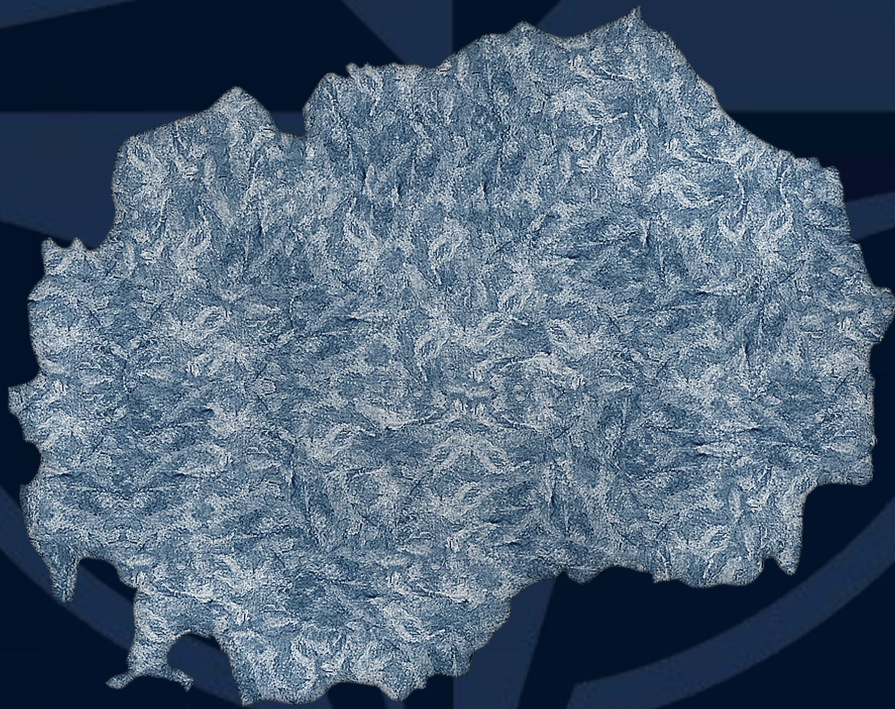




NORTH MACEDONIA

NATO Country Assessment —*TIER TWO*—

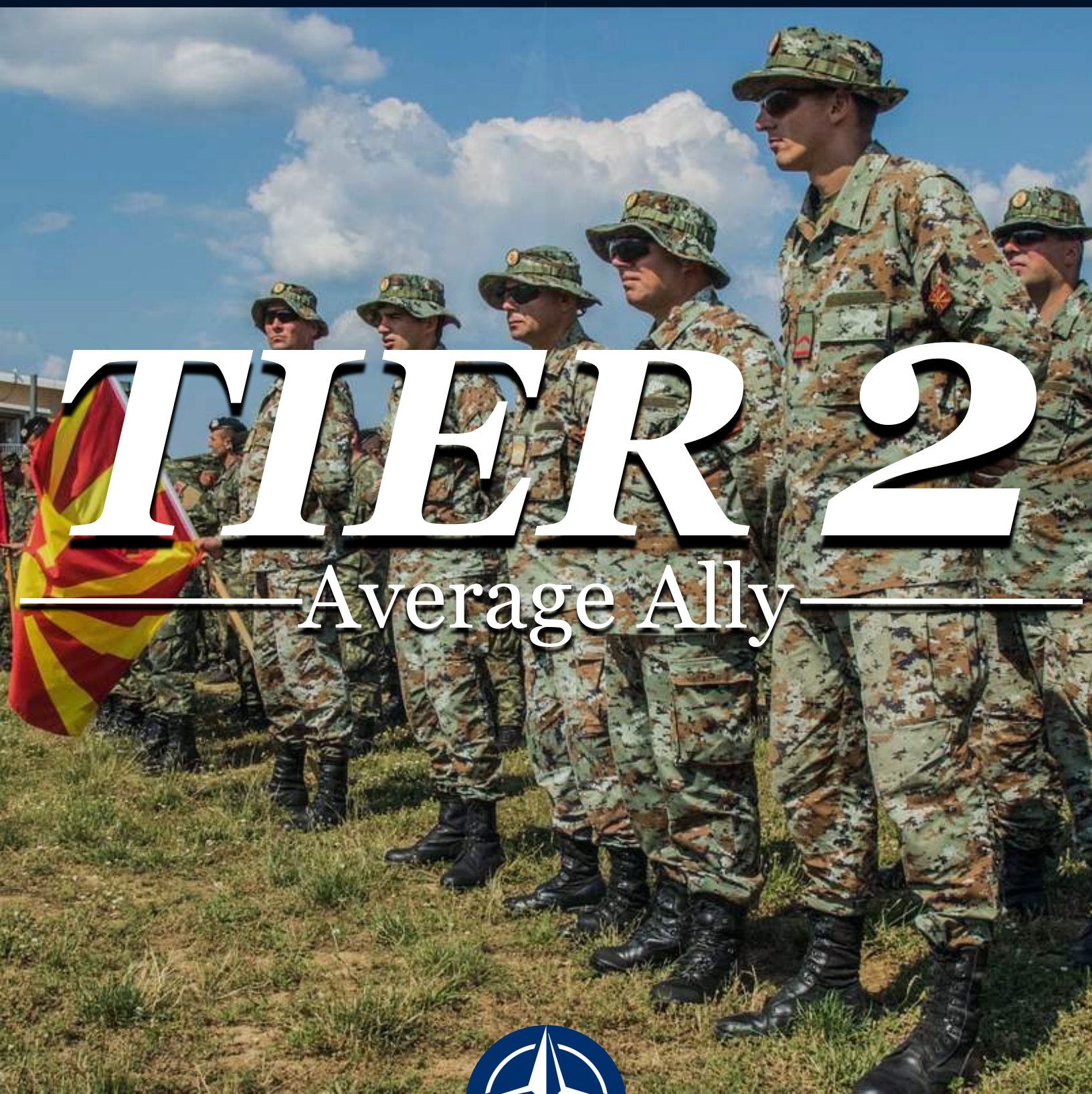
UKRAINE SUPPORTER • CLEAR-EYED ON THREATS • WEAK PUBLIC SUPPORT



JULY 2026



TIER TWO | NORTH MACEDONIA



TIER 2

Average Ally



AT A GLANCE

Toplines

- **Taking Responsibility for the Fight in Ukraine:** The Krivolak Training Area is one of the largest NATO-accessible training facilities in the Western Balkans, supporting Defender Europe exercises and US bilateral rotations in a region where large training sites are genuinely scarce.
- **Calling the Threat Out and Aligning with NATO:** The 2024–2029 National Security Strategy explicitly names Russian intelligence operations, hybrid warfare, and Chinese coercive policies as direct threats.
- **Urgent Need to Build Public Support:** Public support for collective defense is the second-lowest in the entire alliance: only 37% of North Macedonians say their country should defend another NATO ally if attacked, and only 41% support Ukraine.



