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# SPAIN

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## NATO Country Assessment — *TIER THREE* —

CRITICAL BASING • FLAGRANT FREE-RIDER • UNDERMINING ALLIANCE



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JULY 2026

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# TIER 3

Lagging Ally



# AT A GLANCE

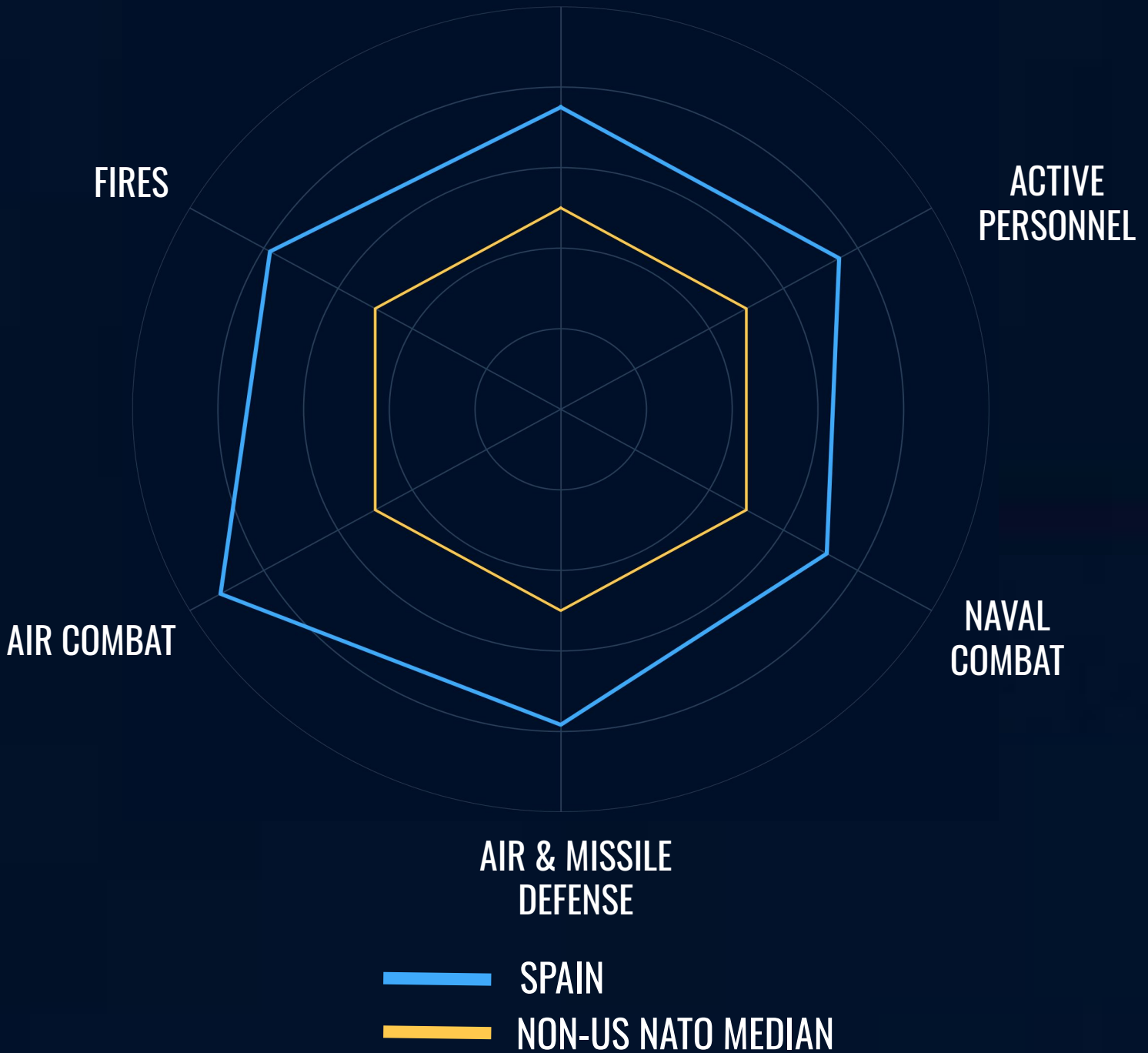
## *Toplines*

- **Critical Basing Infrastructure for American and European Security:** Spain hosts two of NATO's most valuable US basing assets at Rota Naval Base and Morón Air Base making Spain critical to US and NATO naval and crisis-response operations across the Mediterranean, Atlantic, and North Africa.
- **Flagrantly Rejecting Responsibility and Actively Free-Riding:** Spain was the only NATO member to formally reject the Hague 3.5% core defense target, despite smaller and poorer allies signing on.
- **Damaging Regional Security and Undermining the Alliance:** Spain denied US use of Rota and Morón and closed Spanish airspace during Operation Epic Fury, directly undermining the United States ability to take action to protect the West.



