



NETHERLANDS

NATO Country Assessment — *TIER ONE* —

LEADERSHIP • SAFEGUARDING TECHNOLOGY • SPENDING TURNAROUND



JULY 2026



TIER 1
Model Ally



AT A GLANCE

Toplines

- **One of NATO's Sharpest Spending Turnaround:** from roughly 1% of GDP for most of the decade to 2.49% in 2025, with the defense budget more than doubling from \$13.9B to \$29.1B between 2021 and 2025.
- **Safeguarding the West's Most Important Technology:** the Netherlands coordinated the export restriction on semiconductor technology to China and invoked the Goods Availability Act against a Chinese-owned chip company, among the EU's most assertive economic security actions against China.
- **Taking Command and Accepting Responsibility:** A German-Dutch corps headquarters will take operational control of all NATO forces in Estonia and Latvia by mid-2026—roughly 40,000–60,000 troops. The Netherlands will assume sole command in early 2028.



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.

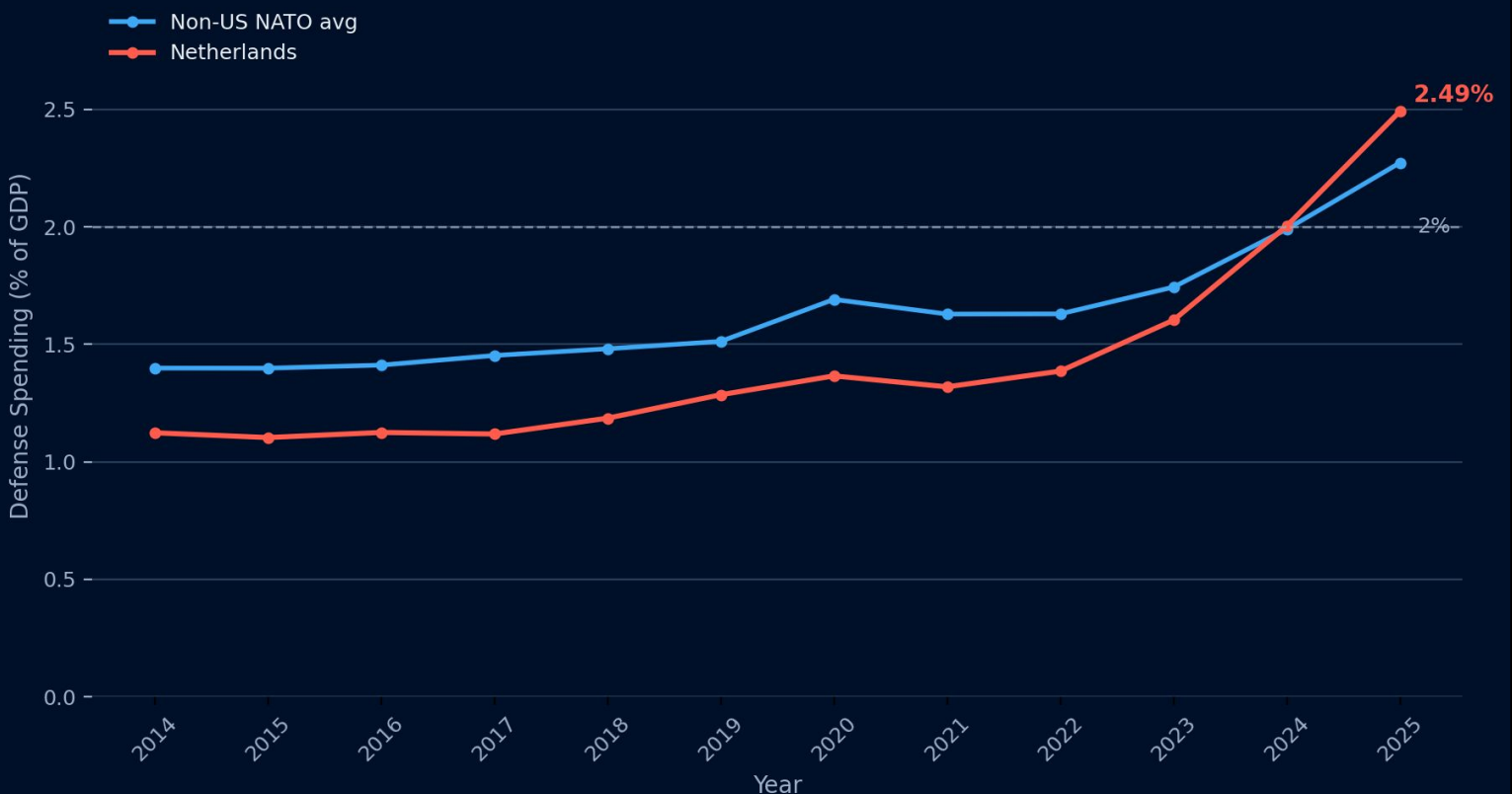


MILITARY CONTRIBUTIONS

Defense Spending Level

The Netherlands has executed one of the most impressive [defense spending](#) turnarounds among major NATO allies. The data shows the Netherlands tracking consistently below the non-US NATO average from 2014 through 2023 (spending just 1.1-1.3% of GDP for most of the decade) before a sharp acceleration to 2.49% in 2025, now essentially matching the alliance average. The defense budget more than doubled from \$13.9B in 2021 to \$28.1B in 2025, with the 2026 budget rising further. The Netherlands accepted the Hague 3.5% core plus 1.5% framework.

