



# Greece

## NATO Country Assessment — *TIER TWO* —

BOOSTING CAPABILITY • STRENGTHENING SECURITY • WEAK SUPPORT



JULY 2026



# TIER 2

Average Ally



# AT A GLANCE

## *Toplines*

- **Bolstering European Capability:** Greece is one of NATO's most consistent defense spenders, never dipping below 2% of GDP since 2014 and currently sitting at 2.85%, well above the alliance average.
- **Contributing to the US-NATO Shared Security:** Greece commands EU Operation Aspides from Larissa with frigates deployed to the Red Sea and provided basing access during Operation Epic Fury.
- **Weak Public Support:** Public support for collective defense is among the weakest in NATO—only 51% say Greece should defend another ally if attacked—and the KKE party openly advocates NATO withdrawal, giving Greece one of the largest parliamentary constituencies for outright alliance exit of any member state.



# 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.

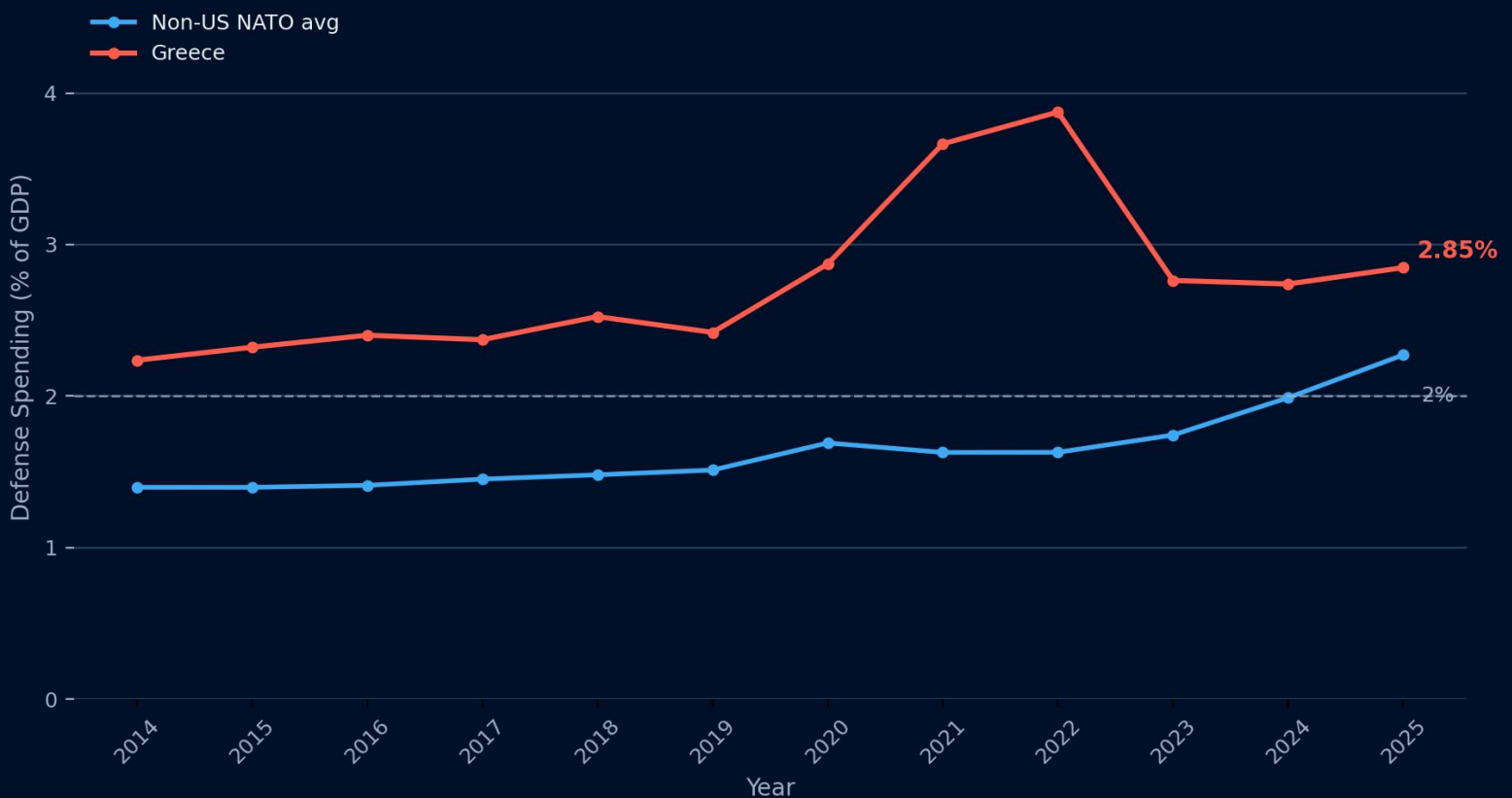


# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

Greece is one of NATO's most consistent [high defense spenders](#). Greece has spent above 2% of GDP every single year since 2014—never dipping below the NATO floor even during the depths of its financial crisis—and has consistently run at roughly double the non-US NATO average throughout the period. Spending peaked at roughly 3.9% of GDP in 2022 before settling at 2.85% in 2025, still well above the alliance average of 2.5%. The April 2025 announcement of a [€25B twelve-year](#) Long-Term Defense Armaments Plan commits Greece to sustained high investment through 2036. Greece accepted the Hague 3.5% core plus 1.5% framework from a considerably higher baseline than most allies.

