NATO

Win Tracker

JULY 2026

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INTRODUCTION

As the NATO Summit concludes, one fact has become impossible for the legacy media and foreign policy establishment to deny: President Trump has strengthened NATO in ways that none of his predecessors could.

For decades, American presidents urged Europe to rearm while U.S. taxpayers continued to carry a disproportionate share of the burden. A sea-change came in 2017 when President Trump demanded outcomes instead of promises—and the results speak for themselves. Today, nearly every NATO member meets the Alliance's long standing two percent defense spending floor, nearly every ally has committed to raising core defense spending to 3.5 percent of GDP while working toward the five percent target, and NATO Europe and Canada have committed approximately $1.2 trillion in additional defense spending since President Trump's first term. NATO Secretary General Mark Rutte has appropriately coined this sum as the "Trump Trillion."

These victories were far from inevitable. They were achieved because the Trump Administration rejected the failed bipartisan consensus that polite diplomacy alone could solve NATO's burden-sharing crisis. President Trump ignored the media's premature obituaries of the Alliance and the establishment's warnings that forcing allies to pay their fair share would fracture NATO.

Those critics were wrong. Rather than weakening NATO, the Trump Administration has led its rescue from decades of managed decline by pushing its most significant military revitalization since the end of the Cold War. President Trump didn't break NATO—he broke Europe's dependence on the American taxpayer. And now, the very media critics and liberal elites who spent years predicting NATO's collapse are trying to explain its

INTRODUCTION

comeback.

That matters because, despite its imperfections, NATO remains one of the most successful military alliances in history. The Alliance was created after two catastrophic world wars claimed more than half a million American lives on European battlefields. NATO was never intended to become a welfare program for European defense. It was created because America was tired of sending its sons to fight and die in Europe's wars. Strong deterrence is the Alliance's founding principle—not American subsidization. President Trump's burden-sharing revolution is not a departure from that mission; it is a return to it.

For nearly eighty years, NATO has fulfilled that mission by winning the Cold War, preserving peace across Europe, deterring conflict with Russia, and serving as a force-multiplier for America's security. Today, however, the West confronts its most dangerous strategic environment since the Cold War. Russia continues its campaign of aggression in Europe. Communist China seeks to divide the democratic world and displace American leadership. Iran arms terrorist proxies across the Middle East while hostile powers increasingly exploit weakness and political division within the West. At the same time, decades of complacency within the West have left too many NATO members underprepared for the challenges ahead.

America cannot afford a weak NATO that expects the United States to carry the burden alone. America needs an Alliance that is stronger, fairer, and more effective for the American people.

INTRODUCTION

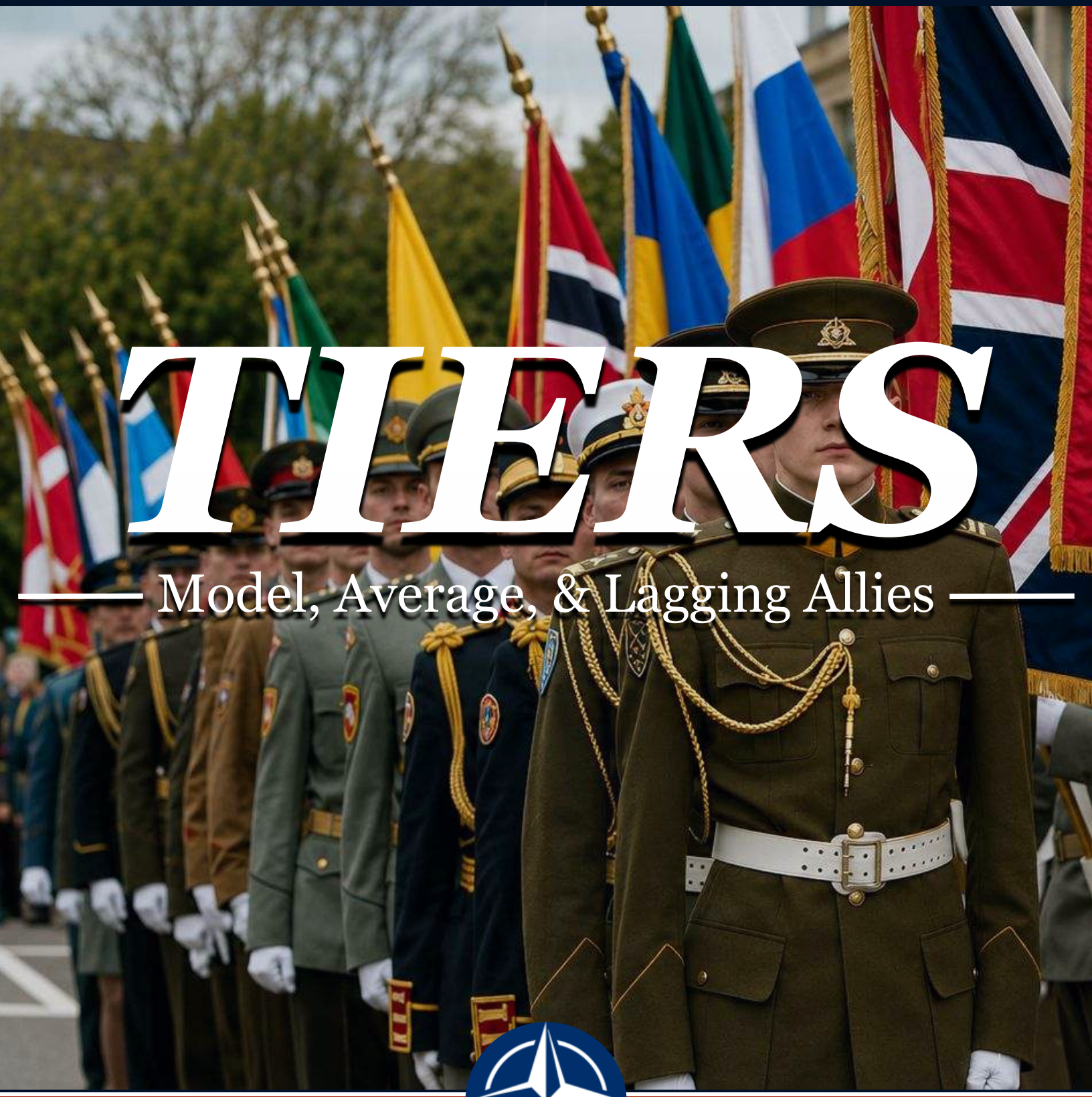
The Trump Administration's NATO strategy reflects that principle. While the Obama and Biden Administrations treated NATO as a diplomatic talking shop—long on communiqués and short on military capability—the Trump Administration is restoring the Alliance's original purpose: deterring America's enemies through overwhelming strength. NATO's transformation from a lethargic social club into a credible Western alliance is historic.

To quantify the Trump Administration's successes and identify where more work remains, POLARIS National Security has developed a 'NATO Win Tracker' highlighting the Alliance's remarkable military resurgence in recent years. First, we assess how the alliance has progressed as a whole.

From that baseline, we assess every NATO member across two core dimensions: military contributions and strategic alignment with the Alliance's collective security objectives. Based on those findings, members are grouped into three tiers.

President Trump has already achieved what generations of American presidents promised but failed to deliver: a Europe that is finally rebuilding its militaries. That is a victory not only for NATO, but for every American taxpayer who has spent decades shouldering Europe's security burden.

But the job is not finished. NATO's resurgence will only endure if every ally does its part and if Washington refuses a return to the failed policies of the past. POLARIS National Security measures that progress, celebrates those driving NATO's revival, and identifies where more work remains.



