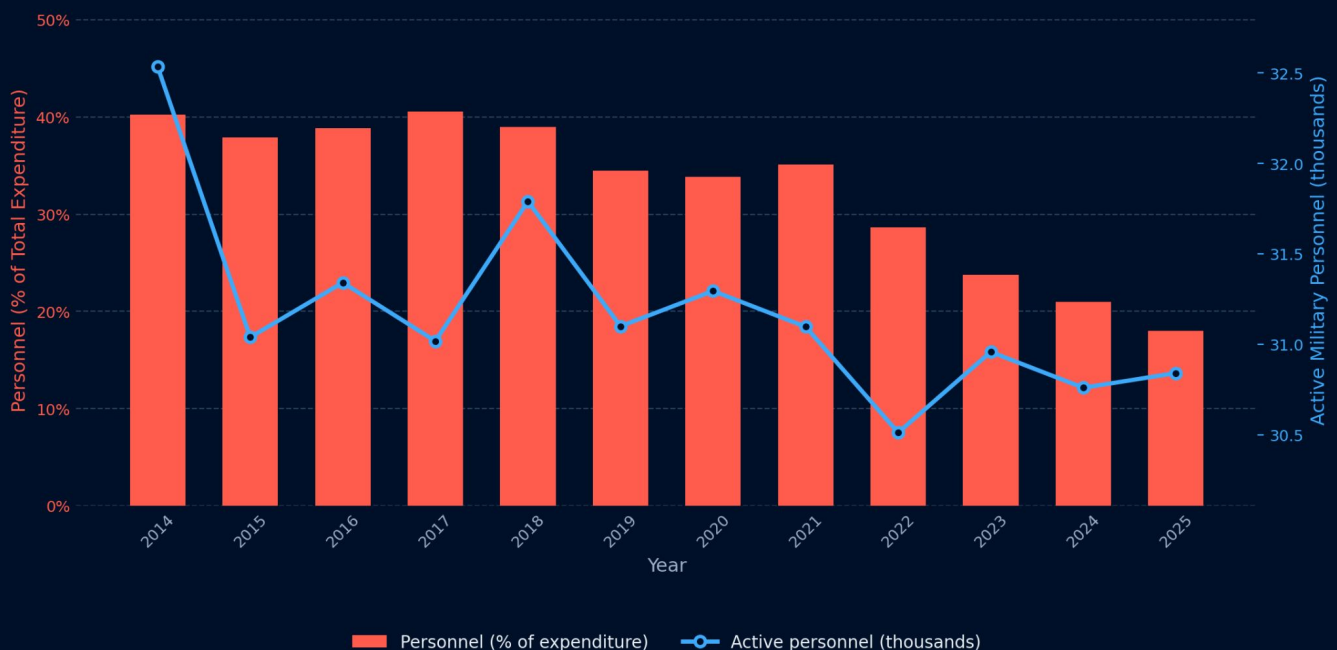


MILITARY CONTRIBUTIONS

Manpower & Recruitment

Finland's [personnel picture](#) reflects a force always prudent of the threat it faced. Active military personnel have held relatively stable at roughly 30,500–32,500 throughout 2014–2025, with no dramatic collapse of the kind seen in other countries. Personnel cost share has fallen sharply (from roughly 40% in 2014 to approximately 19% in 2025) not because the force shrank but because the budget grew fast enough that equipment now dominates. The deeper personnel story is the reserve: Finland maintains a [900,000-strong trained reserve](#) fed by universal male conscription, giving it a mobilizable force that dwarfs its active headcount and is larger than most NATO allies' entire military. That reserve structure is the product of decades of consistent investment. Finland never dismantled it during the post-Cold War period when most European allies were cutting equivalent capabilities. NATO accession has added new integration requirements, with Finnish personnel adapting to NATO command frameworks.

Finland — Personnel Cost Share & Active Personnel, 2014–2025



MILITARY CONTRIBUTIONS

Capability Modernization

Finland's modernization [program is comprehensive](#) and starts from a stronger baseline than most NATO allies. The headline: 64 F-35As under a \$10B contract (the largest fighter fleet in Northern Europe when complete) equipped with AGM-158 JASSM cruise missiles giving Finland a rare European standoff deep-strike capability. Air defense is already layered: Patriot PAC-3 MSE, NASAMS II, Crotale NG, and ASRAD, with David's Sling being added for long-range ballistic missile defense. Ground forces are robust: 200 Leopard 2 MBTs, 48 K9 Thunder howitzers, 41 M270 MLRS, and hundreds of additional artillery pieces. Four Pohjanmaa-class corvettes are being built under the Squadron 2020 program, each equipped with ESSM, anti-ship missiles, and torpedoes. Drone and counter-drone procurement was [accelerated in April 2026](#) in direct response to Ukraine war lessons. Finland is upgrading an already serious force.



