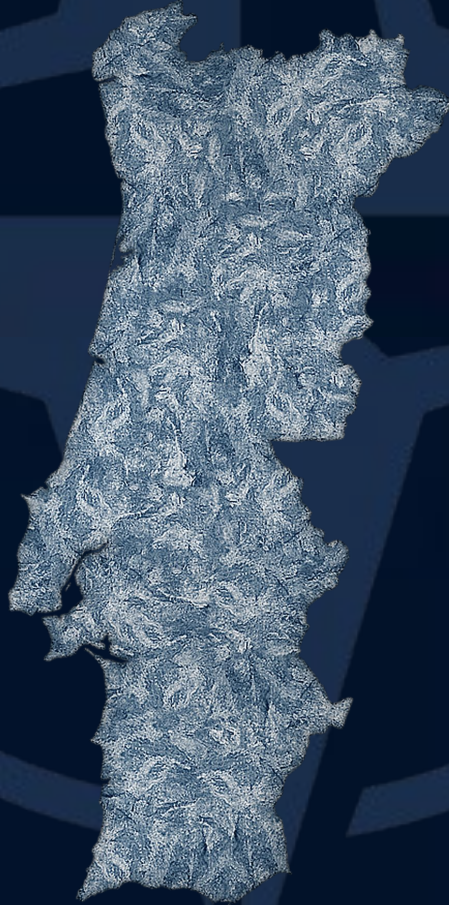




# PORTUGAL

## NATO Country Assessment —TIER TWO—

VITAL BASING • PUBLIC SUPPORT FOR NATO • UNACCEPTABLE HEDGING



JULY 2026



# TIER 2

Average Ally



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# AT A GLANCE

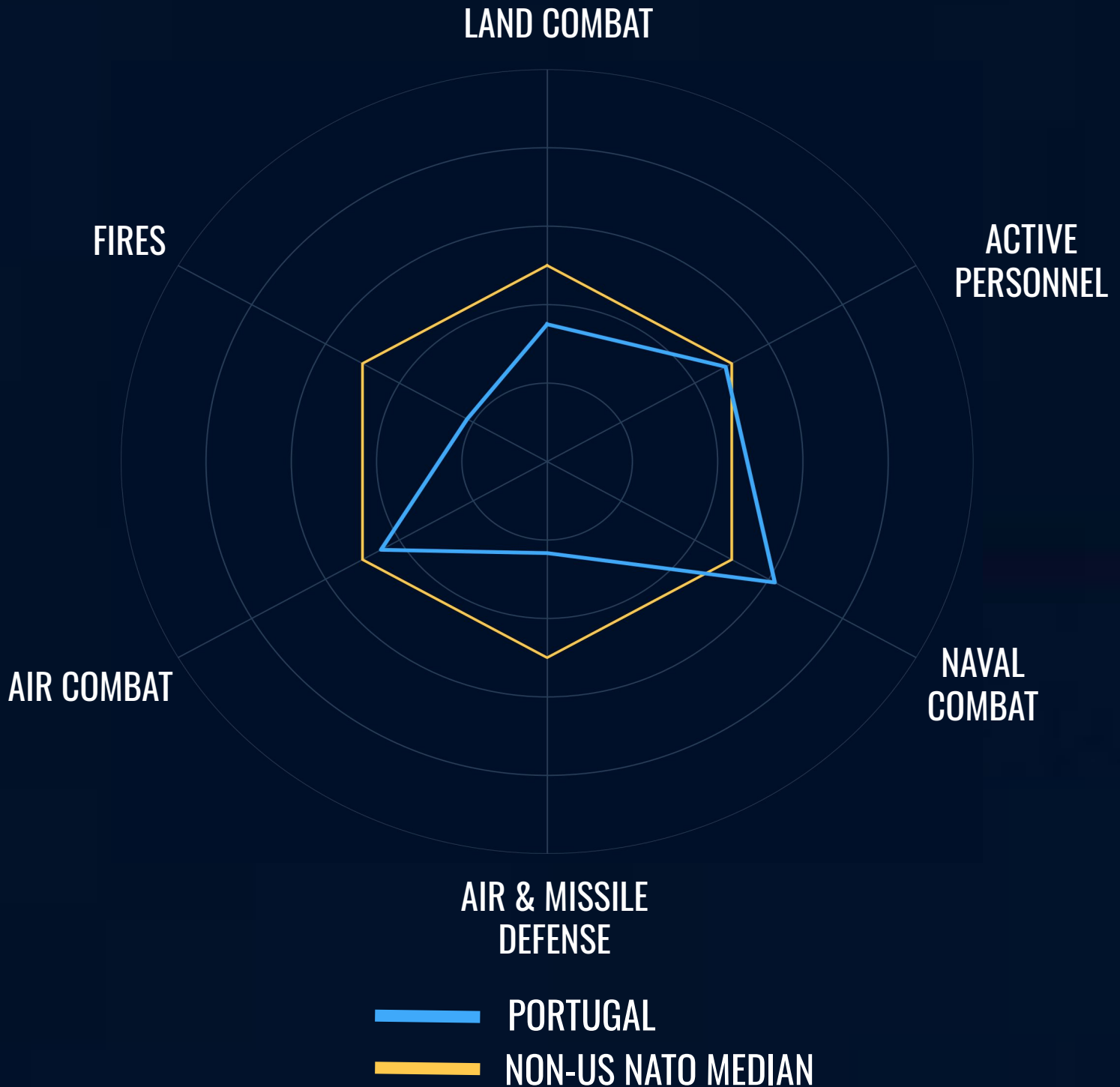
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## *Toplines*

