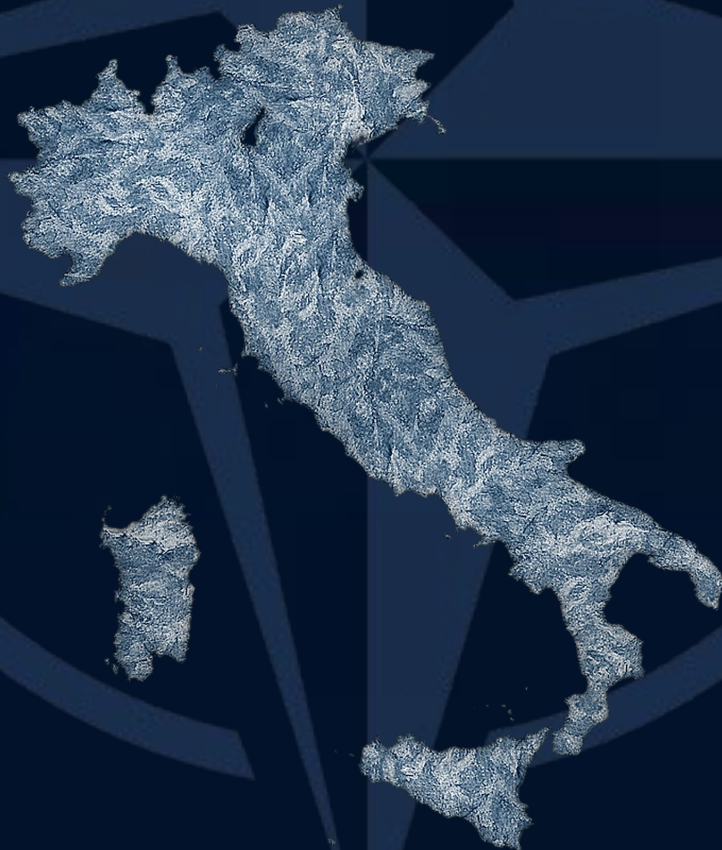




# ITALY

## NATO Country Assessment —*TIER TWO*—

BASING HUB • REVERSING CHINESE INFLUENCE • UNDERMINED EPIC FURY



JULY 2026



# TIER 2

Average Ally