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

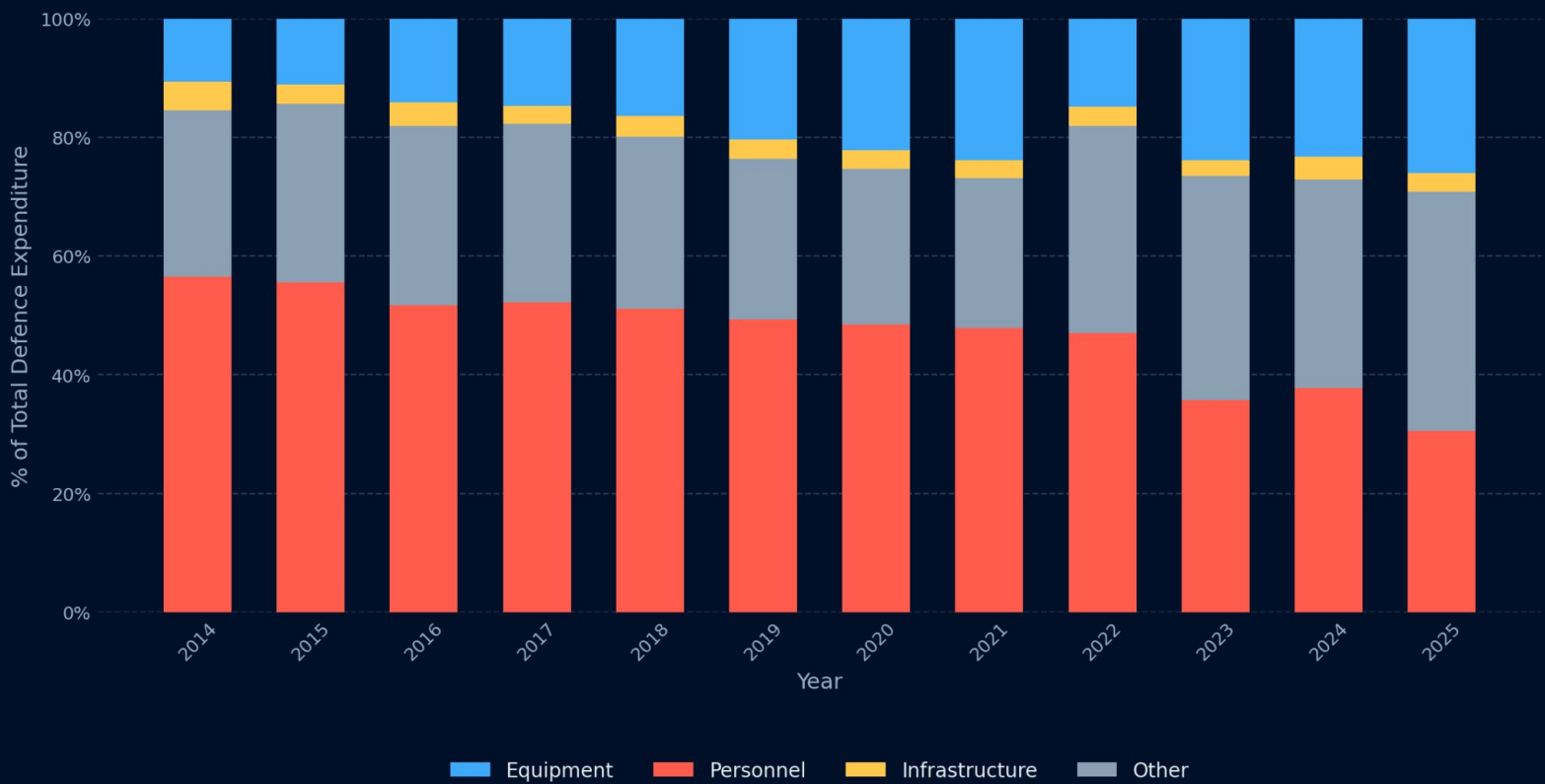


MILITARY CONTRIBUTIONS

Equipment Share

The Netherlands' [equipment share](#) has risen dramatically—rising to approximately 26% by 2025, above NATO's 20% benchmark. This clearly shows the prioritization change: personnel costs fell from roughly 57% in 2014 to approximately 30% in 2025 as the budget doubled and equipment investment dominated the surge. The pattern is consistent throughout: the Netherlands is buying the highest-quality variant in each category—Leopard 2A8, F-35A, PAC-3, CV9035 upgrades—rather than cheaper alternatives. The gap is mass: 46 tanks, 52 F-35As, and two brigades represent a capable but thin force relative to Dutch GDP and strategic ambitions, and most of the procurement pipeline is still delivering rather than in service.