- **A Critical Alliance Outpost Opened for Business:** Lajes Air Base in the Azores is Portugal's central alliance contribution. Lajes is a critical mid-Atlantic hub equidistant between North America, Europe, and the Middle East that no other ally can replicate, and Portugal's authorization of 76 US aircraft landings and 25 overflights during Operation Epic Fury.
- **Strong Domestic Support for the Alliance:** Public NATO support is among the strongest in Southern Europe with 87% favor staying in NATO, 72% say Portugal should defend another ally if attacked, and Ukraine support stands at 81% combined.
- **Unacceptable Alliance Hedging for Political Posturing:** Defense Minister Melo's March 2025 framing of the F-35 cancellation around criticisms of Trump was an unnecessary diplomatic provocation from an ally whose Azores basing access makes the bilateral relationship one of the most strategically valuable in Southern Europe.



# FORCE STRUCTURE AT A GLANCE



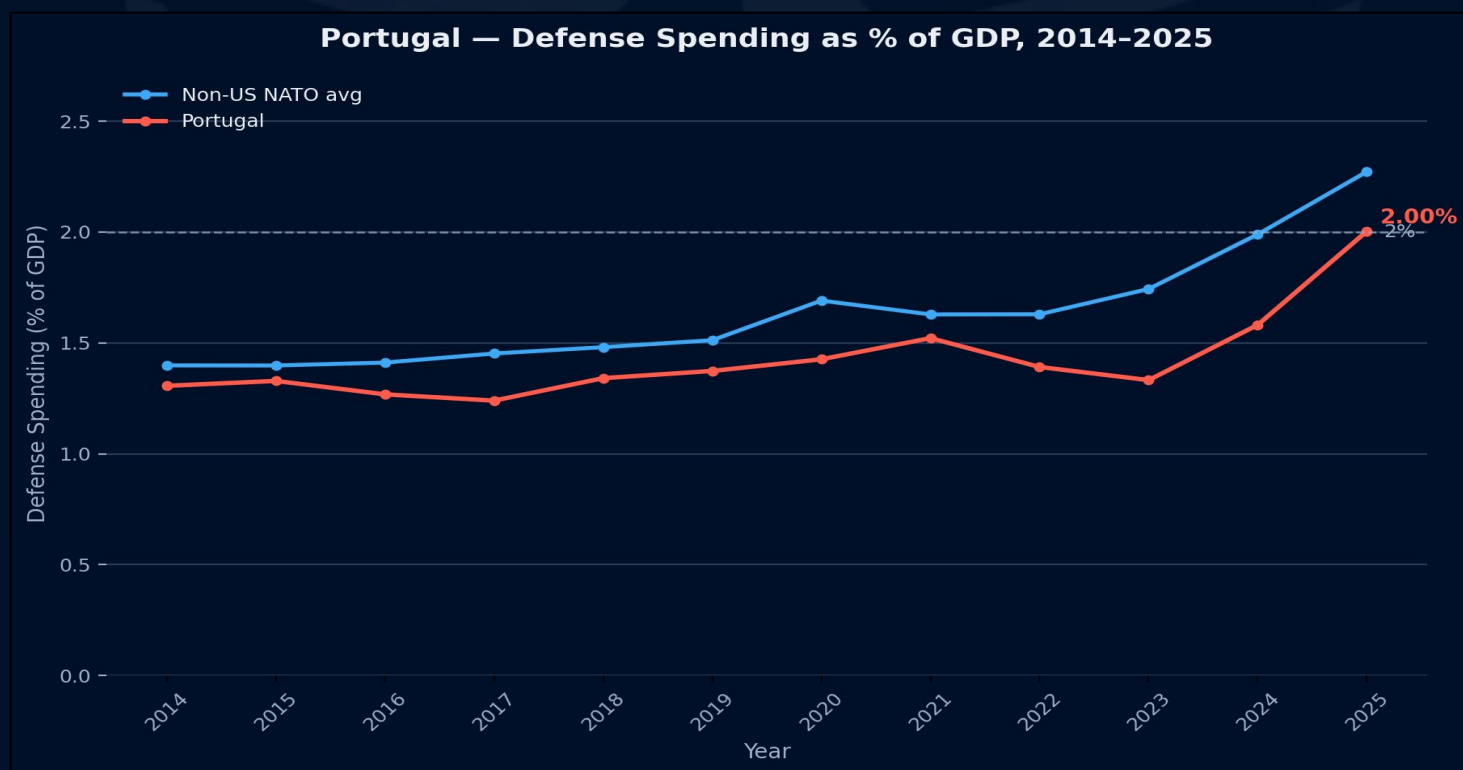
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