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# AT A GLANCE

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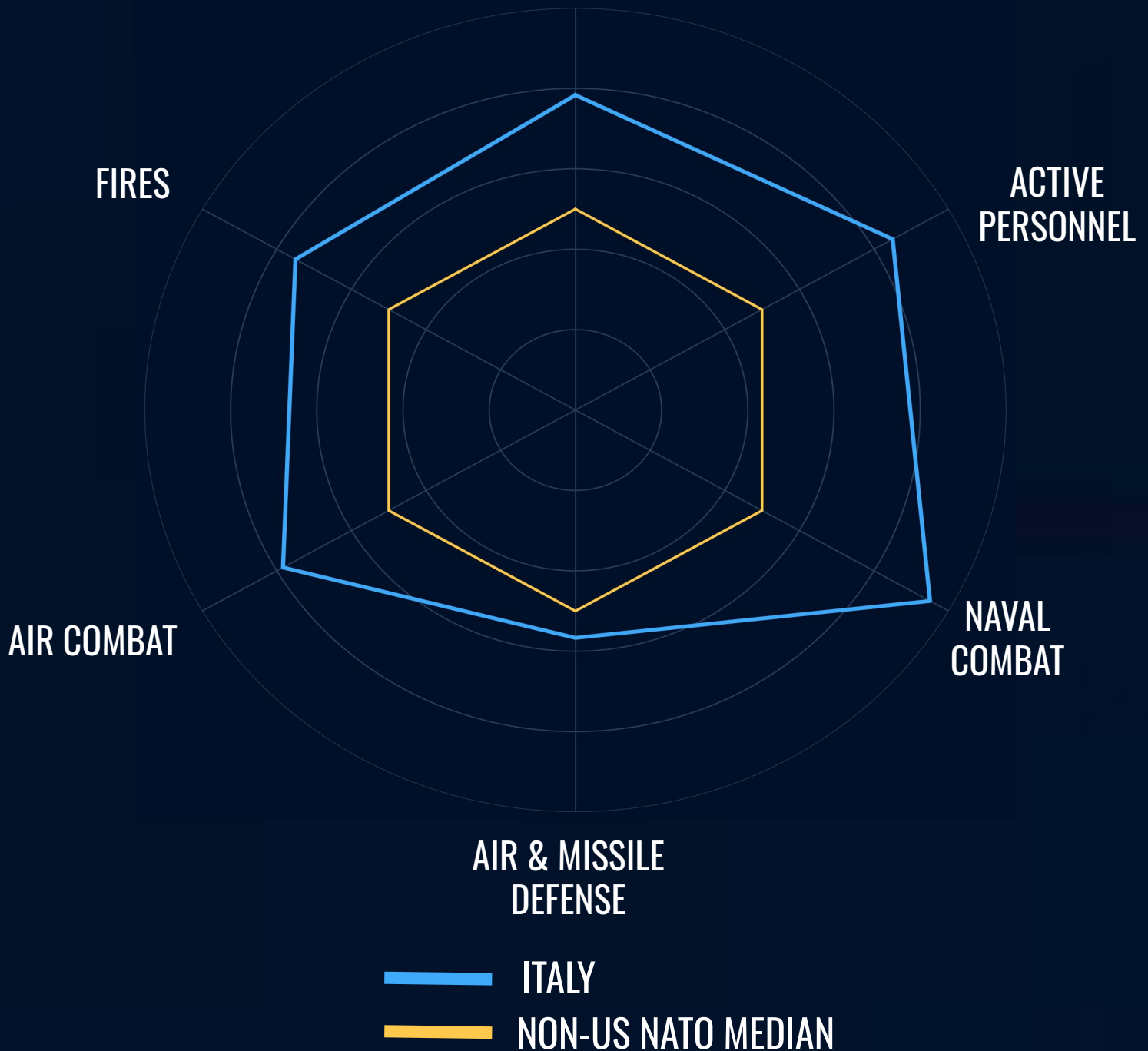
## *Toplines*