Netherlands — Defence Expenditure by Category, 2014-2025

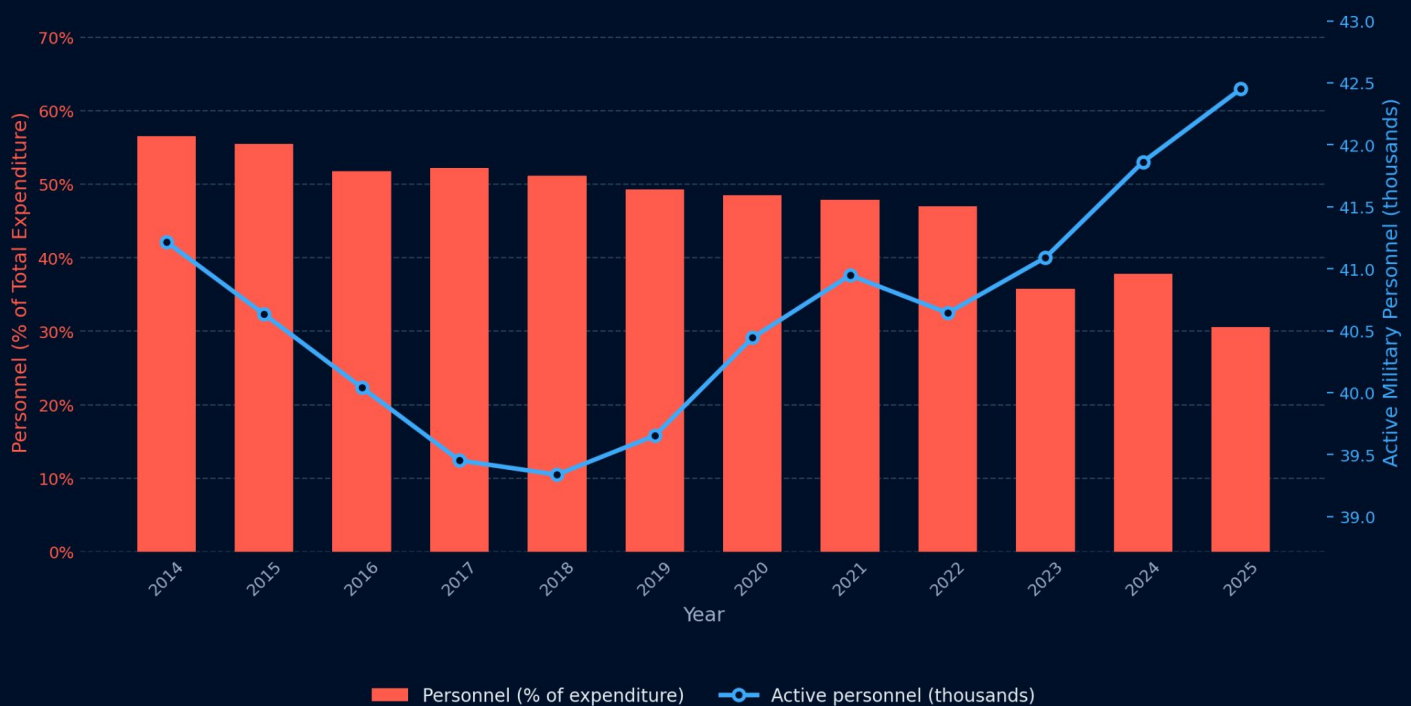


MILITARY CONTRIBUTIONS

Manpower & Recruitment

The Netherlands' [personnel picture shows](#) a force that bottomed out and is now recovering—active personnel fell from roughly 41,000 in 2014 to approximately 39,200 by 2017-2018 before rebounding to approximately 42,400 by 2025. Personnel costs have fallen from roughly 57% to 31% of the defense budget, not because the force shrank but because the budget doubled faster than headcount. The force is growing at the same time equipment spending surges—the right direction. The challenge is pace: at 42,000 active personnel, the Netherlands remains thin relative to its two-brigade structure, and a tight Dutch labor market creates persistent pressure on filling technical and specialist roles.

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



MILITARY CONTRIBUTIONS

Capability Modernization

The Netherlands' [modernization strategy](#) is comprehensive and well-resourced. On combat aircraft, 52 F-35As are fully operational. On armor, the May 2025 Leopard 2A8 contract for 46 tanks restores a tank battalion after a 14-year absence, with deliveries 2028-2031. On air defense, 18 Patriot PAC-3 launchers and 6 NASAMS II batteries provide layered coverage, with Dutch Patriots forward-deployed to NATO's eastern front and donated to Ukraine. On ground forces, CV9035NL upgrades, Boxer APCs, PzH 2000 howitzers, and PULS rocket artillery address infantry and fires. On naval forces, De Zeven Provinciën destroyers, Walrus-class submarines, and new Belgium-Netherlands joint ASW frigates address the growing Russian submarine threat. The gap is mass: ground forces remain thin and the tank absence won't be fully corrected until 2031.