TIERS

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*

NATO

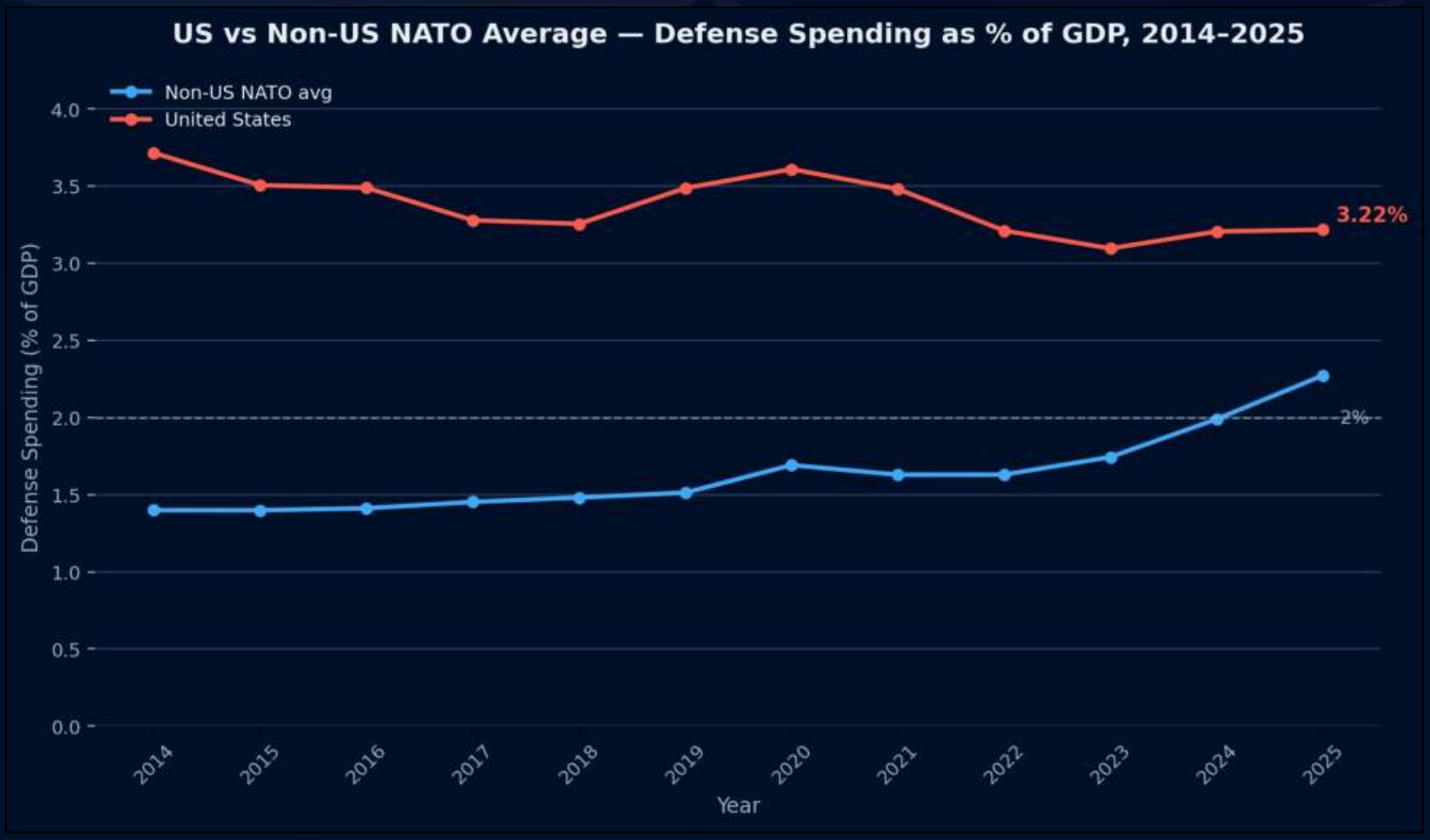
Alliance Assessment

MILITARY CONTRIBUTIONS • COLLECTIVE SECURITY • STRATEGIC ALIGNMENT

MILITARY CONTRIBUTIONS

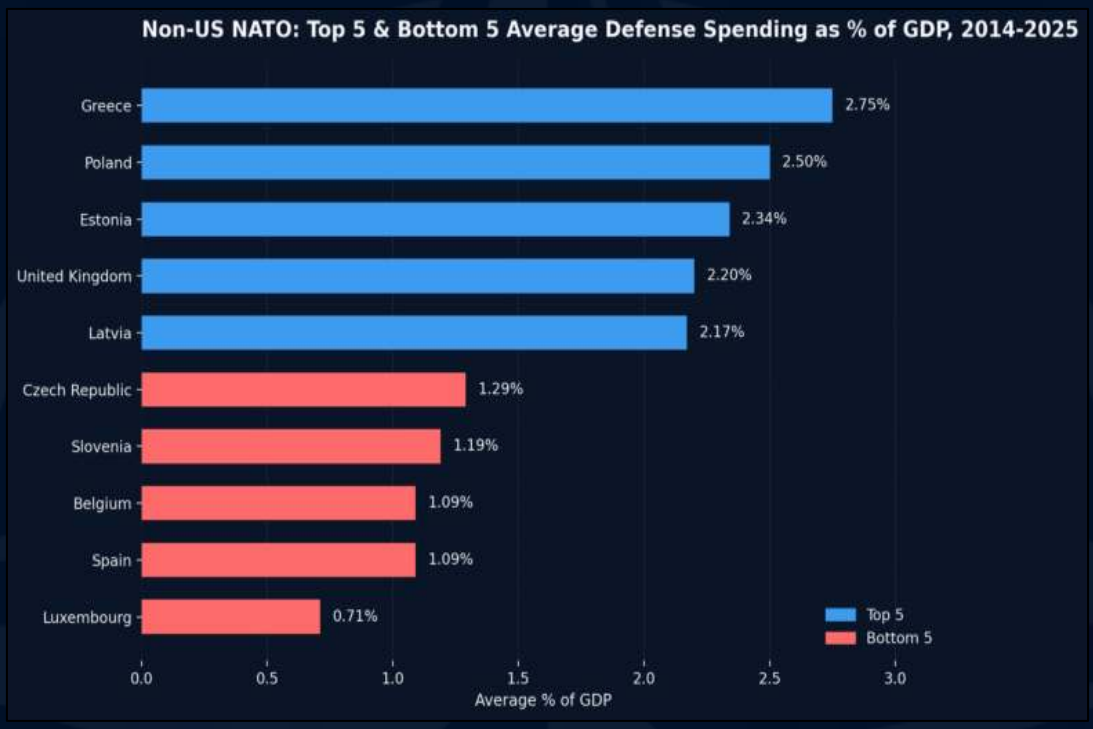
Defense Spending Level

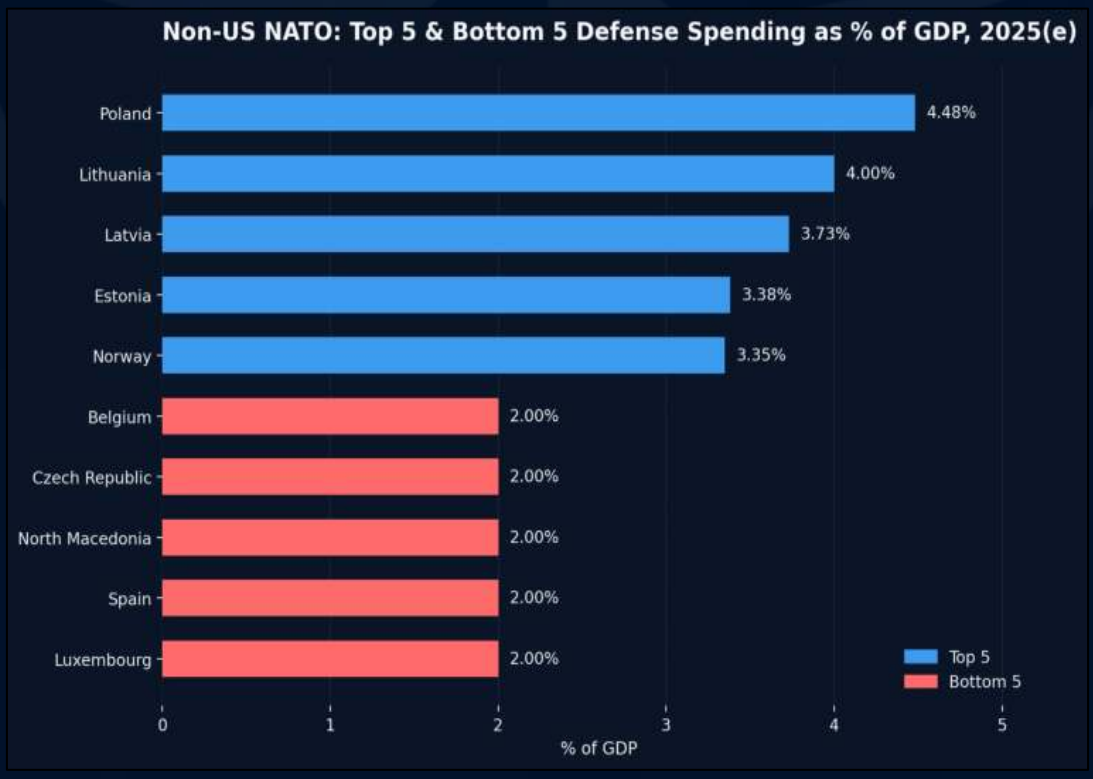
The defense spending figures are taken from the official NATO database that accumulates military spending and breakdowns. As a whole, NATO defense spending is trending upward and closing the once significant gap between the United States and non-US NATO. The Hague Summit Declaration codified NATO's goal 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

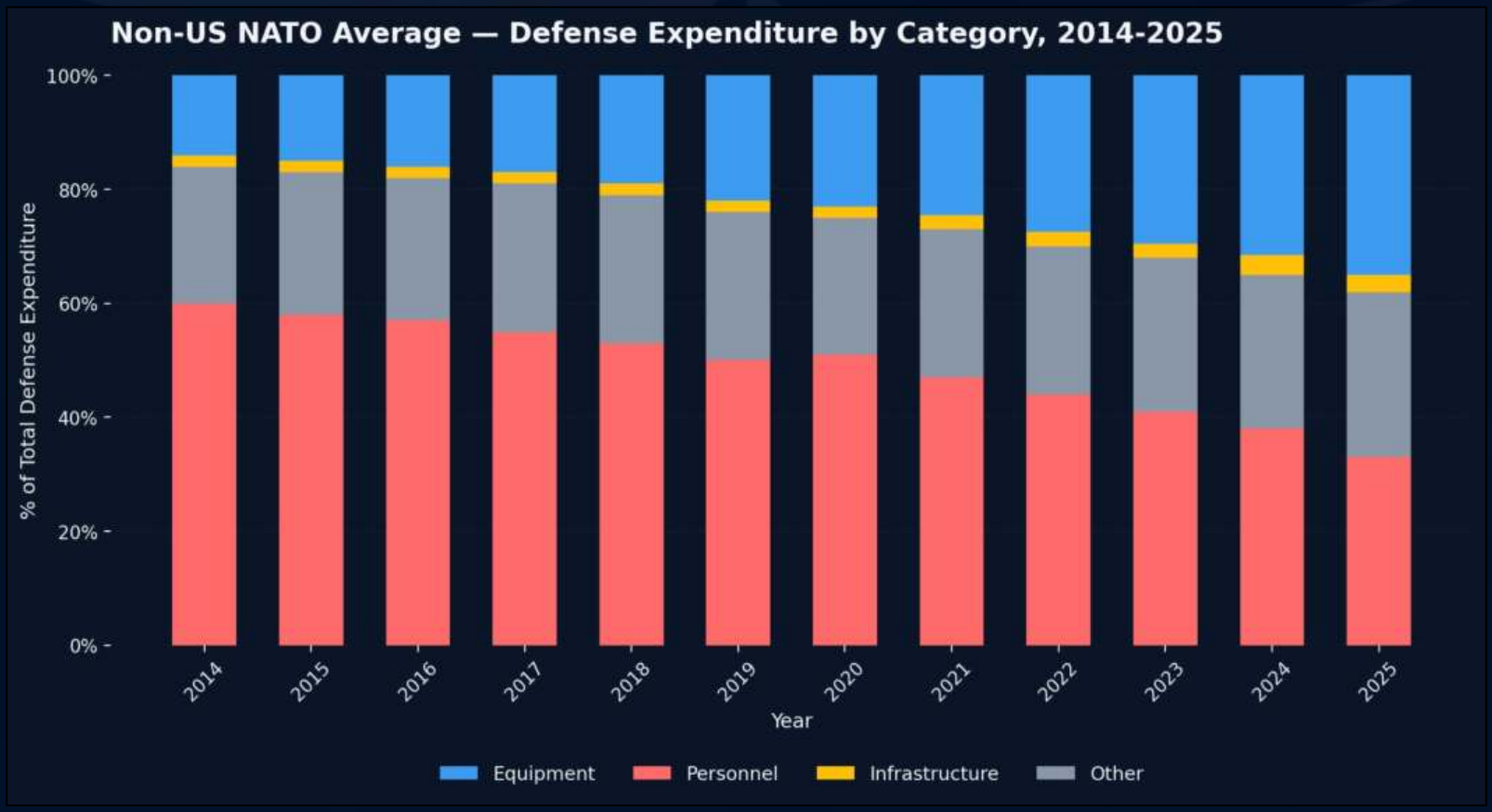




MILITARY CONTRIBUTIONS

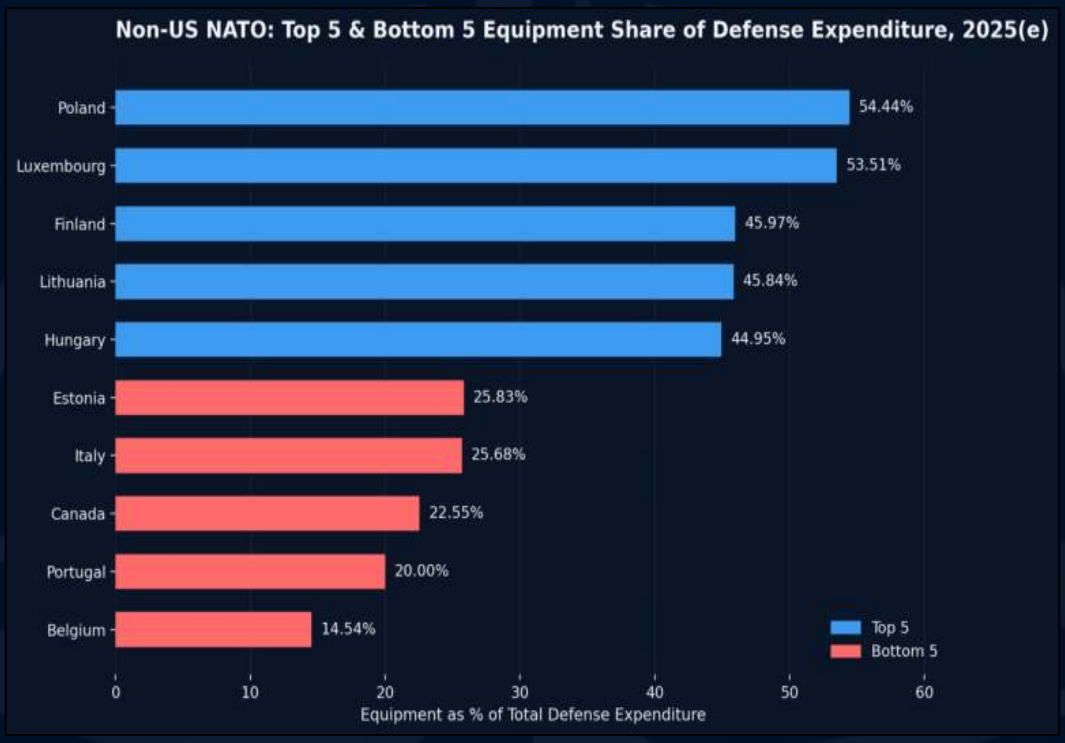
Equipment Share

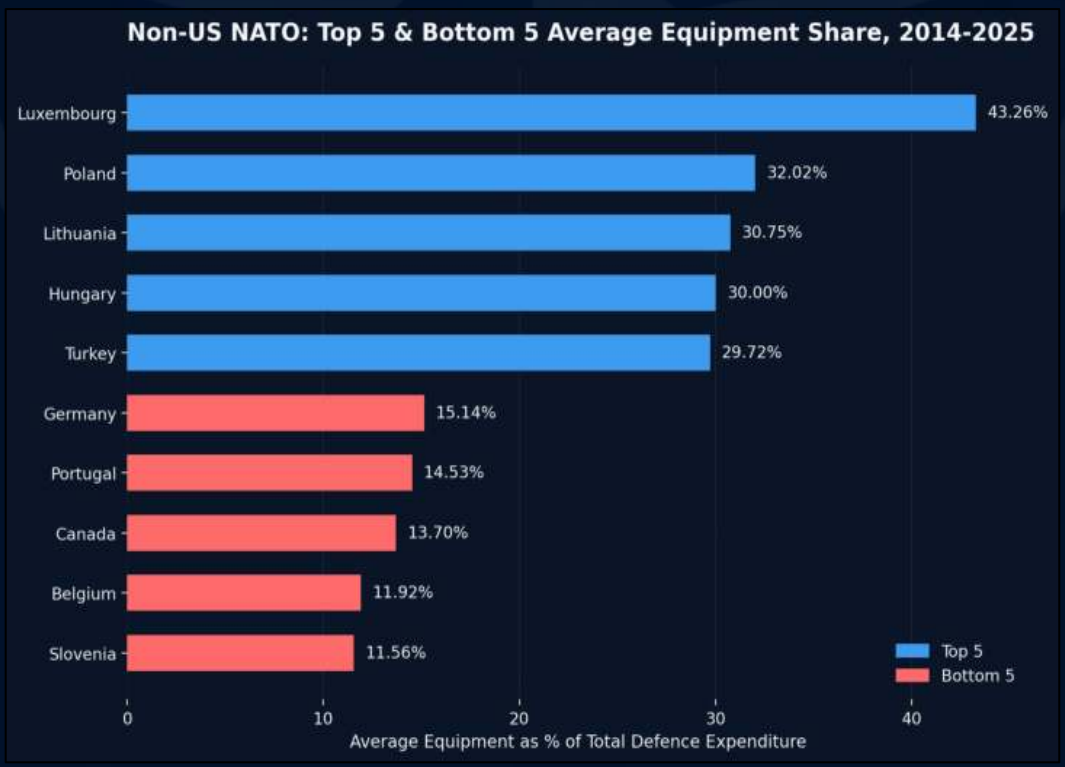
Defense spending totals only tells part of the story. To understand if countries are actually investing in warfighting capability, it is critical to see how they are spending that money. Under the Vilnius Defence Investment Pledge, NATO has set a goal for all countries to spend at least 20% of defense 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.