MILITARY CONTRIBUTIONS

Force Posture

Finland's NATO accession in April 2023 gave the alliance its longest direct land border with Russia at roughly 1,340km. The [US-Finland Defense Cooperation Agreement](#), in force since September 2024, grants US forces unimpeded access to 15 agreed facilities including five near Russia, with pre-positioning of equipment and personnel authorized by unanimous parliamentary vote. NATO's [Multi-Corps Land Component Command Northwest](#) became operational at Mikkeli in September 2025, making Finland a NATO command node. [NATO Forward Land Forces Finland](#) will be based at Rovaniemi and Sodankylä under Swedish framework leadership. Combined with Swedish accession, the Nordic region has transformed from a gap in NATO's planning architecture into an integrated defense space.



MILITARY CONTRIBUTIONS

Industrial Base

Finland's defense industrial base is strategically significant in several domains. [Patria](#), the state-owned defense prime, produces the AMV 8×8 armored vehicle fielded by Finland, Poland, Sweden, and South Africa, and manufactures F-35 front fuselages and F135 engine maintenance. This makes Finland an important manufacturing partner within the global F-35 supply chain. [Rauma Marine Constructions](#) is building all four Pohjanmaa-class corvettes domestically. Finland has substantially expanded domestic ammunition and explosives production since 2022, with stockpile reserves deeper than most NATO allies. On raw materials, Finland [holds significant deposits](#) of cobalt, nickel, lithium, and rare earth elements critical to batteries, electronics, and precision munitions. Nokia provides trusted domestic telecom infrastructure reducing exposure to high-risk vendors.



STRATEGIC ALIGNMENT

Declared Posture

Finland's declared posture is among the clearest in NATO. The [2024 Foreign and Security Policy Report](#) and [2024 Defence Report](#) explicitly treat Russia's war against Ukraine as driving a long-term existential threat to European security. This is backed by action: 1,340km of Russian border, closed border crossings as hybrid coercion countermeasures, and Ottawa Treaty withdrawal enabling reintroduction of anti-personnel mines. On China, Finland increasingly treats Beijing as a long-term security risk, though PM Orpo's [January 2026 Beijing visit](#) and the October 2024 EU EV-tariff abstention place Finland softer than other NATO countries on facing the China threat. Finland's declared strategy and actual investment are unusually well aligned.



