



SWEDEN

NATO Country Assessment — *TIER ONE* —

RAPID DEFENSE GROWTH • UKRAINE SUPPORT LEADER • BALTIC SECURITY



JULY 2026



TIER 1

Model Ally



AT A GLANCE

Toplines

- **Among the Fastest Defense Spending in the Alliance:** roughly doubled the defense budget since 2020, reaching 2.51% of GDP in 2025 with a committed path to 3.5% by 2030, five years ahead of the Hague deadline.
- **A Leading Ukraine Supporter in the Alliance:** aid rose from 0.15% of GDP in 2022 to 0.73% in 2025, and the May 2026 Gripen framework, offering up to 150 fighters over a decade plus an immediate donation of up to 16 aircraft, represents potentially the most significant airpower commitment to Ukraine by any European ally.
- **Controls the Baltic's Most Strategically Important Island:** Gotland's remilitarization with a permanent garrison gives NATO dominance over sea lanes and reinforcement routes critical to defending the Baltic states.



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.

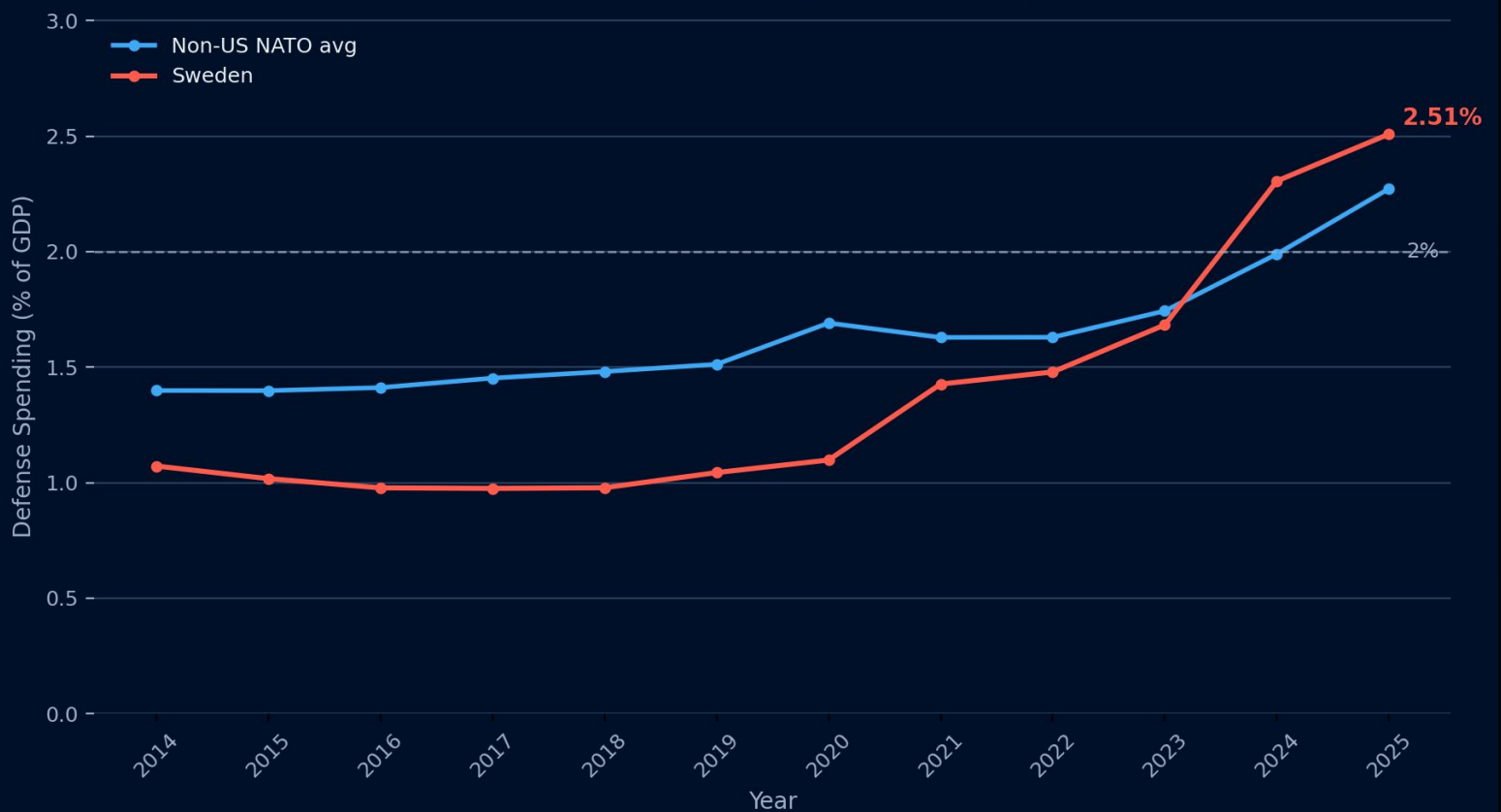


MILITARY CONTRIBUTIONS

Defense Spending Level

Sweden's [defense spending](#) trajectory since NATO accession in March 2024 is among the most accelerated in the alliance. Sweden reached 2.51% of GDP in 2025, having roughly doubled its defense budget since 2020. The [2026 budget raised spending](#) by SEK 26.6B—an 18% single-year increase—with forecast spending of ~2.8% in 2026 and 3.1% by 2028. Sweden has committed to reaching 3.5% by 2032, three years ahead of the Hague deadline, and accepted the full 5% framework. For a country that maintained formal non-alignment for decades, the speed and scale of the acceleration is among the most significant shifts in the alliance. The main constraint is that portions of the ramp are debt-financed, requiring sustained fiscal commitment across political cycles.

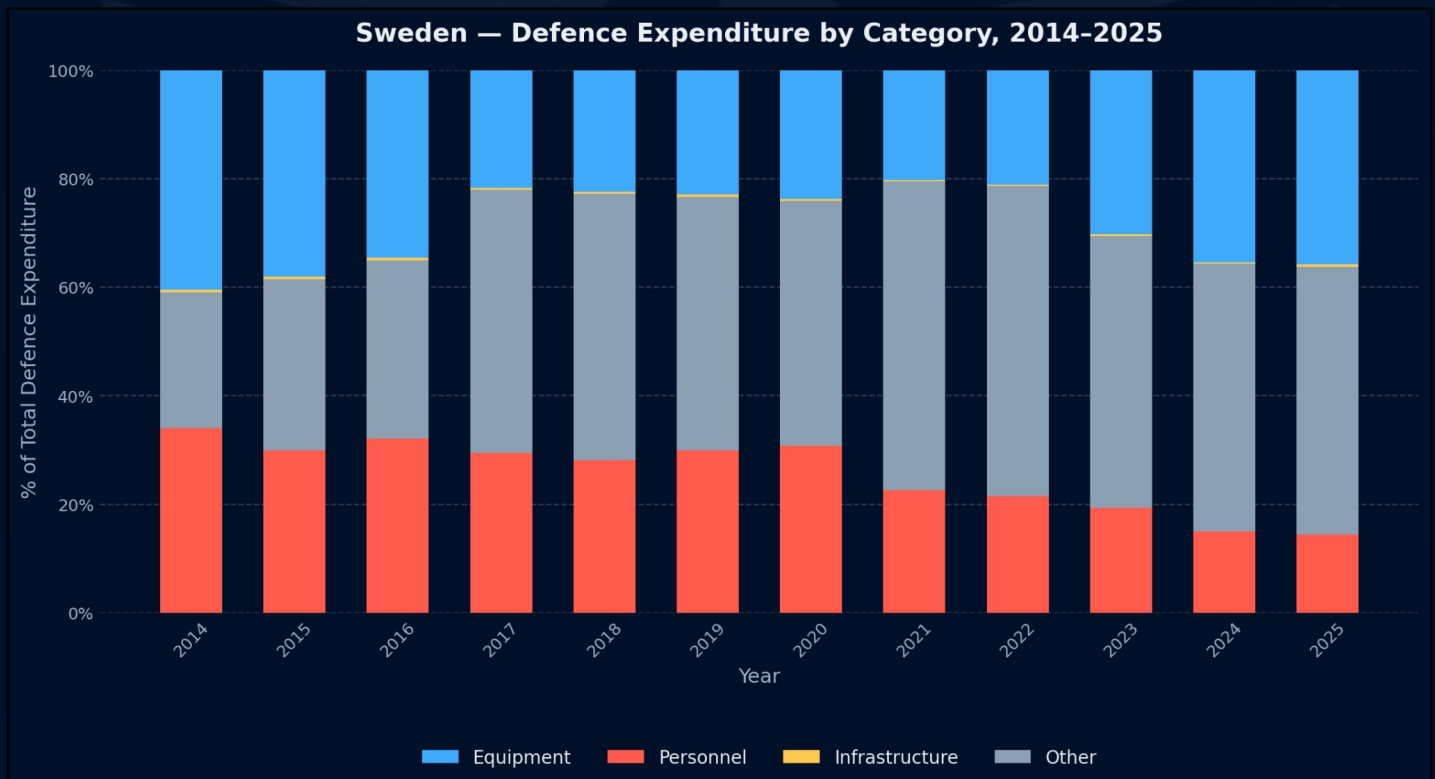
Sweden — Defense Spending as % of GDP, 2014-2025