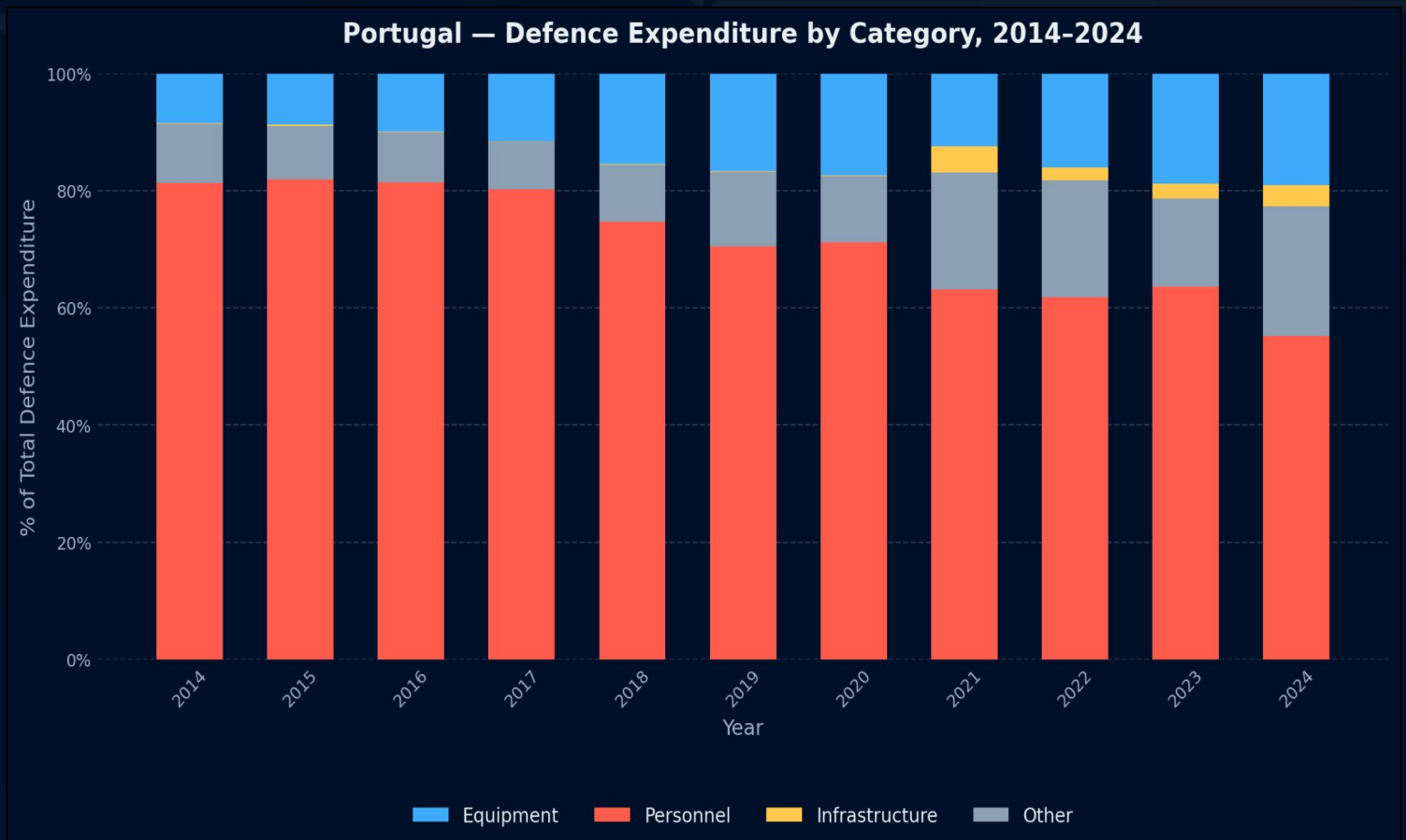
Portugal's [defense spending](#) data shows it has consistently tracked below the non-US NATO average for over a decade: spending 1.25-1.55% of GDP through 2014-2024 while the alliance average rose steadily above it. The jump to 2.00% in 2025 is real and represents the fastest single-year acceleration in Portugal's recent history. Portugal accepted the Hague 3.5% core plus 1.5% framework. The [Military Programming Law 2023-2034](#) allocates €5.57B, covering cyber and space for the first time. Portugal remains in the bottom tier by GDP share and has decades of underfunding to correct. The path from 2% to 3.5% by 2035 requires sustained annual increases that Portugal has not historically demonstrated.