FORCE STRUCTURE AT A GLANCE



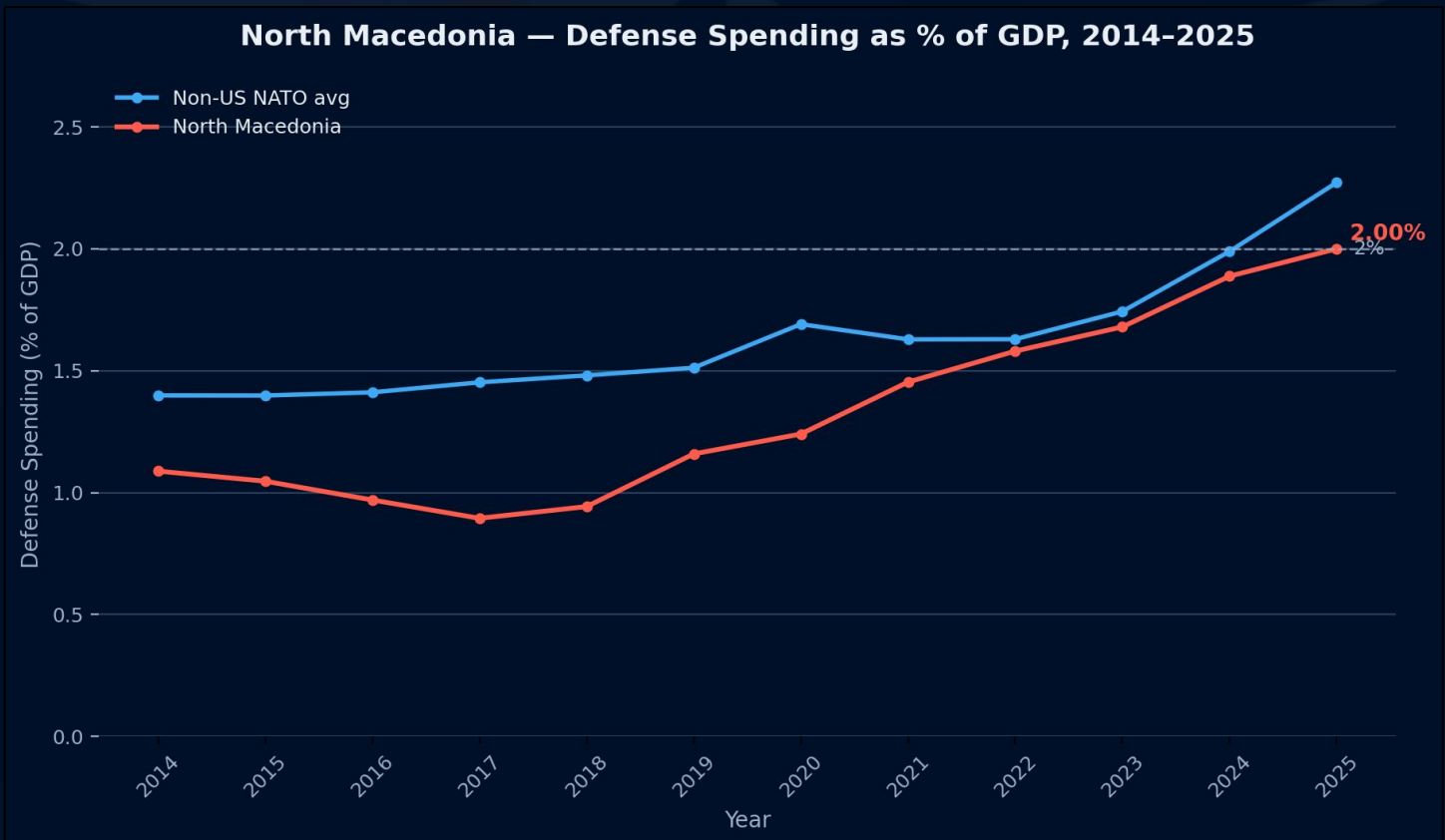
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

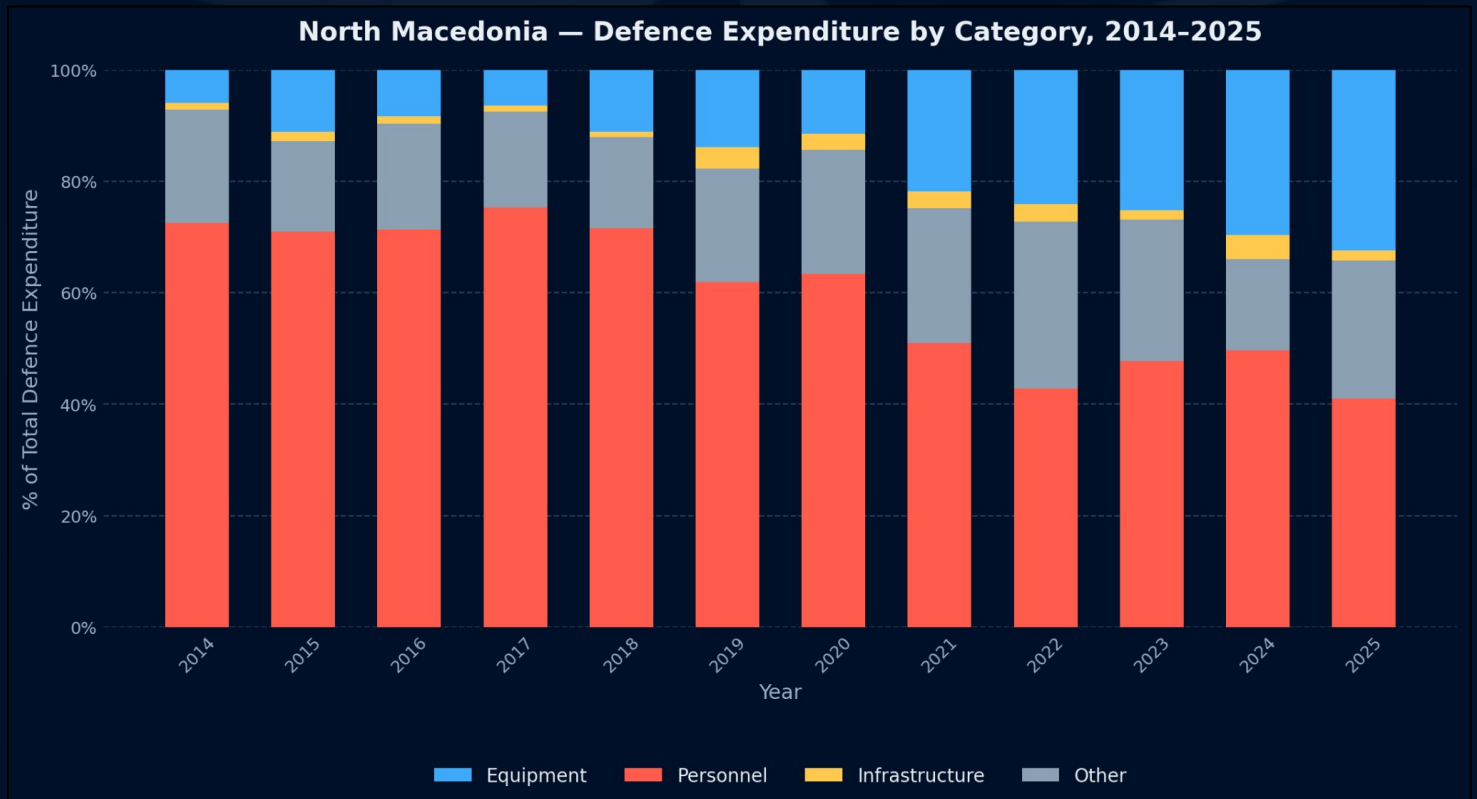
North Macedonia's [defense spending](#) trajectory shows consistent improvement from a low baseline. The data shows spending dipping below 1% of GDP in 2016-2018 before a sustained acceleration to 2.00% by 2025—meeting the NATO floor for the first time, though still well below the non-US NATO average of 2.5%. Spending grew from \$101M in 2017 to \$358M in 2025, a threefold increase in eight years. North Macedonia accepted the Hague 3.5% framework at the June 2025 summit. North Macedonia has the small country problem: even at 2%, a population of 1.8 million produces a modest absolute budget, but the trajectory is consistent and the 2025 milestone is genuine.



