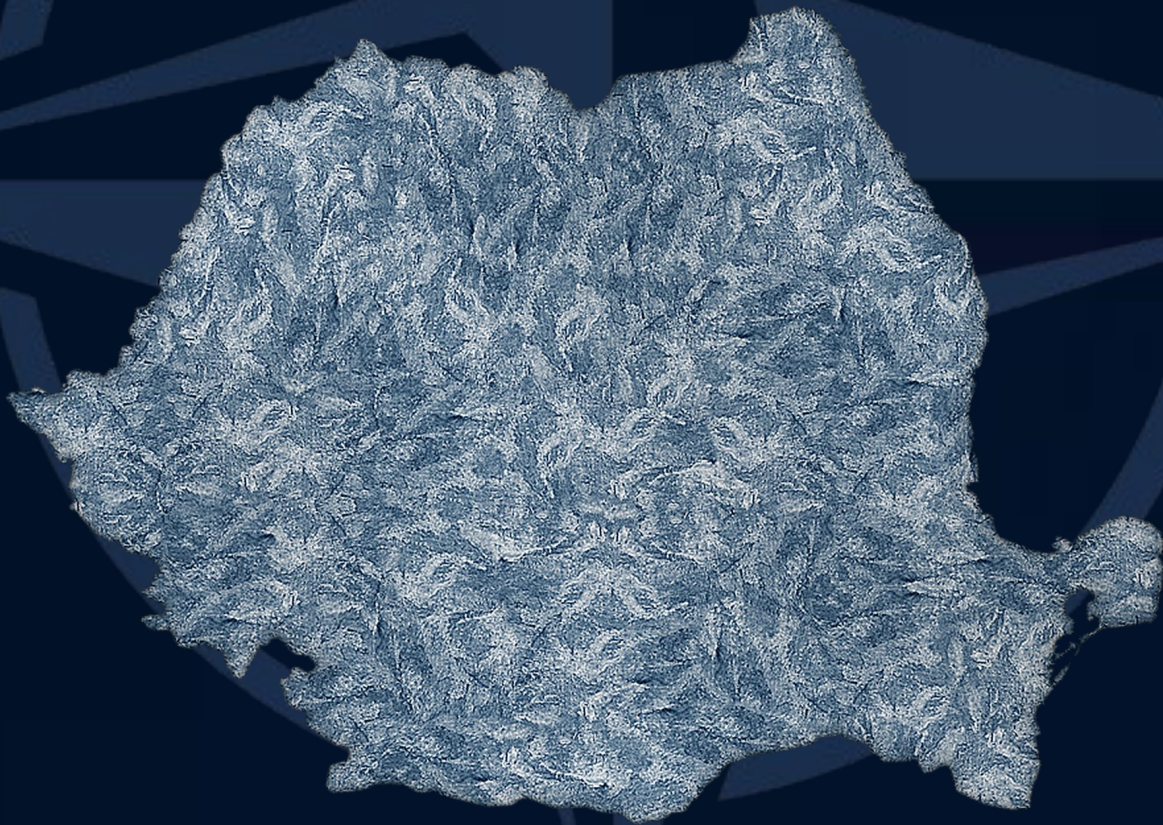




# ROMANIA

## NATO Country Assessment —TIER TWO—

NEW AIR BASE • EPIC FURY SUPPORT • COMPETING BUDGET PRIORITIES



JULY 2026



# TIER 2

Average Ally



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# AT A GLANCE

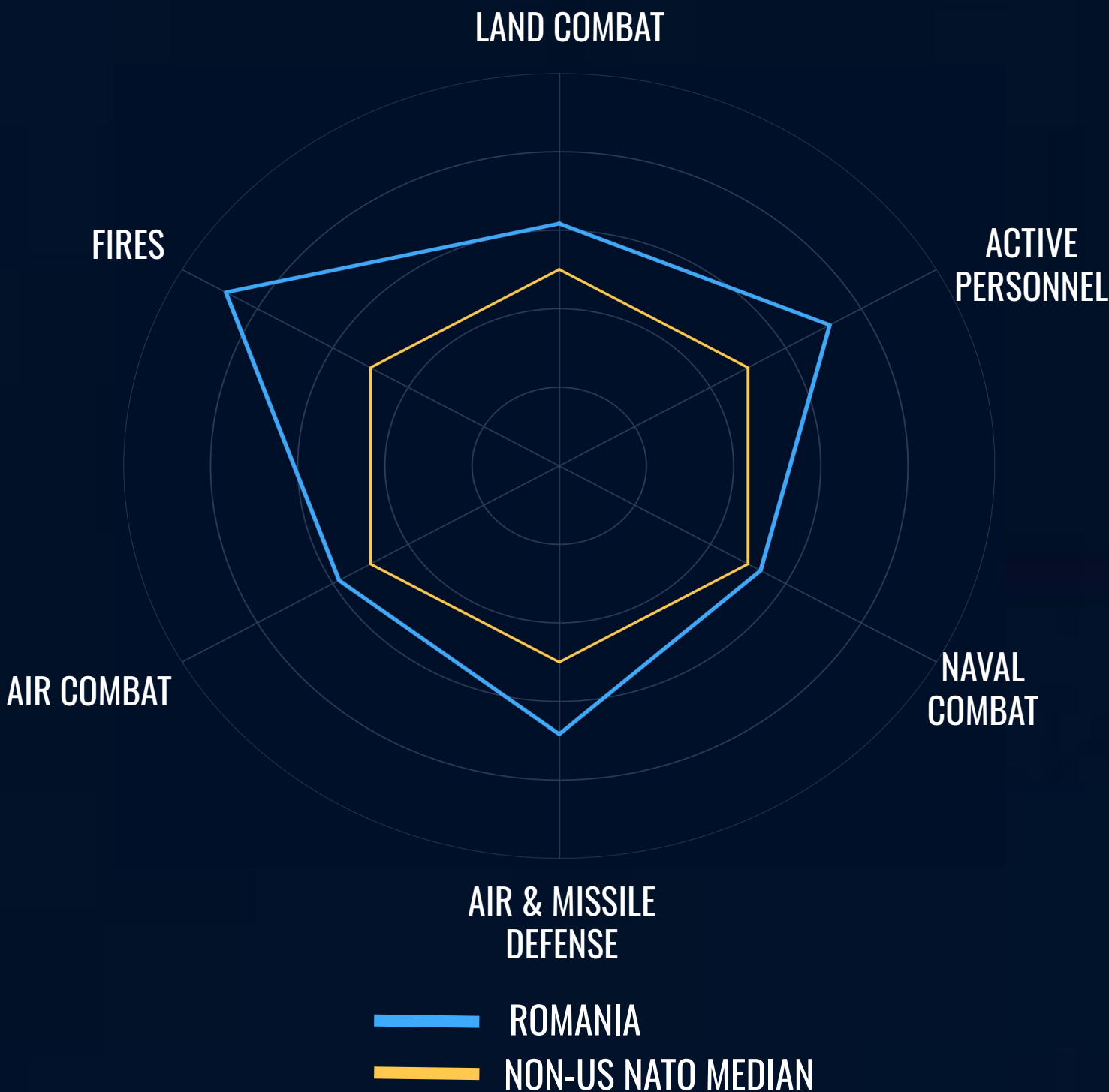
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## *Toplines*

- **Building Ties That Bind:** Romania is building what may become NATO's largest European air base at Mihail Kogălniceanu. It is a \$2.3B expansion to 10,000-troop capacity that formally anchors American power projection on NATO's southeastern front in a way that directly enables Washington's forward posture.
- **Standing by Your Allies When it's Hard:** Romania authorized US use of Mihail Kogălniceanu and Câmpia Turzii for refueling and monitoring during Operation Epic Fury, one of the most operationally significant Iran conflict basing decisions by any Eastern European NATO state.
- **Righting the Ship to Fund Tomorrow's Deterrence:** Romania missed its 2023 defense target significantly, budgeting at 2.5% but spending roughly 1.6% due to a high budget deficit, which jeopardizes their Hague 3.5% commitment.