# MILITARY CONTRIBUTIONS

## *Equipment Share*

Portugal's [equipment share](#) has improved slowly. The data shows personnel costs falling from roughly 81% in 2014 to approximately 55% by 2024, with equipment rising correspondingly to almost 20%, approaching NATO's 20% benchmark. The rebalancing reflects the [Military Programming Law](#) investment beginning to register in actual expenditure. Equipment share is improving but the absolute budget limits simultaneous procurement across multiple domains.

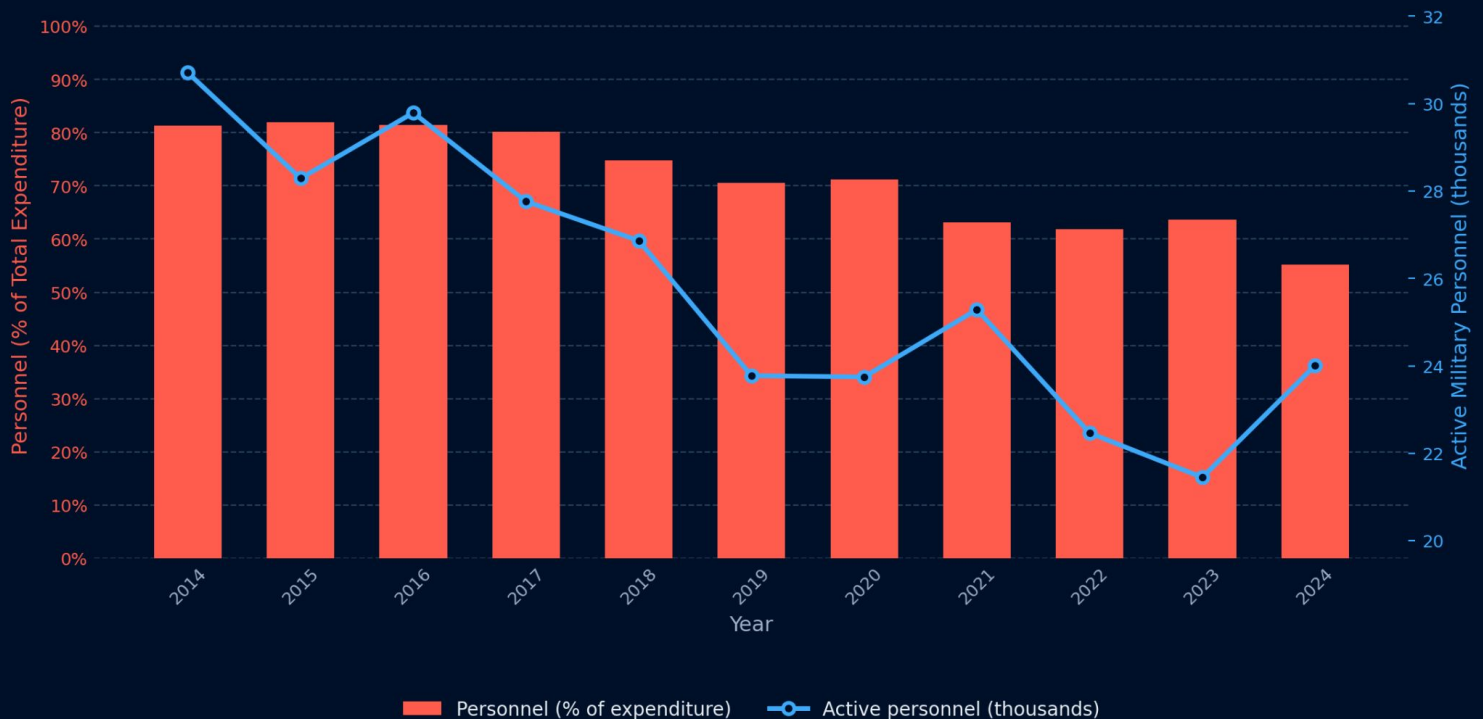


# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

Portugal's [personnel picture](#) shows a force that has been both shrinking and trying to recover. Active military personnel fell from roughly 31,000 in 2014 to approximately 22,000 by 2023 before rebounding to approximately 25,000 by 2025. Personnel costs have fallen significantly, a combination of falling headcount and equipment investment. Portugal has invested in recruitment initiatives including improved pay scales and expanded reserve integration under the Military Programming Law, targeting [further personnel growth](#) to support modernization ambitions. The structural challenge is that at roughly 25,000 active personnel, Portugal remains thin with significant Atlantic maritime responsibilities, and a historically tight labor market creates persistent competition for technical and specialist roles.

Portugal — Personnel Cost Share & Active Personnel, 2014-2024



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