# FORCE STRUCTURE AT A GLANCE

LAND COMBAT



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.

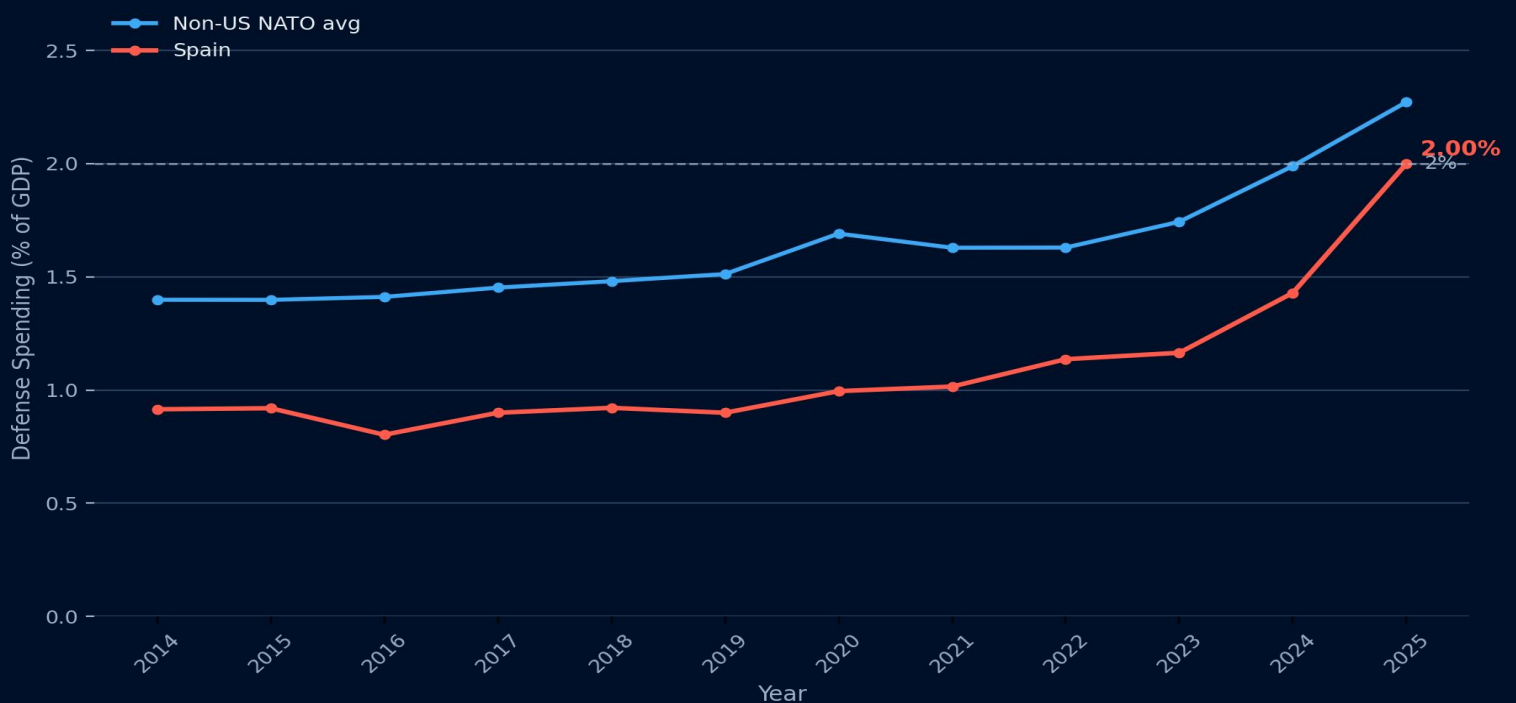


# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

Spain's [defense spending](#) record is the most problematic of any major NATO economy. Spain reached 2.00% of GDP in 2025—nominally meeting the NATO floor for the first time—but the [figure is contested](#), with roughly a third of the increase attributed to telecommunications and cybersecurity spending classified under looser categories rather than core military capability. Spain spent below 1% of GDP for most of the post-Cold War period and just barely hit 1% in 2021. At the June 2025 Hague Summit, Spain was the [only NATO member](#) to formally reject the 3.5% core defense target within the 5% framework—a commitment every other member signed, including countries far smaller and poorer. The April 2025 €10.471B spending increase was driven by sustained allied pressure rather than strategic conviction, and the trajectory beyond 2% remains the alliance's most contested open question among major economies.