MILITARY CONTRIBUTIONS

Equipment Share

Sweden's [equipment share](#) reflects one of the most sophisticated defense-industrial nations in the alliance investing heavily in its own platforms and in NATO-aligned procurement. Sweden's equipment share fell from over 40% in 2014 to around 20-23% through 2017-2022, then surged sharply to ~35% by 2024-2025 as major procurement programs began landing simultaneously. Major programs include 60 JAS 39E Gripens (first delivered October 2025), HIMARS approved March 2026 (\$930M), a \$916M air defense and counter-drone package from Saab and BAE Systems in April 2026, IRIS-T SLM under European Sky Shield, A26 Blekinge-class submarines, Archer 155mm howitzers, and Patriot PAC-3 MSE. A significant share of procurement flows through domestic industry, unusual for a country Sweden's size and representing genuine defense-industrial depth rather than import dependence.

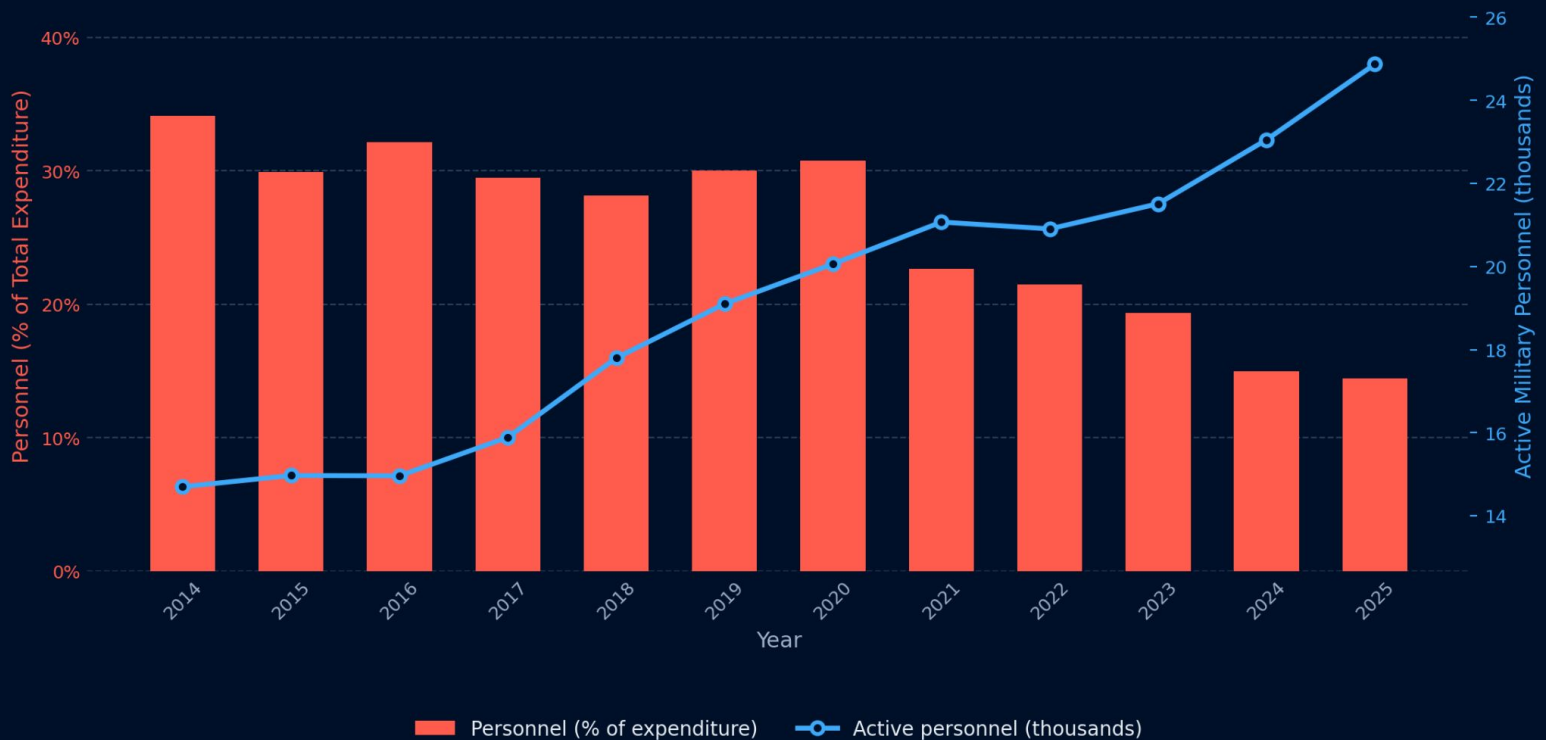


MILITARY CONTRIBUTIONS

Manpower & Recruitment

Sweden's personnel cost share has fallen from ~34% in 2014 to ~15% by 2025—one of the lowest in the alliance—as the budget has grown faster than personnel costs. Active personnel have risen sharply, from ~15,000 in 2014 to ~25,000 by 2025, driven by conscription reintroduction and expansion toward a target of 10,000 conscripts annually by 2030. Sweden's recruitment model is distinctive: reintroduced conscription in 2017 after a 2010 suspension, drawing on a mobilization culture maintained even through the non-alignment decades, and combines conscripts with a professional core and Home Guard reserves to generate trained mass alongside high-end equipment. The trajectory is steeply positive and inherently different from allies relying on voluntary recruitment alone—translating into a national culture of readiness.

Sweden — Personnel Cost Share & Active Personnel, 2014-2025



MILITARY CONTRIBUTIONS

Capability Modernization

Sweden's [modernization program](#) is comprehensive and domestically anchored across all priority domains. On combat aircraft, 60 JAS 39E/F GripenS on order through 2030 replace the current C/D fleet. On fires, HIMARS approved March 2026 (\$930M) adds precision strike depth alongside 48 Archer howitzers already among Europe's most capable mobile artillery. On air defense, Patriot PAC-3 MSE, IRIS-T SLM under ESSI, and a \$916M Saab/BAE