Portugal's [modernization is focused](#) on maritime patrol, transport, and modest ground force improvement rather than comprehensive reequipping. On maritime patrol, six P-3C Orions acquired from Germany with first delivery in February 2024 address the surveillance and ASW gap across Portugal's vast Atlantic EEZ. On transport, the KC-390 provides modern strategic airlift. On ground forces, 34 Leopard 2A6 MBTs anchor a small armored capability, with Pandur II APC upgrades underway. On drones, [Tekever](#) has emerged as an operationally significant Portuguese manufacturer with Ukraine deployment experience. The most pressing gap is combat aircraft: the March 2025 reversal of the F-35A decision leaves 28 aging F-16AM/BMs without a contracted successor, with Eurofighter, Gripen E, and Rafale under evaluation.



# MILITARY CONTRIBUTIONS

## *Force Posture*

Portugal's force posture is defined primarily by [Lajes Air Base](#) on Terceira Island in the Azores: a critical mid-Atlantic hub for transatlantic force flow, ASW patrol coordination, and maritime surveillance roughly equidistant between Europe and the US East Coast, with 250 US EUCOM personnel permanently based there. During Operation Epic Fury, Lajes authorized 76 US aircraft landings and 25 overflights. Portugal deploys 235 troops to Romania's eFP and 147 to Slovakia's eFP, demonstrating Eastern Flank reach beyond its Atlantic orientation. Portugal hosts NATO's [Cyber Security Academy](#) and relocated Ukrainian F-16 pilot training from Denmark. Baltic Air Policing rotations since 2007 show consistent deployable air contribution. Force posture is modest in mass but outsized in geographic value through the Azores.