- **A Critical Hub for American Power:** Italy hosts the largest US military presence in southern Europe—NSA Naples, Aviano’s nuclear weapons, the 173rd Airborne at Vicenza, Sigonella—making it foundationally indispensable for American power projection across the Mediterranean, North Africa, and Middle East in ways that cannot be quickly replicated elsewhere.
- **Reversing Chinese Encroachment:** Meloni’s December 2023 BRI withdrawal was the most significant single strategic correction any NATO ally has made on China—reversing Italy’s status as the only G7 member inside Beijing’s flagship infrastructure program.
- **Sabotaging Western Shared Interests:** Italy refused US overflight for offensive operations during the 2026 Iran war, actively impeding US strike planning when operational stakes were highest.



# FORCE STRUCTURE AT A GLANCE

LAND COMBAT



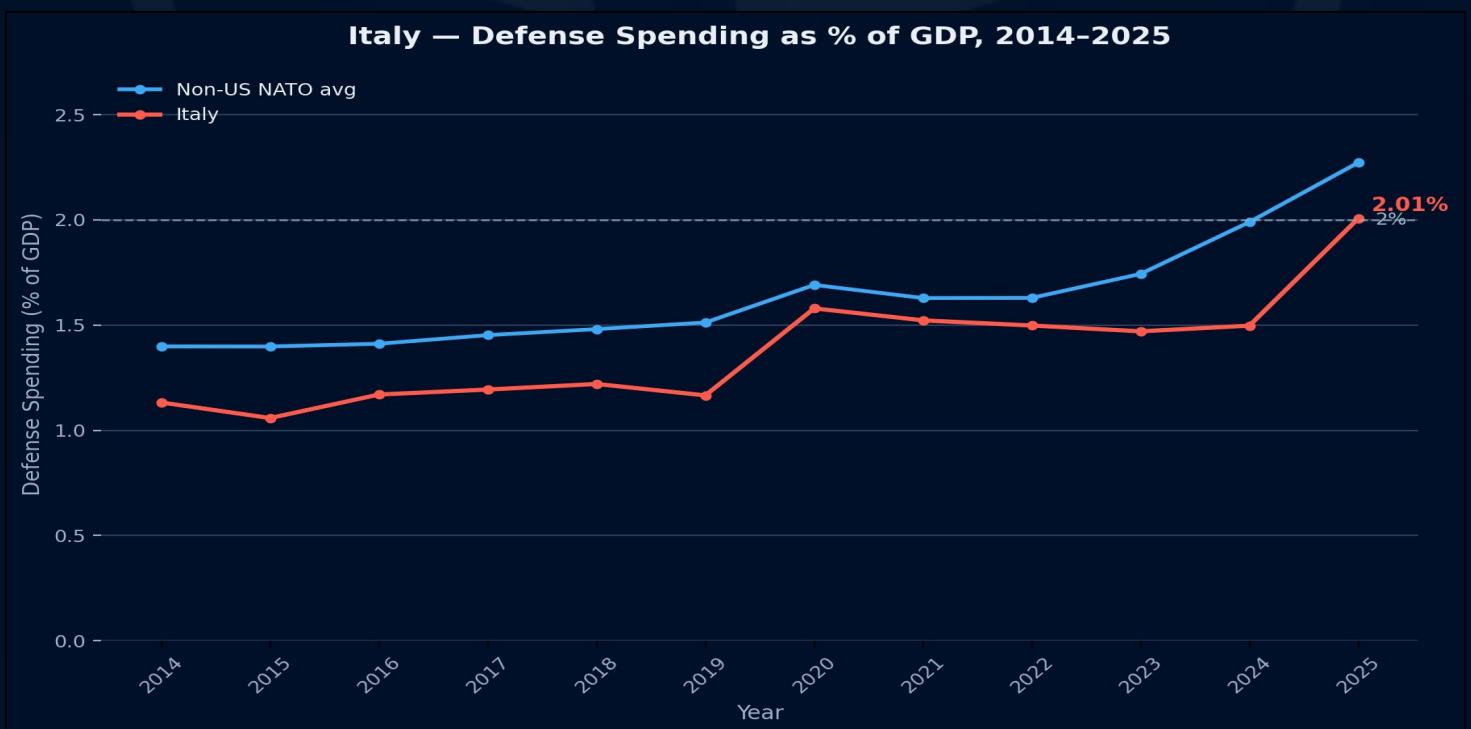
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

