



NORWAY

NATO Country Assessment — *TIER ONE* —

DEFENSE INVESTMENT • CRITICAL ENERGY • VITAL INTELLIGENCE



JULY 2026



TIER ONE | NORWAY

TIER 1

Model Ally



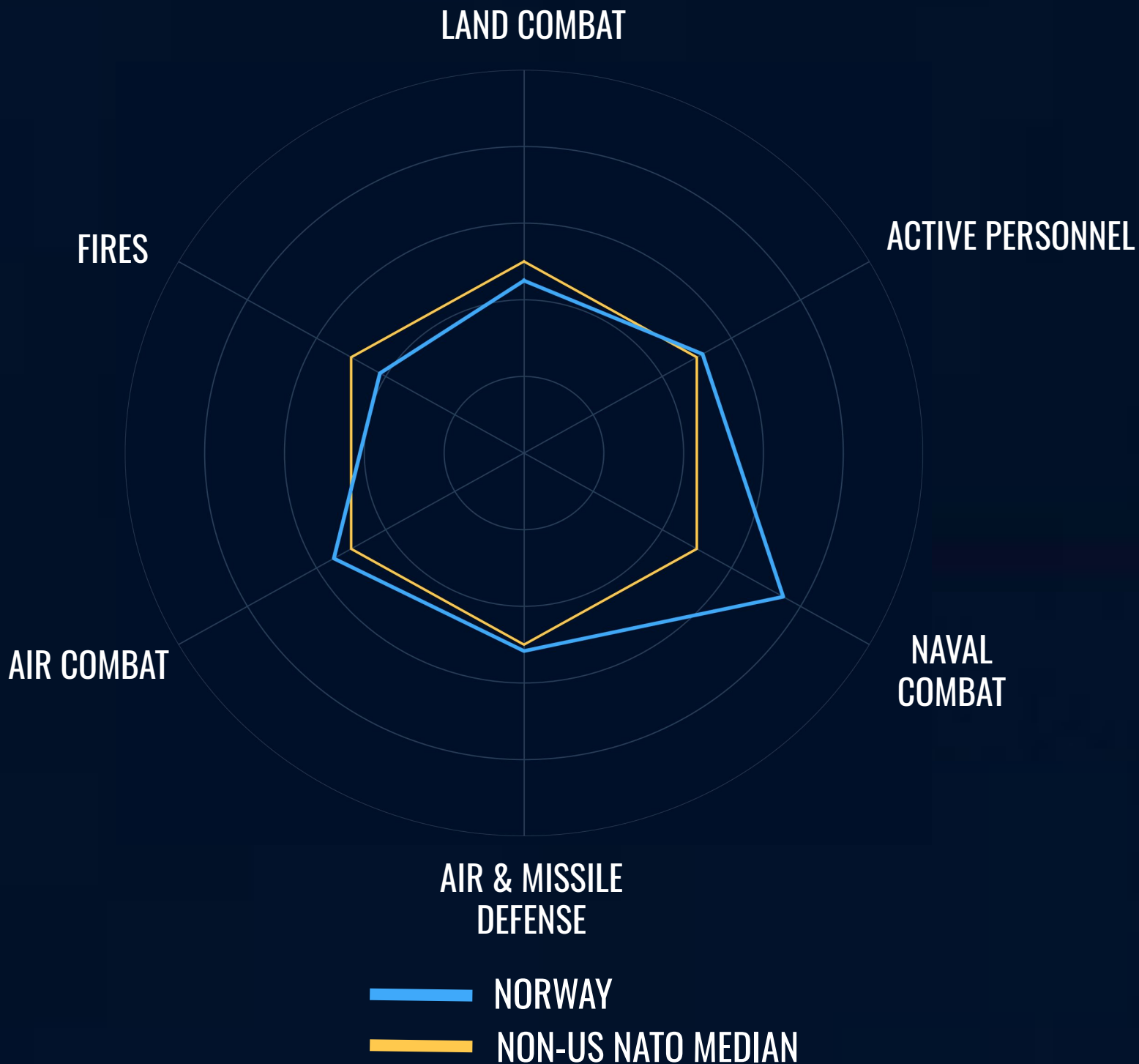
AT A GLANCE

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- **Investing in NATO's Strength:** Norway is the 5th highest defense spender in NATO, backed by a \$1.7T sovereign wealth fund and a 12-year, ~\$152B Long-Term Defence Plan nearly doubling the annual budget in real terms.