# MILITARY CONTRIBUTIONS

## *Industrial Base*

Portugal's [defense industrial base](#) is modest with one standout. Portugal's Tekever has supplied its AR5 drone to Ukraine, where it has been credited with battlefield effect. [Traditional strengths](#) include shipbuilding and naval maintenance capacity. Portugal has no sovereign combat aircraft, submarine, or missile production. On raw materials, [Portugal holds](#) one of Europe's most significant critical minerals profiles: substantial lithium reserves plus tungsten, tin, and copper deposits relevant to defense manufacturing and battery supply chains. The EU's [Critical Raw Materials Act](#) has identified Portuguese lithium as strategically important, and several mining and processing projects are in development that could make Portugal a meaningful contributor to NATO's critical minerals de-risking agenda.



# STRATEGIC ALIGNMENT

## *Declared Posture*

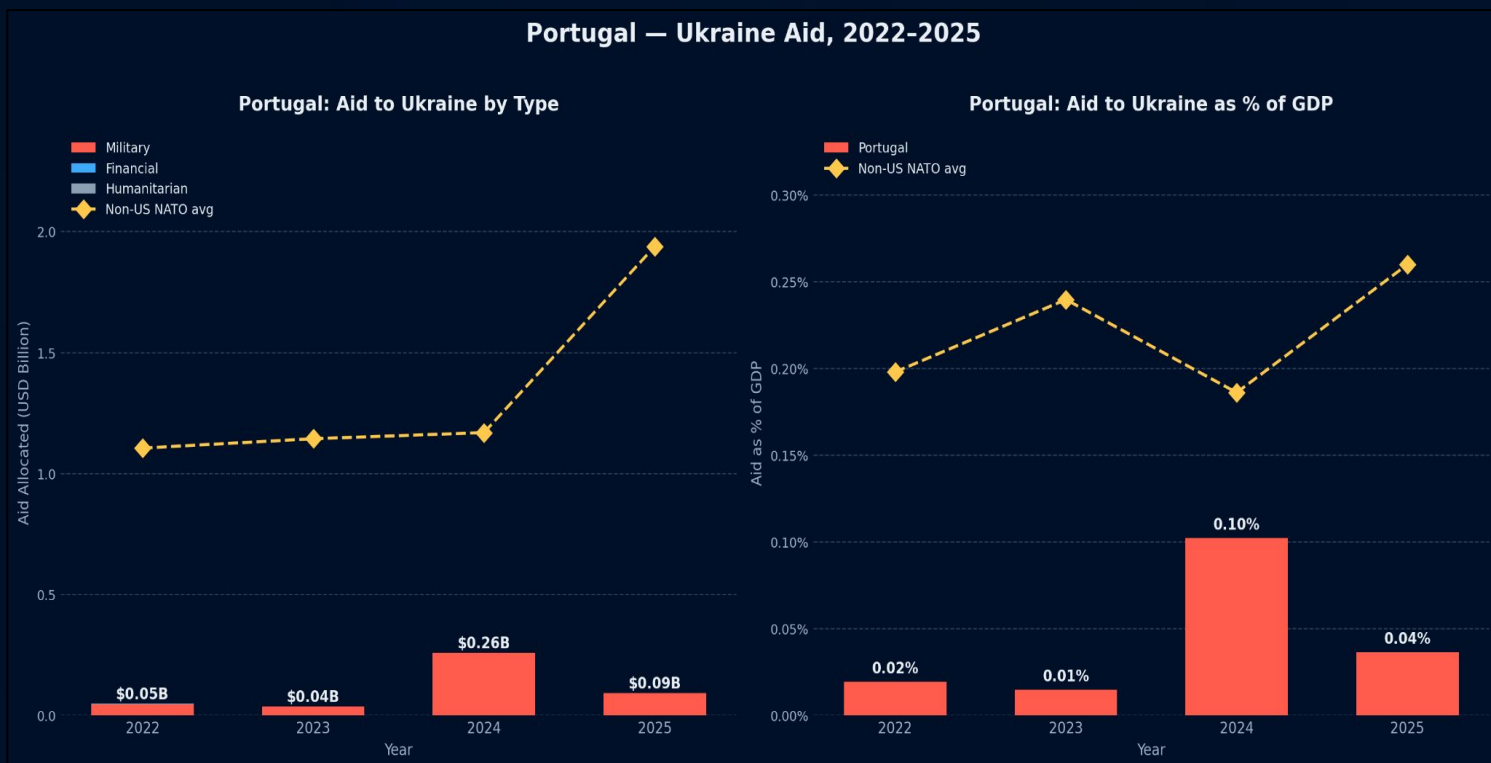
Portugal's declared posture aligns with NATO 2022. NATO Secretary General Rutte explicitly framed [Portugal's Lajes role](#) as central to NATO's Russia deterrence architecture in January 2025. On China, Portugal is subject to meaningful exposure: China Three Gorges holds roughly [19-21% of EDP](#), Portugal's largest utility, and BRI cooperation documents were signed in 2018. Portugal's 5G Huawei ban among the EU's toughest is the clearest China-security positive. On Iran, [Lajes authorization](#) for 76 US aircraft landings and 25 overflights during Epic Fury distinguishes Portugal from Spain, France, and Italy. The one posture concern: Defense Minister Melo's March 2025 framing of the [F-35 reversal](#) around criticisms of Trump introduced uncertainty that the US ambassador publicly pushed back on in February 2026.