# FORCE STRUCTURE AT A GLANCE



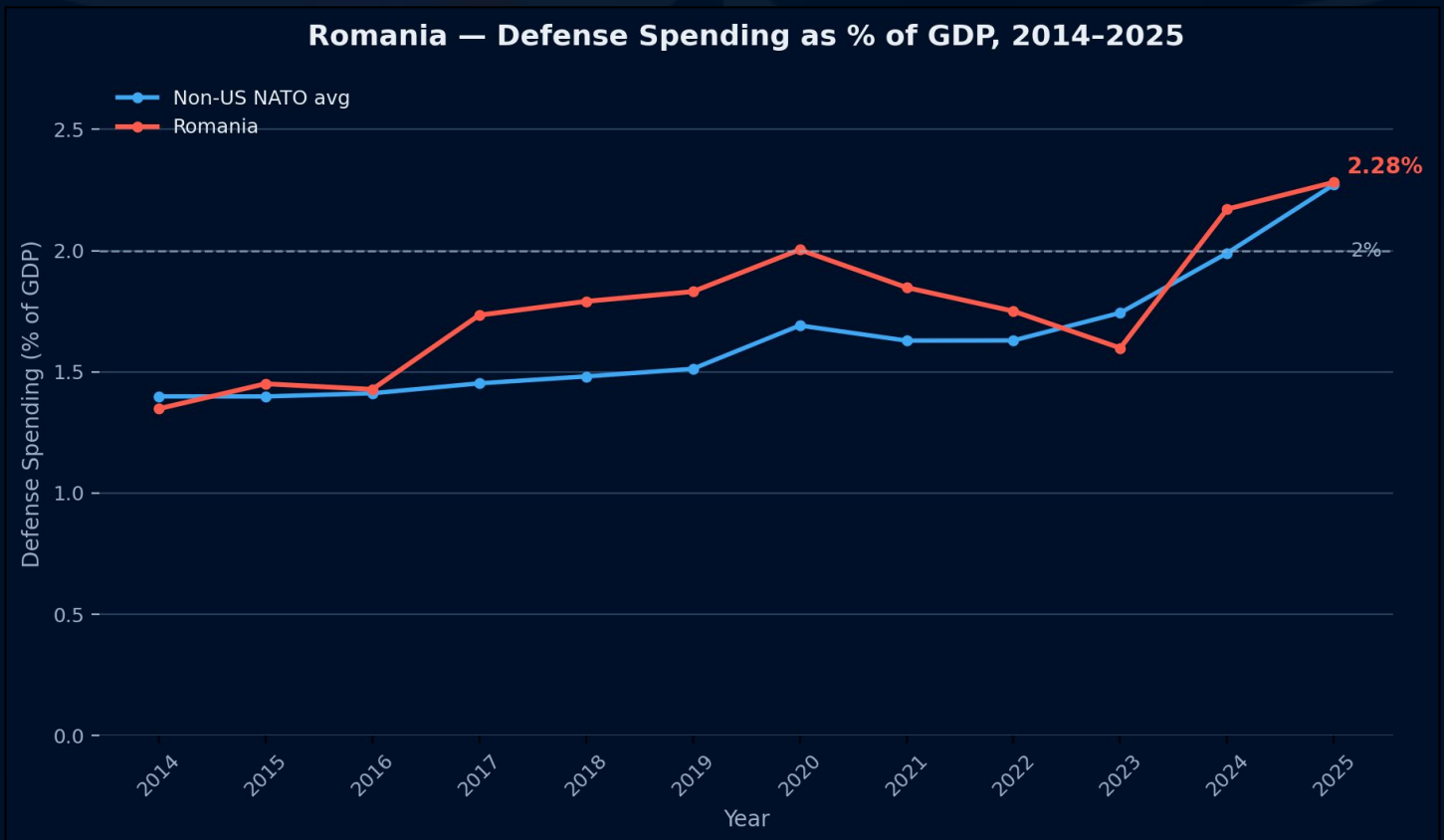
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