Greece — Defense Spending as % of GDP, 2014-2025

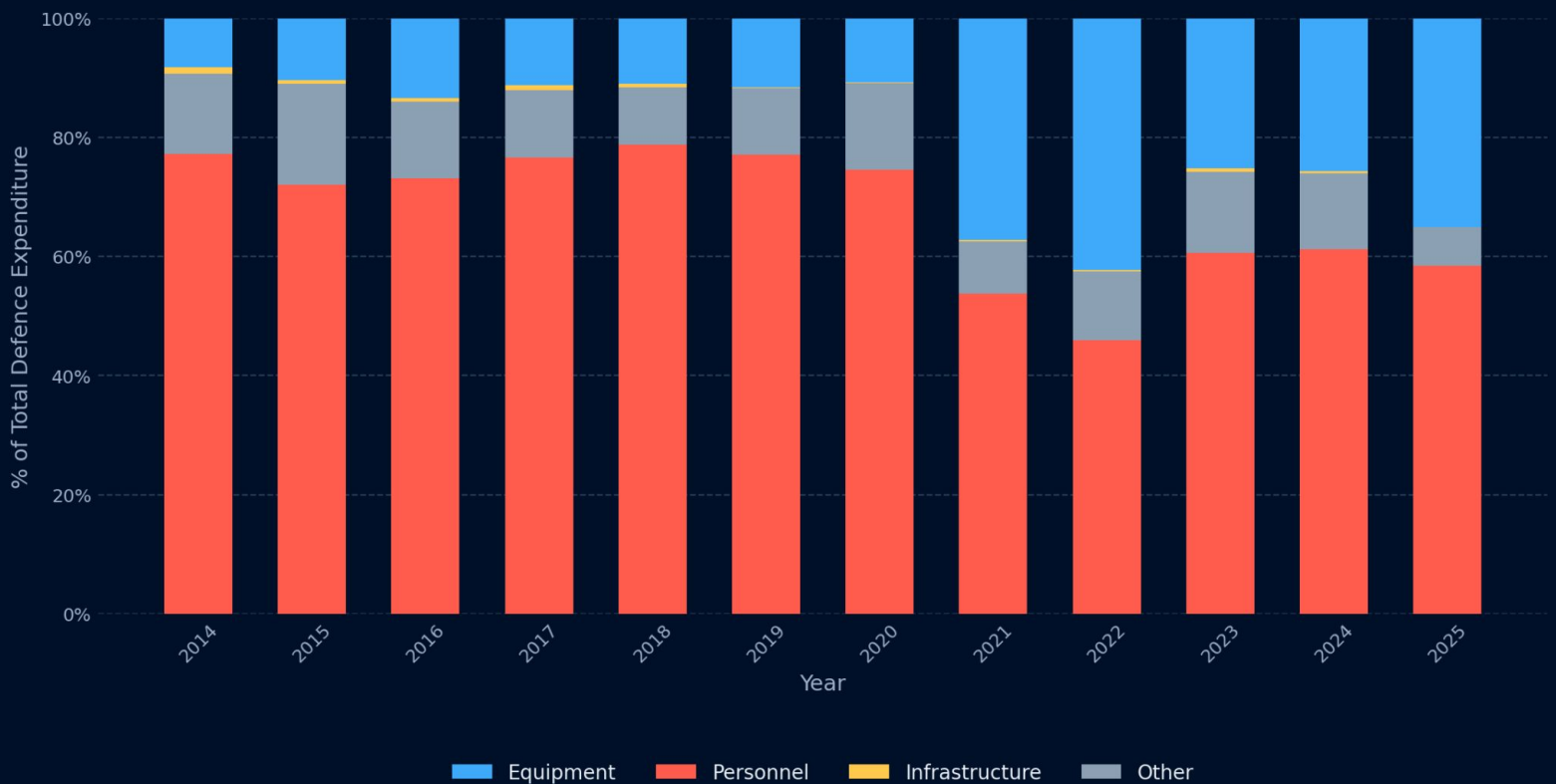


# MILITARY CONTRIBUTIONS

## *Equipment Share*

Greece's [equipment share](#) has transformed dramatically since 2021. After running at roughly 10% of the defense budget through 2014-2020, equipment surged to roughly 35-40% by 2022-2025 as major procurement programs began registering in actual expenditure—one of the more dramatic equipment shifts in the alliance. The investment is real: 24 Rafales delivered, 20 F-35As contracted with an option for 20 more, three FDI Belharra frigates under construction, 83 F-16 Viper upgrades, and a roughly €3B Achilles Shield layered air defense package. The constraint is ground forces: 1,385 MBTs dominated by legacy Leopard 1, M48, and M60 platforms with no tank modernization contract signed. Greece's equipment surge is concentrated in air and naval domains while the ground force remains unreformed.

Greece — Defence Expenditure by Category, 2014-2025



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

Greece's [personnel picture](#) is large, expensive, and growing. Personnel costs ran at roughly 72-78% of the defense budget through 2014-2020—among the highest in NATO—before falling to approximately 59% by 2025 as the equipment surge absorbed more of the enlarged budget. Active military personnel have grown from roughly 104,000 in 2014 to approximately 112,000 by 2025, rising steadily since 2023. Greece maintains one of the larger conscript-based forces in the alliance, which ensures mass but generates high personnel cost burdens that historically crowded out equipment investment. The post-2021 equipment surge represents Greece finally breaking out of that trap, but at 59% personnel costs the structural tension between mass and modernization has not been resolved.

Greece — Personnel Cost Share & Active Personnel, 2014-2025



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

Greece's [modernization](#) is among the most needed in NATO. On combat aircraft, 20 F-35As contracted with an option for 20 more, 24 Rafales already delivered, and ongoing F-16 Viper upgrades create one of the most capable tactical air forces in the Eastern Mediterranean. On naval forces, four Belharra FDI frigates equipped with Aster 15/30 air defense and MdCN naval cruise missiles represent a major capability upgrade. On air defense, the March [2026 Achilles Shield