



NATO

Alliance Assessment

MILITARY CONTRIBUTIONS • COLLECTIVE SECURITY • STRATEGIC ALIGNMENT



JULY 2026



TIER

— Model, Average, & Lagging Allies —



AT A GLANCE

Ally Tiers

- **Tier 1 Allies** | *Lead By Example:* They spend and modernize above average, back Ukraine, and show up for the alliance out of genuine conviction. They independently seek out opportunities to enhance the alliance because they value the role of NATO, not because they're pressured.
- **Tier 2 Allies** | *Solid But Not Exceptional:* These nations contribute meaningfully to the alliance but they meet expectations rather than exceed them. Tier 2 countries need continued pushing from Washington and NATO leadership to close specific shortfalls.
- **Tier 3 Allies** | *The Alliance's Free-Riders:* Despite their contributions, they largely fail to meet alliance standards: they under invest in defense, hedge toward Moscow and Beijing, or undermine US operations actively harming transatlantic security.





TIER 1 | *Denmark, Estonia, Finland, Latvia, Lithuania, Netherlands, Norway, Poland, Sweden*

TIER 2 | *Albania, Belgium, Bulgaria, Croatia, Czech Republic, France, Germany, Greece, Iceland, Italy, Luxembourg, Montenegro, North Macedonia, Portugal, Romania, United Kingdom*

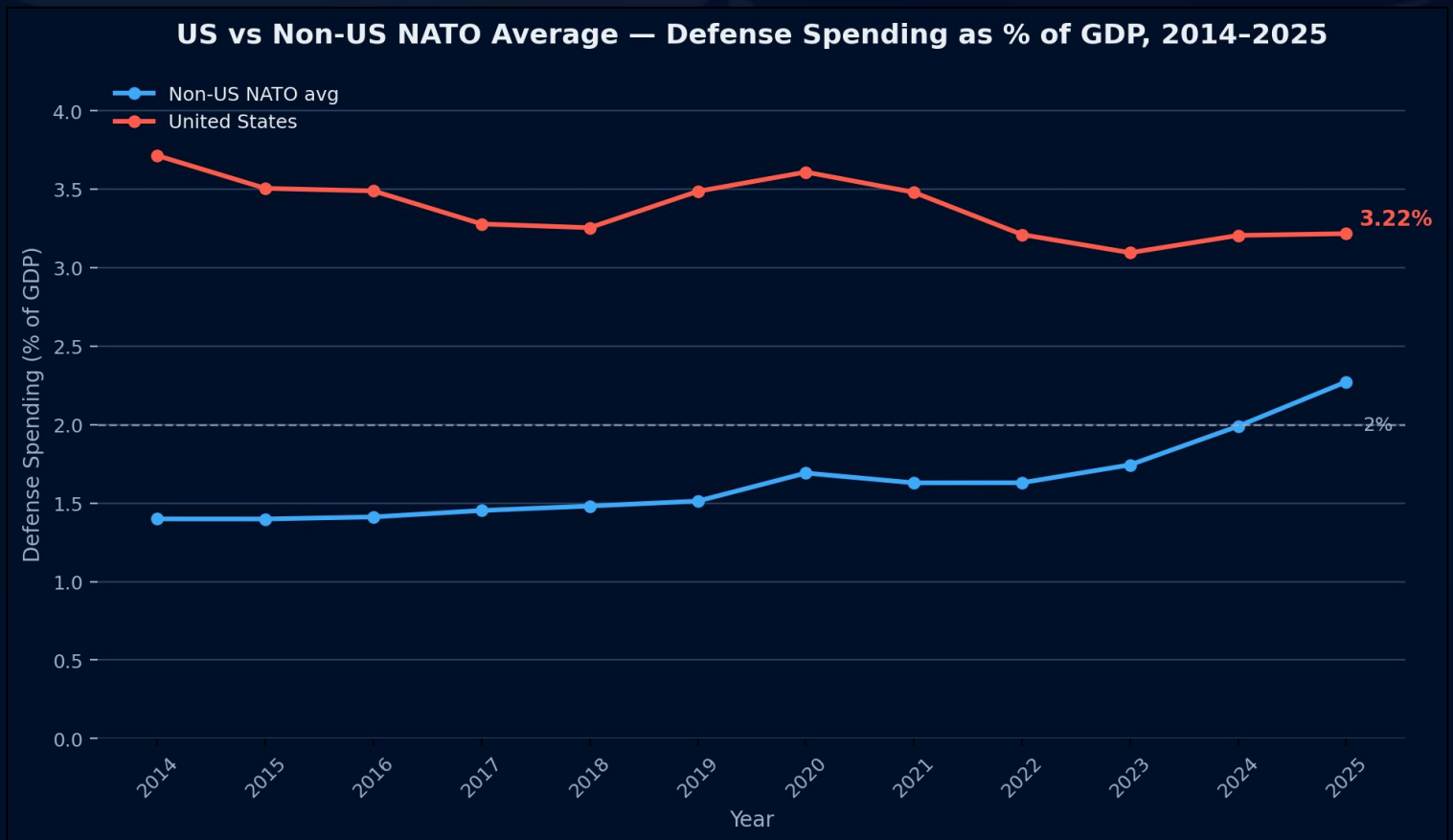
TIER 3 | *Canada, Hungary, Slovakia, Slovenia, Spain, Turkey*