- **A Critical Supplier of European Gas:** Norwegian gas became critical to Russian decoupling for Germany, the UK, France, Belgium, and the Netherlands, while Norway applied every EU sanctions package despite not being an EU member.
- **Irreplaceable Intelligence Contribution on Russia's Northern Fleet:** the Marjata IV vessel provides continuous monitoring of Russian SSBN and naval movements on the Kola Peninsula, a capability no other ally can replicate.



FORCE STRUCTURE AT A GLANCE



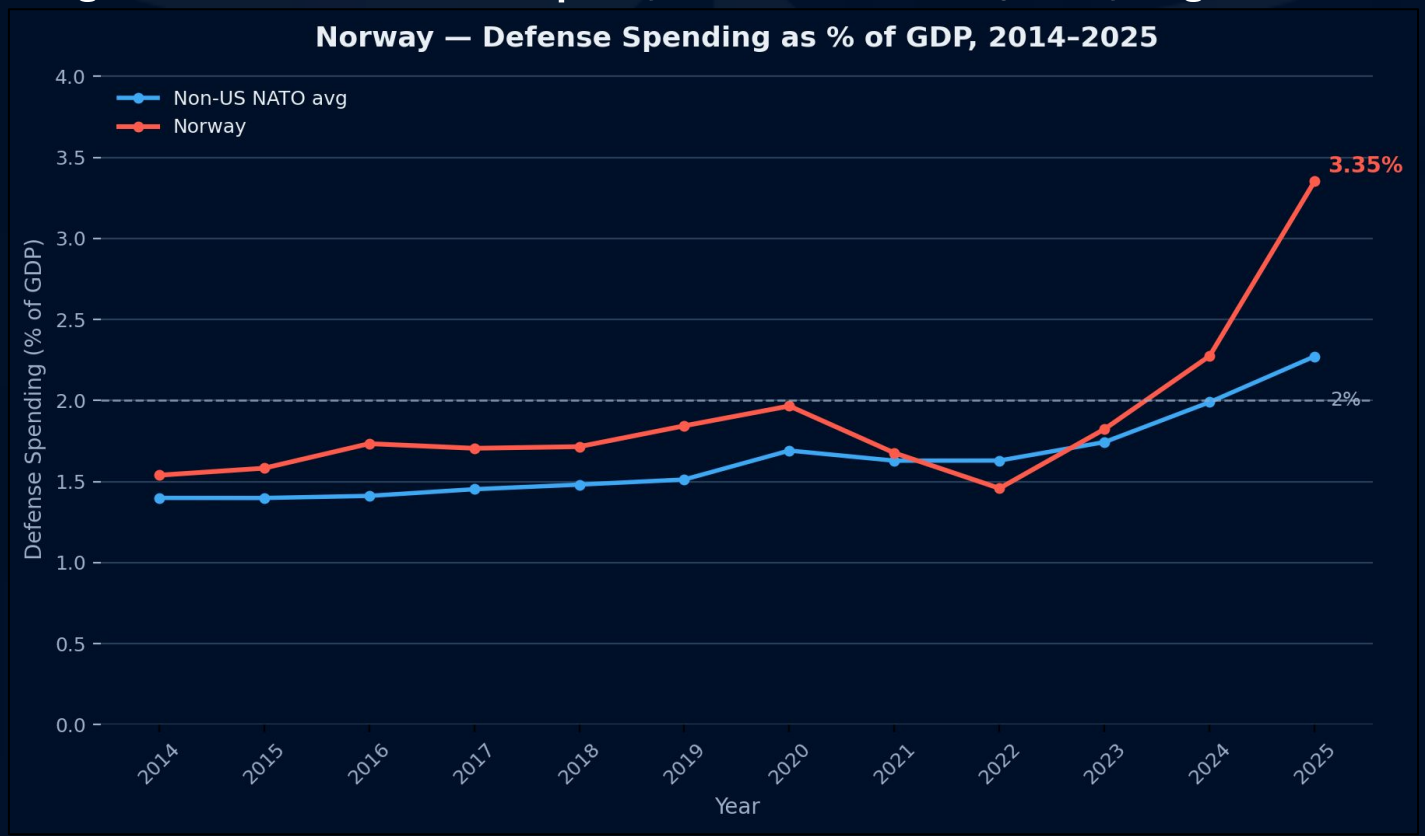
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