MILITARY CONTRIBUTIONS

Force Posture

The Netherlands hosts only 400 US EUCOM personnel domestically but deploys forward across the alliance: [F-35s in Poland](#) for eastern front deterrence, [MQ-9 Reapers in Romania](#), an armored infantry [company in Lithuania](#), an [Landing Platform Docks in NATO Standing Naval Forces](#), and formerly sent 90 personnel for [Operation Interflex](#). The Netherlands hosted the 2025 Hague NATO Summit. The most [consequential force posture](#) development is the May 2026 announcement that 1GNC will assume NATO tactical command of Estonia and Latvia by mid-2026, with command rotating to the Netherlands from Germany in early 2028—giving the Netherlands a future corps-level command role for roughly 40,000-60,000 troops on NATO's most exposed front. Dutch brigades operating under German divisional command represent one of NATO's most advanced bilateral military integration arrangements.



MILITARY CONTRIBUTIONS

Industrial Base

The Netherlands' defense industrial base punches above its weight in two critical niches. [Thales Netherlands produces](#) the SMART-L naval surveillance radar deployed on Dutch destroyers and exported to allies. [Damen Shipyards](#) is a leading global naval shipbuilder. The most strategically significant Dutch asset is ASML—whose extreme ultraviolet lithography machines are the essential bottleneck in global semiconductor manufacturing—with the Dutch-US-coordinated [export restriction to China](#) one of the most consequential economic-security interventions by any allied government. Dutch industrial contribution to NATO runs through semiconductors and high-value electronics rather than platform mass production.