MILITARY CONTRIBUTIONS

Equipment Share

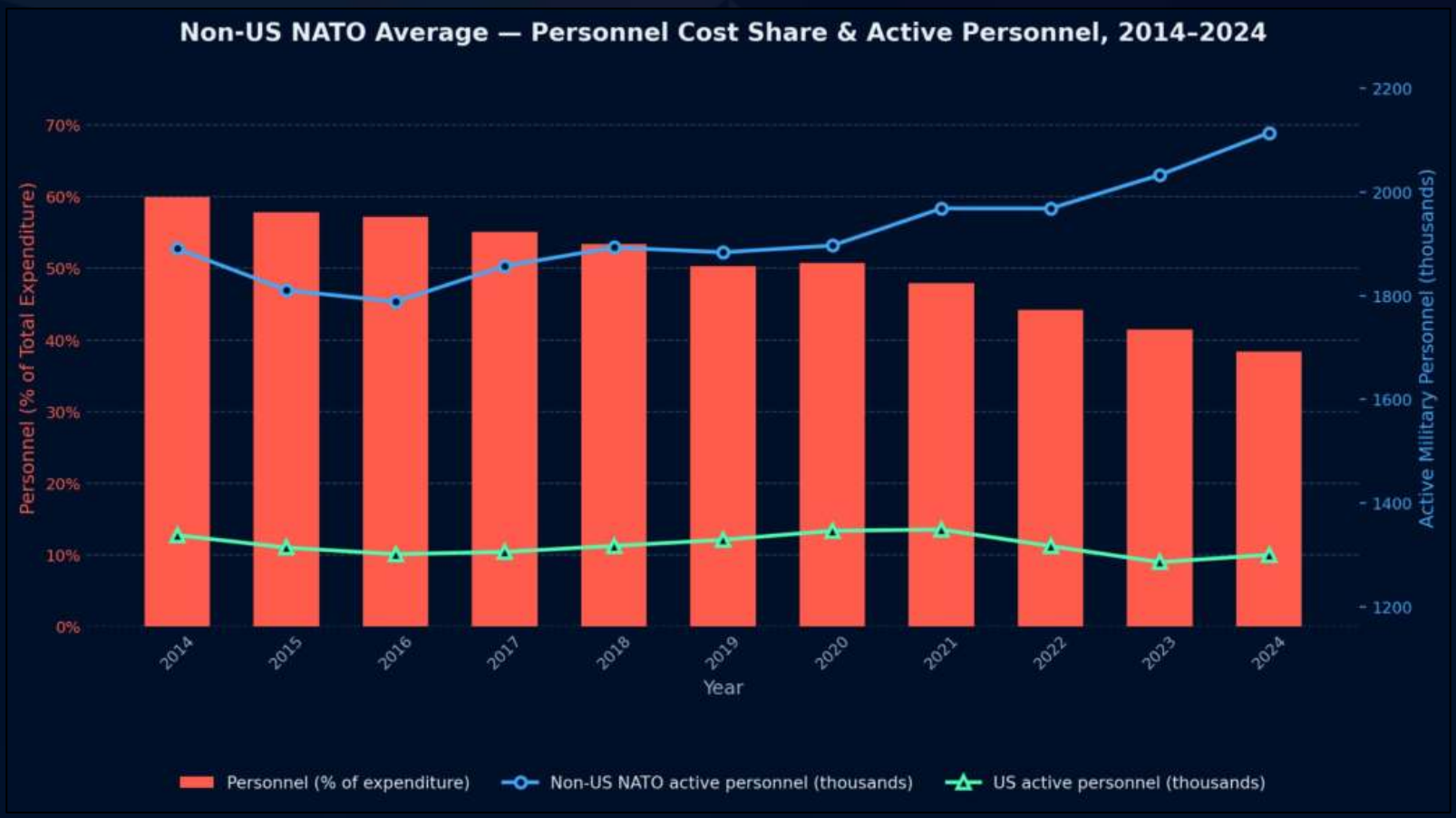




MILITARY CONTRIBUTIONS

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.



MILITARY CONTRIBUTIONS

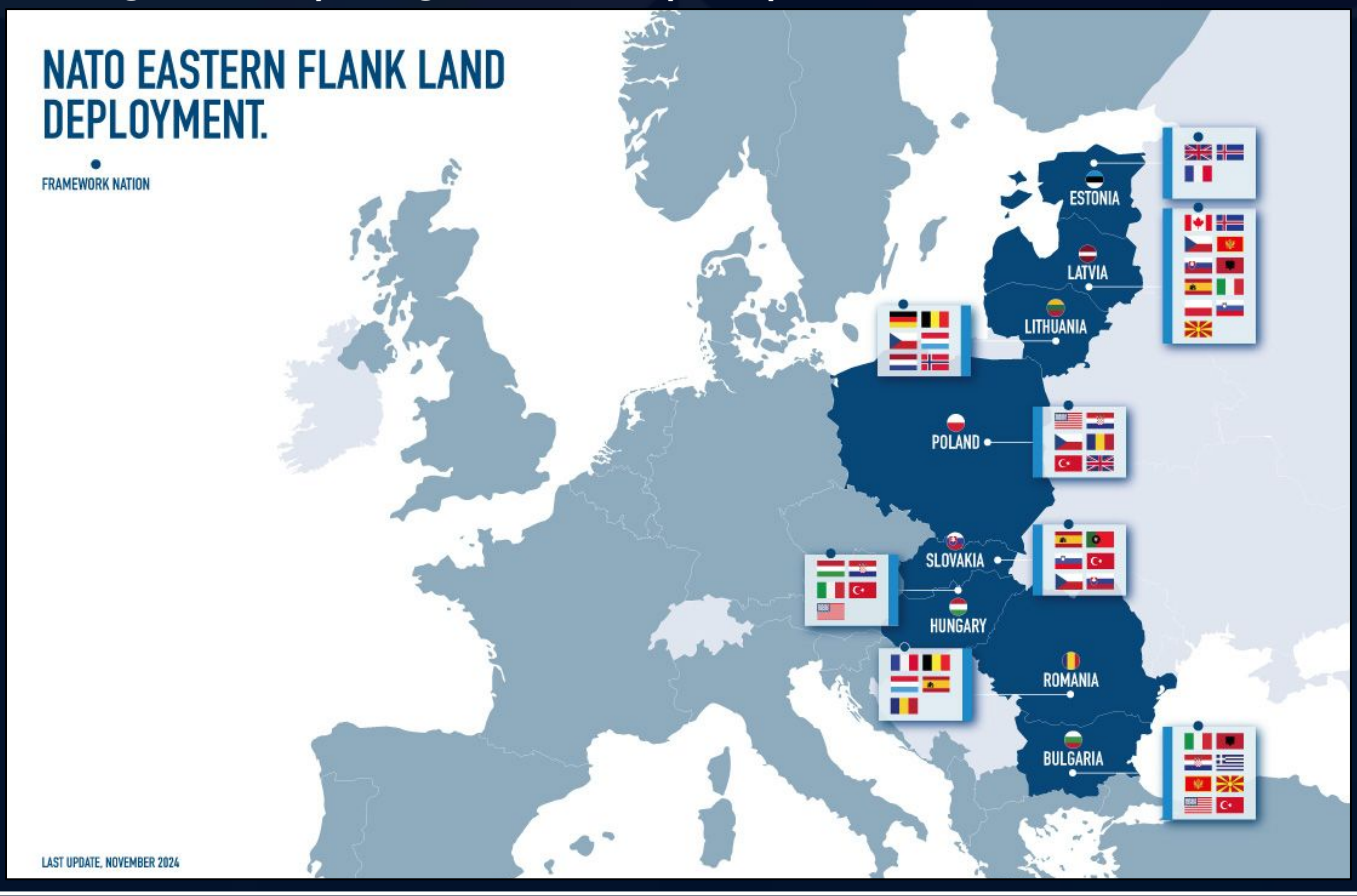
Capability Modernization

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.

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.