Spain — Defense Spending as % of GDP, 2014–2025

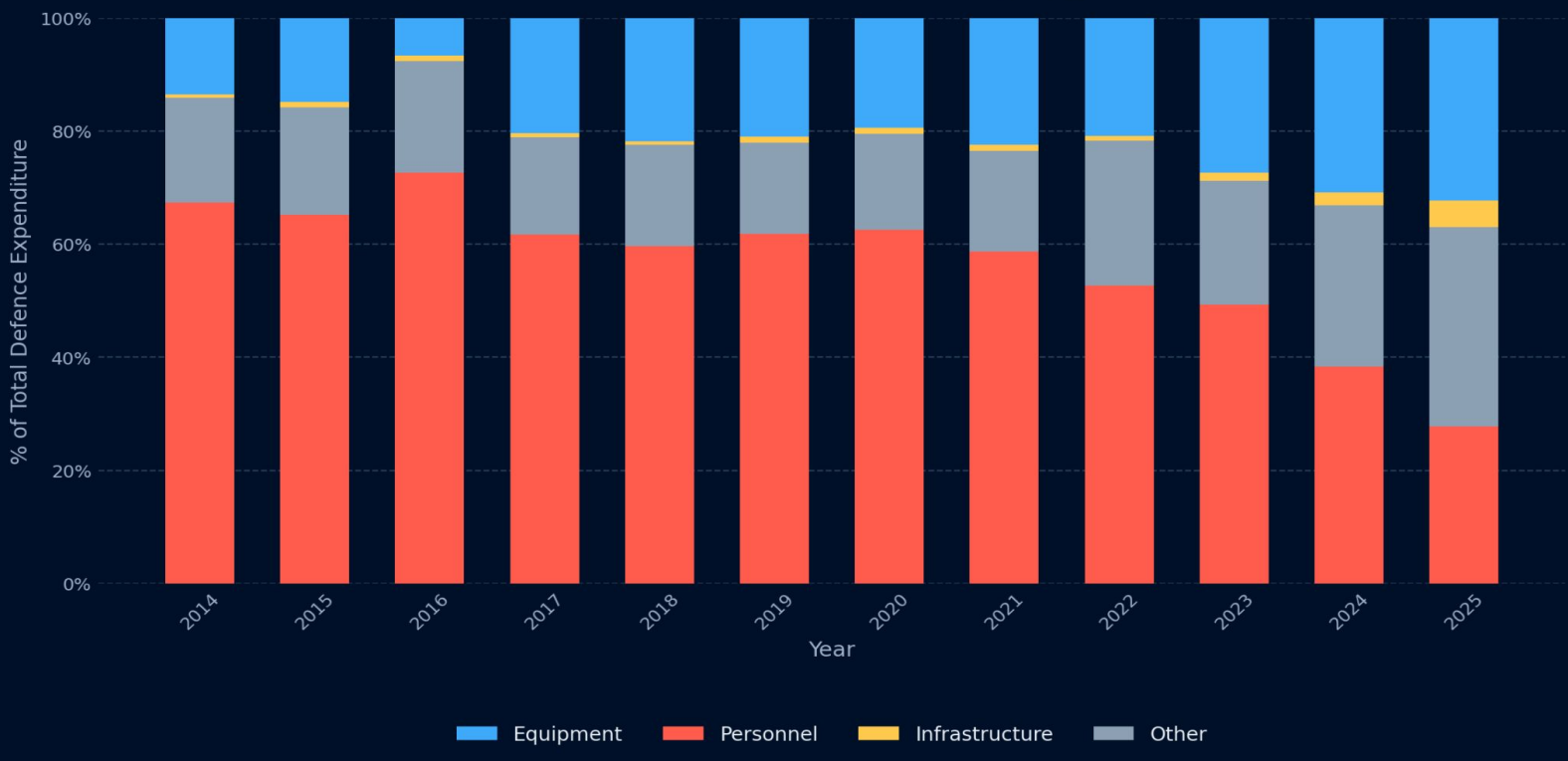


# MILITARY CONTRIBUTIONS

## *Equipment Share*

Spain's [equipment share](#) reached ~32% in 2025, above NATO's 20% guideline. The most consequential equipment gap is combat air: Spain ruled out F-35 acquisition in August 2025 in favor of waiting for FCAS—which France and Germany formally cancelled on June 8, 2026—leaving Spain an entirely fourth-generation air force with no fifth-generation path and no timeline