MILITARY CONTRIBUTIONS

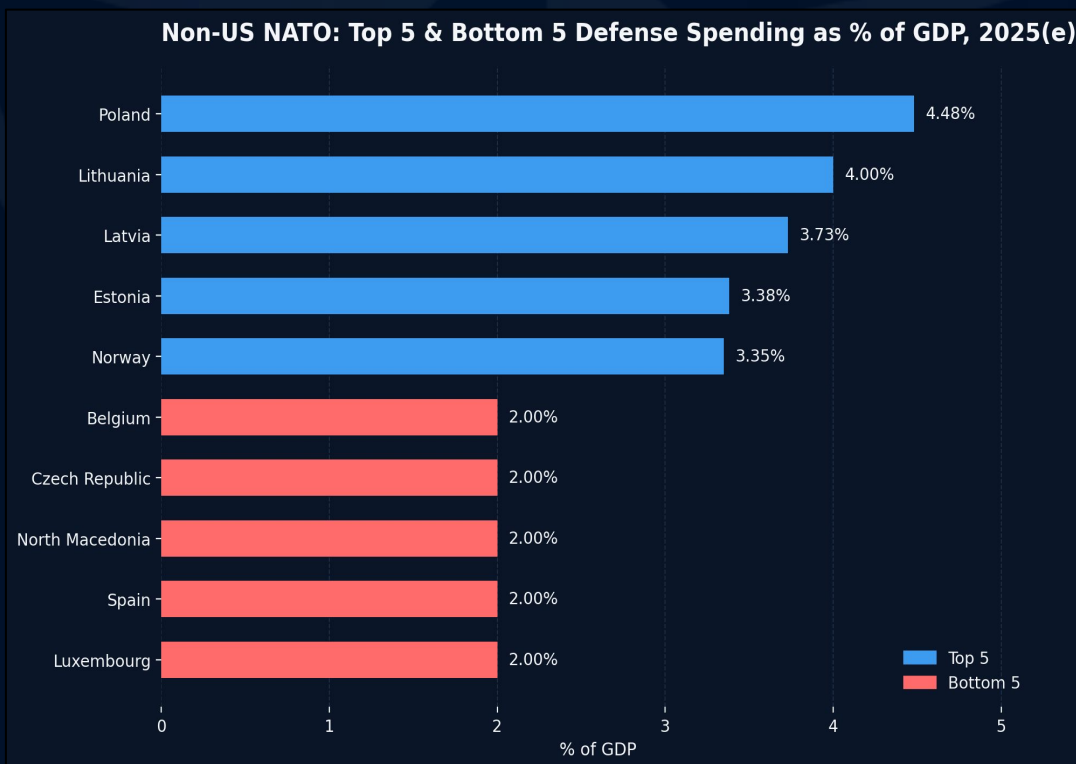
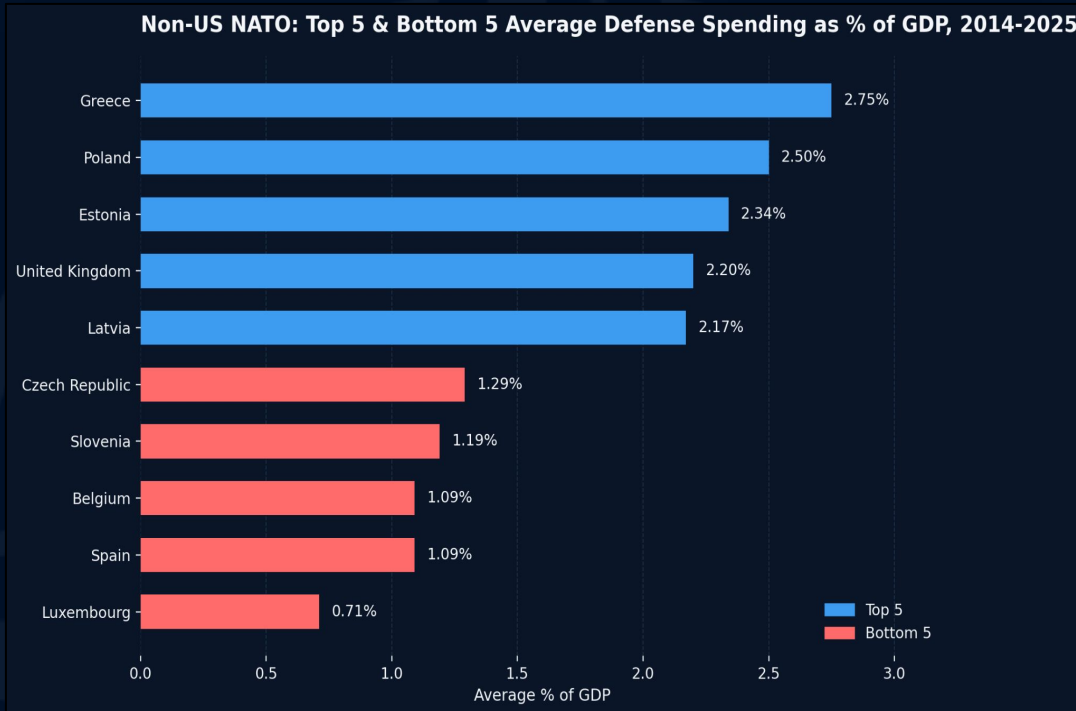
Defense Spending Level

The defense spending figures are taken from the [official NATO database](#) that accumulates military spending and breakdowns. As a whole, NATO defense spending is trending upward and closing the once significant gap between the United States and non-US NATO. The [Hague Summit Declaration](#) codified NATO's goal of 3.5% defense spending and 1.5% infrastructure. As of 2025, Poland, Lithuania, Latvia, Estonia, and Norway are the biggest defense spenders, even spending more than the United States. Belgium, Czech Republic, North Macedonia, Spain, and Luxembourg have all met the 2% floor but still sit at the bottom of the pack. NATO is stepping up, but there is more room for improvement.