Norway's [defense spending](#) trajectory shows sustained above-average investment that has accelerated sharply since 2022. The data shows Norway tracking almost consistently above the non-US NATO average throughout 2014-2025, with a sharp acceleration from roughly 1.45% in 2022 to 3.35% in 2025—fifth-highest in the alliance behind Poland, Lithuania, Latvia, and Estonia. The [2024 Long-Term Defence Plan](#) commits NOK 1,624B over twelve years, nearly doubling the annual defense budget in real terms by 2036, with a [March 2026 supplemental](#) adding NOK 115B. Norway accepted the Hague 3.5% core plus 1.5% framework at the June 2025 summit. For a country with a sovereign wealth fund exceeding \$1.7T and substantial oil-and-gas revenues, the fiscal capacity to sustain this trajectory is genuine.

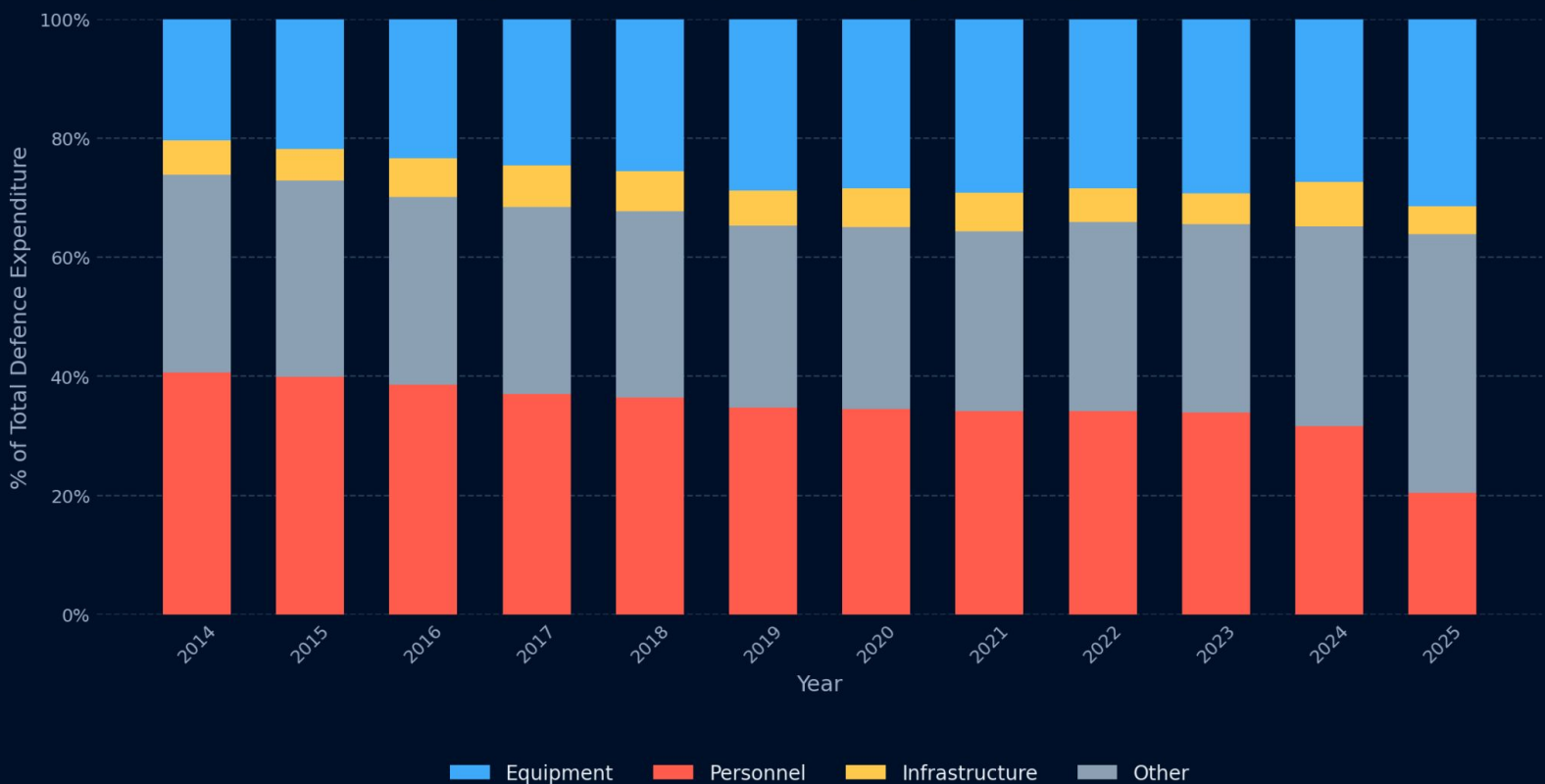


MILITARY CONTRIBUTIONS

Equipment Share

Norway's [equipment share](#) has been consistently high throughout the period—running at roughly 20-25% through 2014-2028 before surging to approximately 31% by 2025 as major capital programs dominate the growing budget. Personnel costs have fallen from roughly 41% in 2014 to approximately 21% in 2025, a substantial rebalancing as procurement absorbs the defense surge. Norway's equipment share is well above NATO's 20% benchmark and rising as the [Long-Term Defence Plan's](#) capital investment phase accelerates.

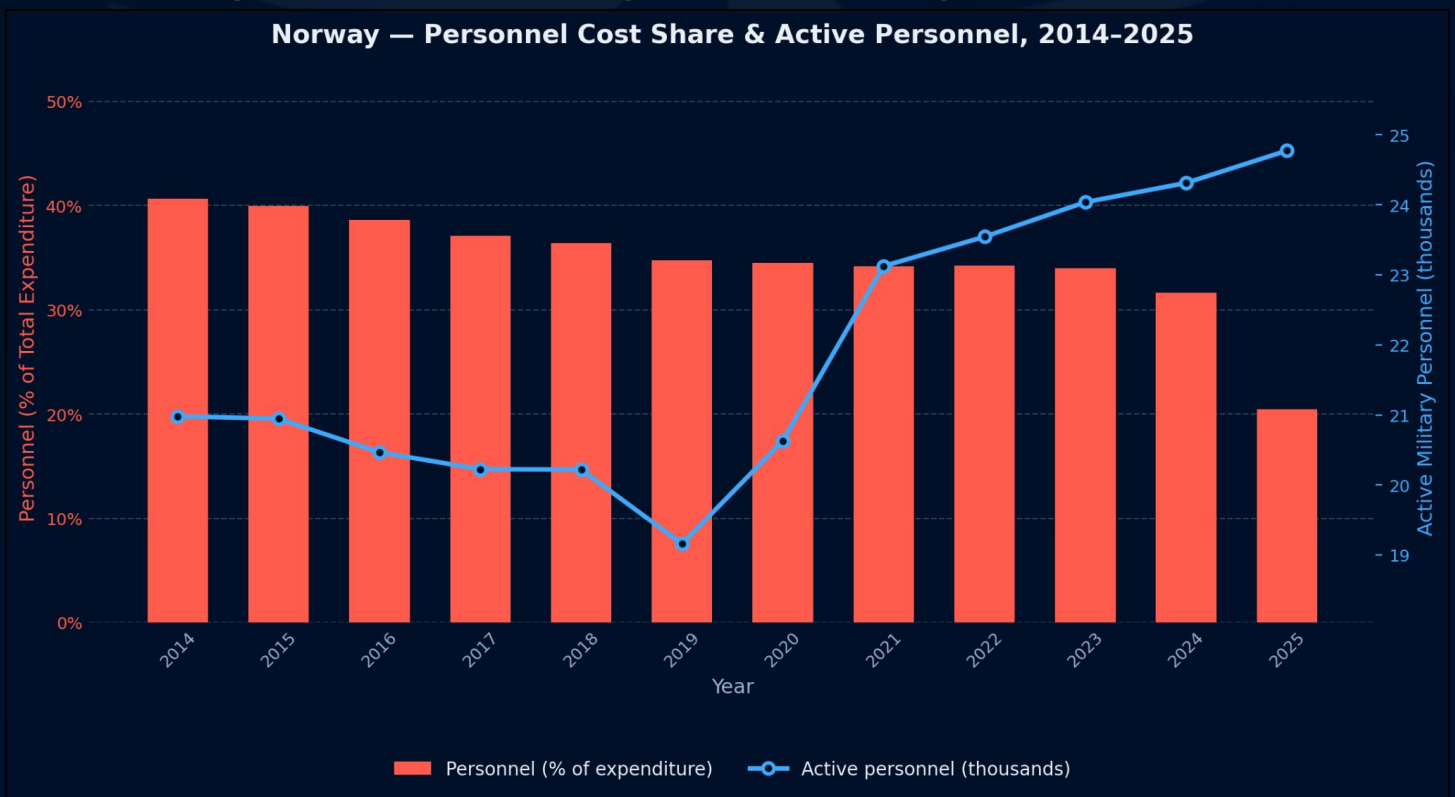
Norway — Defence Expenditure by Category, 2014-2025