# STRATEGIC ALIGNMENT

## *Ukraine Support*

Portugal's [Ukraine aid data](#) shows an underwhelming picture: very low contributions in 2022-2023 (0.02% and 0.01% of GDP, well below the NATO average) before a notable surge to 0.10% in 2024—driven by €100M to the Czech Ammunition Initiative and €52M to the Drone Coalition—then falling back to 0.04% in 2025. Kiel tracks €0.385B allocated and €0.528B committed, approximately 0.179% and 0.246% of GDP. Direct transfers include 3 Leopard 2A6 tanks, roughly 60 M113 APCs, Ka-32 and Puma helicopters, howitzers, and Tekever drones with confirmed battlefield effect. The [10-year bilateral security agreement](#) signed May 2024 provides a multi-year framework. Portugal's contribution is below the NATO average by GDP share in all years.



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

Portugal's Russian energy decoupling is among NATO's cleanest. Russian gas imports were roughly 15% of total before 2022 and ceased in mid-2022, substituted through the Sines LNG terminal, alongside Iberian and North African pipeline connections. No Russian oil pipeline, Rosatom nuclear, or LNG structural dependence. Portugal supported every EU Russia sanctions package through the 20th without obstruction. The separate concern is China Three Gorges holding 19-21% of EDP, Portugal's largest utility—Chinese leverage over energy infrastructure that is worth monitoring independently of Russia decoupling.