approval](#) adds David's Sling, Barak MX, and SPYDER to an existing inventory already including 36 Patriot launchers and 12 S-300PMU1 systems—creating one of the most sophisticated national air defense architectures in the alliance. On fires, 36 M270 MLRS with ATACMS provides genuine long-range precision strike. The significant gap is ground forces: no contract has been signed to replace the legacy Leopard 1, M48, and M60 tanks that dominate the fleet.



# MILITARY CONTRIBUTIONS

## *Force Posture*

Greece hosts two of NATO's most strategically valuable Mediterranean facilities. [Souda Bay on Crete](#) is a deep-water port capable of hosting carrier strike groups, nuclear submarines, and amphibious forces, with 1,200 US EUCOM personnel including a helicopter battalion. The 2021 MDCA update [expanded US access](#) to Souda Bay, Larissa, Alexandroupoli, and Stefanovikeio. Alexandroupoli has become NATO's primary alternative logistics ingress for the eastern front after Turkey closed the Bosphorus under Montreux, linked by the [2024 Harmonized Military Mobility Corridor](#) connecting Thessaloniki, Alexandroupoli, Varna, and Constanța. Ground contributions include UNIFIL Lebanon, KFOR Kosovo, and Bosnia-Herzegovina. Active force of approximately 112,000 is substantial relative to a population of 10 million.



# MILITARY CONTRIBUTIONS

## *Industrial Base*

Greece's [defense industrial base](#) is limited but has two areas of genuine relevance. [Hellenic Shipyards](#) at Skaramangas provides naval maintenance and overhaul capacity for allied vessels in the Eastern Mediterranean. [Intracom Defense Electronics](#) produces defense electronics and communications systems with allied export markets. On raw materials, [Greece holds significant deposits](#) of bauxite, nickel, chromite, and rare earth elements—including one of Europe's largest identified rare earth deposits in the Evros region—that are increasingly relevant to NATO's critical minerals supply chain as the alliance seeks to reduce Chinese dependence. The €25B twelve-year defense plan includes a 25% local content requirement in foreign contracts, which will push Greek industry toward greater defense integration from a currently constrained baseline. Greece has no sovereign combat aircraft or major platform design capability, but its raw materials profile may prove more strategically valuable than its manufacturing base.