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Norway's [personnel picture](#) shows a force that bottomed out and is now growing substantially. Active military personnel fell from roughly 21,000 in 2014 to approximately 19,200 by 2018-2019 before recovering sharply to approximately 25,000 by 2025. Personnel costs have fallen from roughly 41% in 2014 to approximately 21% in 2025, because the budget more than doubled faster than headcount grew. The [Long-Term Defence Plan](#) explicitly targets further personnel expansion: the Finnmark Brigade build-out, Army expansion from one to three brigades, and Home Guard expansion to 45,000 all require sustained recruitment. Norway operates a mixed conscript-volunteer system, with roughly one-third of the force drawn from national service. Chief of Defence [Eriksen has publicly stated](#) that Norway needs “more people, more equipment, and more speed,” framing personnel growth as equally urgent as capital investment.



MILITARY CONTRIBUTIONS

Capability Modernization

Norway's [modernization is serious](#). On combat aircraft, 52 F-35As were fully delivered in April 2025, armed with Kongsberg JSM cruise missiles providing standoff strike against maritime and land targets. On naval forces, the August 2025 UK-Norway £10B agreement for five Type 26 frigates replaces the current fleet with ASW-optimized surface combatants designed for High North operations. On submarines, six Type 212CD boats are under joint procurement with Germany for early 2030s delivery. On ground forces, Brigade North fields Leopard 2A4 tanks, CV9030N IFVs, and K9 howitzers; the [Finnmark Brigade](#) established August 2025 adds a dedicated border force; and the 2024 plan mandates expansion to three brigades total. Five P-8A Poseidons and the Marjata IV intelligence vessel provide persistent monitoring of Russian Northern Fleet activity. The principal gap is time: frigates, submarines, Finnmark Brigade, and long-range air defense all have delivery timelines extending into the 2030s.