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

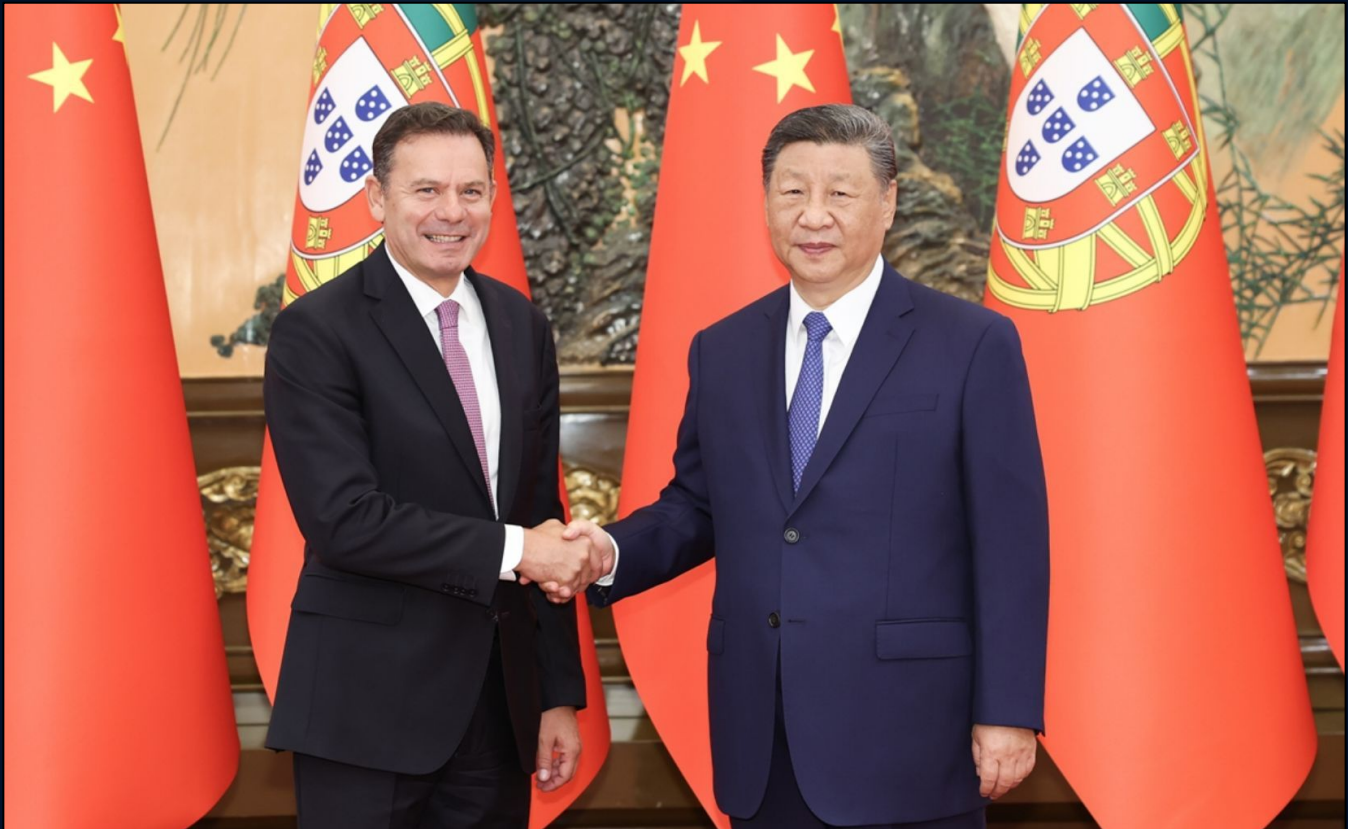
Portugal recorded 87% for staying in NATO, 72% agreeing the country should defend another ally, and 73% agreeing NATO membership makes a foreign attack less likely, all above the alliance median. Fifty percent favored increasing defense spending in 2024, high given Portugal's historically modest contribution levels, and Ukraine support stood at around 81% combined, one of the stronger figures in Southern Europe. The AD government under Montenegro is pro-NATO, and the PS (Socialists) in opposition is broadly aligned. Chega, the far-right second-largest party, has made some sympathetic noises toward Russia but has not taken a posture of opposition to NATO membership, while the PCP (Communists, around 4 to 6% of voters) calls openly for Portuguese withdrawal but carries no governing leverage. Portugal's combination of high public NATO support, above-average Ukraine solidarity, and minimal parliamentary opposition to the alliance makes it a more reliable Southern European partner than its capability contributions alone would suggest.



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

Portugal's hedging record is broadly positive with two concerns worth noting. On China, Three Gorges holds roughly [19-21% of EDP](#), Portugal's largest utility. BRI cooperation documents were signed in 2018, though the footprint never became significant. The 5G Huawei ban is the clearest positive, among the toughest in Europe and explicitly praised by the US ambassador. On US alignment, Defense Minister Melo's March 2025 framing of the [F-35 cancellation](#) around criticisms of Trump was a concerning action—a real hedge against Washington that the US ambassador publicly pushed back on in February 2026. No high-level Moscow, Beijing, or Tehran engagement during the war period.



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

Portugal contributed forces to [Afghanistan under ISAF](#) and to coalition [operations in Iraq](#). On recent US operations, Portugal's most consequential decision was authorizing 76 US aircraft landings and 25 overflights at Lajes during Operation Epic Fury. Lajes Field on Terceira Island a critical mid-Atlantic hub equidistant between North America, Europe, and the Middle East that provides refueling and staging capability no other ally can replicate at that geographic position. The P-3C Orion acquisition restores Atlantic ASW capacity feeding NATO's picture of Russian submarine activity across Portugal's enormous EEZ. [Portugal contributes](#) 235 troops to Romania's eFP and 147 to Slovakia's eFP, with Baltic Air Policing rotations since 2007. Portugal does not participate in Operation Aspides or Prosperity Guardian—its operational value is Atlantic, Azores-centric, and eastern front rotational.