# STRATEGIC ALIGNMENT

## *Declared Posture*

Greece's declared posture presents NATO's most complicated alignment picture. Defense Minister Dendias [explicitly identified Turkey](#) as Greece's principal threat in 2025-2026 strategy statements, and the [€25B Achilles Shield defense plan](#) is organized primarily around deterring Turkish airpower, naval forces, and missiles in the Aegean. On Russia, Greek doctrine aligns with NATO 2022 at the rhetorical level and Greece has held with EU and NATO consensus on Ukraine despite significant domestic pro-Russian sentiments from both left and right. On China, the Mitsotakis government has [shifted toward de-risking](#) rhetoric since 2022 without pursuing divestment of COSCO's 67% Piraeus stake—the largest Chinese-controlled critical infrastructure asset in NATO Europe. On Iran, Greece commands EU Operation Aspides from Larissa and aligns with EU sanctions. The defining tension is that Greece's doctrine is organized around a NATO ally as its primary threat, translating to a complicated scenario for NATO.



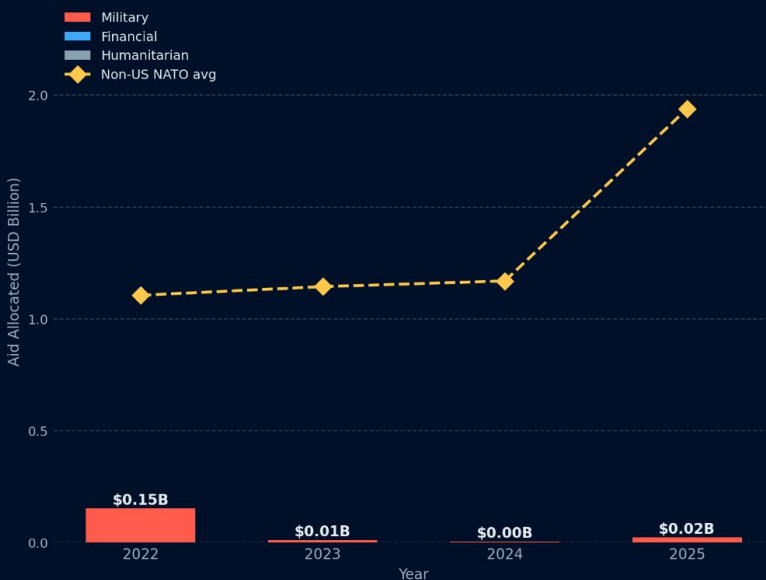
# STRATEGIC ALIGNMENT

## *Ukraine Support*

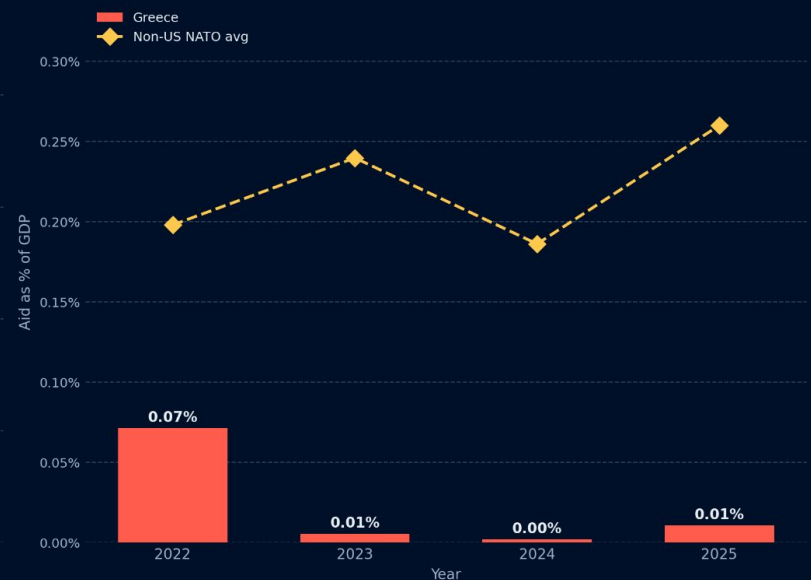
Greece's [Ukraine aid figures](#) tell a clear story: \$0.15B in 2022 (0.07% of GDP), collapsing to \$0.01B in 2023, essentially zero in 2024, and \$0.02B in 2025—consistently far below the non-US NATO average every year. Kiel tracks just €0.169B allocated total, placing Greece near the bottom of NATO donors by proportional measure. Direct transfers have included RPGs, missiles, M114 howitzers, and surplus Soviet-era equipment. The defining constraint is [Greece's refusal to transfer](#) Patriot or S-300 air defense to Ukraine despite US and EU pressure, with Mitsotakis publicly refusing in April-May 2024 citing Turkey-deterrence requirements. Greece's most important Ukraine contributions are geographic and institutional rather than financial: [Alexandroupoli port](#) serves as NATO's primary alternative logistics route to the eastern front when Turkey's Bosphorus closure blocks direct sea access, and the Kalamata flight training center is training Ukrainian F-16 pilots. These are real and in some cases irreplaceable contributions—but they are infrastructure value, not aid intensity.