counter-drone package from April 2026 create layered coverage. On naval forces, four Gotland/Södermanland-class SSKs provide one of NATO's most capable conventional submarine fleets for Baltic shallow-water operations, with two A26 Blekinge-class submarines contracted for 2031 and 2033 delivery. On ground forces, 110 Leopard 2A5 MBTs support four brigade targets by 2030. The primary gap is the A26 delivery timeline and Gotland-class life-extension requirements bridging into the 2030s.



MILITARY CONTRIBUTIONS

Force Posture

Sweden's force posture has been transformed by NATO accession. Sweden serves as a framework nation for [NATO Forward Land Forces Finland](#), leading allied land defense adjacent to the Russian Arctic frontier with Denmark, France, Norway, and the UK contributing. A persistent battalion rotation to Latvia's eFP, Nordic air-domain integration with Denmark, Finland, and Norway, and participation in NATO Standing Naval Forces extend Sweden's contribution across the alliance's northern architecture. The [2024 US-Sweden Defense Cooperation Agreement](#) provides a legal framework for US forces to operate from and pre-position equipment on Swedish territory. [Gotland, remilitarized](#) with a permanent garrison, controls Baltic sea lanes central to any NATO reinforcement of the Baltic states. The Enköping base will serve as [Joint Logistics Support Group Headquarters](#) for NATO's Northwest Area of Operations by 2027.



MILITARY CONTRIBUTIONS

Industrial Base

Sweden's [defense industrial base](#) is among the most capable in the alliance relative to country size. Saab produces the JAS 39 Gripen, the A26 submarine, the GlobalEye AEW aircraft, Carl-Gustaf and AT4 recoilless weapons used across dozens of militaries, and the BAMSE air defense system. BAE Systems Hägglunds produces the CV90 IFV deployed across multiple NATO armies and supplied to Ukraine. NLAW anti-tank weapons, co-produced with the UK, were among the most consequential early-war Ukraine transfers. Sweden is a [net defense exporter](#) and a supply-chain asset to the alliance. On raw materials, Sweden holds significant iron ore, rare earth, and critical mineral deposits—including one of Europe's largest identified rare earth deposits at Kiruna—directly relevant to defense-industrial production and increasingly prioritized under EU and NATO critical materials frameworks.