for one. Spain's [Chief of Defense Staff](#) [acknowledged](#) the gap directly, stating the country will have to “survive with the fourth generation we have and wait for the FCAS someday.” Eight Patriot Configuration-3+ batteries (four contracted 2023, four late 2025) represent real air defense progress, but ground forces have no HIMARS, no long-range rocket artillery, and no standoff strike capability.

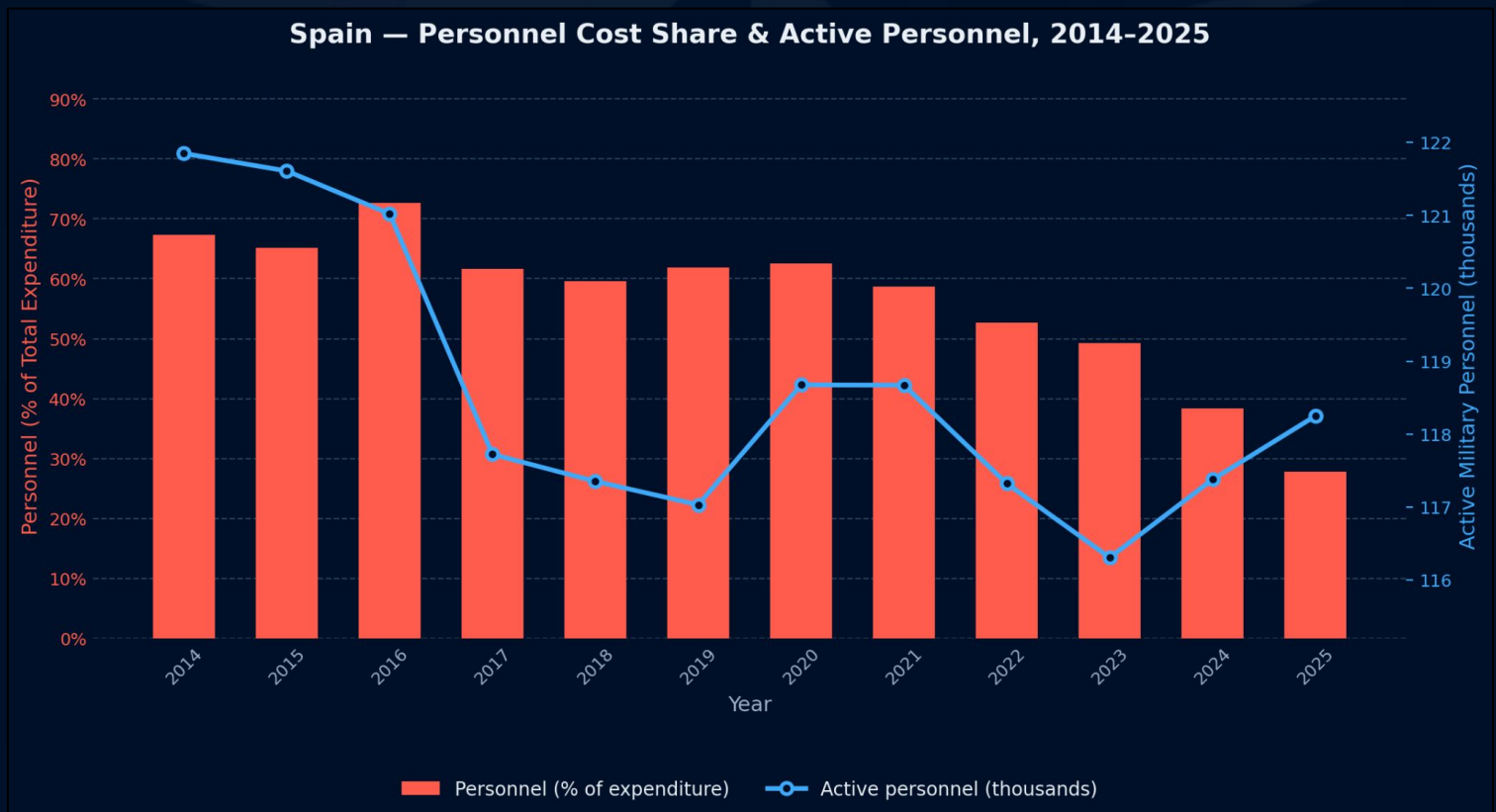
Spain — Defence Expenditure by Category, 2014-2025