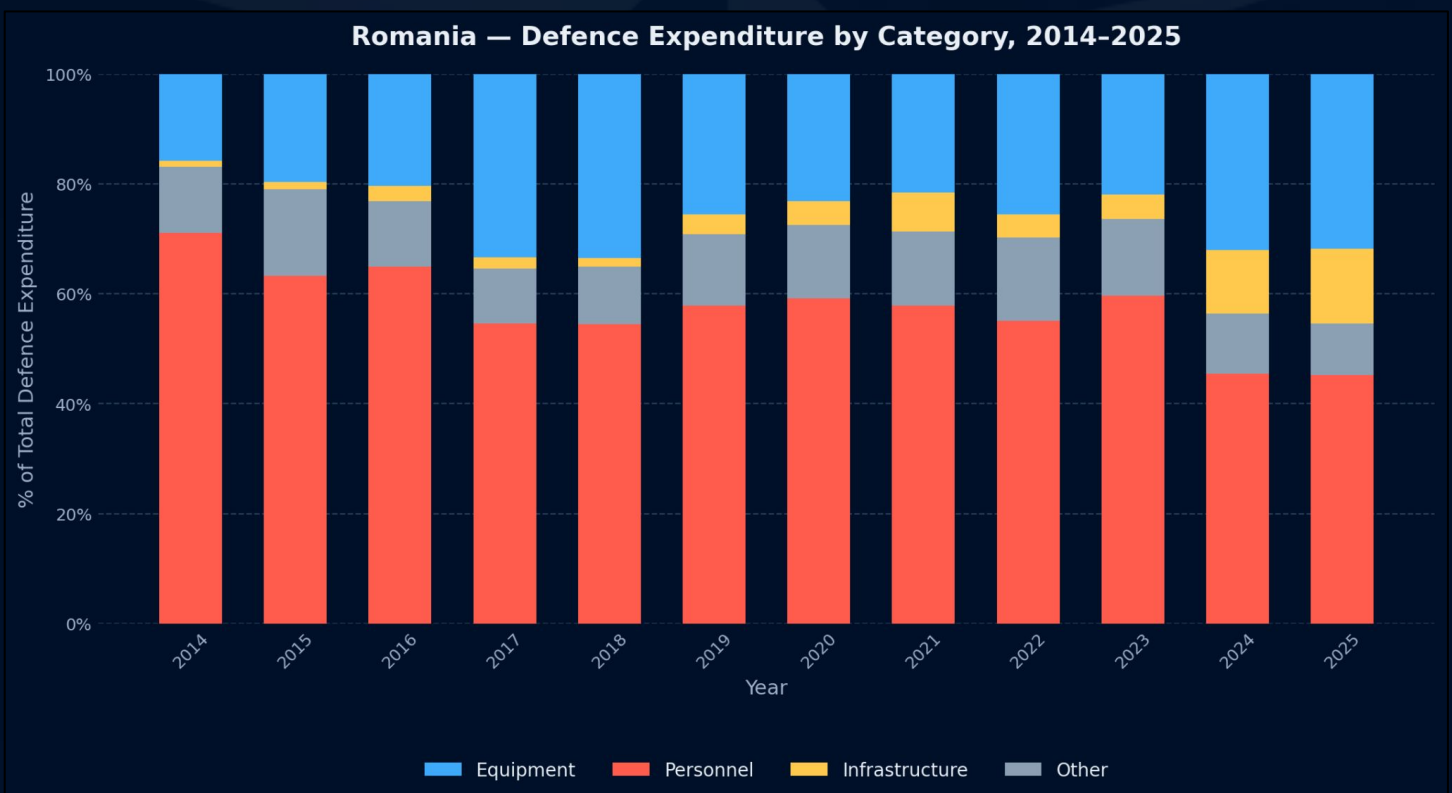
Romania has been one of NATO's more consistent eastern front spenders, consistently above the non-US NATO average. [Defense spending](#) reached 2.28% of GDP in 2025, and President Dan committed Romania to the Hague 3.5% framework after his May 2025 election. The critical constraint is Romania's high budget deficit, which forces difficult choices between defense investment and fiscal stability. Romania missed its 2023 defense target significantly—budgeting at 2.5% but spending roughly 1.6%—reflecting a chronic financial vulnerability between announced ambition and delivered expenditure that the Dan government has not yet fully resolved.