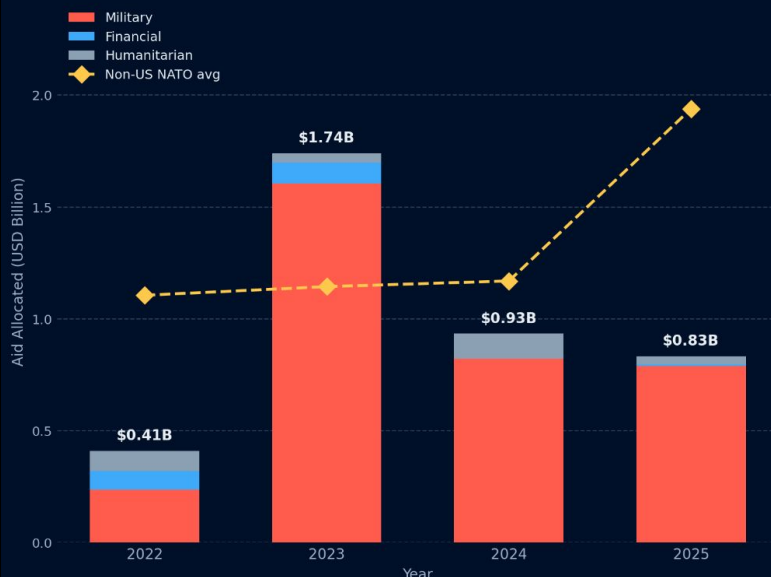
STRATEGIC ALIGNMENT

Ukraine Support

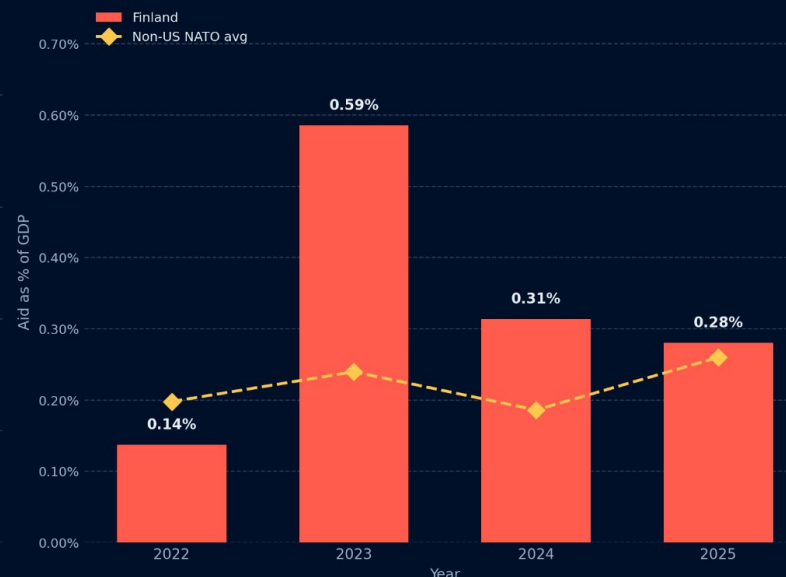
Finland's [Ukraine aid](#) peaked at \$1.74B in 2023 (0.59% of GDP, well above the non-US NATO average) before settling at \$0.93B and \$0.83B in 2024–2025, still running above the alliance average. Kiel tracks €3.605B allocated and €4.433B committed (1.43% and 1.76% of GDP) substantially military-heavy across 33 packages totaling roughly €3.4B in defense materiel by May 2026. Finland participates across the artillery, F-16, and Drone Coalitions and the Czech Ammunition Initiative. Finland's [operational secrecy policy](#)—not disclosing package contents or delivery routes—enabled transfers without political delays, particularly important before NATO accession when Finland was navigating a complex diplomatic environment.

Finland — Ukraine Aid, 2022–2025

Finland: Aid to Ukraine by Type



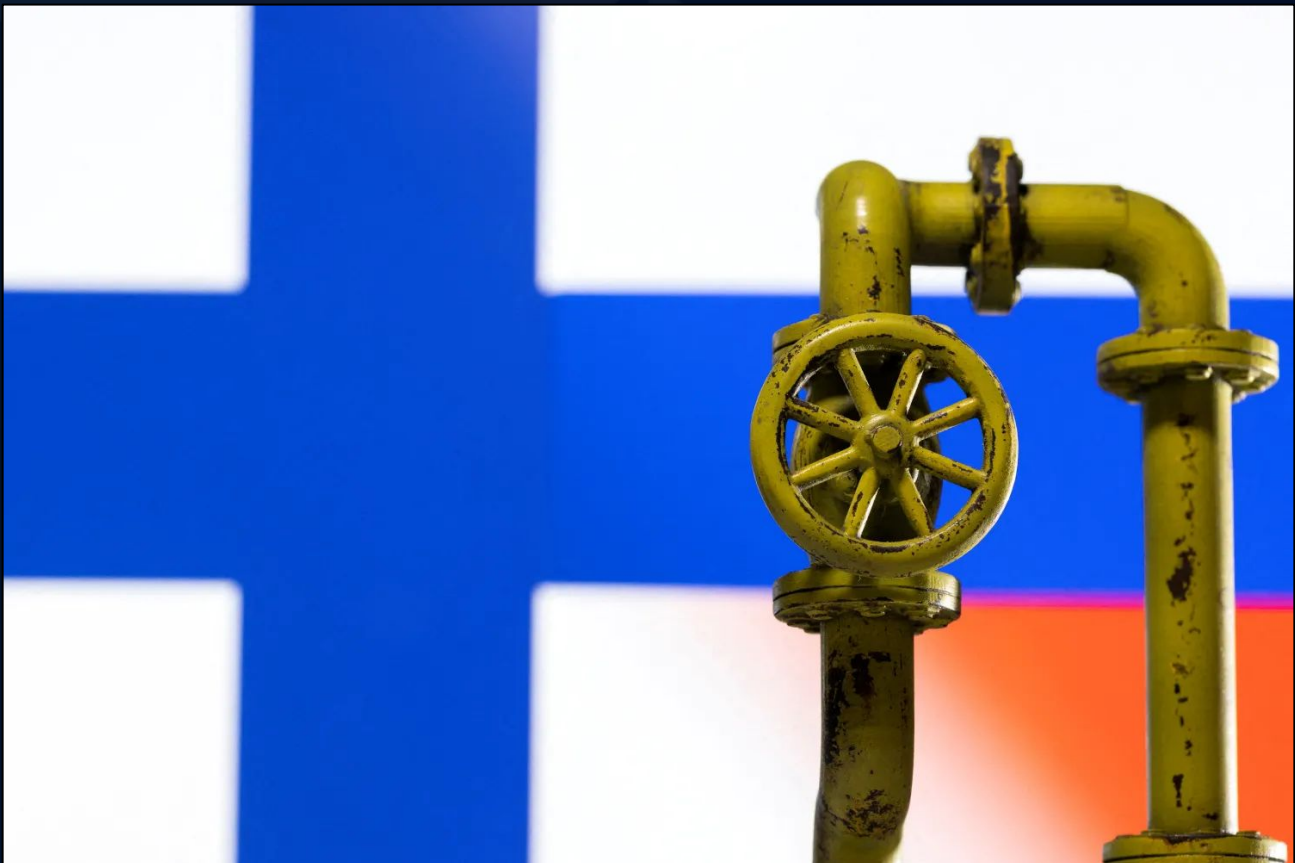
Finland: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