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

Spain's personnel cost share has fallen sharply (from ~67% in 2014 to ~28% by 2025), one of the more dramatic re-budgeting shifts in the alliance. Active personnel have declined modestly from ~122,000 to ~120,000 over the period, reflecting a professional all-volunteer force that eliminated conscription in 2001. Spain has not set aggressive personnel expansion targets comparable to eastern front allies, and recruitment has been a persistent challenge for a country where military service carries limited benefits. For a country of 47 million and the 14th-largest global economy, 120,000 active personnel is a reasonable absolute number—the quality and equipping of that force, rather than its size, is Spain's primary manpower challenge.



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

Spain's [modernization strategy](#) prioritizes naval capability and air defense while accepting a severe and now open-ended gap in combat air. The Patriot upgrade—eight Configuration-3+ batteries across two contracts (\$2.8B in 2023, four more in late 2025)—is the most consequential near-term improvement. Naval forces represent Spain's strongest domain: five Álvaro de Bazán Aegis destroyers, the Juan Carlos I, and four S-80 Plus submarines entering service. Ground forces have 274 Leopard 2 tanks but no HIMARS, no long-range rocket artillery, and no standoff precision strike capacity. The defining modernization failure is combat air: Spain ruled out F-35 acquisition in favor of FCAS—which France and Germany cancelled on June 8, 2026—leaving Spain with no fifth-generation path.



# MILITARY CONTRIBUTIONS

## *Force Posture*

Spain hosts two of NATO's most strategically significant US basing assets. [Rota Naval Base](#) is home to US forward-deployed Arleigh Burke-class Aegis destroyers under the European Phased Adaptive Approach, agreed to expand from four to six, making Rota one of the most important US naval access points in Europe for Mediterranean, Atlantic, African, and Middle Eastern operations. [Morón Air Base](#) provides US crisis-response, airlift, and support infrastructure with relevance for North African and Mediterranean contingencies. Spain has led NATO's [Multinational Battlegroup Slovakia](#) since July 2024—its primary eastern front ground contribution. NATO's Rapid Deployment Corps headquarters at Bétera gives Spain a high-readiness corps command role, and the Combined Air Operations Center at Torrejón provides alliance air-command infrastructure for Southern Europe.



# MILITARY CONTRIBUTIONS

## *Industrial Base*

Spain's [defense industrial base](#) has meaningful strengths in naval systems and defense electronics. [Navantia](#) is a capable naval platforms, producing the Álvaro de Bazán destroyers and S-80 Plus submarines with genuine export potential. Spain holds approximately 13% of Eurofighter workshare through Airbus Defence and Space. [Indra](#) provides radar, C4ISR, and defense electronics with alliance-relevant capabilities. Spain has no significant armored vehicle or missile production, and the F-35 rejection removed Spain from the global F-35 industrial supply chain. With FCAS now cancelled, Spain's aerospace industrial positioning requires reassessment. Raw material contributions are limited: Spain has no significant critical mineral or defense-relevant resource base that distinguishes it.