# MILITARY CONTRIBUTIONS

## *Equipment Share*

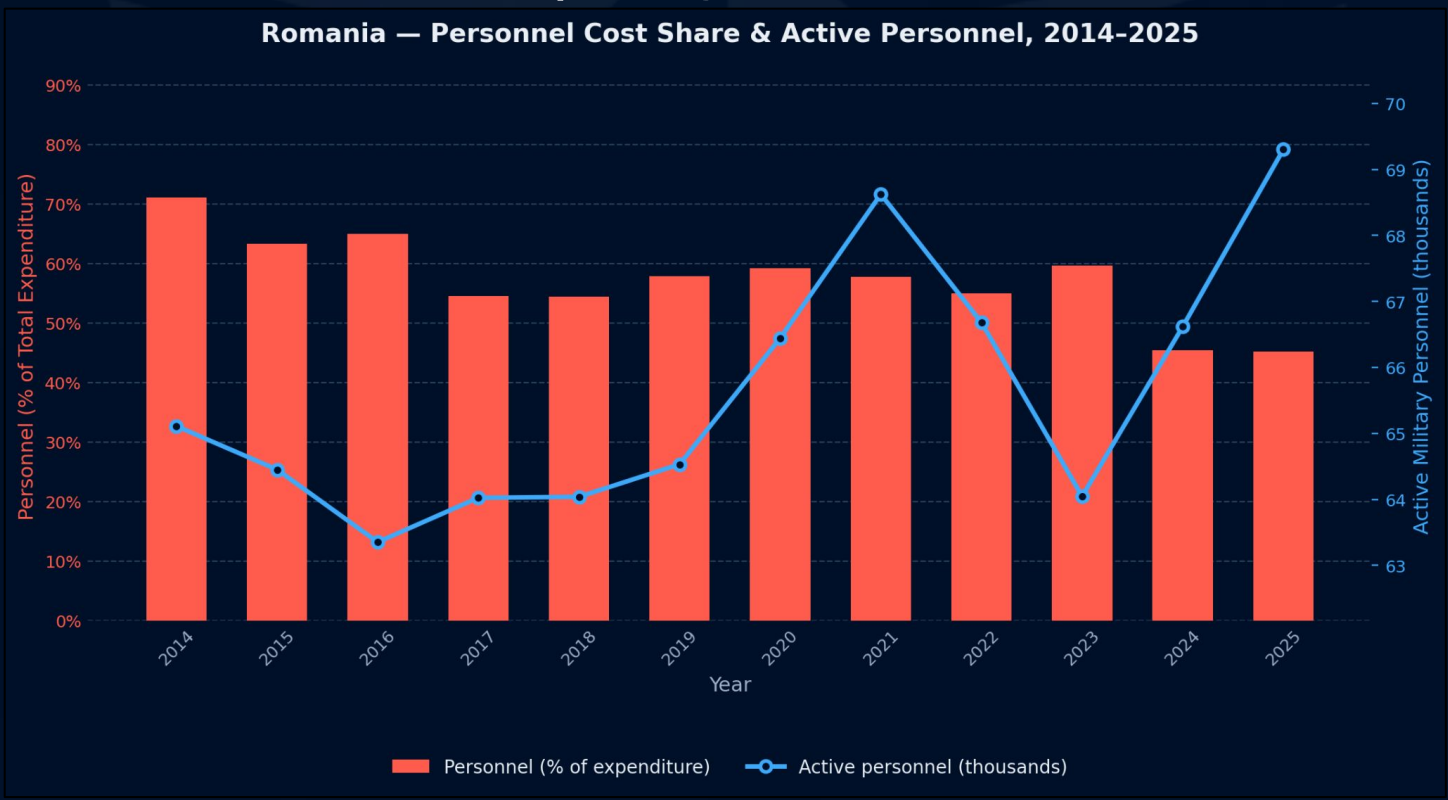
Romania's [equipment share](#) reflects a comprehensive reequipment program: 32 F-35As, 54 M1A2 SEPv3 Abrams with 216 more approved, 227 Piranha V IFVs assembled domestically, a tracked IFV competition at ~€2.5B, two Scorpène submarines, Black Sea corvettes, and 36 HIMARS already operational. The scale is extraordinary relative to Romania's budget, and implementation risk is real given the fiscal deficit. The most consequential long-term element is the [Rheinmetall armor partnership](#) produced on Romanian soil—converting procurement ambition into indigenous industrial capacity.