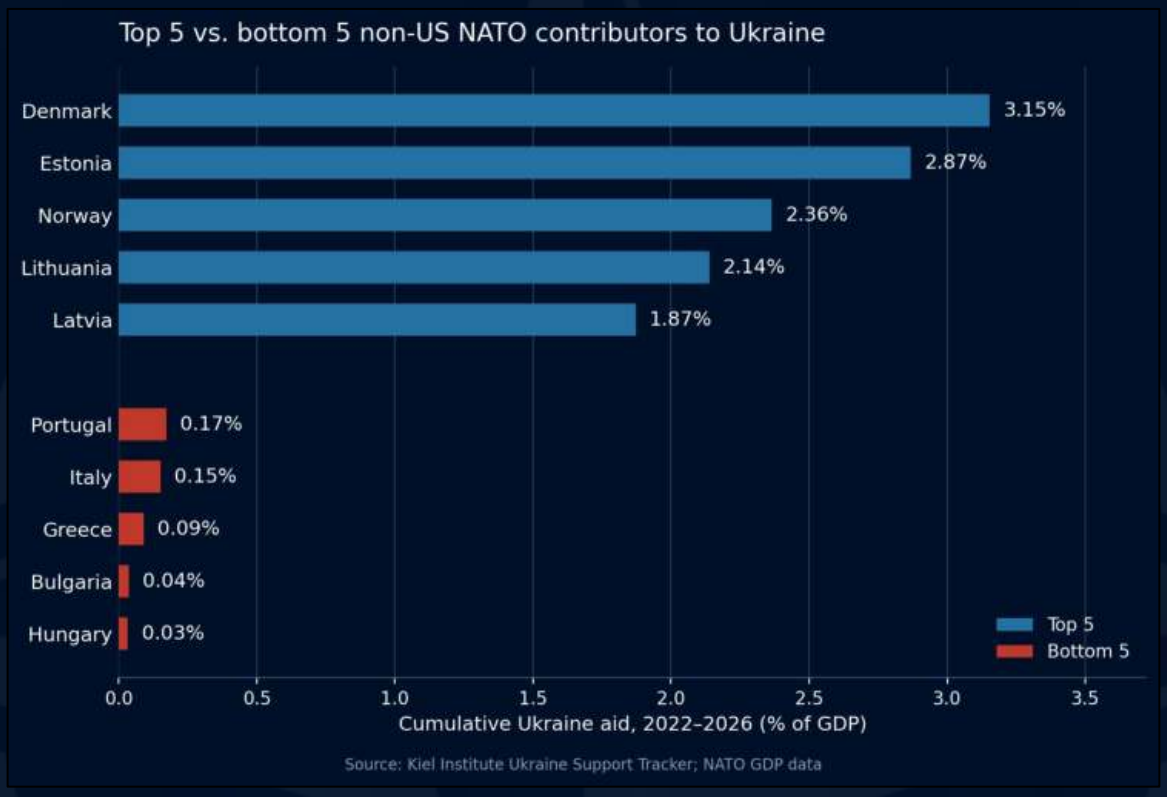
STRATEGIC ALIGNMENT

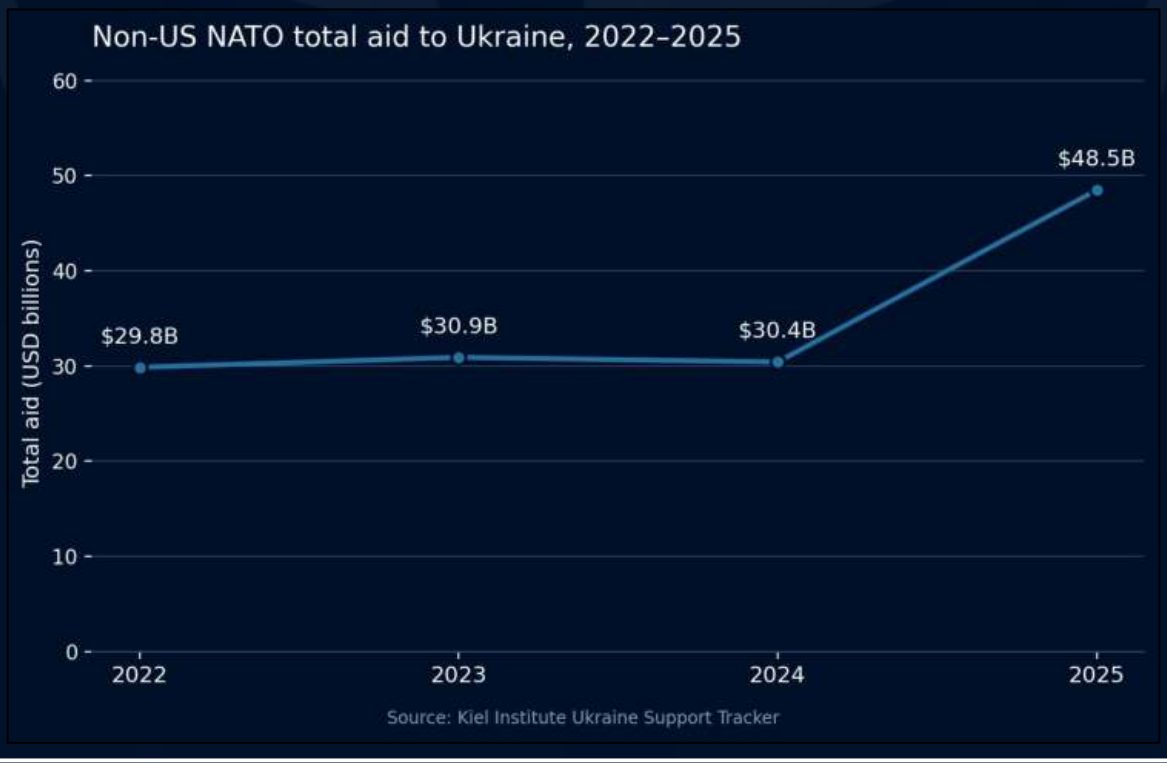
Ukraine Support

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

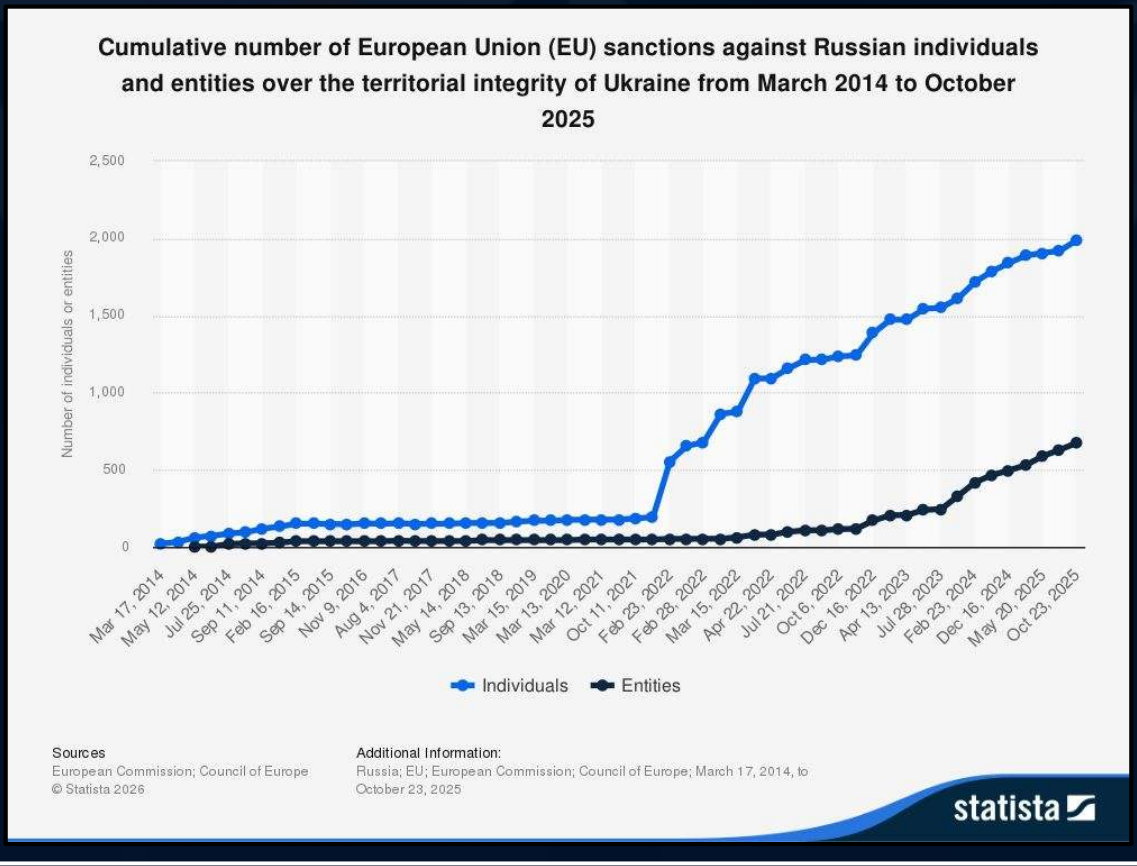




STRATEGIC ALIGNMENT

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.