MILITARY CONTRIBUTIONS

Defense Spending Level

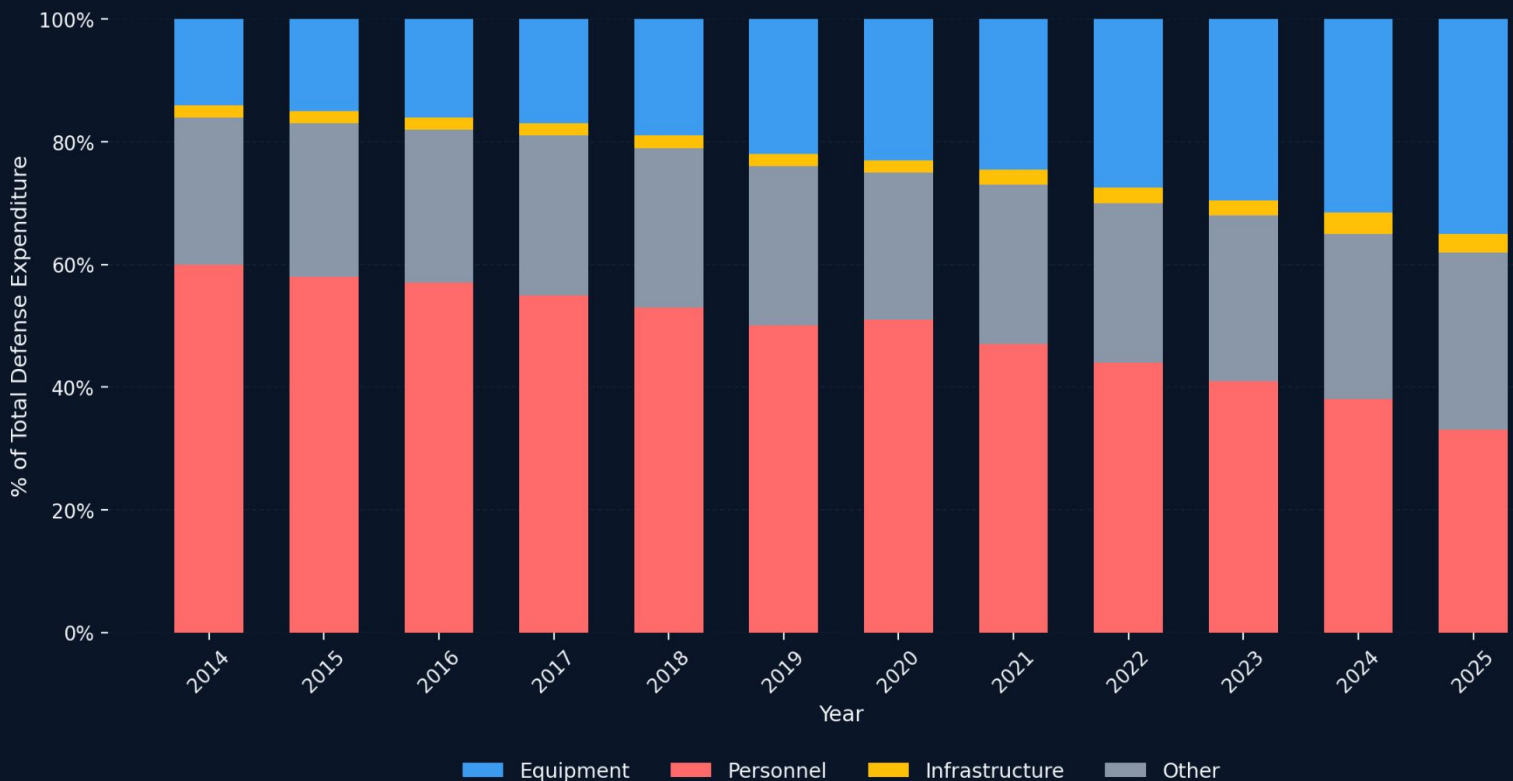


MILITARY CONTRIBUTIONS

Equipment Share

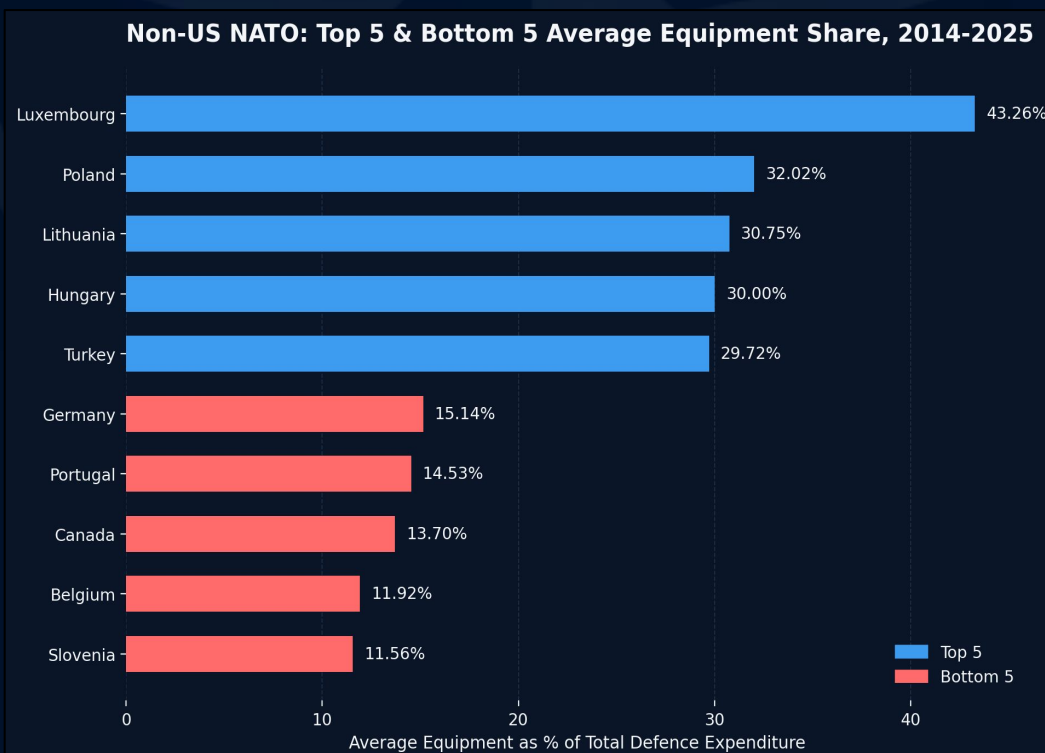
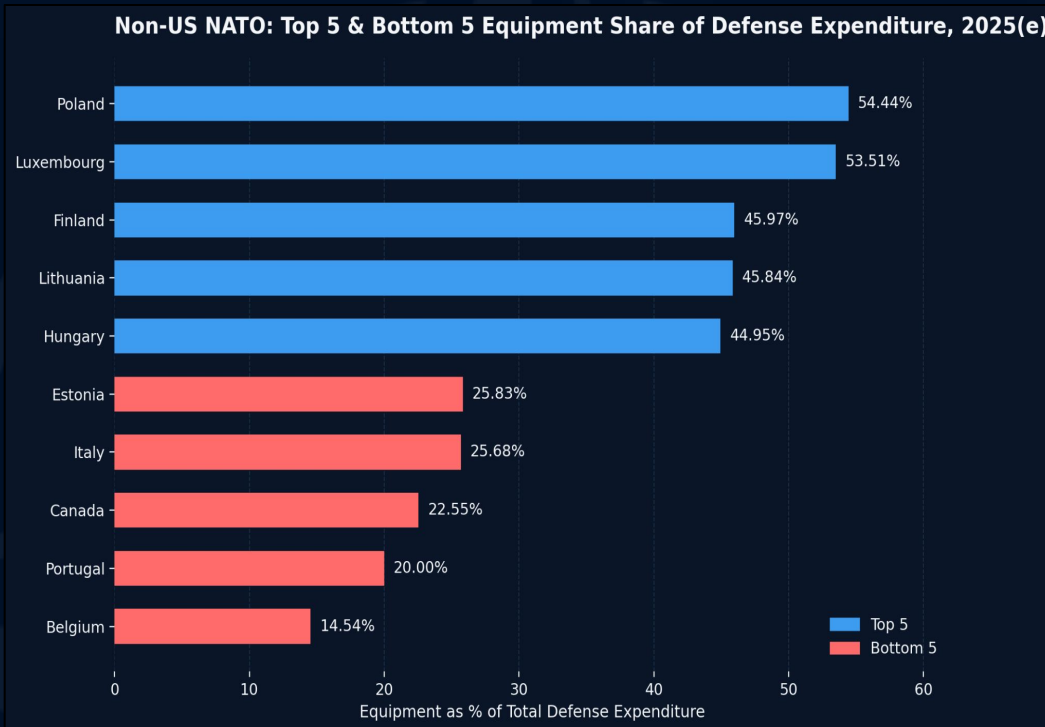
Defense spending totals only tells part of the story. To understand if countries are actually investing in warfighting capability, it is critical to see how they are spending that money. Under the [Vilnius Defence Investment Pledge](#), NATO has set a goal for all countries to spend at least 20% of defense spending on actual equipment and platforms. Militaries are not a jobs program, they're a warfighting machine. Using [NATO's official data](#), the non-US NATO average is trending in the right direction with the overall 2025 average at 33%. NATO as a whole is taking it seriously. As of 2025, Poland, Luxembourg, Finland, Lithuania, and Hungary are the largest investors in capability with Estonia, Italy, Canada, Portugal, and Belgium at the bottom of NATO.