MILITARY CONTRIBUTIONS

Equipment Share

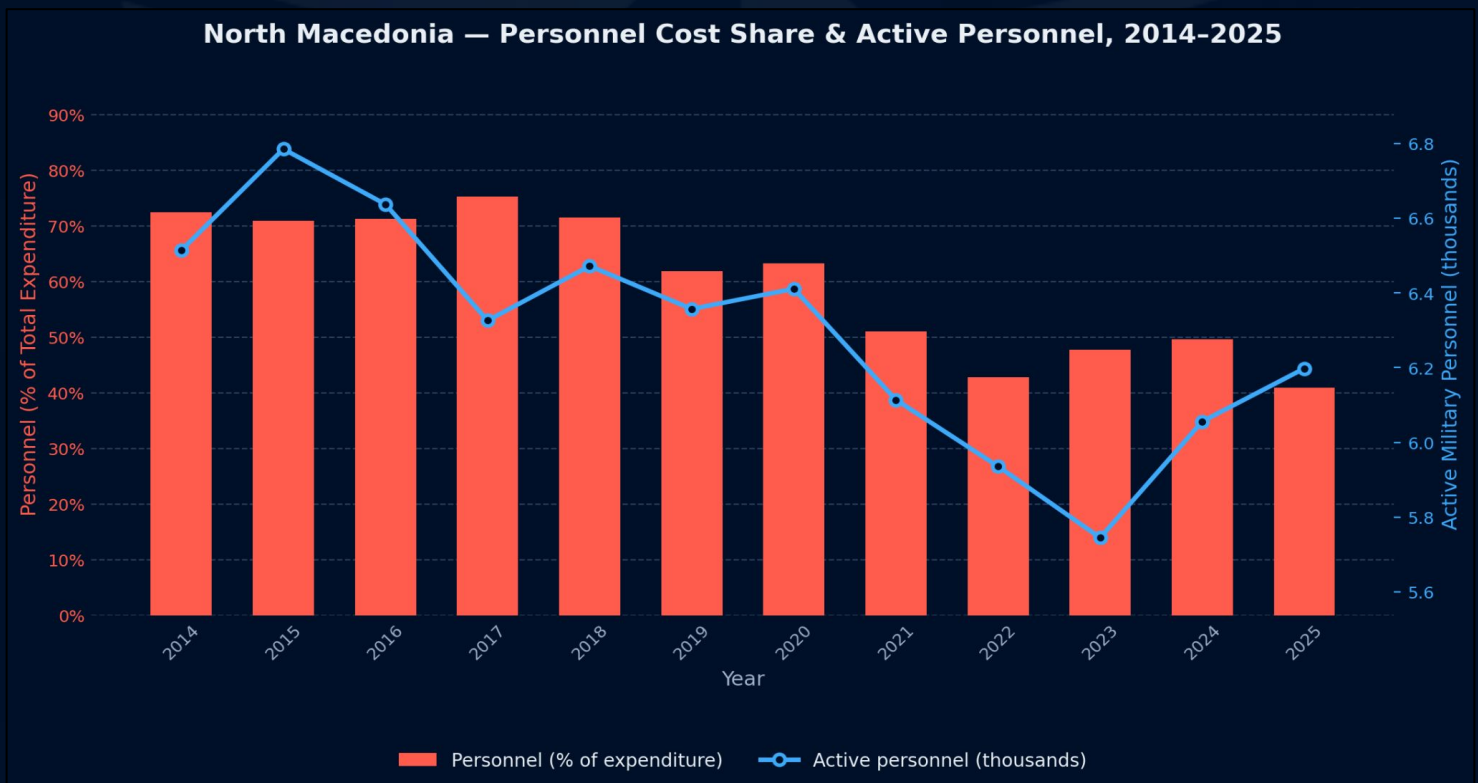
North Macedonia's equipment share transformation is visible in the data—rising from roughly 6-7% in 2014-2017 to approximately 32% by 2025, well above NATO's 20% benchmark, while personnel costs fell from roughly 72% to 41% over the same period. The inflection from 2021 onward reflects deliberate procurement investment. The equipment share metric is genuinely favorable; the challenge is that the procurement pipeline—Bradleys, JLTVs, AW149 helicopters—remains incomplete, creating a multi-year gap between legacy Soviet capability and delivered Western capability.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