STRATEGIC ALIGNMENT

Declared Posture

The [2024 Defence White Paper](#) states explicitly that an attack on NATO is no longer inconceivable, frames the ministry's mission as keeping Russia at bay, and documents Russian espionage targeting the OPCW in The Hague. On China, [ASML export controls](#) coordinated with the US and the Nexperia intervention demonstrate willingness to use legal tools against Chinese-owned strategic assets. On Iran, the Netherlands [deployed to Operation Aspides](#) and the [Eastern Mediterranean](#) during the 2026 Iran war. The minority Jettens coalition government's 66-seat parliamentary base is the principal risk to sustained spending commitments.

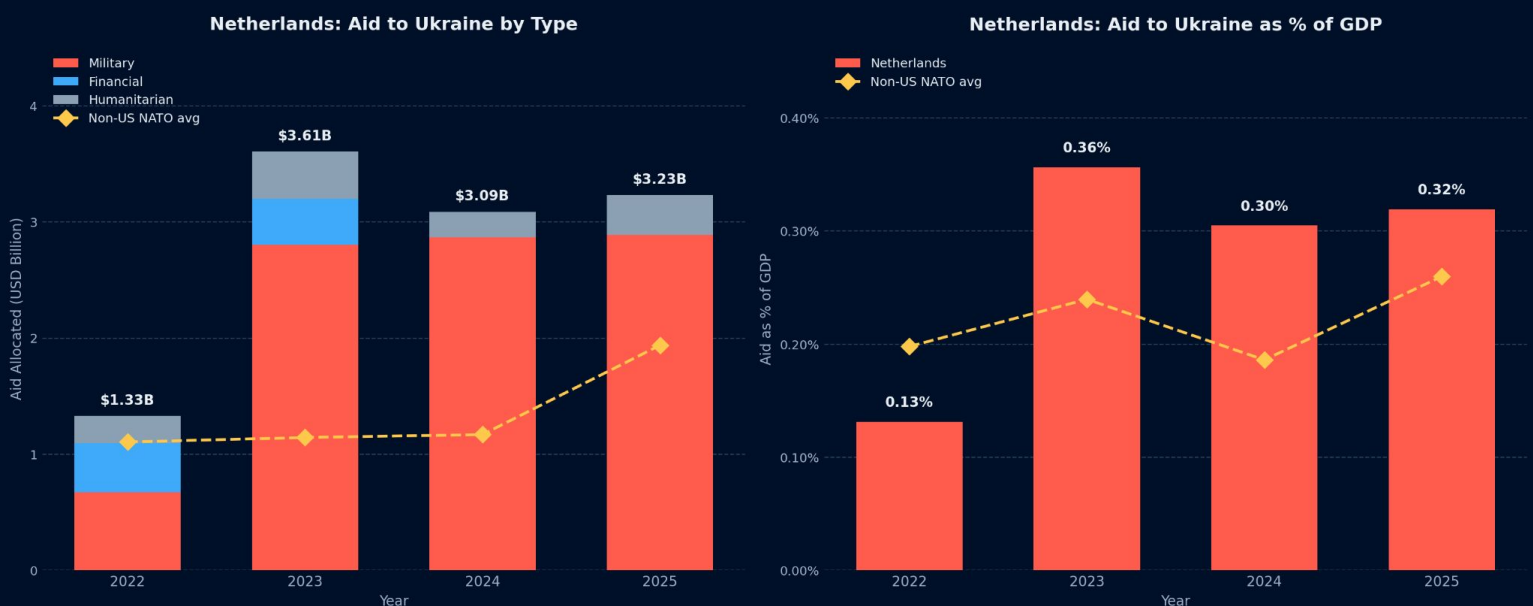


STRATEGIC ALIGNMENT

Ukraine Support

The Netherlands' [Ukraine aid data](#) shows sustained above-average contribution: 0.13% of GDP in 2022 rising sharply to 0.36% in 2023—well above the non-US NATO average—before stabilizing at 0.30-0.32% in 2024-2025, consistently above the alliance average. Kiel tracks €10.441B allocated and €13.722B committed (1.219% and 1.602% of GDP) placing the Netherlands in the core European group sustaining Ukraine at scale. The signature contribution is F-16 coalition leadership: the Netherlands completed [delivery of all 24 promised](#) F-16s by May 2025 and coordinated the multinational coalition with Denmark, Belgium, and Norway. Patriot system donations, a €2B military support commitment in 2024 alone under the March [2024 bilateral security agreement](#), and a €500M 2025 package round out a contribution defined by high-end capability leadership rather than volume alone. The €3.281B commitment gap and minority government fiscal constraints are the principal concerns.

Netherlands — Ukraine Aid, 2022-2025



STRATEGIC ALIGNMENT

Russian Decoupling

The Netherlands' Russian energy decoupling is substantially complete. Russian pipeline gas dependence [fell sharply after 2022](#) through LNG infrastructure at Eemshaven and the Gate terminal, Norwegian supply, and US and Qatari LNG. Dutch refineries shifted from Russian crude after EU sanctions. Borssele nuclear operates on Western fuel with no Rosatom dependence. The [toughest challenge is Rotterdam](#): as Europe's largest port and major oil-refining and gas-trading hub, Rotterdam creates persistent shadow-fleet, dual-use transit, and sanctions-enforcement complexity that Dutch authorities must manage at very high volume. The Netherlands supported every EU Russia sanctions package through the 20th and has been an active push state for shadow-fleet pressure and anti-circumvention measures.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