STRATEGIC ALIGNMENT

Declared Posture

Sweden's [2024 National Security Strategy](#) identifies Russia as the central multi-dimensional threat to Swedish and European security, and China as a long-term systemic and economic-security challenge. The [Defence Resolution 2025–2030](#) frames the current period as “the most serious security situation since World War II” and commits to the most substantial total defense reinforcement since the Cold War. The Swedish Security Service's [2025 annual assessment](#) explicitly names Russia as the greatest threat to Sweden and China as a growing long-term economic-security risk. On China, Sweden closed Huawei and ZTE out of 5G networks through a nationally upheld court ruling and cut diplomatic relations to chargé d'affaires level following the Gui Minhai detention—demonstrating security-driven China hawkishness with real diplomatic costs. The declared posture is among the clearest in the alliance.



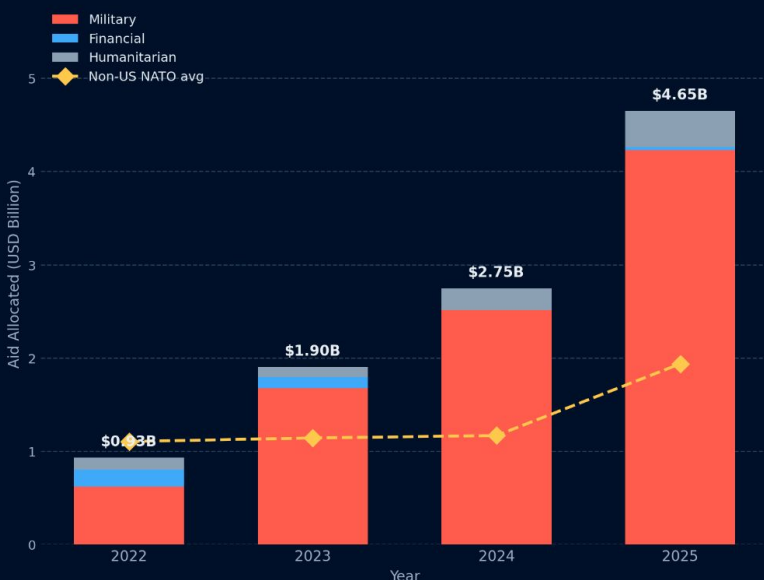
STRATEGIC ALIGNMENT

Ukraine Support

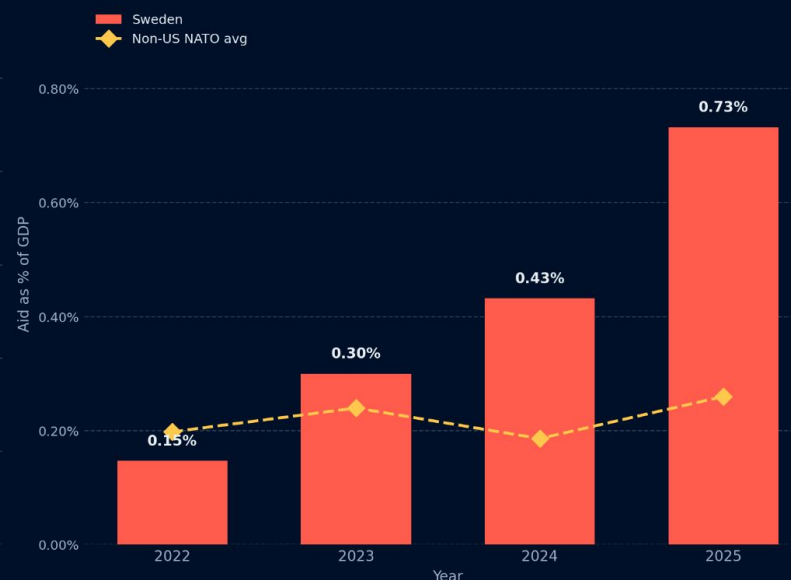
Sweden is among Ukraine's most [consequential supporters](#) by GDP share and absolute value. Kiel tracks €10.320B allocated—rising from 0.15% of GDP in 2022 to 0.73% in 2025, consistently above the non-US NATO average and top-tier alongside Denmark and the Baltics. Prior transfers include CV90 IFVs, Archer howitzers, ASC 890 airborne early warning aircraft, CB90 combat boats, NLAW anti-tank weapons, RBS 70 air-defense systems, and substantial ammunition. The [May 2026 Gripen commitment](#)—up to 16 JAS 39 C/D donated from Swedish Armed Forces, plus a framework for Ukrainian acquisition of up to 150 Gripen E/F over a decade—represents a potential transformation of Ukrainian air power. Caveats are real: C/D deliveries not before 2027, E/F several years later, no signed Saab contract yet, but the strategic ambition is the most consequential airpower commitment by any European ally during the war.