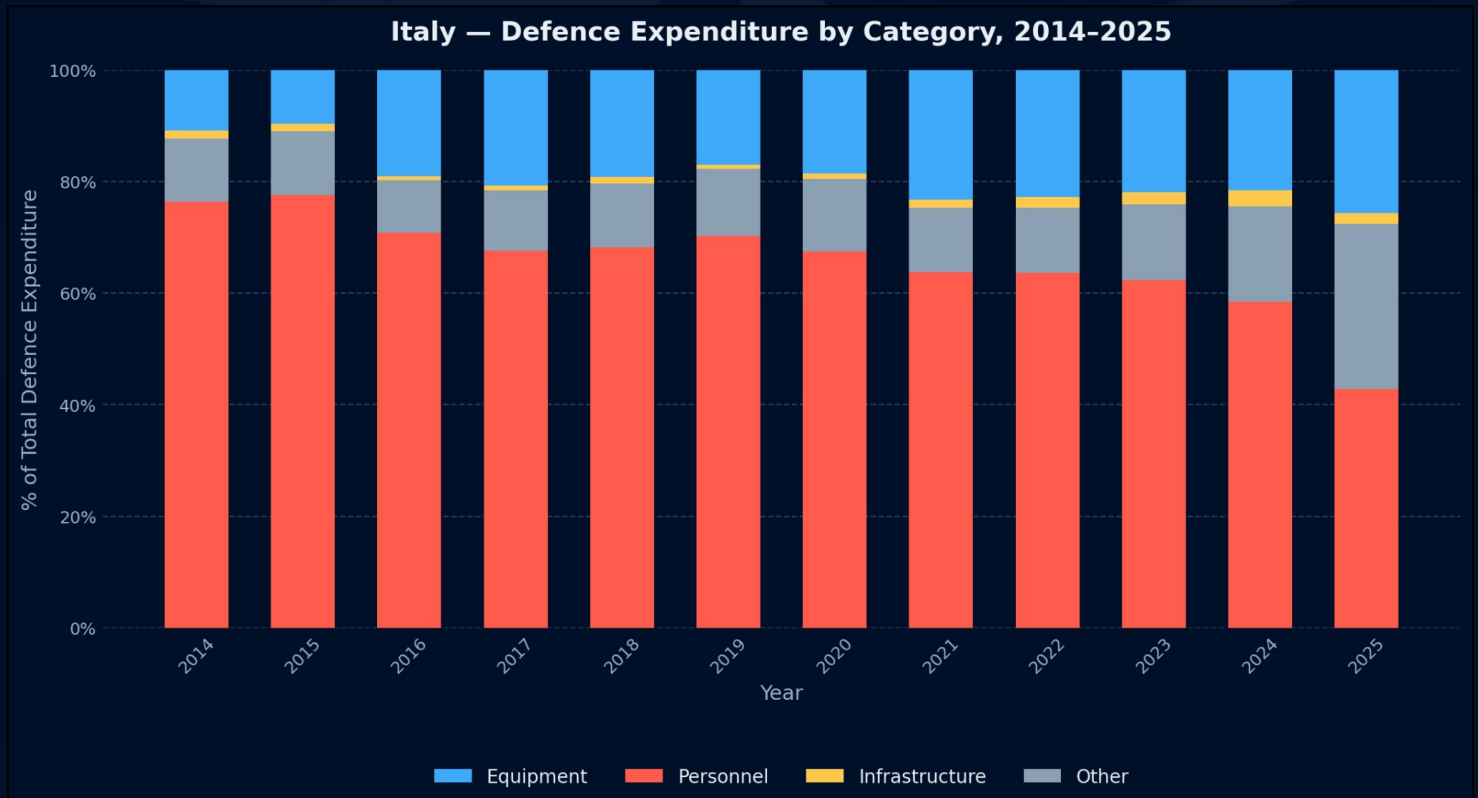
Italy's [defense spending](#) chart shows a country that has exclusively tracked below the non-US NATO average for over a decade, spending around 1.1-1.6% of GDP through 2014-2024 while the alliance average rose steadily above it. The jump to 2.01% in 2025 is real but contested: Italy reached the NATO floor primarily through accounting reclassification—incorporating Carabinieri pensions, coastguard, cyber, and space items—rather than a genuine defense budget surge. The regular defense budget sits at roughly €31B while the NATO-counted total reaches roughly €45B after reclassification. Italy is Europe's fourth-largest absolute defense spender, large enough to sustain a capable military and world-class industrial base. But with public debt at 135% of GDP and weak growth, Meloni's endorsement of the Hague 3.5% framework by 2035 needs a credible fiscal path. Italy's absolute spending is significant; its GDP-share trajectory is among the worst of any major NATO economy.