North Macedonia's [personnel picture](#) shows a force that has been slowly declining but is now recovering. Active military personnel fell from roughly 6,600 in 2014 to approximately 5,800 by 2023 before rebounding to approximately 6,200 by 2025. Personnel share have fallen dramatically (from roughly 72% in 2014 to approximately 41% in 2025) as the defense budget grew faster than headcount and equipment investment dominated the spending surge. Defense Minister [Misajlovski has identified](#) force professionalization and expansion as priorities alongside equipment modernization, and the [National Security Strategy](#) targets meaningful personnel growth to support the transition from Soviet-legacy mass to a lighter, more mobile NATO-compatible force. The real constraint is a population of roughly 1.8 million with a serious demographic ceiling on military recruitment.



MILITARY CONTRIBUTIONS

Capability Modernization

North Macedonia's [modernization](#) is a force rebuild converting from a Soviet-legacy inventory to a lighter, NATO-interoperable force on a modest budget. Key programs: Bradley IFVs and 25 JLTVs (\$111M FMS, December 2024) for protected mobility; three batteries of Turkish Boran 105mm howitzers for fires; and a €250M Leonardo contract for four AW149 multirole and four AW169M light helicopters replacing the Mi-8/17 and Mi-24 fleets. The critical gap is air defense: no national combat aircraft and no medium-range air defense contract signed despite Defense Minister Misajlovski identifying it as a top priority. The modernization direction is right; the transition period creates a genuine capability gap.



MILITARY CONTRIBUTIONS

Force Posture

North Macedonia's [force posture](#) punches above its size through distributed contributions across five simultaneous NATO and EU missions: 70 troops in KFOR Kosovo, 35 in Romania's eFP, 33 in EUFOR Bosnia-Herzegovina, 30 in Bulgaria's eFP, and 9 in Latvia's eFP. Participation in both the Canada-led NATO Multinational Brigade Latvia and Italy-led Multinational Battlegroup Bulgaria demonstrates eastern front engagement well beyond the immediate neighborhood. The [Krivolak Training Area](#) is North Macedonia's most important hosting contribution—one of the largest NATO-accessible training facilities in the Western Balkans, supporting Defender Europe exercises and US bilateral rotations. Allied air policing covers North Macedonian airspace given the absence of national combat aircraft.



MILITARY CONTRIBUTIONS

Industrial Base

North Macedonia has virtually no indigenous [defense industrial capability](#) beyond small arms and ammunition. [Eurokompozit Prilep](#) produces composites and ATS Ballistics produces ballistic protection—the only meaningful domestic outputs. For all heavy equipment, aviation, and electronics, North Macedonia is entirely import-dependent. The Leonardo helicopter contract and [US FMS cases](#) include limited local industrial cooperation provisions without sovereign production capability. On raw materials, [North Macedonia holds](#) copper and lead-zinc deposits with some historical mining significance, but current output has limited direct NATO defense-industrial relevance. The €38M in EU [European Peace Facility](#) support—covering ISR, electronic warfare, and communications systems—reflects allied investment in North Macedonia’s capability development rather than any domestic production base.