MILITARY CONTRIBUTIONS

Force Posture

Norway hosts 1,100 US EUCOM personnel including pre-positioned [Marine Expeditionary Unit](#) equipment and a 155mm artillery battalion set. The [Norwegian Defence Cooperation Agreement](#) with the US expands access to designated facilities near the Russian border, relaxing Norway's traditional Finnmark restraint in a visible shift toward more active allied presence. The September 2025 US RQ-4 Global Hawk flight from Finnish Lapland over Finnmark and the Barents Sea signaled deepened US-Norwegian intelligence integration. Norway contributes 150 troops to Lithuania's eFP, 2+ F-35s to Poland's air deterrence, and 150 instructors to Operation Interflex. The Marjata IV intelligence vessel provides continuous Kola Peninsula monitoring that serves the entire alliance. All Nordic allies were placed under JFC Norfolk in December 2025, with Norway as the regional [High North anchor](#).



MILITARY CONTRIBUTIONS

Industrial Base

Norway's defense industrial base is among NATO's most strategically valuable relative to country size. [Kongsberg](#) produces the Naval Strike Missile, Joint Strike Missile, and NASAMS, the world's most widely deployed medium-range air defense system outside Patriot, in service with 15+ nations including the United States. Nammo provides artillery propellants, shoulder-launched weapons, and rocket motors as a critical NATO munitions supplier since 2022. Norway also holds significant [rare earth deposits](#) that are increasingly relevant to NATO's critical minerals agenda. Both companies are embedded in US and European procurement as critical suppliers.



STRATEGIC ALIGNMENT

Declared Posture

Norway's declared posture is explicitly Russia-focused. The [2024 Long-Term Defence Plan](#), May [2025 National Security Strategy](#), and [2025 White Paper on Total Preparedness](#) collectively frame the current security environment as the most serious Norway has faced since World War II. Norway's 198km land border with Russia in Finnmark and maritime frontage on the Kola Peninsula—home to Russia's Northern Fleet and SSBN nuclear bastion—makes the threat assessment urgent. On China, Norwegian doctrine is increasingly hard-edged in the Arctic context: the National Security Strategy calls for a restrictive policy toward Chinese activity in the High North, Norway blocked the Søre Fagerfjord sale on Svalbard on foreign-acquisition grounds, and 5G core networks are restricted from Chinese vendors. The [March 2026 spending supplemental](#) passed with broad political support demonstrates doctrine and spending are aligned across the political cycle.