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

Romania's personnel cost share has fallen from roughly 70% in 2014 to 45% by 2025—a budget rebalancing that reflects the procurement surge. Active personnel have grown modestly, from ~65,000 to ~70,000. Romania eliminated conscription in 2007 and has struggled with recruitment ever since; the armed forces have operated below authorized strength for most of the intervening period. The 2022 invasion accelerated efforts to close that gap, with Romania setting a target of 93,000 active personnel by 2030—roughly a 33% increase from current levels. Whether recruitment can deliver that expansion while simultaneously absorbing the procurement surge is the central manpower question for Romanian defense planning.



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

Romania's [modernization program](#) is quite comprehensive. The air force fields 55 F-16AM/BMs after full MiG-21 retirement, with 32 F-35As contracted (delivery ~2031) and Norwegian F-16s bridging the transition. Air defense rests on 12 Patriot PAC-3 MSE launchers and Aegis Ashore BMD at Deveselu. Thirty-six HIMARS with ATACMS provide one of Europe's more capable deep-strike arsenals. Ground modernization replaces Soviet T-55 and TR-85 platforms with 54 M1A2 SEPv3 Abrams (216 more approved), 227 Piranha V IFVs assembled domestically, and a tracked IFV competition ongoing. Two Scorpène submarines mark Romania's first undersea capability in 20 years. The program is genuinely comprehensive. However, most major outputs far off, and delivery risk is real given budget constraints.



# MILITARY CONTRIBUTIONS

## *Force Posture*

Romania's force posture punches well above its size through hosting contributions. [Mihail Kogălniceanu](#) is being expanded into potentially NATO's largest European air base (\$2.3B+, 10,000-troop capacity), hosting US Army V Corps rotations and formalizing US Army Garrison Black Sea in 2024. Deveselu hosts one of NATO's two European Aegis Ashore BMD sites. [Romania leads both](#) Multinational Division Southeast and Multinational Corps Southeast, hosts the French-led eFP battlegroup at Cincu, and runs the Fetești F-16 Training Center training Ukrainian and allied pilots. Constanța port serves as the primary US military supply ingress to the region; Romania's 650km Ukraine border and Black Sea coastline make it geographically indispensable to NATO's southeastern deterrence architecture.



# MILITARY CONTRIBUTIONS

## *Industrial Base*

Romania's [defense industry](#) is transitioning from Soviet-era maintenance toward Western licensed manufacturing. Romarm subsidiaries have expanded 155mm ammunition production since 2022 under EU EDIRPA and ASAP funding. The Rheinmetall partnership for tank and IFV manufacturing on Romanian soil is the most consequential development—creating a CEE production node for Western armored vehicles. Piranha V assembly at the Bucharest Mechanical Plant demonstrates domestic APC capability, with 150 additional vehicles planned. Romania holds significant raw material advantages, including rare earth deposits and substantial mineral reserves. Romania has no sovereign combat aircraft, submarine, or precision missile design capability—its industrial value is as a licensed assembly, maintenance, and raw material platform rather than an independent design-and-manufacture base.