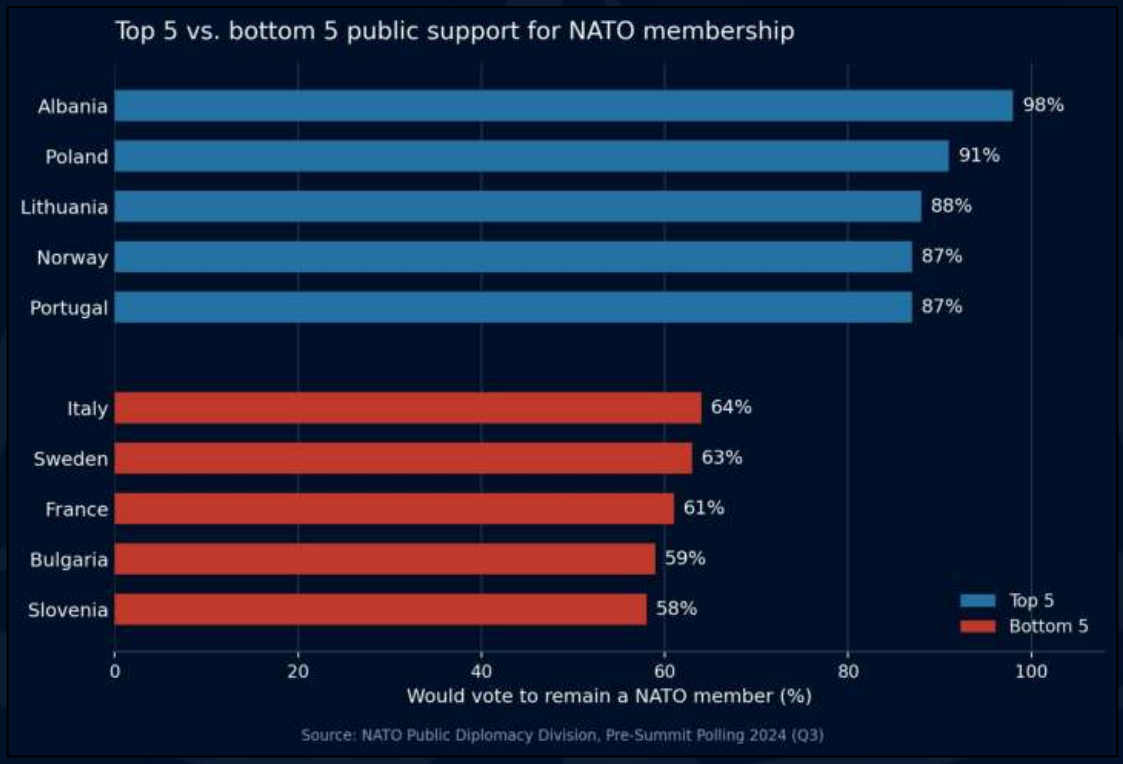
STRATEGIC ALIGNMENT

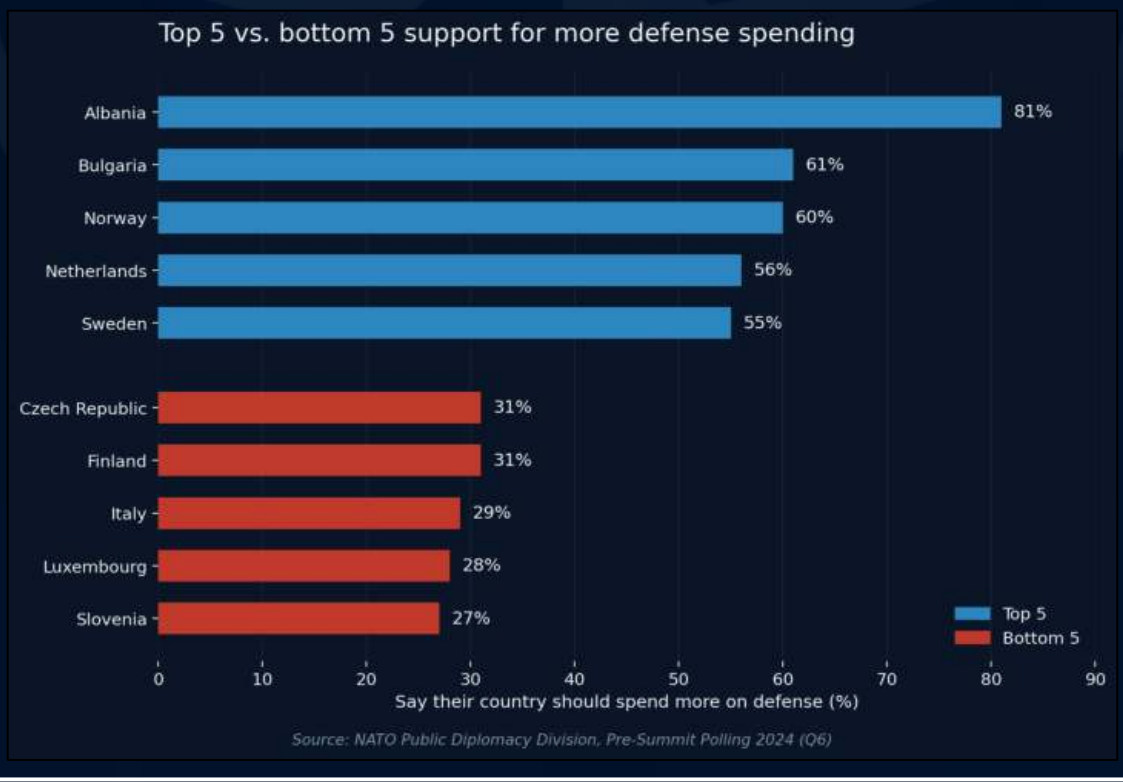
Public Support & Political Resilience

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

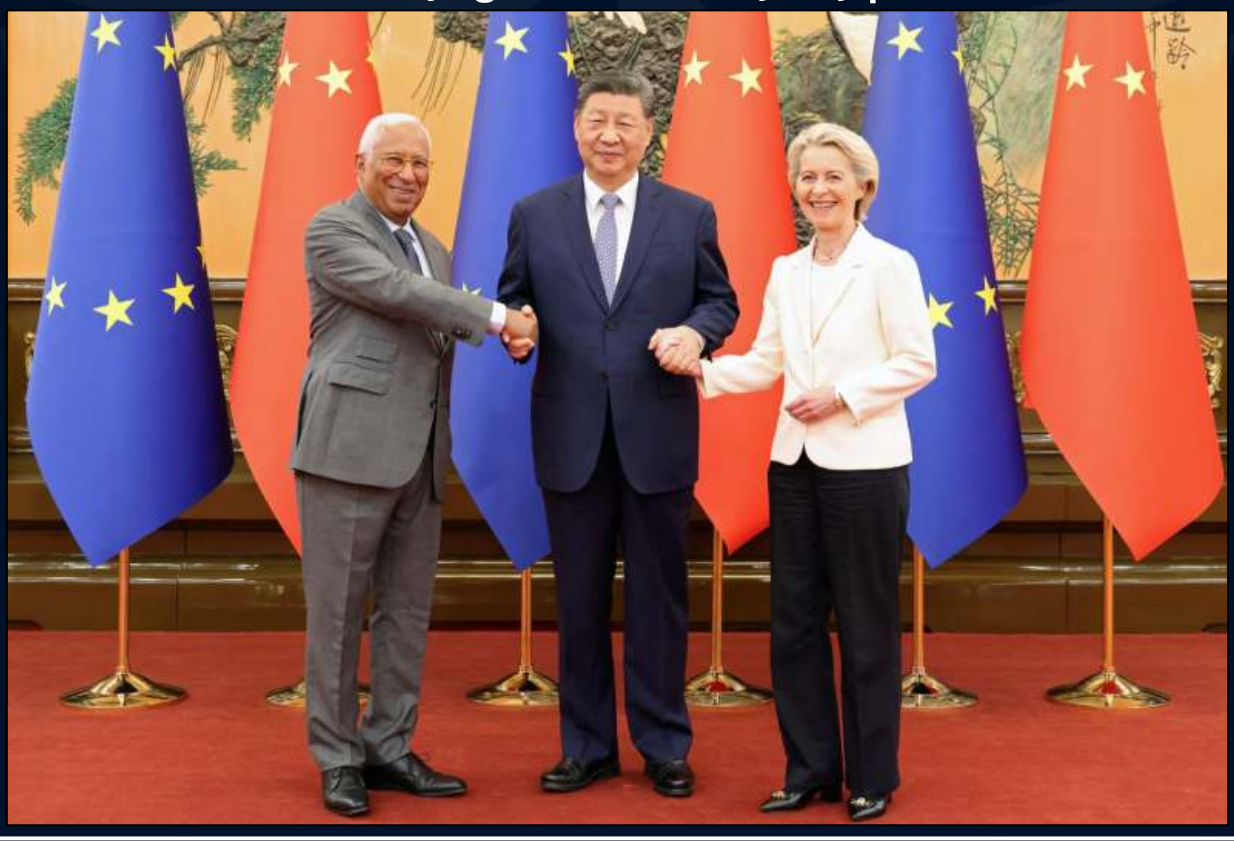




STRATEGIC ALIGNMENT

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.

TIER 1

Model Allies

TIER 1

At A Glance

Every NATO ally contributes to the alliance, but some more than others. Tier 1 allies are not the biggest countries taking advantage of their absolute size to garner prestige—in fact, only one major European country makes the list. Rather, these allies are defined not by meeting expectations but by exceeding them.

Each Tier 1 ally contributes in unique but substantial ways. Almost all exceed the non-US NATO average on defense spending, but that alone is not what earns this designation. What separates Tier 1 allies is leadership. While Tier 2 and Tier 3 countries often require inducement and pressure to meet the basic obligations of alliance membership, Tier 1 allies are demonstrating what genuine engagement looks like: investing in modern military capability, contributing to multiple NATO missions, shouldering alliance burdens out of shared conviction rather than external pressure, maintaining clear-eyed threat assessments, robustly supporting Ukraine's defense, sustaining resilient public support for the alliance, and consistently enabling American and NATO operations when it matters most.

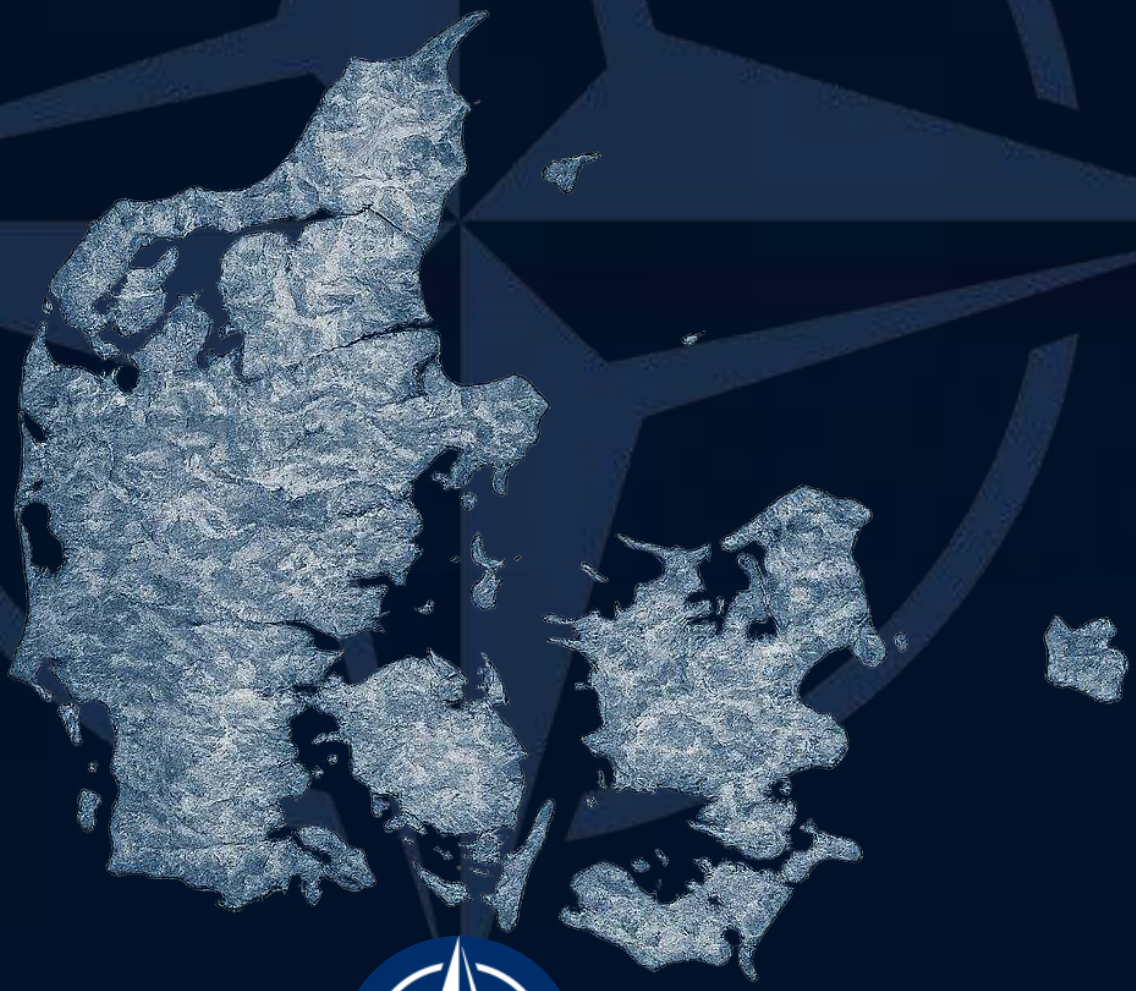
Therefore, these policy recommendations are designed to reward Tier 1 allies for their leadership—and in doing so, create an incentive structure that encourages other allies to aspire to the same standard.

DENMARK

NATO Country Assessment

— TIER ONE —

DEFENSE BUILDUP • UKRAINE LEADERSHIP • ARCTIC & BALTIC SECURITY



AT A GLANCE

Toplines

- **Defense Spending Nearly Tripled in Three Years**: from 1.3% in 2022 to 3.22% in 2025, bolstered by a $7.6B Acceleration Fund, $13.7B long-term plan, and commitment to the full Hague 5% framework.
- **Ukraine's #1 European Supporter at 3.27% of GDP**: $12B allocated, a dedicated $8.8B Ukraine Fund through 2028, and a pioneering model of financing Ukrainian domestic weapons production rather than drawing from allied stocks.
- **Combat-Proven in the Red Sea**: frigate *Iver Huitfeldt* deployed to *Operation Prosperity Guardian* and shot down four Houthi drones, one of the few European allies to take combat action in the theater.