Sweden — Ukraine Aid, 2022-2025

Sweden: Aid to Ukraine by Type



Sweden: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

Sweden's Russian energy decoupling is among the cleanest in the alliance: minimal dependence pre-2022, rapidly eliminated post-invasion. Electricity runs on hydro, nuclear, wind, and non-Russian sources; Russian gas and oil exposure was negligible and is now gone. Sweden has no Rosatom dependence and is pursuing nuclear expansion through Western pathways. Sweden supported every EU sanctions package and was an [active state](#) during its 2023 EU Council presidency. Swedish naval and surveillance assets are operationally central to NATO Baltic Sentry, [monitoring shadow-fleet](#) tanker traffic and suspicious maritime activity in the most Russia-contested maritime environment in Europe.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

Sweden recorded 63% for staying in [NATO in 2024](#), in the lower half of the alliance but notable given this was the first survey wave as a formal member (March 2024 accession), and 61% agreed their country should defend another NATO ally. Fifty-five percent favored increasing defense spending in 2024, above the alliance average and consistent with Sweden's trajectory toward and above 2% of GDP. Ukraine support stood at around 77% combined, one of the stronger figures in the survey, and 61% agreed NATO membership makes a foreign attack less likely. The Tidö coalition is strongly pro-NATO, and the Sweden Democrats have fully embraced membership as consistent with their national security priority, meaning the governing coalition's most nationalist member is actually among the most hawkish. The Left Party and portions of the Social Democratic base retain residual neutralist sentiment, but this is a declining force without parliamentary leverage on defense policy.



STRATEGIC ALIGNMENT

Hedging Behavior

Sweden's hedging behavior is among the cleanest in the alliance. There is no BRI participation, no adversary arms procurement, and no high-level Moscow, Beijing, or Tehran engagement during the war period. Sweden was an early and decisive Huawei and ZTE 5G exclusion—among the most assertive telecom-security postures in the EU—upheld through national court proceedings. [Sweden-China relations](#) have been among the coldest in Europe since the Gui Minhai detention, with Sweden absorbing sustained Chinese diplomatic pressure rather than accommodating Beijing. The one concern is [Geely, the Chinese automaker](#) that owns Volvo, which gives China meaningful economic leverage over Sweden's auto industry and has softened Sweden's willingness to back EU tariffs on Chinese cars—a real vulnerability.



STRATEGIC ALIGNMENT

Operational Cooperation

Sweden contributed to both [Afghanistan](#) and earlier [Balkan stabilization operations](#), establishing an operational cooperation record before NATO accession. Since joining in March 2024, Sweden's operational integration has been rapid. As framework nation for NATO Forward Land Forces Finland, Sweden leads allied land defense on the alliance's northern frontier adjacent to the Russian Arctic. Gotland's remilitarization gives NATO control over the Baltic's most strategically important island, dominating sea lanes and reinforcement routes to the Baltic states. Swedish Gotland/Södermanland submarines and Visby corvettes provide specialized Baltic ASW capability uniquely suited to the littoral environment. Sweden participates in [Baltic Sentry](#) and [Eastern Sentry](#) undersea-infrastructure protection. The May 2026 Gripen commitment to Ukraine—up to 150 aircraft—would make Sweden central to Ukrainian air combat for decades. Sweden is not a Red Sea or Indo-Pacific actor, but its northern front, Baltic, and Ukraine airpower contributions are among the most strategically irreplaceable in the alliance.