# STRATEGIC ALIGNMENT

## *Declared Posture*

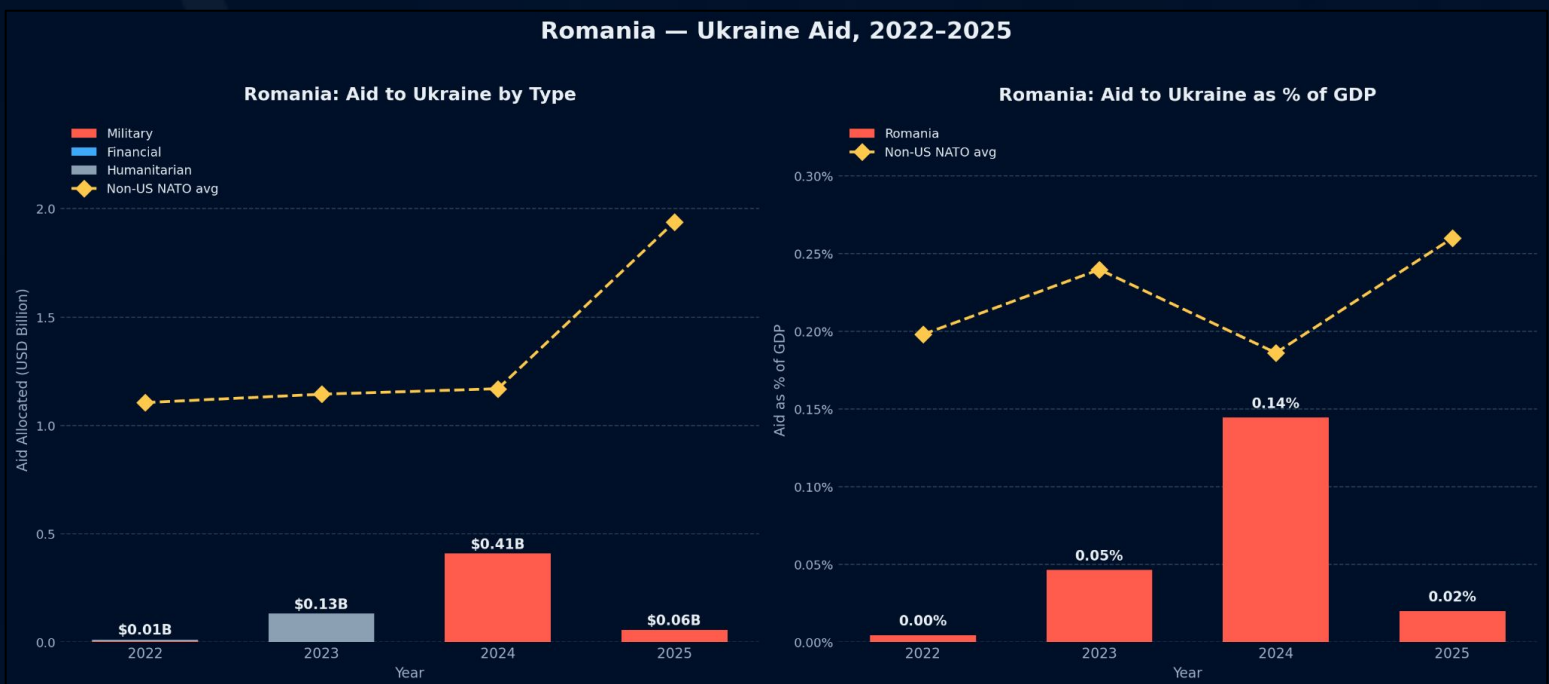
Romania's declared strategic posture is explicitly Russia-focused. The [2020 Defense Strategy](#) identified Russia's Crimea militarization as a central threat; the [2025–2030 Defense Strategy](#) under President Dan escalated to warning that Russia's military posture endangers Black Sea security and energy exploitation. On China, Romania has excluded Huawei and ZTE from 5G core networks. The decision to allow American use of basing for Operation Epic Fury in March 2026 demonstrated operational alignment extending well beyond Romania's formal doctrine.