# MILITARY CONTRIBUTIONS

## *Equipment Share*

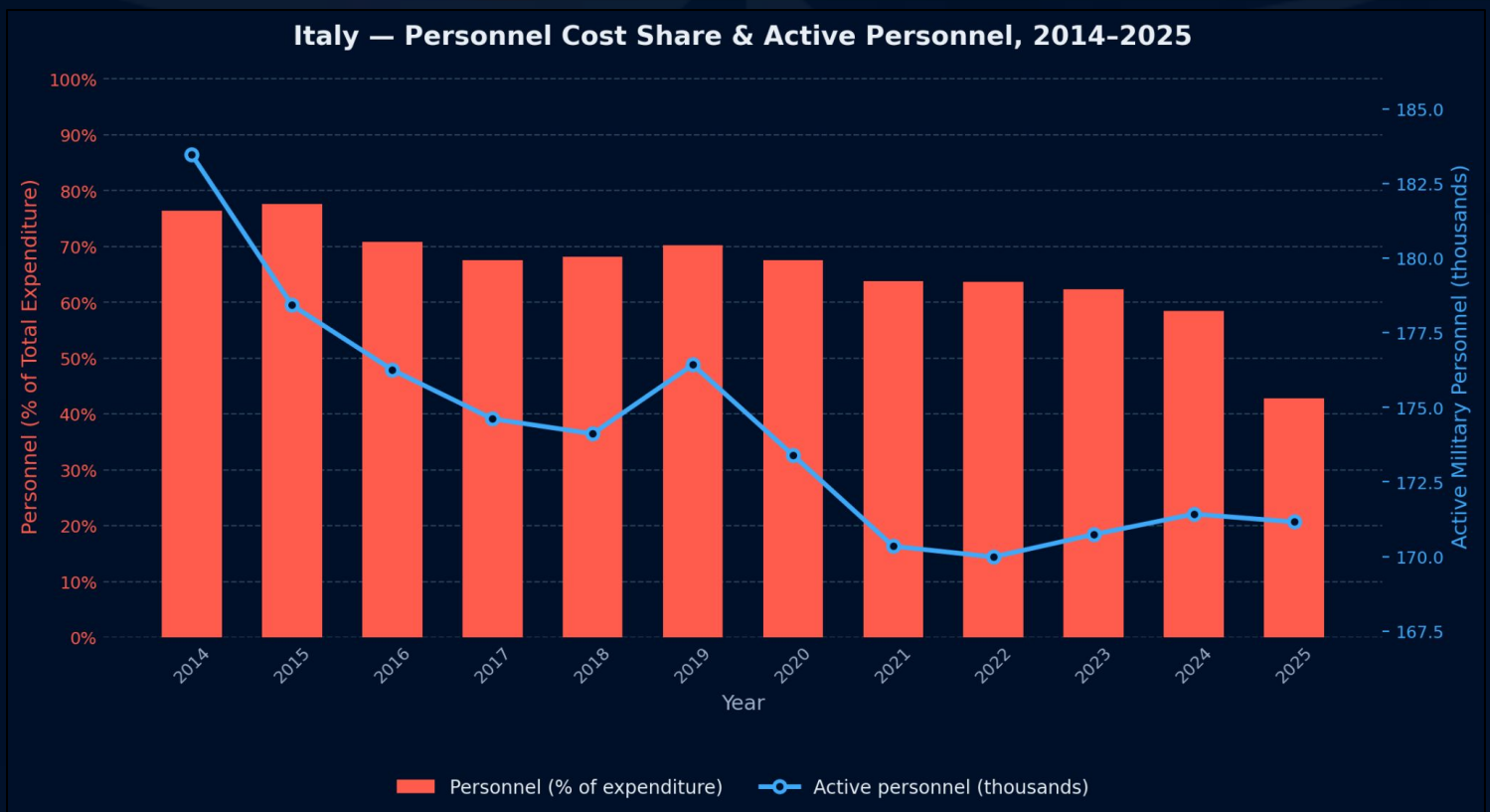
Italy's [equipment share](#) has improved, equipment surged to roughly 25%+ in 2025—a genuine rebalancing. The 2025 equipment investment reflects the F-35 program, naval procurement, and GCAP investment all registering simultaneously. Italy's equipment share now exceeds NATO's 20% benchmark. The story behind the numbers is uneven: Italy builds world-class naval vessels and aircraft, while its army operates 150 aging Ariete MBTs with a 1990s design and no delivered replacement. Equipment investment is real and growing, but heavily specialized in air and naval domains while ground force modernization lags significantly.



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

Italy's [personnel picture](#) is one of the most concerning in the alliance. Active military personnel has fallen from roughly 183,000 in 2014 to approximately 170,000 by 2025. This decline is driven by structural recruitment failure rather than deliberate professionalization. Italy's Chief of Defense Staff [told parliament in 2024](#) that the armed forces are “absolutely undersized” and below the “limit of survival” threshold, with actual strength at 165,564. The Italian Navy alone needs 39,000 sailors against a current 29,000. Personnel costs have fallen from roughly 76% to 43% of the defense budget, but this reflects a shrinking force alongside a growing budget rather than genuine efficiency gains. A debate about reintroducing voluntary conscription has re-emerged, but no bill has been enacted. Italy's personnel crisis is the most acute of any major NATO ally.



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

Italy's modernization is strong in aviation, naval, and air defense but seriously lagging in ground forces. On combat air, 118 operational Eurofighters and 26 F-35As progressing toward 115 total, with the only European F-35 final assembly facility at Cameri embedding Italy in the global supply chain as both customer and manufacturer. GCAP adds the next-generation bet alongside the UK and Japan. On naval forces, the Cavour carrier and newly commissioned Trieste LHD give Italy simultaneous carrier and amphibious power projection; six FREMM frigates with naval cruise missiles provide long-range precision strike shared only with France among European allies. On air defense, eight SAMP/T batteries and co-production with France through MBDA make Italy a central European air-defense power. On ground forces, 150 aging Ariete MBTs await modernization with no delivered replacement, and an army manpower shortfall of approximately 45,000 soldiers is Italy's most acute structural gap.