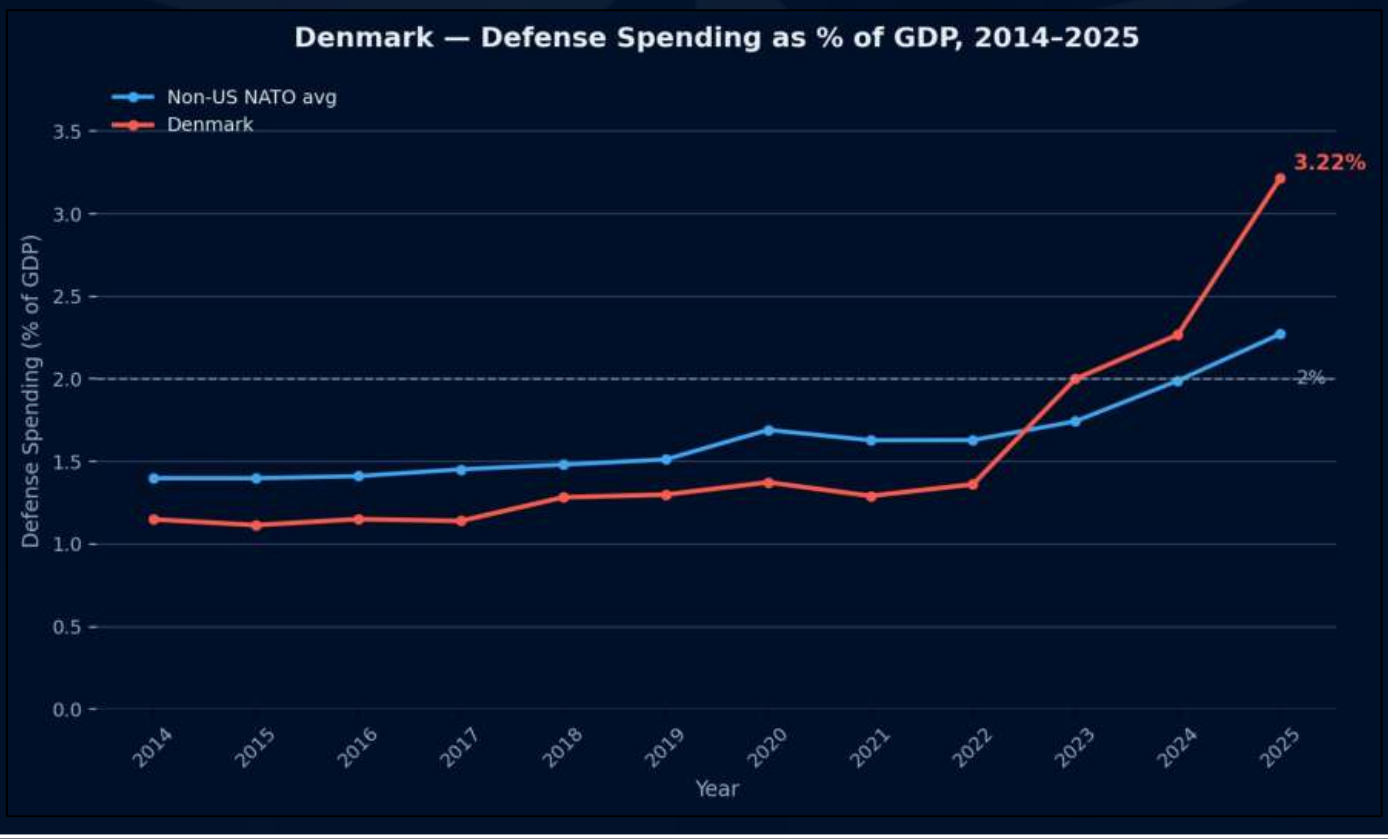
FORCE STRUCTURE AT A GLANCE

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

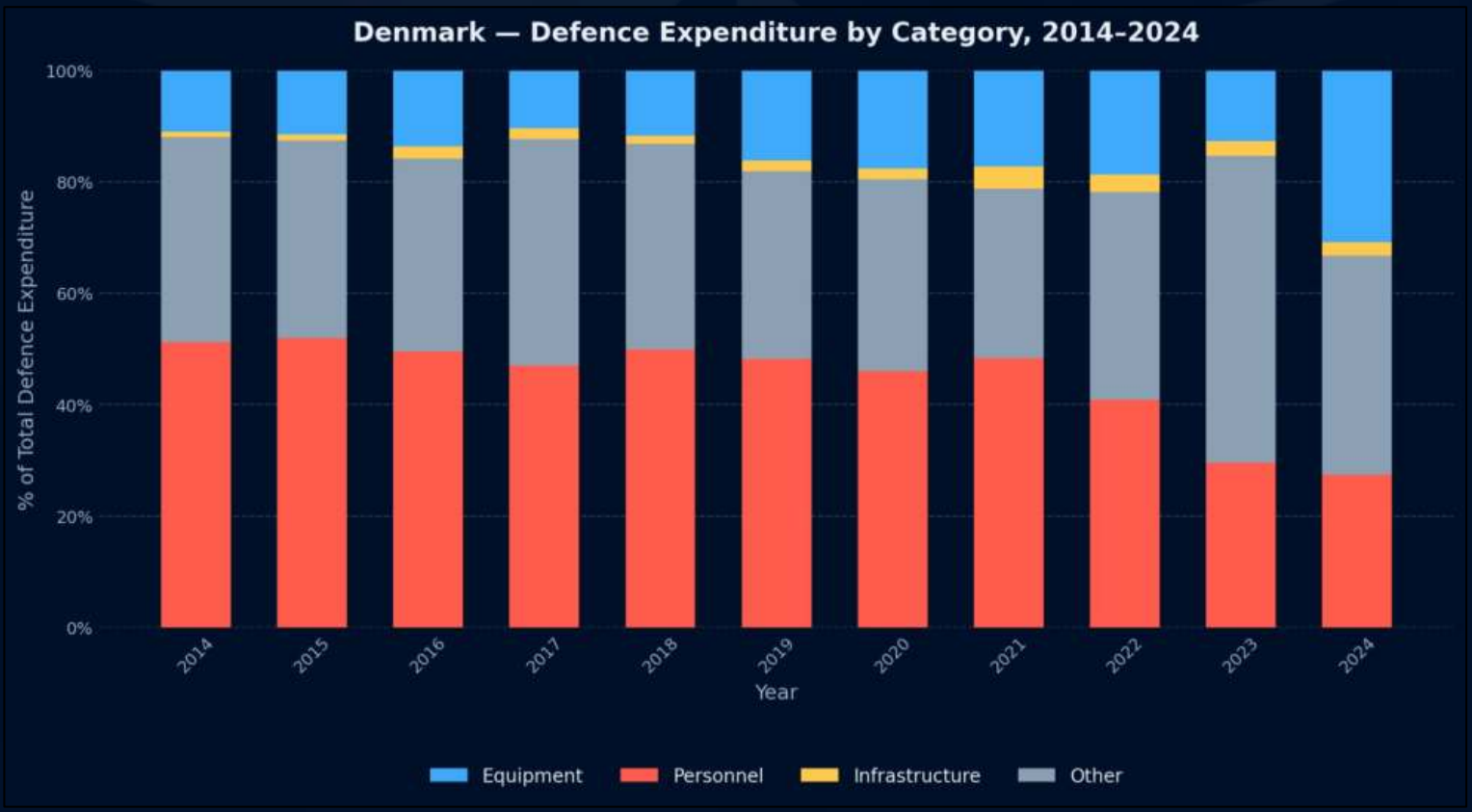
Denmark's defense spending trajectory is one of the most dramatic in the alliance. Spending tracked below the non-US NATO average for most of the past decade and hovering around 1.1–1.3% of GDP through 2022. After the Russian invasion of Ukraine, Danish defense spending accelerated: 2.0% in 2023, 2.3% in 2024, and 3.22% in 2025, now well above the non-US NATO average of 2.5%. The chief enabler was the February 2025 Acceleration Fund of $7B, nearly doubling defense spending in a single year. An additional $13.7B plan through 2033 covering F-35s, air defense, and Arctic capabilities followed in October 2025. Denmark has committed to the Hague 3.5% core plus 1.5% framework by 2035.



MILITARY CONTRIBUTIONS

Equipment Share

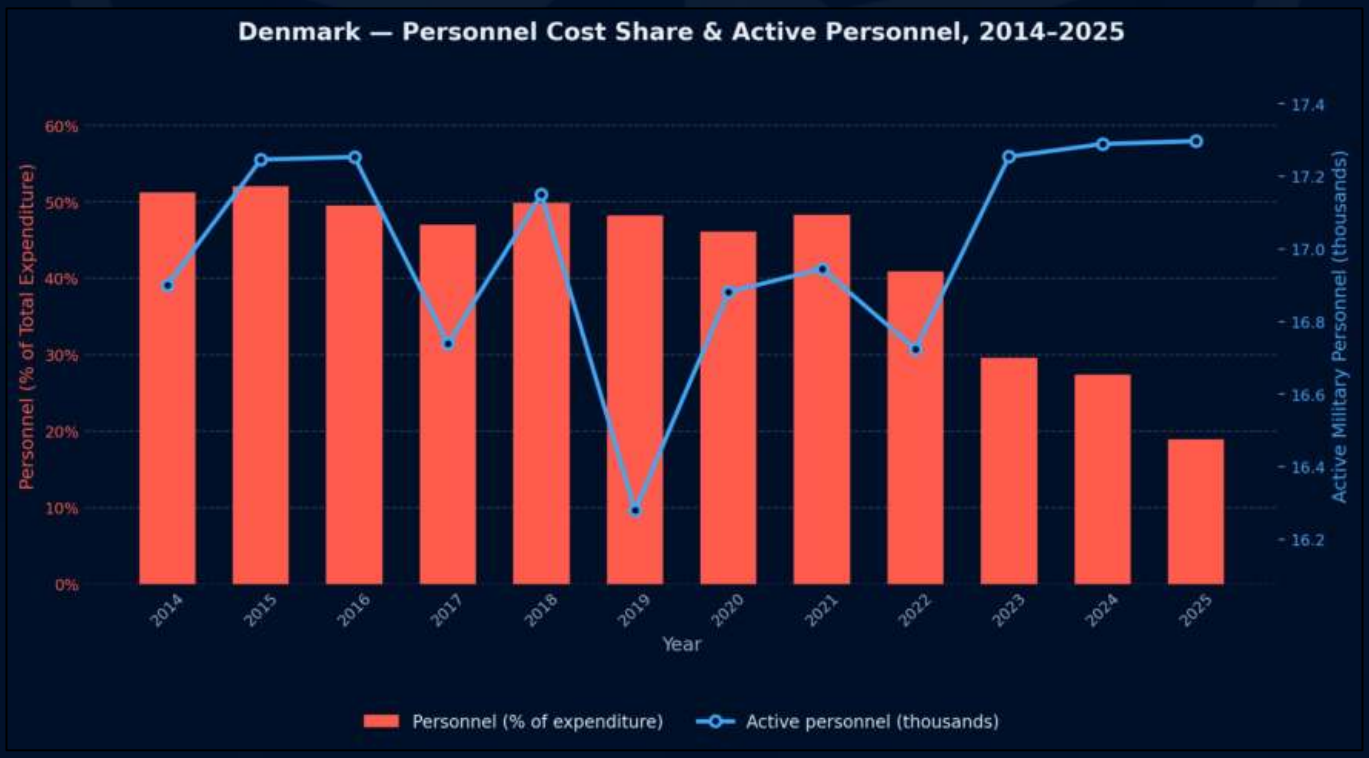
Denmark's equipment share transformation is a model story of transformation. Personnel costs ran at roughly 48–52% of the defense budget through most of 2014–2022, with equipment investment modest and relatively flat. The inflection comes sharply in 2023 and 2024: equipment has surged to roughly 30%+, reflecting the F-35 deliveries, air defense procurement, Naval Strike Missiles, and CV9035 IFVs all registering in actual expenditure simultaneously. Denmark has moved from a personnel-heavy, equipment-light budget to one of the most equipment-dominated spending profiles in the alliance.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Denmark's personnel picture shows a stable but now expanding force. Active military personnel had trended unevenly throughout 2014–2022, with some volatility but no dramatic collapse. Personnel cost share has fallen sharply—from roughly 51% in 2014 to approximately 19% in 2025—not because the force shrank but because the budget grew so fast that equipment investment now dominates. The conscript cohort is being expanded from 5,000 to 7,500 annually by 2033, with national service extended to eleven months, deliberately building mobilizable reserve depth alongside the high-end equipment surge. Denmark is growing the force while freeing budget space for procurement rather than trading one against the other.



MILITARY CONTRIBUTIONS

Capability Modernization

Denmark is executing one of the most comprehensive modernization programs in the alliance. The Headline: 43 F-35As total, replacing their fleet of F-16s. Air defense is the most dramatic shift, Denmark went from zero ground-based coverage to simultaneously procuring IRIS-T SLM, VL MICA, and NASAMS, with a $9B commitment including long-range SAMP/T. Naval strike is being upgraded with Kongsberg Naval Strike Missiles. On land, 115 additional CV9035 IFVs address gaps created by Ukraine transfers. Arctic investment spans five new vessels, East Greenland radar, and a new Nuuk Joint Arctic Command headquarters. MQ-9B Sky Guardians add ISR depth.

MILITARY CONTRIBUTIONS

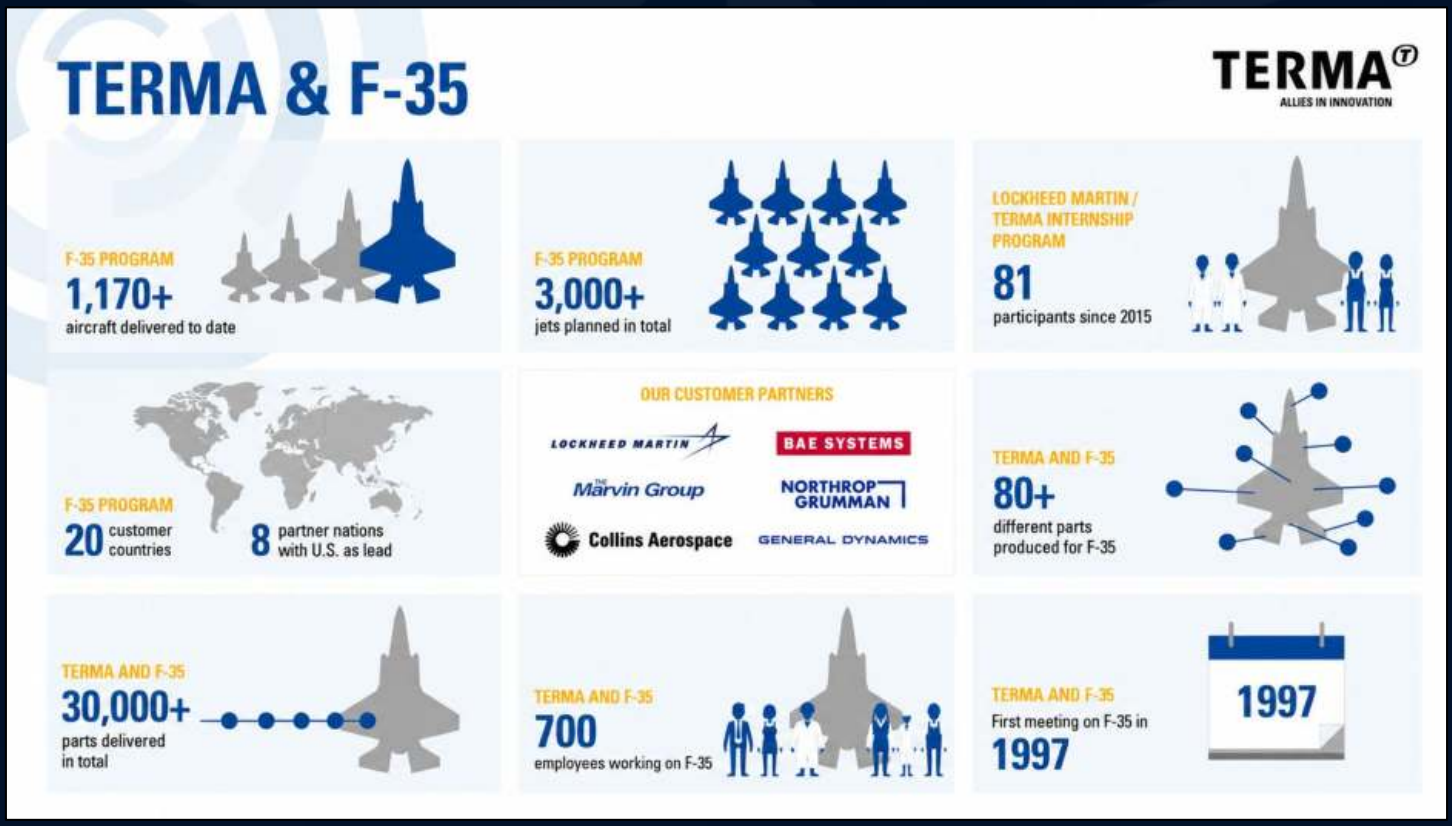
Force Posture

Denmark's force posture is defined by geographic leverage far exceeding its population of six million. Danish territory spans the Baltic approaches, North Sea, and High Arctic through Greenland and the Faroe Islands. Pituffik Space Base in Greenland, operating under the 1951 US-Denmark defense framework, is one of America's most important missile-warning and space-surveillance centers. Denmark co-leads NATO's Multinational Division North with Latvia, commands an 800-troop armored battlegroup in Latvia under Enhanced Forward Presence, and contributes 130 instructors to Operation Interflex training Ukrainian soldiers in the UK. Nordic air integration with Finland, Norway, and Sweden deepens the regional architecture. Denmark doesn't host a large US garrison, but Greenland's strategic value to the US Arctic and missile-defense posture gives it outsized significance.