# STRATEGIC ALIGNMENT

## *Ukraine Support*

Romania's [Ukraine support](#) is more significant than bilateral aid figures suggest. Kiel tracks €0.537B allocated—lower-middle NATO band proportionally—but the headline understates strategic contribution. The [Patriot donation](#) in September 2024 was among only a handful of complete system transfers by any NATO ally, with Norway and Sweden contributing ~\$151M toward replacement. The [Fetești F-16 Training Center](#) develops Ukrainian pilot capability. The Danube corridor through Constanța and Galați has been structurally decisive for Ukrainian grain exports during Russian Black Sea blockade periods. Additional transfers include APRA-40 launchers, TAB-71 armored vehicles, MiG-29 spare parts, and Soviet-caliber ammunition. Romania's lower aid transparency partly explains the gap between its strategic contribution and its tracked headline.



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

Romania has a clean energy decoupling case. Domestic oil, gas, CANDU nuclear at Cernavodă, hydro, and renewables provide important independence from Russian energy with no Rosatom footprint. The [Neptun Deep offshore project](#) (~100 billion cubic meters recoverable, first gas 2027) is expected to double Romanian output and position Romania as the EU's largest gas producer. NuScale SMR cooperation makes Romania one of Europe's leading advanced nuclear cases entirely outside Russian technology. Romania has supported every EU sanctions package and is a push state for Black Sea maritime enforcement. Enforcement challenges are maritime—shadow-fleet activity and Danube dual-use transit risk—rather than energy dependence.



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

Romania recorded 81% for staying in NATO, 65% agreeing the country should defend another ally, and 73% agreeing NATO membership makes a foreign attack less likely, with defense spending support at 53% favoring increases, above the alliance average. Ukraine support stood at around 58% combined, below the Western European average, reflecting a more complex public posture toward the conflict despite Romania's Black Sea position. The PSD/PNL coalition government is nominally pro-NATO and has committed to increased spending. The AUR (Alliance for the Unity of Romanians), a right wing party with Russian sympathies and significant vote growth since 2020, has used sovereignty framings to build a substantial popular base, and 2025's presidential election turmoil reflected the depth of that anti-establishment current. Romania's combination of a formally committed government, strategically valuable territory, and a fast-growing NATO-skepticism is one of the more concerning alignment trajectories in the Central-Eastern sector.



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

Romania's hedging behavior is minimal. There is no meaningful BRI participation—Romania is functionally inactive in the China-CEE format with no major Chinese-controlled critical infrastructure. Huawei and ZTE are excluded from 5G core networks. Procurement is US and NATO-aligned with zero adversary procurement and Soviet platforms systematically retired. Romania provided US operational basing for Operation Epic Fury and has pursued no high-level Moscow, Beijing, or Tehran engagements during the war period. Romanian outreach to China has been limited to standard EU-framework trade and diplomatic contacts with no bilateral security or infrastructure agreements of note.



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

Romania's operational cooperation is broad and deep. [Mihail Kogălniceanu's \\$2.3B+ expansion](#) into a potential 10,000-troop hub is the alliance's most consequential southeastern infrastructure investment, formalizing US Army Garrison Black Sea after rotational presence since 1999. Deveselu Aegis Ashore, one of only two European BMD installations, has been operational since 2016. Romania leads [Multinational Division Southeast](#) and hosts Multinational Corps Southeast and the French-led eFP battlegroup at Cincu. The March 2026 Operation Epic Fury basing decision—approving US use of MK and Câmpia Turzii for refueling and monitoring—is the most operationally significant Iran-relevant decision by any Eastern European NATO state. Romania contributed substantially to both [Iraq](#) and [Afghanistan](#), deploying thousands of troops across both campaigns and sustaining casualties, establishing a long operational cooperation record with US forces well before the current deterrence posture. Constanța port remains the primary US military supply ingress to NATO's eastern front.