The [Netherlands recorded](#) 82% for staying in NATO and 79% agreeing the country should defend another ally, among the highest figures in the alliance for the latter metric, while 76% agreed NATO membership makes a foreign attack less likely. Fifty-six percent favored increasing defense spending in 2024, and Ukraine support stood at around 66% combined. The PVV (Wilders)-led coalition has kept Dutch policy firmly within the mainstream NATO lane, supported by coalition partners (NSC, VVD, BBB). The hosting of the Hague NATO Summit in June 2025 anchored the Netherlands publicly in the alliance's core, making significant deviation politically costly for the government. The VVD and D66, the strongest NATO advocates, are in opposition but retain influence over the parameters of acceptable policy.



STRATEGIC ALIGNMENT

Hedging Behavior

The Netherlands' hedging behavior record is among the strongest in the alliance. No BRI participation, no adversary arms procurement, no meaningful Chinese-controlled critical infrastructure, no high-level Moscow or Tehran engagement. ASML export controls coordinated with the US and the September [2025 Nexperia intervention](#)—invoking the Goods Availability Act against a Chinese-owned semiconductor company—represent the EU's most assertive economic-security actions against Chinese strategic technology. Former PM Rutte's March 2024 Beijing visit is the one engagement note, but he used it to [publicly raise Chinese cyberespionage](#) and urge China to use its influence on Russia—confrontation rather than accommodation. The Nexperia intervention being suspended after Chinese retaliation illustrates the limits of unilateral action, but the willingness to initiate it distinguishes the Netherlands from more cautious European peers.



STRATEGIC ALIGNMENT

Operational Cooperation

The Netherlands contributed to [Afghanistan under ISAF](#)—including the demanding Uruzgan province mission 2006-2010 with significant Dutch casualties—and to [Iraq coalition](#) operations. On recent US operations, fully supportive: HNLMS [Karel Doorman deployed](#) to Operation Aspides, HNLMS [Evertsen to the Eastern Mediterranean](#) during the 2026 Iran war. Core contributions: 1GNC assumes [NATO tactical command](#) of Estonia and Latvia by mid-2026, with the Dutch taking sole command in early 2028—corps-level responsibility for roughly 40,000-60,000 troops on NATO's front. F-35s forward-deployed to Poland, Patriots on the eastern front, MQ-9 Reapers in Romania, and 90 Interflex personnel training Ukrainians complete a deployment profile spanning every domain simultaneously.