# STRATEGIC ALIGNMENT

## *Declared Posture*

Spain's [2021 National Security Strategy](#) frames Spain as a committed NATO ally with support for Ukraine and eastern front deterrence, while identifying the Sahel, North Africa, and Maghreb as primary threat vectors. Spain has a [Mediterranean-first orientation](#) that de-prioritizes eastern front deterrence relative to front-line allies. On China, [Sánchez has argued explicitly](#) that Europe and China should forge closer ties, framing engagement as a strategic alternative rather than a risk to manage. Spain's posture toward China has drawn repeated US and NATO warnings about Chinese data and telecommunications access. On spending, Spain's formal rejection of the Hague 3.5% target is the clearest gap between declared alliance commitment and actual policy, with Sánchez describing the requirement as "unreasonable and counterproductive." The declared posture is nominally NATO-aligned at the document level; the operational and diplomatic conduct represents one of the alliance's widest strategy-behavior gaps.



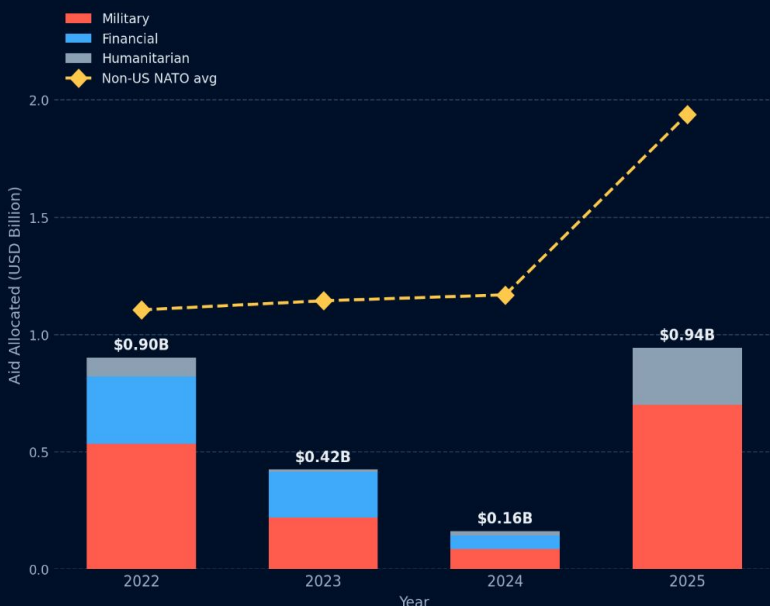
# STRATEGIC ALIGNMENT

## Ukraine Support

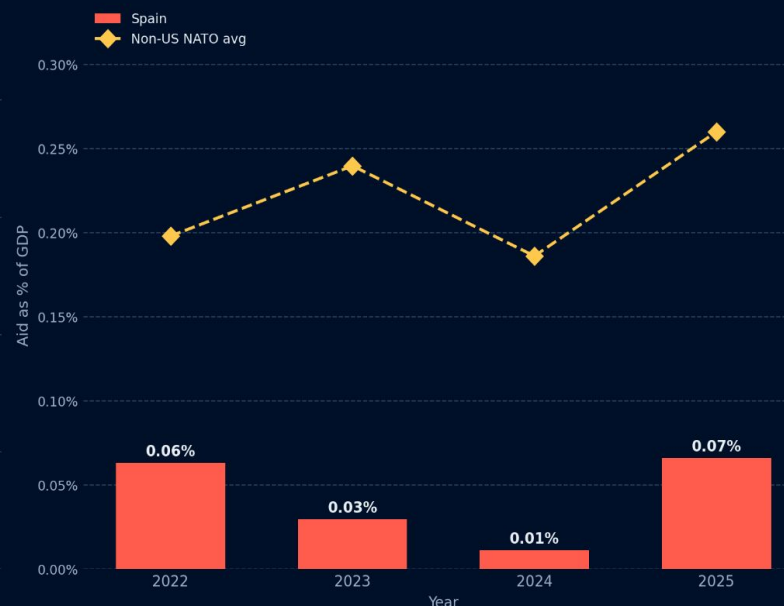
Spain's [Ukraine support](#) is disappointing for a major NATO ally. Despite the relatively low aid, it has provided meaningful capabilities. Kiel tracks €2.228B allocated: roughly 0.05% of GDP annually, well below the non-US NATO average and Spain's peer group. Confirmed transfers include Patriot interceptors, a HAWK battery, 20 Leopard 2A4 tanks, Aspide air-defense systems, OTO Melara howitzers, and ammunition. Spain's most distinctive contribution is the [Toledo Training Coordination Center](#): over 9,000 Ukrainian personnel trained across 230+ modules covering Patriot, HAWK, Leopard 2, artillery, and combined-arms tactics by May 2026, one of NATO's most comprehensive Ukraine training programs. Spain reportedly resisted a fixed 0.25% GDP annual military-aid benchmark, consistent with its broader resistance to binding alliance spending commitments.