Greece — Ukraine Aid, 2022-2025

Greece: Aid to Ukraine by Type



Greece: Aid to Ukraine as % of GDP



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

Greece's Russian energy decoupling is one of the most problematic among NATO members. Pre-2022 [Russian gas dependence](#) was roughly 40%. After the invasion, dependence rose rather than fell: by mid-2024, Russian gas imports were estimated at roughly 60% of Greek consumption, driven by displaced Russian flows taking Mediterranean routes through TurkStream. This is a serious decoupling failure that distinguishes Greece from virtually every other Western NATO ally. The Alexandroupoli LNG terminal, operational October 2024, creates an alternative supply platform for Bulgaria and the wider Balkans, but cancellation of a second planned terminal signals slowing momentum. On oil, Greek refineries shifted away from Russian crude rapidly in 2022-2023. On sanctions, Greece supported every EU package through the 20th, but Greek-owned tankers have been repeatedly flagged for Russian oil cargo and oil-price-cap evasion—a persistent enforcement gap in one of Greece's most politically sensitive industries.



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

Greece recorded 70% for [staying in NATO](#) in 2024, though only 51% agreed Greece should defend another NATO ally if attacked, one of the lowest figures in the survey, and only 51% agreed NATO membership makes a foreign attack less likely. NATO favorability has historically been capped below 50% in Greece, and concern about war in NATO countries was among the alliance's lowest at 65%. The New Democracy government (Mitsotakis) is formally a loyal NATO member but navigates alliance politics largely through the lens of Greek-Turkish bilateral tensions, periodically creating friction with Washington and Brussels. SYRIZA nominally accepts NATO membership but has historically been hostile to NATO military operations and is ambivalent on Ukraine support, while the Communist KKE, consistently polling around 8 to 10%, calls openly for Greek withdrawal from NATO. Greece is one of the only NATO members with a parliamentary constituency of that scale explicitly advocating outright exit from the alliance.



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

Greece's hedging behavior record is mixed, with one concern that stands out across the entire assessment. COSCO holds a [67% controlling stake](#) in Piraeus Port Authority, the largest Chinese-controlled critical infrastructure asset in NATO Europe. Xi Jinping called Piraeus the "dragon head" of the Belt and Road during his 2019 visit. The Mitsotakis government has resisted further Chinese expansion since 2022 and a December 2025 US Ambassador statement publicly raised divestment for the first time, but Athens has not pursued it. Arms procurement is aggressively Western: F-35, Rafale, FDI Belharra, F-16 Viper, Israeli Hellenic Dome and SPIKE. No high-level Moscow or Tehran engagement during the war period. Greek-Turkish tensions complicate alliance dynamics continuously but have not produced Russia-policy breaks. Huawei presence is less restricted than harder China-security states. COSCO-Piraeus opens one of NATO's largest ports to Chinese influence and subversion, creating deep vulnerability for NATO.



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

Greece has a strong track record of supporting US-led operations. It contributed forces to [Afghanistan under ISAF](#) and coalition [operations in Iraq](#), and Souda Bay on Crete has served as a critical US forward operating site supporting Mediterranean and Middle East operations for decades—hosting permanently forward-deployed US naval assets and supporting operations across the region. On recent US operations, Greece has been broadly cooperative. It [commands EU Operation Aspides](#) from Larissa with Greek frigates deployed to the Red Sea, making Greece the operational anchor for freedom-of-navigation responses. On Operation Epic Fury, Greece provided basing access and did not obstruct US operations, placing it in the positive Iran-access column. Alexandroupoli has become structurally critical to NATO Eastern Front logistics since 2022, serving as the primary Bosphorus-workaround route for moving US and allied troops and equipment toward Bulgaria and Romania. The Kalamata flight training center supports allied and Ukrainian F-16 pilot training. The notable gaps are Greece’s refusal to transfer Patriot or S-300 to Ukraine despite US pressure, and a ground force eastern front contribution that does not match its financial investment—high-end assets are reserved for Aegean deterrence against Turkey rather than NATO’s collective eastern requirements.