Non-US NATO Average — Defense Expenditure by Category, 2014-2025



MILITARY CONTRIBUTIONS

Equipment Share

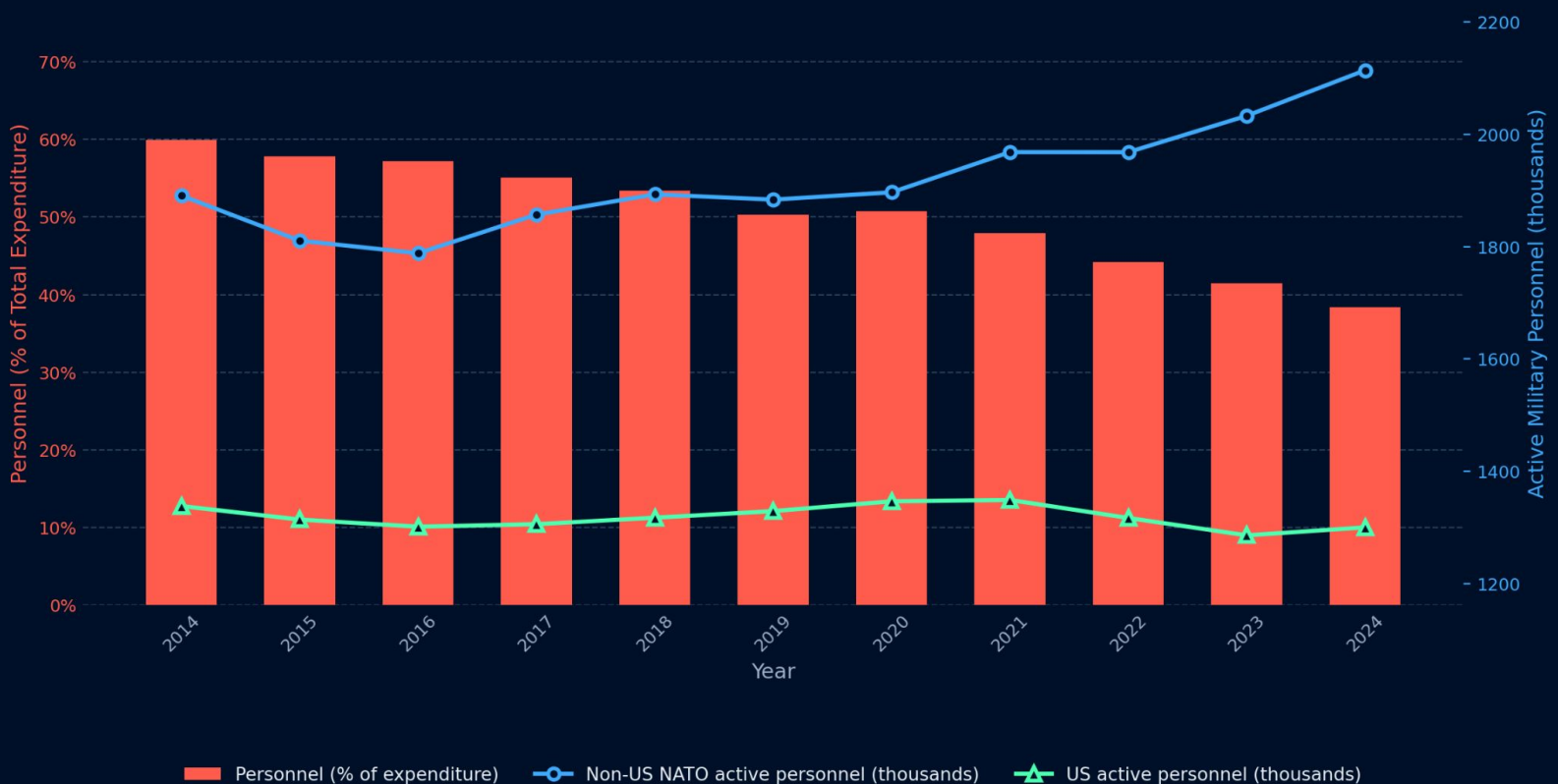


MILITARY CONTRIBUTIONS

Manpower & Recruitment

Troops will always be at the core of any military. It is essential that each NATO country has sufficient manpower and a robust recruitment program. The ideal country trend is one that shows a growing military in active personnel with a shrinking share of the budget, demonstrating that defense spending and equipment share is growing. When looking at non-US NATO as a whole, it is clear that the trend is in the right direction: shrinking personnel share while overall active personnel is increasing. It is also notable how many troops are stationed in non-US NATO, a significant force multiplier to the United States.

Non-US NATO Average — Personnel Cost Share & Active Personnel, 2014-2024



MILITARY CONTRIBUTIONS

Capability Modernization

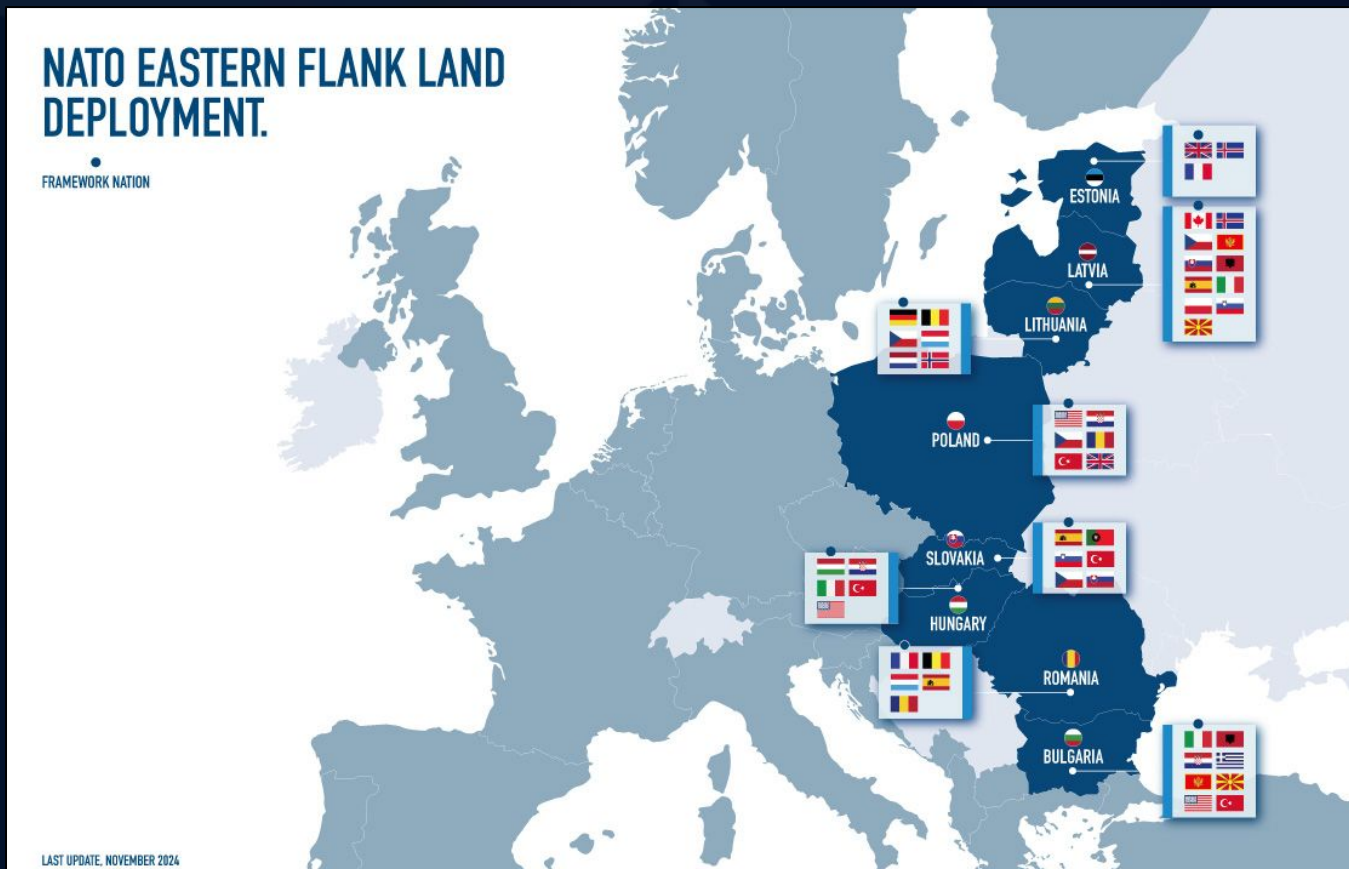
NATO's modernization picture is one of accelerating investment against years of decay. Equipment [procurement alone](#) exceeded €88 billion and R&D spending reached €13 billion in 2024, projected to hit €17 billion in 2025. However, [analysis finds](#) that total equipment stocks in European NATO countries remain below 2021 levels because of donations to Ukraine, legacy retirements, and long delivery timelines. The gap between spending and fielded capability is exactly what separates a Tier 1 modernizer from a Tier 3 laggard. A Tier 1 country has a growing modern capability trajectory with equipment stocks moving toward newer generations, sustained combat power, emerging attritable systems, and survivable platforms. A Tier 2 ally shows credible modernization plans and partial fielding, but lags Tier 1 on pace or scale. A Tier 3 ally relies too heavily on legacy systems that cannot survive a modern battlefield, underinvesting in modernization with no funded procurement pipeline to close the gap.