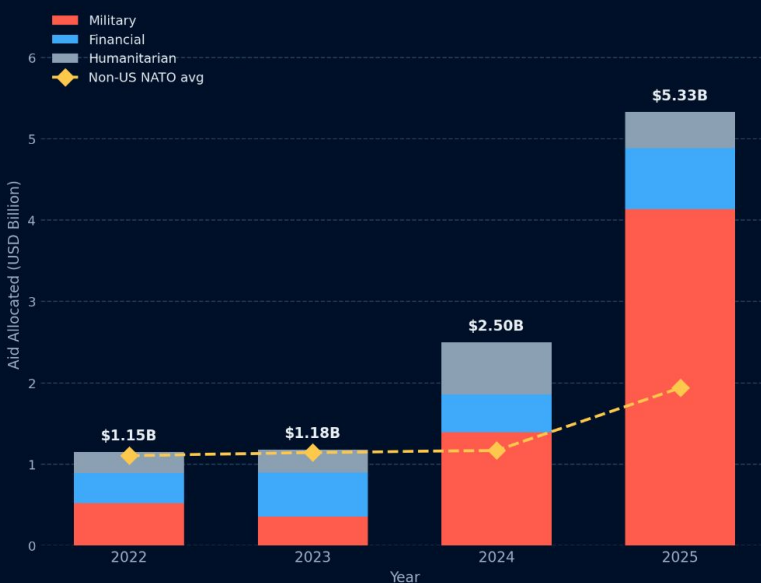
STRATEGIC ALIGNMENT

Ukraine Support

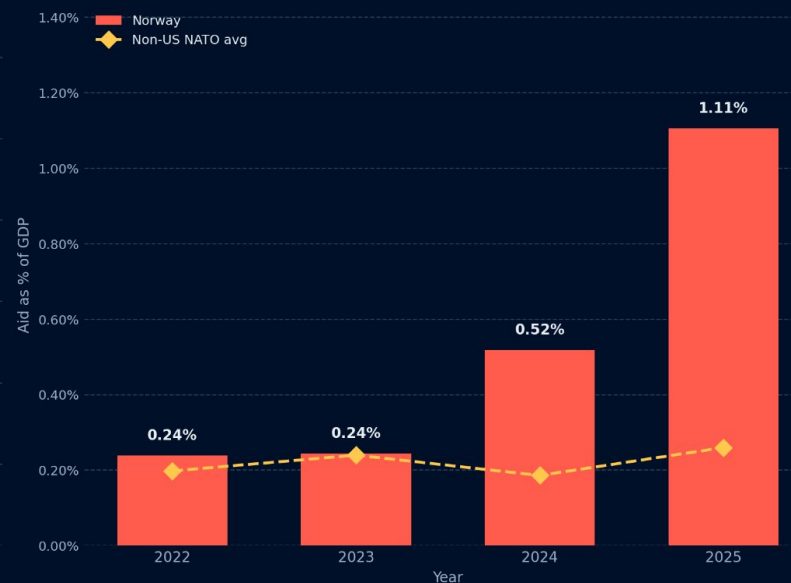
Norway's [Ukraine aid data](#) demonstrated sustained commitment: contributions running at \$1.15-1.18B (0.24% of GDP) in 2022-2023, before surging to \$2.50B (0.52%) in 2024 and \$5.33B (1.11%) in 2025, far above the alliance average. Kiel tracks €10.005B allocated and €24.724B committed (2.454% and 6.065% of GDP) the largest commitment-to-GDP ratio in the alliance, driven by the NOK 275B [Nansen Support Programme](#) running 2023-2030. Norway was the largest single PURL contributor in 2025 at approximately \$835M, and funded NOK 1.4B to backfill Romania's Patriot donation to Ukraine. Major transfers include NASAMS systems, Leopard 2 tanks, F-16s, CV90 IFVs, artillery, and naval mines. The Nansen Programme's multi-year Storting mandate insulates Ukraine support from political cycles.

Norway — Ukraine Aid, 2022-2025

Norway: Aid to Ukraine by Type



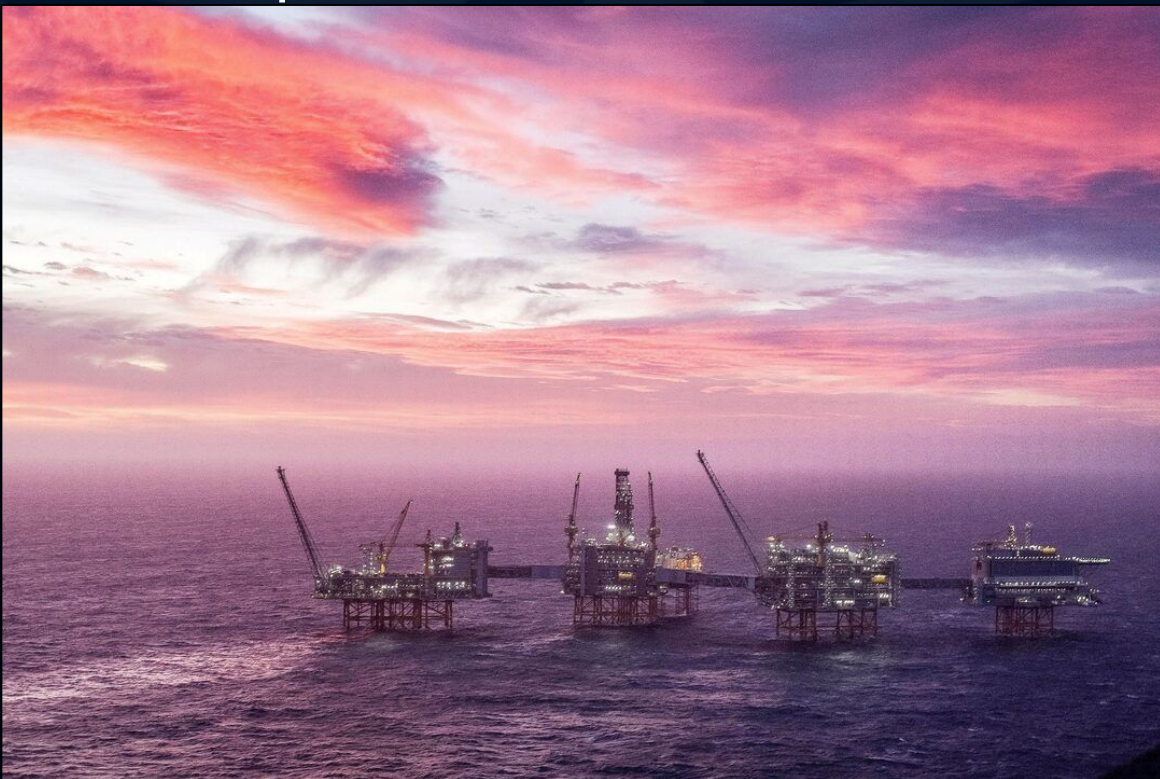
Norway: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