Spain — Ukraine Aid, 2022-2025

Spain: Aid to Ukraine by Type



Spain: Aid to Ukraine as % of GDP



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

Spain's Russian energy decoupling is clean on pipeline gas and oil—Algerian and Norwegian supply dominate, with no Rosatom nuclear dependence. The complication is LNG: Spain emerged as one of the EU's [larger Russian LNG importers](#) post-2022, with Spanish ports serving as notable re-export nodes garnering EU scrutiny. Spain has supported every EU sanctions package without obstruction but has not been consistent for shadow-fleet listings or tougher enforcement. The EU's progressive LNG phaseout measures will close the re-export channel over time, but until they do, Spain's role as a Russian LNG transit node remains a live decoupling concern that sits awkwardly alongside its declared Russia posture.



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

Spain recorded 73% for staying in [NATO in 2024](#), 68% willing to defend another ally, and 70% agreeing NATO membership makes a foreign attack less likely, reasonable aggregate numbers. Forty-five percent favored increasing defense spending, and Ukraine support stood at around 77% combined, above the Southern European average. The Sánchez PSOE-Sumar coalition rejected the Hague 5% framework, with Sánchez publicly calling the goal “unreasonable,” while Sumar’s left flank contains forces that hold even more anti-NATO positions. The PP (Partido Popular) in opposition is more conventionally pro-NATO and has attacked Sánchez’s public theatrics against Trump as damaging to alliance cohesion. Spain is the one ally where the governing coalition’s left flank creates active downward pressure on defense spending rather than passive reluctance.



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

Spain's hedging behavior is the most concerning of any major NATO country. There is no adversary arms procurement, but Spain has generated sustained alliance friction across three simultaneous dimensions. On China, Sánchez's April 2025 and April 2026 [Beijing visits](#), King Felipe VI's November 2025 state visit, and Sánchez's explicit argument that Europe and China should forge closer ties drew consecutive [US ambassador warnings](#) and Treasury Secretary criticism. Spain's hedging toward China is the most sustained US-NATO bilateral friction over China engagement issued to any ally. The US ambassador's May 2026 [warning about Chinese-linked](#) companies in sensitive Spanish public contracting is the most specific recent concern. On Iran, [Spain denied US use](#) of Rota and Morón and closed Spanish airspace during Operation Epic Fury—crossing from rhetorical autonomy into damaging operational obstruction. Spain's behavior consistently undermines shared goals and has generated more sustained alliance friction across China, Iran, and defense spending simultaneously than any comparably-sized NATO member.



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

Spain's operational cooperation record is split between a strong historical baseline and a significant recent rupture. Spain deployed thousands of troops to both [Iraq](#) and [Afghanistan](#), sustaining casualties, and contributed to NATO-led Libyan operations in 2011. Spanish basing and airspace access [supported US counterterrorism](#) operations in North Africa and the Sahel across both the Obama and Trump administrations, with Morón serving as a key hub for AFRICOM rapid-response operations including the 2013 Mali intervention support. Toledo Training Center's 9,000+ trained Ukrainian personnel across 40 specialties represents one of NATO's most valuable per-euro Ukraine contributions. Spain has led NATO's Multinational Battlegroup Slovakia since July 2024 and participates in [EU NAVFOR MED IRINI](#) and NATO maritime missions. Against this baseline, the decision to deny basing access for Operation Epic Fury represents the most damaging operational obstruction of US military operations by any NATO ally in the current crisis. Trump's justified frustration with Spain at the 2026 NATO Summit illustrates that the alliance is also economically linked and failure in security cooperation can lead to a degradation in economic cooperation.