MILITARY CONTRIBUTIONS

Force Posture

A thoughtful, resilient force structure is essential to deterrence. NATO's force posture is anchored by the [Forward Land Forces](#) (also referred to as enhanced Forward Presence or eFP) which are multinational battlegroups that are forward-deployed along the alliance's eastern front. While not large enough to stop an invading force, they act as a deterrent "tripwire" against Russia. Originally established as four battalion-sized battlegroups in Estonia, Latvia, Lithuania, and Poland after the [2016 Warsaw Summit](#), the model doubled in scale to eight persistent locations from the Baltic to the Black Sea after Russia's 2022 invasion of Ukraine, incorporating Bulgaria, Hungary, Romania, and Slovakia, and expanded again in June 2026 with a ninth battlegroup, Forward Land Forces Finland. Each of these battlegroups are led by what is termed a framework country. For the country profiles, force posture assessment covers eFP roles, hosting of US or allied basing/equipment, nuclear-sharing status, air policing rotations, and participation in military exercises.



MILITARY CONTRIBUTIONS

Industrial Base

Europe's defense industrial base is dilapidated and brittle, but with the right investment can once again be a civilizational arsenal. [Europe's defense industry](#) is a mix of large primes and roughly 2,000+ Small and Medium-sized Enterprises, together which generate an estimated €148 billion in 2024, an increase of more than 60% since 2021, with about €48 billion in exports and roughly 500,000 people directly employed. Ammunition output illustrates both the progress and the constraint: EU officials cite 155mm shell production rising from roughly 300,000 rounds in 2022 to a [2 million-round annual target](#) under the Act in Support of Ammunition Production (ASAP). However, the [EU's ammunition base](#) is just 15 producers across 11 countries, and most of that capacity is already locked into existing contracts. In the country profiles, industrial base assessment weighs domestic production capacity, export relevance, and participation in joint EU/NATO/US production initiatives.



EUROPEAN 155MM SHELL OUTPUT PUBLIC TARGETS AS OF JULY 2026

- **Rheinmetall (Germany)**
750,000 / year
public goal: 1.1M–1.5M by 2027
- **BAE Systems (UK)**
500,000 / year
targeted by end-2026
- **KNDS / Nexter**
100,000+ / year
plus additional casing capacity
- **PGZ (Poland)**
150,000–180,000 / year
target range
- **STV Group (Czechia)**
100,000+ / year



★ Source: public company guidance and reporting, compiled July 2026



STRATEGIC ALIGNMENT

Declared Posture

NATO's baseline for declared posture is its own [2022 Strategic Concept](#). It remains the alliance's foundational strategic document buttressed by a clear-eyed assessment of the threats posed. It names Russia as "the most significant and direct threat" to allied security, addresses China's "systemic challenges" for the first time, and organizes the alliance around three core tasks: deterrence and defense, crisis prevention and management, and cooperative security. Secretary General Mark Rutte has since bolstered that framework. In his June 2025 [Chatham House address](#), he warned allies that Russia "could be ready to use military force against NATO within five years," argued that "hope is not a strategy," and laid out a plan to make NATO "stronger, fairer and more lethal." Critically, he anchors that plan in the 5%-of-GDP defense investment pledge, expanded production targets (a 400% increase in air and missile defense alone), and a "[NATO-first](#)" approach to burden-sharing. In the country profiles, each ally's declared posture is graded against this shared baseline. This report assesses if its national security strategy or defense white paper names Russia and China as threats, whether it is current post-2022 or a pre-war holdover, and whether it comes with real budget commitments behind it. A good contributor's doctrine includes these core aspects.