MILITARY CONTRIBUTIONS

Industrial Base

Denmark's defense industrial base is specialized but strategically valuable. Terma produces electronic warfare systems and radar components embedded in the global F-35 supply chain. Systematic's SitaWare C4ISR software is deployed by multiple NATO allies including the United States, making Denmark a genuine military-software contributor. The July 2025 Denmark-Ukraine defense industry agreement gives Denmark access to Ukrainian battlefield drone innovation in exchange for allowing Ukrainian firms to operate in Denmark—positioning Danish industry at the leading edge of drone warfare development. Denmark also administered roughly €830M in EU frozen-asset windfall proceeds for Ukrainian procurement in 2025, extending its industrial influence well beyond domestic production capacity. Denmark is not a major munitions producer or platform manufacturer, but its software, electronics, and procurement-architecture contributions punch above its size.



STRATEGIC ALIGNMENT

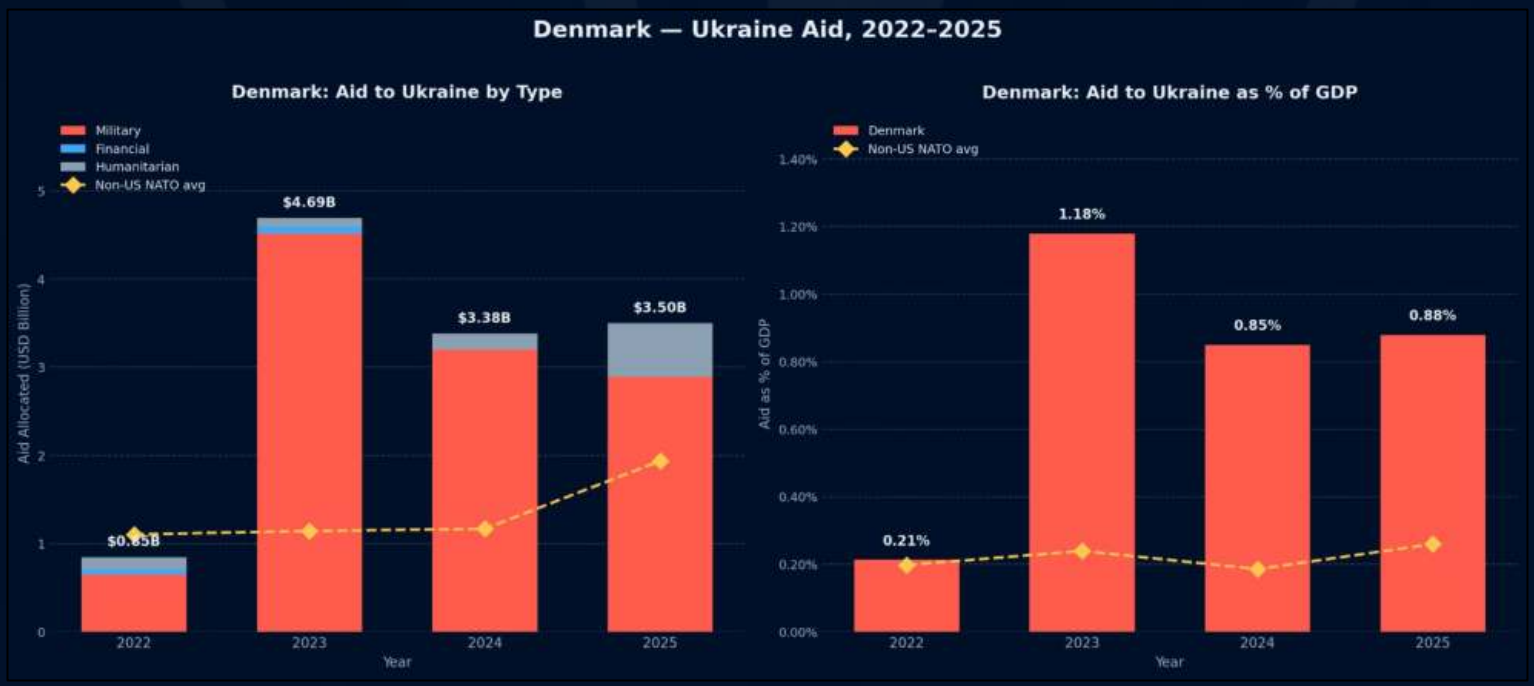
Declared Posture

Denmark's declared posture is among the sharpest in the alliance. The 2024–2033 Defence Agreement frames Russia as the central security threat, and PM Frederiksen has been consistently direct: "We are not safe" and "buy, buy, buy" have defined her public communications on rearmament. The 2025 Arctic and North Atlantic agreements treat the High North as core NATO deterrence terrain. On China, Denmark voted yes on the October 2024 EU Chinese EV tariffs and has explicitly warned against Chinese predatory interest in Arctic mining, airports, and logistics—areas that intersect directly with US missile-warning infrastructure in Greenland. On Iran, Denmark joined the March 2026 Hormuz statement signaling conditional openness to maritime security action. Now Frederiksen's minority government after the March 2026 snap election must balance rearmament ambition against welfare and cost-of-living pressures.

STRATEGIC ALIGNMENT

Ukraine Support

Denmark is Ukraine's number one European supporter contributing massively in aid to Ukraine's fight. Aid surged to $4.69B in 2023 before stabilizing at $3.38B and $3.50B in 2024–2025. The Kiel Institute tracks €11.020B allocated and €12.075B committed (3.272% and 3.586% of GDP) making Denmark top tier alongside the Baltics. The Ukraine Fund provides DKK 60.4B (~$8.8B) in multi-year military support through 2028. Denmark pledged 19 F-16s to Ukraine and helped train Ukrainian pilots. The most distinctive contribution is the financing of weapons manufactured by Ukraine's own defense industry rather than drawing from allied stocks, cutting delivery timelines dramatically. For example, the Bohdana 155mm howitzer moved from contract to battlefield in roughly two months. Denmark also administers €830M in EU frozen-asset windfall proceeds for Ukrainian-industry procurement.



STRATEGIC ALIGNMENT

Russian Decoupling

Denmark's Russian energy decoupling is among NATO's cleanest: no pipeline dependence, no Druzhba crude problem, no Rosatom nuclear, no significant Russian LNG. EU sanctions are implemented without obstruction. The vulnerability is maritime infrastructure. The Nord Stream explosions near Danish and Swedish waters brought the war to the deepsea, and Denmark's geography places it at the center of the pipelines, cables, and chokepoints that the post-Russian European energy system now depends on. Denmark's decoupling position is strong, but the challenge is defending the infrastructure that depends on it.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Denmark posted 85% for staying in NATO, 78% for defending another ally, and 83% feeling more safe from NATO cooperation, all near the top of the alliance. Forty-five percent favored increasing defense spending in 2024, above the alliance average and consistent with Denmark's trajectory well above 2% of GDP and growing toward 3%, and Ukraine support stood at 75% combined, among the alliance's highest. Seventy-nine percent agreed NATO membership makes a foreign attack less likely, and 72% said Russia's war had affected Denmark's security. The Frederiksen Social Democratic government has been one of the most decisive Ukraine supporters in the alliance, and the full parliamentary spectrum from conservatives to social democrats maintains near-total consensus on NATO. No major party challenges alliance membership, and Greenland's political salience has paradoxically strengthened rather than weakened Danish public attachment to NATO solidarity.

STRATEGIC ALIGNMENT

Hedging Behavior

Denmark's hedging behavior record is clean. No BRI participation, no adversary arms procurement, no high-level Moscow or Tehran engagement, no obstruction of Finnish or Swedish accession. Arms procurement is entirely Western: F-35A, NASAMS, IRIS-T SLM, SAMP/T, Naval Strike Missiles, CV9035, MQ-9B. Denmark voted yes on Chinese EV tariffs and has moved to restrict Chinese infrastructure access to Greenland's strategic assets, including ordering Huawei equipment removed from sensitive telecom networks. It did not obstruct Operation Epic Fury and joined the Hormuz statement. While the future of Greenland remains an unresolved point of friction with the Trump Administration, Denmark displays no meaningful hedging concerns.

STRATEGIC ALIGNMENT

Operational Cooperation

Denmark has one of the strongest operational track records in NATO relative to its size. It suffered 44 soldiers killed in Afghanistan—the highest per capita death toll of any NATO ally—deploying nearly 20,000 personnel to the region and was the largest per-capita troop contributor to ISAF. Eight more died in Iraq. On recent operations, Denmark deployed the frigate Iver Huitfeldt to Operation Prosperity Guardian—shooting down four Houthi drones in combat. Denmark also joined the March 2026 Hormuz statement, and did not obstruct Operation Epic Fury. Pituffik Space Base in Greenland provides one of the most important US missile-warning and space-surveillance facilities in the world. Denmark has consistently demonstrated its commitment to the alliance and to shared operations with the United States, at real cost.

ESTONIA

NATO Country Assessment

— TIER ONE —

DEFENSE SPENDING • UKRAINE LEADERSHIP • RUSSIAN DECOUPLING

AT A GLANCE

Toplines

- **NATO's 4th Highest Defense Spender at 3.38% of GDP in 2025:** committed to 5.4% from 2026–2029—outstanding commitment for a country of just 1.4 million.
- **Ukraine's 2nd Highest Donor at 2.8% of GDP Committed:** transferred much of its artillery stock in 2022 including Javelins sent before the full-scale invasion, and co-leads the IT Coalition supporting Ukrainian cyber defense.
- **Complete Russian Energy Decoupling:** including the February 2025 Baltic grid synchronization ending decades of BRELL integration with Russia.