Finland's Russian energy decoupling was rapid and comprehensive. Before 2022, roughly one-third of Finnish energy came from Russia across oil, gas, coal, electricity, and nuclear. After the invasion, each dependency was cut: Russia terminated gas supply in May 2022 and [Finland substituted](#) through alternatives; Russian electricity imports ended; Russian oil was replaced through Western markets; and the [Hanhikivi nuclear project](#) with Rosatom was terminated entirely. Finland's limited gas dependence made the transition more manageable than other European countries. Sanctions enforcement has scaled dramatically, with hundreds of investigations annually replacing the pre-war handful.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

Eighty-three percent of [Finns said in 2024](#) they would vote to stay in NATO, remarkable for a country that formally joined only in April 2023, while 73% agreed Finland should defend another ally and 79% agreed NATO membership makes a foreign attack less likely. Seventy-nine percent said Russia's war had affected Finland's security, among the highest figures in the survey, and Ukraine support stood at around 81% combined. The Orpo government is firmly pro-NATO, and the Finns Party, historically NATO-skeptic, has fully embraced NATO membership as a national security imperative since 2022. The Social Democrats, who governed during the accession decision under Marin, remain committed, leaving essentially no mainstream opposition to NATO membership in Finland. The alignment question has been settled with unusual speed and political consensus.



STRATEGIC ALIGNMENT

Hedging Behavior

Finland's hedging behavior record is strong with a couple worrying developments with China. No BRI participation, no adversary arms procurement, no Moscow or Tehran engagement, no obstruction of EU sanctions or NATO enlargement. Arms procurement is entirely Western: 64 F-35As, David's Sling, K9 Thunder, M270 MLRS, Patria domestic production. The two China signals worth noting: President Stubb's October [2024 Beijing visit](#) and PM Orpo's January [2026 Beijing visit](#) were mostly based on trade rather than hedging against the United States. The October 2024 EU EV-tariff abstention is the softest mark in the record. Neither rises to true counter-alignment: Finland's security posture toward China on telecom, infrastructure, and Arctic access is genuinely hard. However, the high-level Beijing engagement warrants monitoring given Finland's Arctic position and critical minerals profile.



STRATEGIC ALIGNMENT

Operational Cooperation

Finland was not a NATO member during [Iraq](#) and [Afghanistan](#) but notably still contributed to both as a partner nation, deploying to ISAF and coalition stabilization efforts. Since accession in April 2023, integration has been exceptionally fast. The [US-Finland Defense Cooperation Agreement](#) grants access to 15 facilities including five near Russia, with US pre-positioning authorized by unanimous parliamentary vote. NATO's [Multi-Corps Land Component Command Northwest](#) became operational at Mikkeli in September 2025, making Finland a command-generating nation. On recent US operations, Finland has not hindered American action: no obstruction of Operation Epic Fury, full Iran sanctions alignment, and active Baltic Sentry participation. For a country that was formally non-aligned three years ago, the speed of operational integration with the United States is remarkable.