STRATEGIC ALIGNMENT

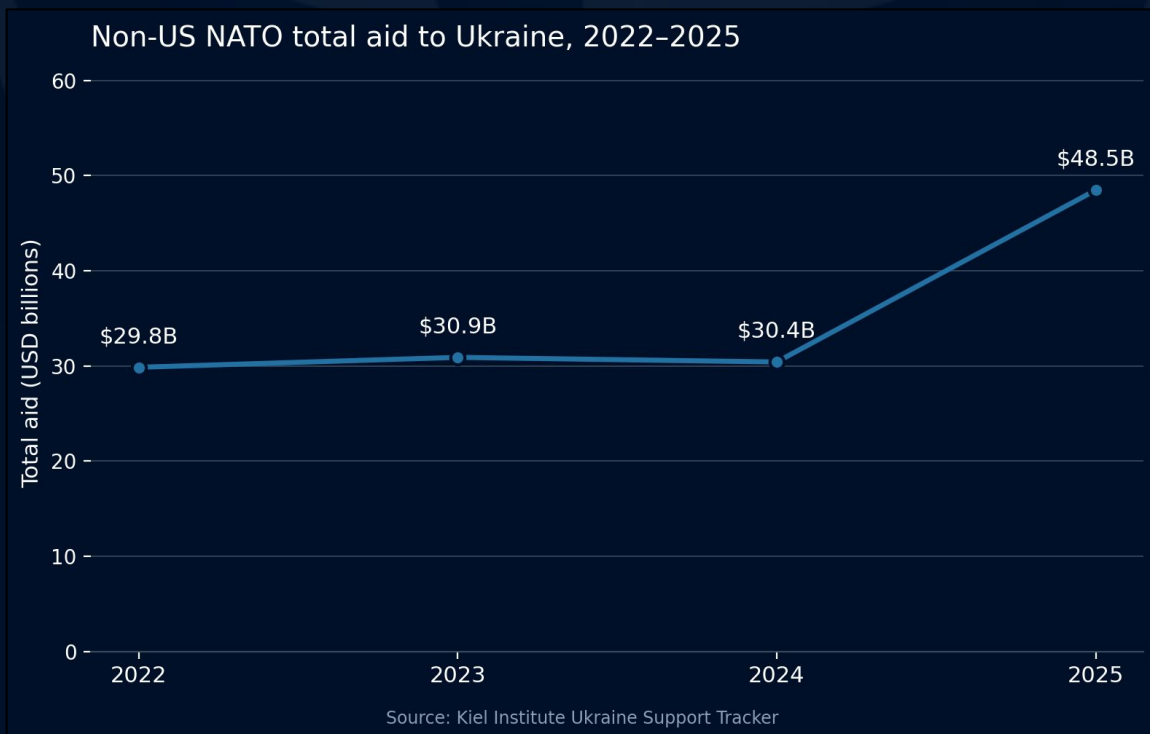
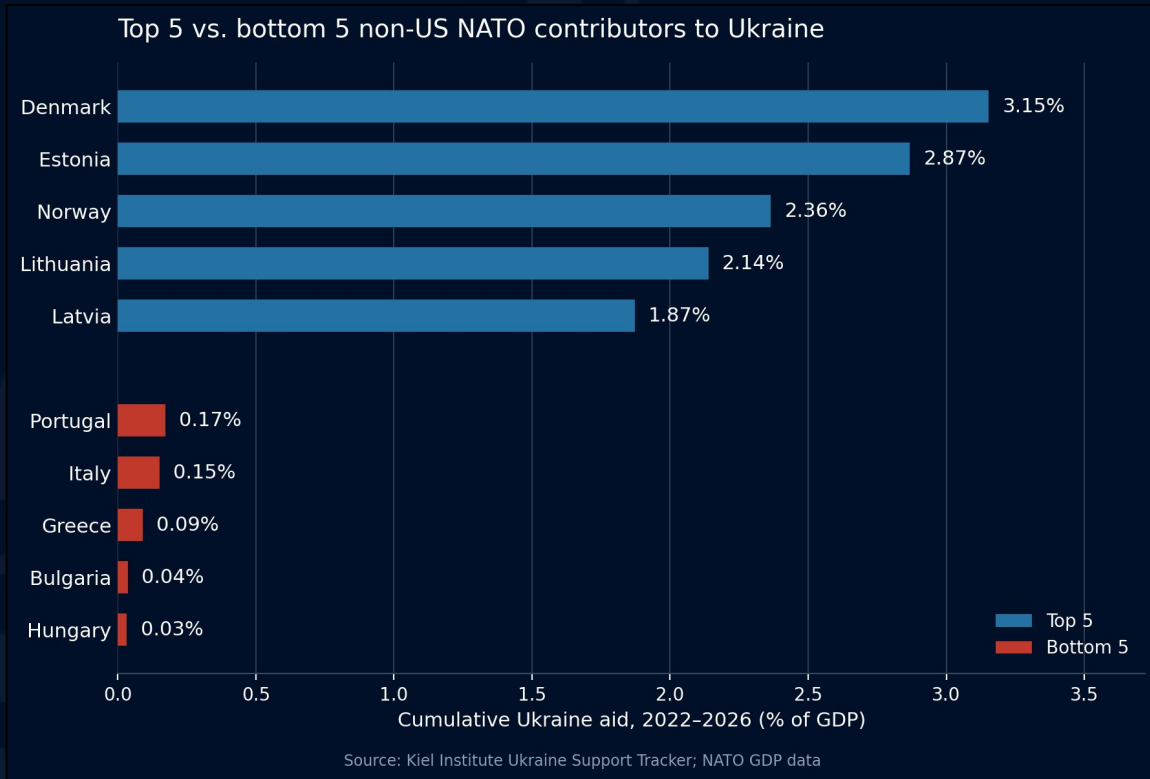
Ukraine Support

NATO's Ukraine aid story is one of allies taking responsibility for European security. [Kiel Institute data](#) show Europe has now cumulatively overtaken the US as Ukraine's main backer. European military aid alone [rose 67% above the 2022–2024 average in 2025](#) after US packages slowed. The main Trump administration initiative is PURL (Prioritized Ukraine Requirements List). NATO allies buy US weapons at a 10% markup and route them to Ukraine, letting Washington keep supplying hardware without directly funding it. Uptake has been real but uneven: eight countries had funneled about [€1.9 billion through PURL](#) by August 2025, yet European military aid still fell sharply that summer even with PURL counted in. It rebounded into 2026, with a heavier tilt toward drones.