# MILITARY CONTRIBUTIONS

## *Force Posture*

Italy hosts 12,662 US military personnel—the largest US military presence in southern Europe. Key installations include [NSA Naples](#) with roughly 8,500 personnel as headquarters of US Naval Forces Europe-Africa and the Sixth Fleet; [Aviano Air Base](#) as a primary US tactical air hub hosting NATO nuclear weapons; and [Caserma Ederle](#) in Vicenza hosting the 173rd Airborne Brigade, the US Army's primary rapid-reaction force in Europe. Italy is a framework nation for NATO's eFP battlegroup in Bulgaria with 750 troops and commands NATO's [NRDC-ITA corps headquarters](#). Italy maintains 866 troops in KFOR as one of the largest national contributors. Italian F-35As rotate through Baltic Air Policing. The force posture is broad across the eastern front, Mediterranean, and Kosovo, but the Bulgaria framework role is smaller than comparable UK, German, Canadian, or Spanish eastern front commitments.



# MILITARY CONTRIBUTIONS

## *Industrial Base*

Italy's [defense industrial base](#) is one of Europe's strongest. Leonardo produces Eurofighter components, helicopters, defense electronics, and radar systems, and holds an equal industrial stake in GCAP alongside the UK and Japan. Fincantieri is one of the [world's leading shipbuilders](#). MBDA Italia co-produces SAMP/T with French and British partners. Cameri's F-35 FACO is the only European final assembly facility, giving Italy a structural role in the alliance's dominant fifth-generation fighter program that no other European ally replicates. On raw materials, Italy has limited domestic critical minerals but is positioned through the Mattei Plan's €5.5B Africa framework and G7 Lobito Corridor involvement to develop supply chain access to African critical minerals—cobalt, lithium, and rare earths—relevant to NATO's defense-industrial de-risking agenda. Italy builds world-class capabilities that allied militaries depend on.



# STRATEGIC ALIGNMENT

## *Declared Posture*

Italy's declared posture under Meloni has moved decisively toward NATO alignment. The DPP 2025, the Italy-Ukraine [10-Year Security Agreement](#) signed February 2024, G7 Apulia Communiqué, and Hague endorsement all reflect full alignment with NATO's threat framework. Italy's December 2023 BRI withdrawal is the most significant single strategic correction. Italy voted yes on Chinese EV tariffs, joined the Coalition of the Willing, and has maintained Ukraine support and eastern front commitments despite significant domestic coalition pressure. The vulnerability is Lega: Salvini's party holds a 2017 cooperation agreement with Putin's United Russia and has repeatedly criticized lethal aid to Ukraine and EU defense loans, representing a durable ceiling on how explicitly hawkish Italian policy can become. Meloni's achievement is keeping Lega inside a coalition that votes yes on Ukraine, but the fragility of that alignment is a real concern.