Norway had no Russian energy dependence to unwind and has become one of Europe's most important replacement gas suppliers. Norwegian gas infrastructure supplying Germany, the UK, France, Belgium, and the Netherlands became critical to European energy security after 2022. Norway applied every EU Russia sanctions package through the 20th despite non-EU status. The decoupling challenge runs in reverse: Norwegian offshore energy infrastructure has become a priority Russian sabotage target, requiring increased Navy, Coast Guard, and intelligence activity around platforms, pipelines, and cables. Norway is operationally central to High North shadow-fleet monitoring and undersea-infrastructure protection.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

Norway recorded 87% for staying in NATO, 79% willing to defend another ally, and 83% feeling more safe from NATO cooperation, all near the alliance's ceiling. Sixty percent favored increasing defense spending in 2024, already from a position above 2% of GDP, consistent with Norway surpassing the United States in per-capita defense spending in 2026. Eighty percent said Russia's war had affected Norway's security, and Ukraine support stood at around 80% combined. The Støre Labour government is strongly pro-NATO, as are the Conservative Party, the Progress Party, and the Center Party, creating near-total parliamentary consensus. The Red Party and the Socialist Left together represent roughly 10 to 12% of voters and are the only meaningful critics of NATO policy, without governing leverage on core security decisions.



STRATEGIC ALIGNMENT

Hedging Behavior

Norway's hedging record is essentially clean. No BRI participation, no adversary arms procurement, no high-level Moscow or Tehran engagement, no obstruction of any NATO or EU consensus position. Norway blocked Chinese-linked [acquisition at Søre Fagerfjord](#) on Svalbard and restricts Chinese telecom from 5G core networks. The [National Security Strategy](#) explicitly calls for a restrictive approach to Chinese Arctic activity. The one monitoring note is Svalbard itself: the [1920 Svalbard Treaty](#) gives Russia and China legal rights to conduct research and economic activity on the archipelago that Norway cannot simply restrict—creating a persistent vulnerability that Oslo is managing actively but cannot eliminate through policy alone.



STRATEGIC ALIGNMENT

Operational Cooperation

Norway contributed to [Afghanistan under ISAF](#) including combat operations in Helmand, and to [Iraq coalition](#) operations. On recent US operations, Norway has been broadly supportive—participating in [Operation Inherent Resolve](#), contributing to [Operation Aspides](#), and maintaining full Iran sanctions alignment without public obstruction of Epic Fury. The core operational value is geographic and intelligence-based. The Marjata IV provides continuous [monitoring of Russia's](#) Northern Fleet and SSBN movements—a contribution to allied anti-submarine warfare no other ally can replicate. All Nordic allies were placed under JFC Norfolk in December 2025, with Norway as the High North anchor. The [Finnmark Brigade](#), established August 2025, creates the first dedicated Norwegian ground force for the Russian border since the Cold War. Norway contributes to NATO [Forward Land Forces Finland](#), Lithuania's eFP, and Poland's air deterrence. Within the High North and North Atlantic, Norway's contributions are strategically irreplaceable.