STRATEGIC ALIGNMENT

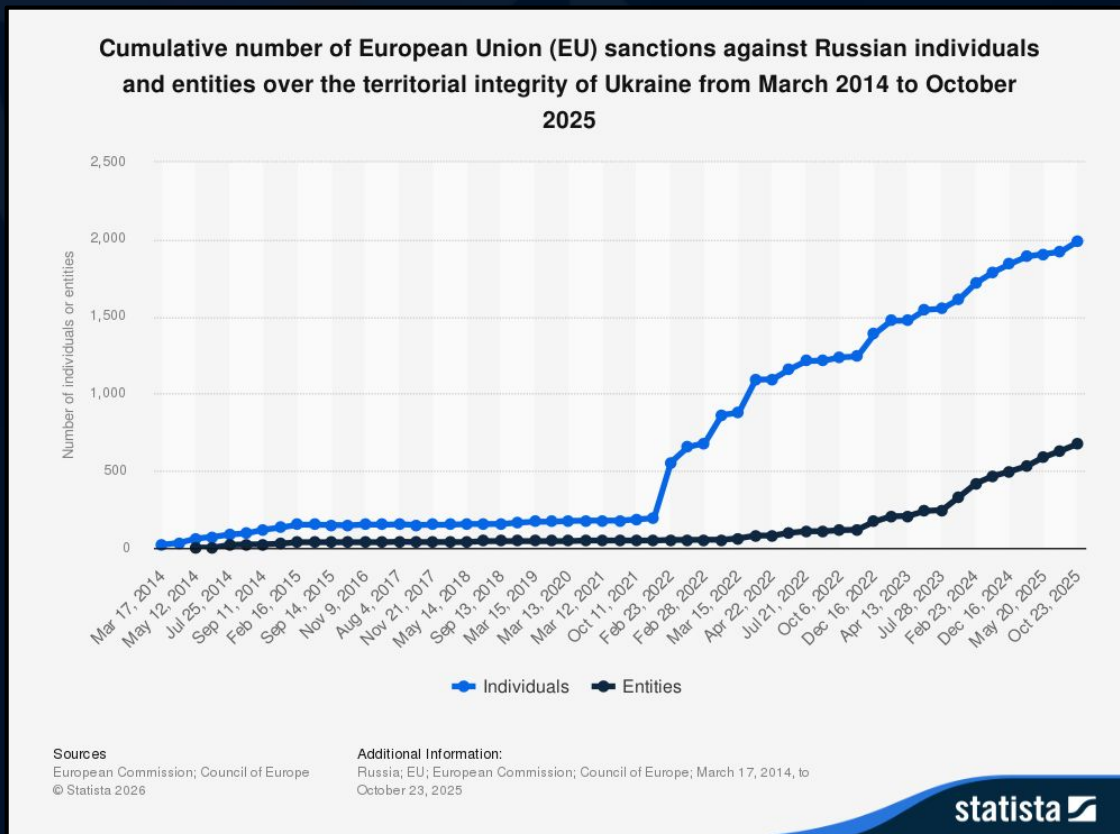
Ukraine Support



STRATEGIC ALIGNMENT

Russian Decoupling

NATO's Russian energy decoupling has moved from rhetoric to action, though still incomplete. Oil is **nearly done**: Russian crude fell from 27% of EU imports in early 2022 to just 2% in 2025. Coal is fully eliminated. Gas has **lagged further behind**: Russian pipeline and LNG gas dropped from 45% of EU imports in 2021 to about 12–13% in 2025. This still translates to over €15 billion a year flowing to Russia. In January 2026, the EU formally adopted a **binding ban** on Russian gas imports: LNG phased out through 2026, pipeline gas by September 2027. All bolstered by an intricate layer of sanctions packages (the EU is now on its 20th) that have separately targeted Russia's shadow fleet, LNG tanker servicing, and terminal operations. In the country profiles, our analysis looks at how thoroughly NATO allies are reducing their strategic dependencies on Russia.



STRATEGIC ALIGNMENT

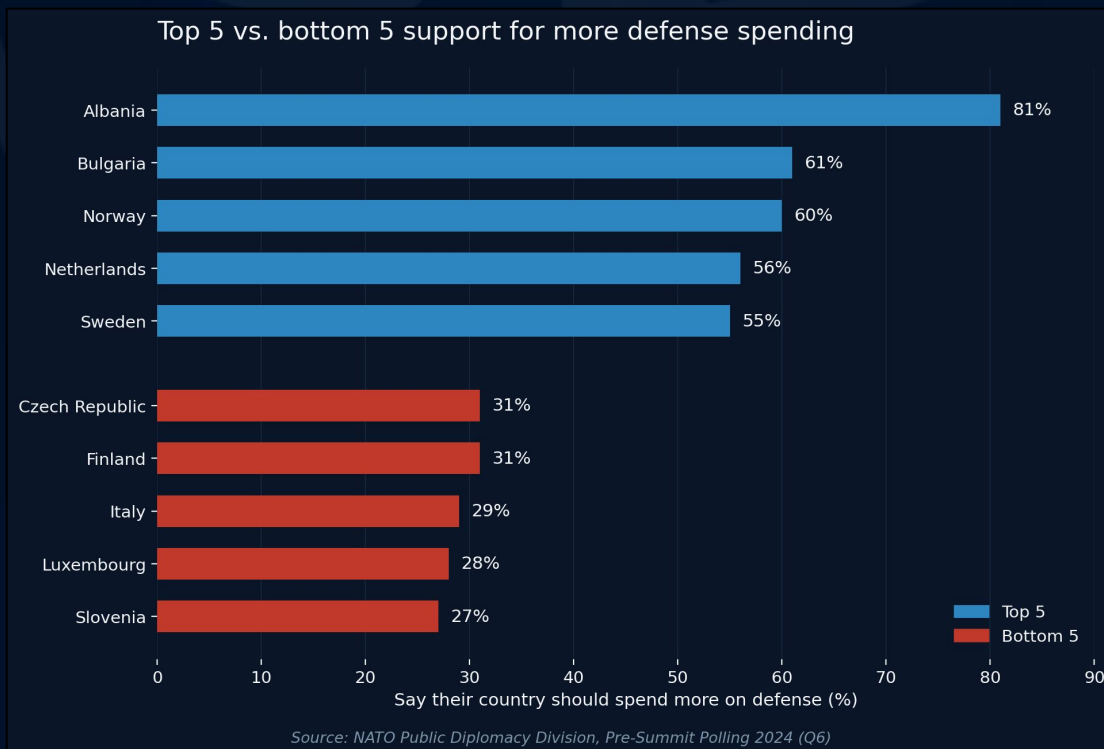
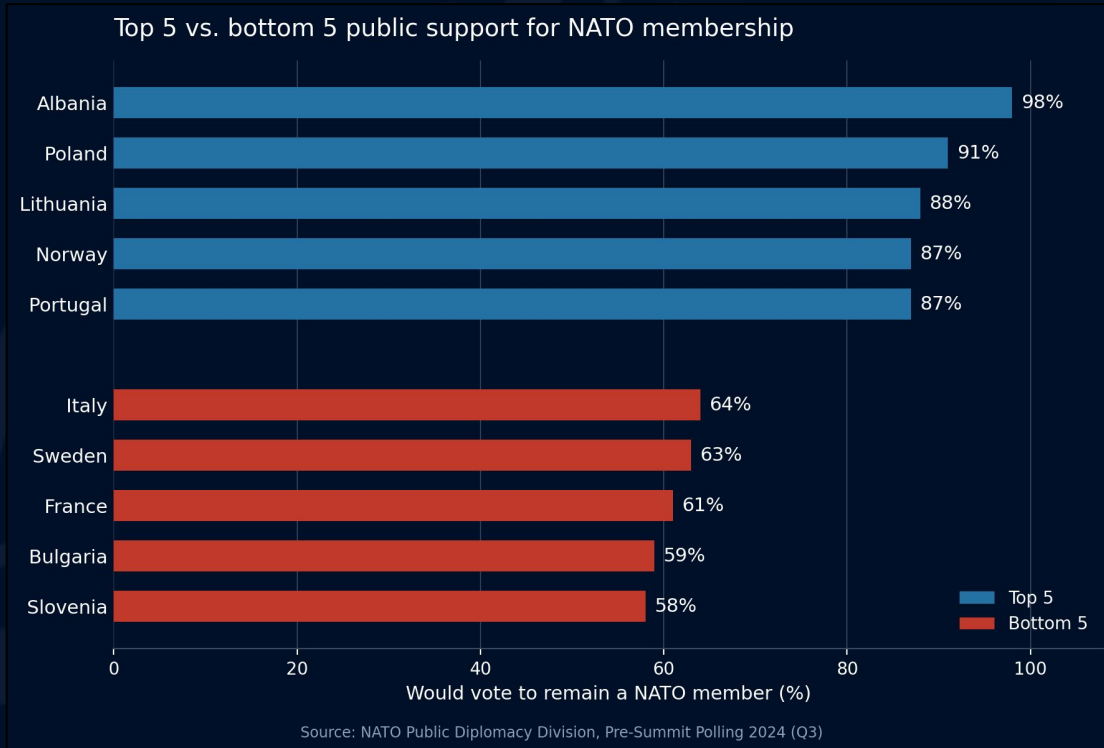
Public Support & Political Resilience