STRATEGIC ALIGNMENT

Declared Posture

North Macedonia's 2024-2029 [National Security Strategy](#) is an explicit assessment—directly naming Russian intelligence services, hybrid operations, disinformation, and coercion as direct threats, and framing China's ambitions and coercive policies as challenges to North Macedonian and NATO interests. The November 2024 [EU Security and Defence Partnership](#) and EEAS confirmation of “full alignment” with EU CFSP reinforced the institutional posture. Public NATO support has shown signs of erosion since accession—a soft underbelly beneath the government-level posture.



STRATEGIC ALIGNMENT

Ukraine Support

The [Kiel Institute](#) does not track North Macedonia's Ukraine aid in its standard dataset, making precise GDP comparisons unavailable. Based on publicly reported transfers, [North Macedonia donated](#) its entire T-72 tank fleet of approximately 31 tanks, four Su-25 ground-attack aircraft, and 12 Mi-24 attack helicopters—effectively transferring its entire heavy combat aviation and armor capability to Ukraine. Additional transfers included artillery, ammunition, and anti-armor systems. [US backfill](#) support of approximately \$139M financed Western replacements, accelerating Macedonian modernization. North Macedonia has contributed significantly to the fight in Ukraine.



STRATEGIC ALIGNMENT

Russian Decoupling

North Macedonia's Russian energy decoupling is steady—limited pre-2022 direct exposure, with post-2022 diversification toward Greek LNG and Azeri gas reducing reliance on Russian-origin supply. No Rosatom footprint. North Macedonia aligned with almost every EU Russia sanctions package from the 6th through the 20th despite non-EU status. Russia's primary leverage is not energy but social: disinformation, political proxies, religious and identity channels, and regional spillover from Serbia, Kosovo, and Bosnia create persistent influence vectors that energy decoupling alone cannot address.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

North Macedonia recorded 64% for staying in [NATO in 2024](#), in the lower third of the alliance, and only 37% agreed their country should defend another NATO ally if attacked, the second-lowest figure recorded. Only 35% said their country is more safe as a result of NATO cooperation, also among the lowest, and Ukraine support was among the weakest in the survey at around 41% combined. Public attachment to NATO membership is weaker than in most new members, partly because accession was driven by elites in a bilateral bargain with Bulgaria that remains deeply unpopular domestically. The governing VMRO-DPMNE (Mickoski) is formally pro-NATO, but no major party has been able to build an enthusiastic domestic constituency for the security implications of membership. The combination of low capability, low solidarity intention, and frustrated NATO expectations makes North Macedonia one of the alliance's more uncertain peripheral members.



STRATEGIC ALIGNMENT

Hedging Behavior

North Macedonia's hedging record is limited. No meaningful BRI exposure, no major Chinese-controlled infrastructure, Chinese telecom restricted from 5G networks, full EU CFSP alignment from the 6th sanctions package, Western-only procurement pivot, no obstruction of Finnish or Swedish accession. The one elite-level hedging concern is Mickoski's engagement with Chinese diplomatic and economic frameworks beyond what North Macedonia's stated de-risking posture would suggest. Maintaining economic engagement channels with Beijing while publicly endorsing NATO and EU alignment creates a complicated picture. This has not produced concrete policy divergence but represents a pattern worth monitoring in a country still consolidating its Western integration.



STRATEGIC ALIGNMENT

Operational Cooperation

North Macedonia contributed forces to Afghanistan under ISAF and Iraq coalition operations. On recent US operations, North Macedonia has been supportive without obstruction: no hindrance to Operation Epic Fury and full EU sanctions alignment. North Macedonia does not participate in Operation Aspides or have a Red Sea role. The core operational contributions are hosting allied forward presence. Krivolak Training Area is the most important hosting asset—one of the largest NATO-accessible training facilities in the Western Balkans, supporting Defender Europe and bilateral US exercises in a region where large training sites are scarce. Forward deployments span five simultaneous missions: KFOR Kosovo, Romania's eFP, EUFOR Bosnia-Herzegovina, Bulgaria's eFP, and Latvia's eFP. This is a genuine alliance commitment from a small country that joined NATO only in 2020.