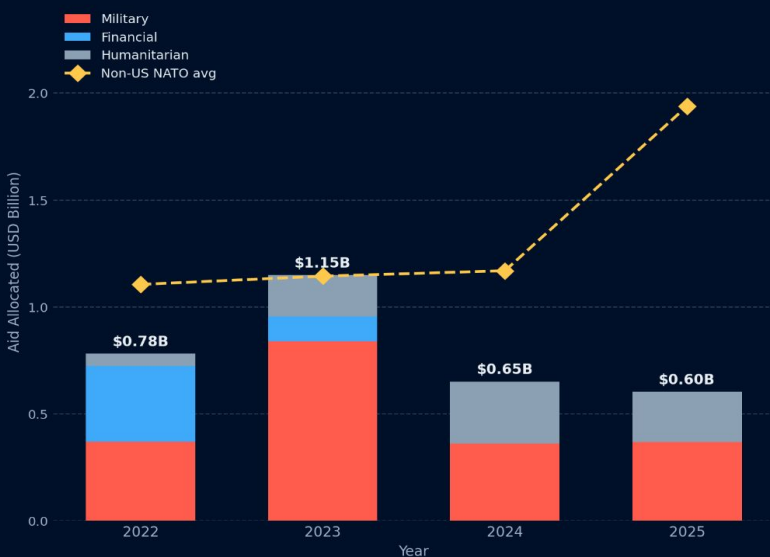
# STRATEGIC ALIGNMENT

## *Ukraine Support*

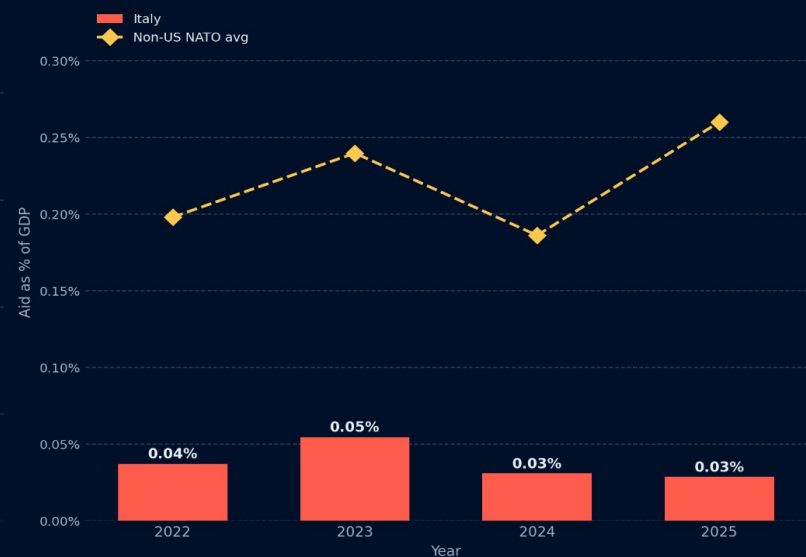
Italy's [Ukraine aid](#) shows a consistent but under performing contributor: \$0.78B in 2022, peaking at \$1.15B in 2023, then declining to \$0.65B and \$0.60B in 2024-2025. This runs at just 0.03-0.05% of GDP every year, consistently well below the non-US NATO average. Kiel tracks €4.095B allocated and €4.052B committed, approximately 0.23% of GDP cumulative. The headline contribution is SAMP/T air defense: Italy and France jointly delivered the first non-US long-range strategic air defense to Ukraine in 2023, with two batteries delivered and a third committed. Additional transfers include Aster interceptors, Puma armored vehicles, and 155mm ammunition across 12 packages through early 2026. Meloni joined the Coalition of the Willing. The structural domestic risk is Lega's consistent criticism of Ukraine aid, which has not yet stopped package continuation but represents a durable political ceiling on Italian ambition.