Public [support for NATO](#) across the alliance remains broad but not uniform, and the gaps track fairly predictably with threat exposure. Frontline and near-frontline states post the strongest numbers for staying in NATO: Albania (98%), Poland (91%), Lithuania (88%), Norway (87%), and Portugal (87%). Poland, Lithuania, and Norway also top the list on defending fellow allies if attacked and on wanting to raise defense spending. Softer support clusters in Western and Southern Europe: Slovenia (58%), Bulgaria (59%), France (61%), and Sweden (63%) sit at the bottom of the membership question, and Bulgaria and Slovenia also post among the weakest numbers on collective defense and the highest disagreement rates on supporting Ukraine. Views of Russia have hardened almost everywhere (62% unfavorable, only 11% favorable), but that hasn't fully translated into uniform appetite for continued Ukraine support, where agreement drops to the 40s and 50s in several Southern and Balkan states even as it stays above 65% in the Baltics and Nordics. In the country profiles, this polling feeds into the domestic political support section, which looks at two things: how the public in each country polls on issues central to NATO, and how strong pro-NATO political parties are relative to anti-NATO parties.



STRATEGIC ALIGNMENT

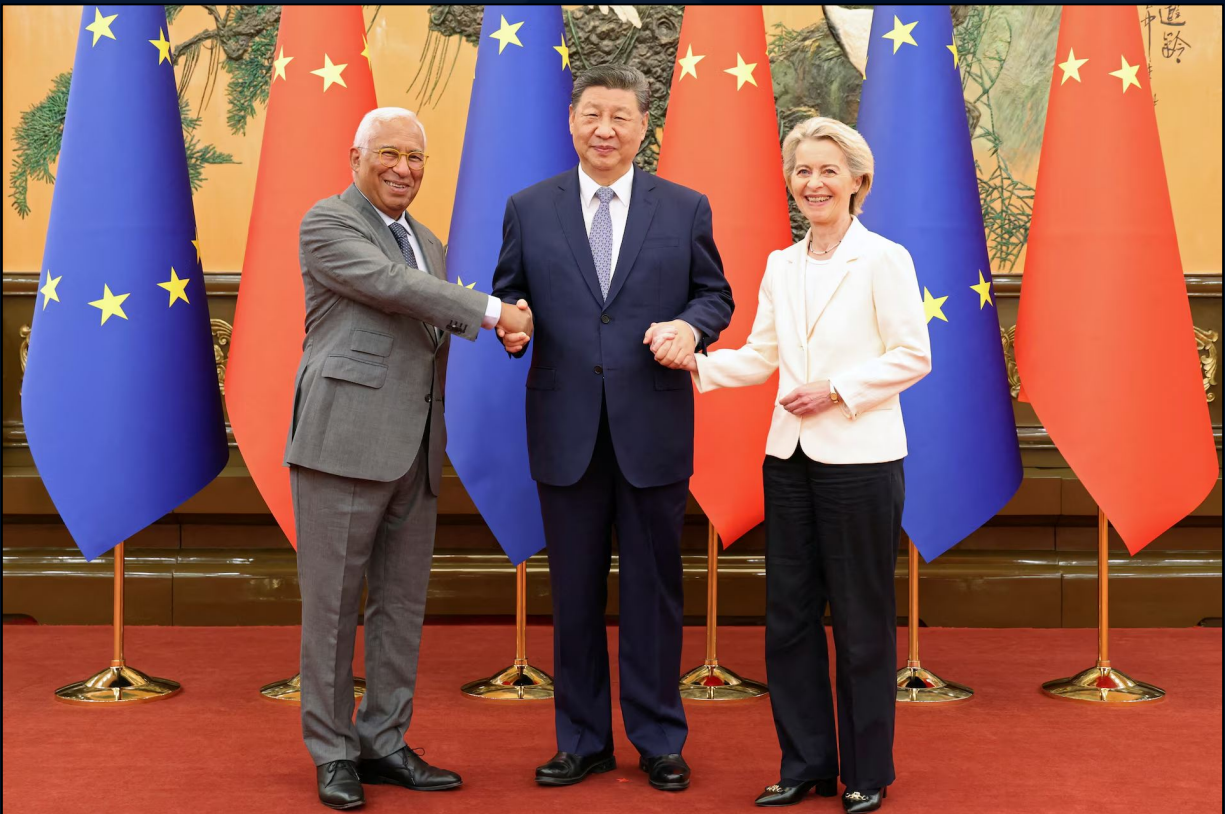
Public Support & Political Resilience



STRATEGIC ALIGNMENT

Hedging Behavior

NATO allies hedging against American and NATO leadership has become an increasing concern in recent years. Overall, NATO nations' hedging record is clean and concentrated in a few repeat offenders. The country profiles score this at the government level only looking at things like BRI ties, Chinese infrastructure access, high-level Moscow, Beijing, or Tehran engagement, and obstruction of sanctions or accession votes. Some allies stand out as strategically aligned allies, such as Lithuania, which actively challenges China rather than just avoiding entanglement. One of the clear outliers is Slovakia under Prime Minister Fico, who has blocked EU sanctions packages, resisted the Hague 5% pledge, and was the only EU and NATO leader at both Moscow's and Beijing's 2025 Victory Day parades.



STRATEGIC ALIGNMENT

Operational Cooperation

NATO is not just a deterrence organization, it is a warfighting coalition. Measuring operational cooperation is central to our understanding of NATO. NATO's operational track record in Iraq and Afghanistan was substantial. In Afghanistan, the International Security Assistance Force (ISAF) became [NATO's largest and longest-running mission](#), peaking at more than 130,000–140,000 troops drawn from 50 NATO and partner countries. In Iraq, non-US coalition contributions were [smaller but still meaningful](#): the UK led with over 8,000 troops at points, followed by Poland, Italy, and others, with 25–34 non-US nations rotating through the Multi-National Force at various points. In the country profiles, operational cooperation is assessed on both historical and current terms: Iraq/Afghanistan-era troop levels alongside more recent conduct. For example, participation in, support for, or obstruction of operations like Operation Epic Fury, Operation Aspides, NATO's Baltic/Black Sea posture, and PURL. Inputs like defense spending and modernization are critical investments into the alliance, but ultimately NATO is about outputs: fighting and winning wars. Operational cooperation is central to that story.