Italy — Ukraine Aid, 2022-2025

Italy: Aid to Ukraine by Type



Italy: Aid to Ukraine as % of GDP

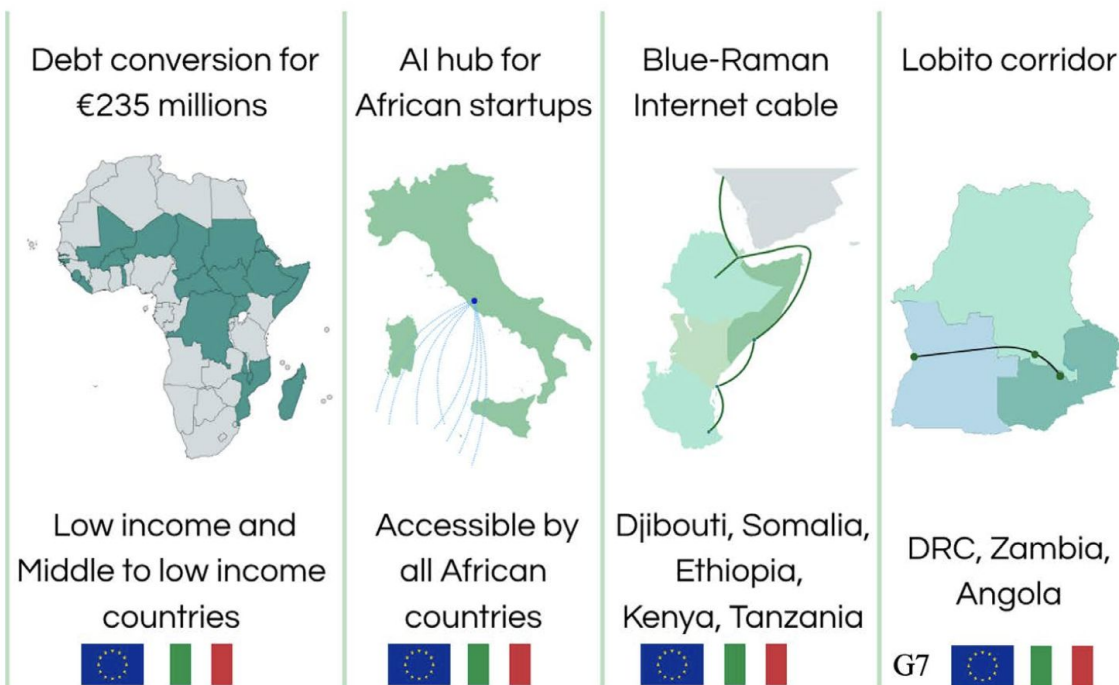


# STRATEGIC ALIGNMENT

## *Russian Decoupling*

Italy's Russian energy decoupling is one of the strongest turnaround stories among major Western European states. Russia supplied roughly 40% of Italian gas in 2021; by 2023 that had fallen to approximately 5%. Italy replaced Russian gas with Mediterranean and African suppliers, plus LNG from Egypt, Qatar, and the US. Italy has no Rosatom nuclear dependence. The Mattei Plan provides a strategic Africa and Mediterranean energy framework reducing long-term single-supplier dependence. Italy endorsed every EU Russia sanctions package through the 20th without obstruction.

Figure 2



Source: Author's elaboration based on own data analysis



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

Italy recorded 64% for staying in [NATO in 2024](#), below the alliance median, and just 51% felt more safe due to NATO cooperation, tied for the lowest figure alongside France. Only 54% agreed Italy should defend another NATO ally if attacked, and defense spending sentiment was the most dovish in the alliance: only 29% favored an increase and 15% actively wanted to spend less. The Meloni (Fdi) government is nominally NATO-loyal but has been the most resistant major European government to new spending targets, and Lega (Salvini), a coalition partner, has long standing dovish stances on Russia. The Movimento 5 Stelle in opposition has been the most vocal parliamentary critic of arms shipments to Ukraine, views that resonate in a public that is distinctly less engaged with the Russia threat than most of its neighbours. Italy is the alliance's most prominent case where the gap between formal NATO commitment and public and political appetite for the costs of that commitment is widest among major Western European members.



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

Italy's hedging behavior record under Meloni is substantially clean. The BRI membership was reversed when Meloni withdrew in December 2023. The residual exposure is [COSCO's 40% stake](#) in the Vado Ligure container terminal, and small Chinese automotive operations in Milan. Arms procurement is entirely Western: Eurofighter, F-35, GCAP, SAMP/T, FREMM, Fincantieri, Leonardo. Meloni has visited Kyiv multiple times and has not visited Moscow, Beijing, or Tehran. The persistent risk is Lega: Salvini's United Russia agreement and consistent Ukraine-aid criticism represent a durable coalition vulnerability that has not yet produced formal policy breaks but constrains how far Italy can go.



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

Italy has a long track record of supporting US-led operations. It contributed forces to [Afghanistan under ISAF](#) and Iraq, and continues to maintain one of the deepest overseas operational footprints in [European NATO](#) across KFOR Kosovo (866 troops), UNIFIL Lebanon, EUFOR Althea, and Mediterranean maritime missions. Italy hosts NATO JFC Naples—one of NATO’s three operational-level commands—and major US bases at Aviano (nuclear sharing, tactical air) and Sigonella (primary Mediterranean and Middle East ISR and logistics hub), making Italy structurally indispensable to US power projection in the region. On recent operations, Italy is a significant EU Operation [Aspides contributor](#) with sustained Red Sea naval presence. During the 2026 Iran war, Italy deployed naval assets to the Eastern Mediterranean alongside the French carrier strike group, while simultaneously [refusing US overflight](#) for offensive operations. Italy deployed F-35As and a SAMP/T battery to Estonia following the September 2025 Russian airspace violation, combining fifth-generation aircraft with strategic air defense in a high-visibility deterrence signal. Italy is the framework nation for NATO’s [eFP battlegroup in Bulgaria](#), though at a smaller scale than UK, German, or Canadian eastern-flank commitments.