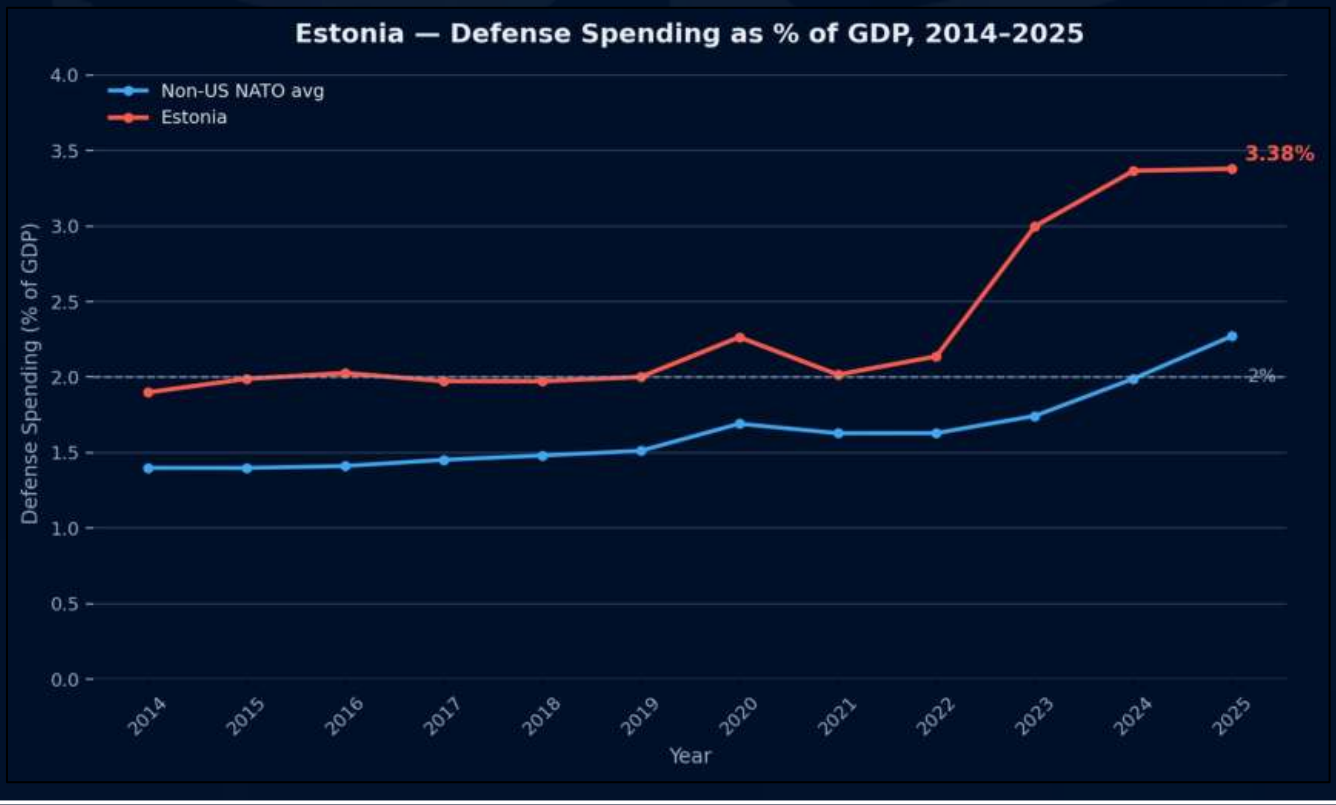
FORCE STRUCTURE AT A GLANCE

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

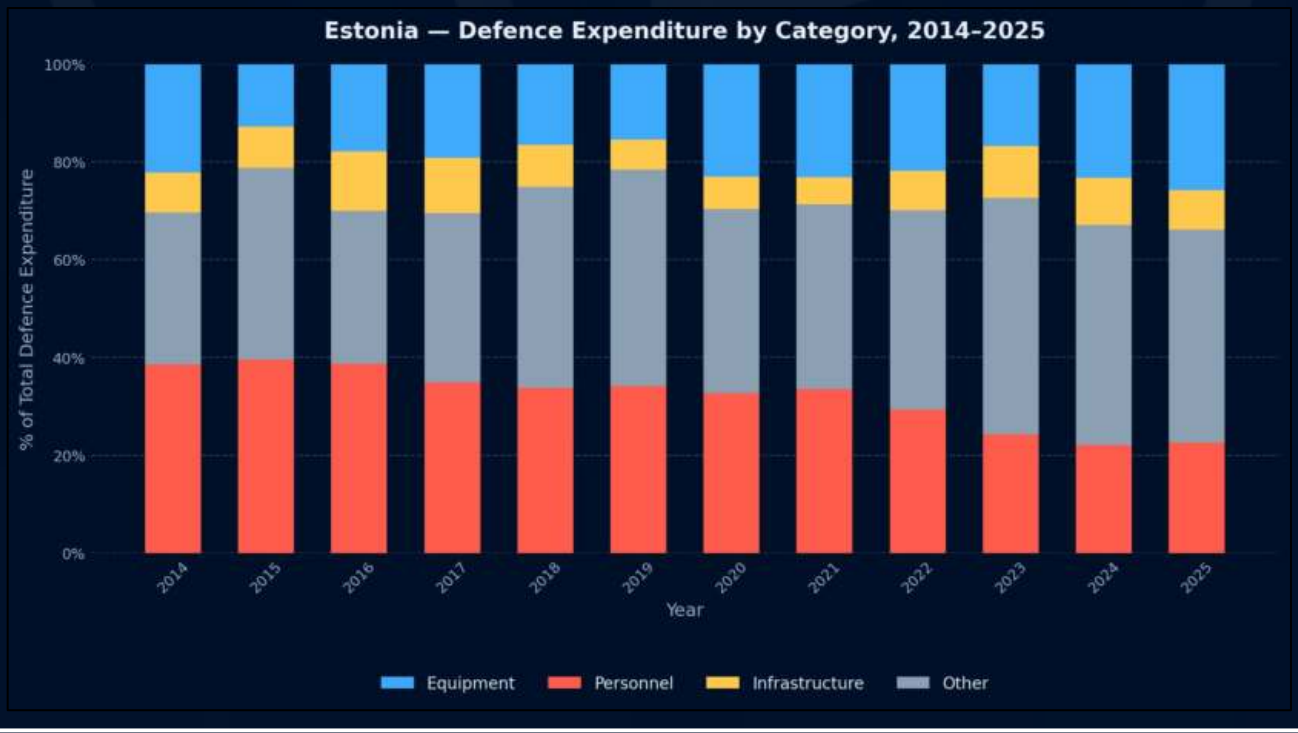
Estonia is one of NATO's most committed allies by defense spending as a share of GDP. Estonia has exceeded 2% of GDP almost every single year since 2014: averaged at 3.37, well before the post-2022 surge reshaped alliance expectations, and now holds at 3.38% of GDP in 2025. Spending has grown from $513M in 2014 to $1.5B in 2025. In April 2025, the government approved a $3.2B supplementary defense investment program committing 5.4% of GDP from 2026 to 2029—one of the highest sustained defense spending commitments in the alliance—with the 2026 budget alone rising 42% to roughly $2.6B. For a country of 1.4 million people with a direct land border with Russia, this is not a political gesture to appease American concerns.



MILITARY CONTRIBUTIONS

Equipment Share

Estonia's equipment share shows an ally consistently arming themselves, cognizant of the risks Europe faces. Personnel costs have fallen from roughly 40% of the defense budget in 2014 to approximately 22% in 2025, while equipment has surged to roughly 20%+, reflecting the scale of capital investment now flowing through the budget. The 2025–2029 investment plan allocates nearly $4B for ammunition alone, with additional procurement across IRIS-T SLM air defense, K239 Chunmoo rocket artillery, CAESAR howitzers, deep-strike munitions, and Baltic Defense Line construction. Estonia's April 2026 decision to redirect a planned €500M IFV program toward drones, air defense, and deep strike captures their acquisition strategy: prioritize what Ukraine's battlefield experience shows actually works over prestige platforms.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Estonia's personnel development is a positive development. Active military personnel has modestly grown from roughly 6,300 in 2014 to approximately 7,800 by 2025 (a 24% increase) while personnel's share of the defense budget has fallen from roughly 39% to approximately 22% over the same period. Estonia is prudently growing its force and freeing budget space for equipment. The foundation is universal male conscription feeding a trained reserve of roughly 40,000 soldiers with regional unit assignments, meaning Estonia's real warfighting mass far exceeds its active headcount. The 2025–2029 defense plan includes significant investment in expanding conscript numbers and reserve readiness. For a country of 1.4 million, Estonia is generating more defense-relevant human capital per capita than virtually any other NATO ally.

MILITARY CONTRIBUTIONS

Capability Modernization

Estonia's modernization strategy is built around a clear lesson from Ukraine: mass fires, deep strike, drones, and air defense matter more than heavy armor. The procurement record reflects this. On fires, Estonia fields 36 self-propelled 155mm howitzers, 6 HIMARS launchers, 12 CAESAR howitzers, and 9 K239 Chunmoo multiple rocket launchers. The Chunmoo's 290km-range CTM-290 tactical ballistic missile gives Estonia one of the few European deep-strike capabilities that can reach Russian territory from Estonian soil. On air defense, IRIS-T SLM batteries are being procured jointly with Latvia, with long-range ballistic missile defense under evaluation at over €1B. On unmanned systems, Estonia redirected the entire CV90 IFV replacement program toward drones and loitering munitions, with up to €150M specifically allocated for drone acquisition within the 2026–2029 plan. Ground forces field 44 CV9035 IFVs now being modernized, 130 Arma APCs, and Javelin and Spike-LR anti-tank missiles. The strategy is robust: maximize deterrence by investing in the capabilities Ukraine's battlefield has proven decisive.

MILITARY CONTRIBUTIONS

Force Posture

Estonia's force posture is built around one core idea: make any Russian attack immediately costly by building a large multinational force in country. The UK-led NATO battlegroup in Estonia is the most credible tripwire on NATO's eastern front. Any Russian attack immediately engages four major NATO allies simultaneously. Ämari Air Base hosts continuous NATO air policing rotations. Estonia's reserve system adds roughly 18,000 trained reservists plus 21,000 Defence League volunteers. The Baltic Defense Line under construction with Latvia and Lithuania adds physical barrier infrastructure along the Russian border. Estonia also hosts NATO's Cyber Defence Centre of Excellence in Tallinn, reflecting its leading role in alliance cyber security. US HIMARS rotations provide visible deep-strike signaling to Moscow.

MILITARY CONTRIBUTIONS

Industrial Base

Estonia's defense industrial base is small but strategically relevant in two domains that matter most for modern warfare. Milrem Robotics produces the THeMIS unmanned ground vehicle and is developing the TYPE-X robotic combat vehicle, placing Estonia at the leading edge of NATO's unmanned ground systems development. Estonia's cyber sector, hardened after Russia's 2007 cyberattacks and anchored by the CCDCOE, provides direct support to Ukraine's cyber defenses and represents a genuine strategic capability. Estonia is not a major munitions producer, but its role in the IT and Drone Coalitions for Ukraine extends its industrial influence in a meaningful way.

STRATEGIC ALIGNMENT

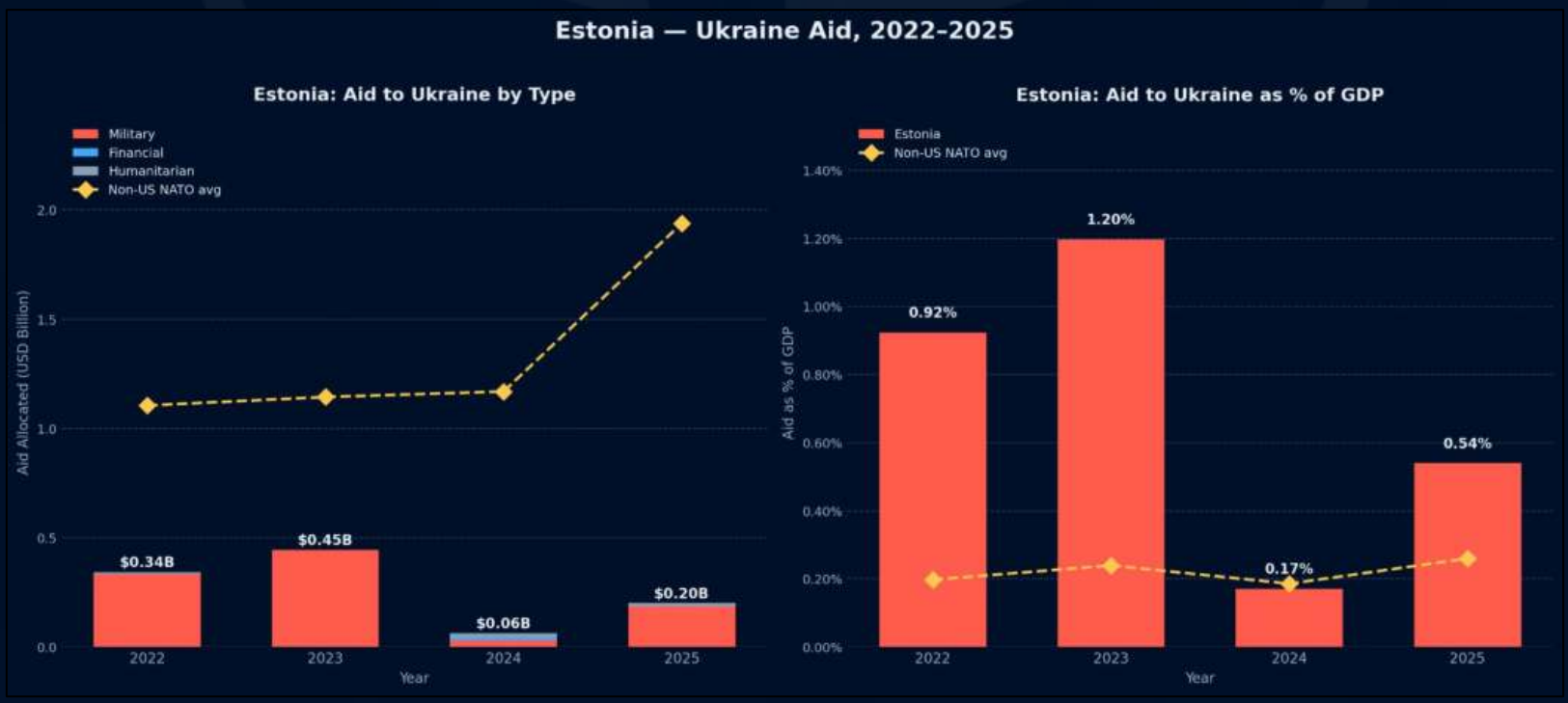
Declared Posture

Estonia's declared posture is one of the most explicit in NATO. The 2023 Foundations of Estonian Security Policy and National Defence Development Plan 2022–2031 treat Russia as an existential, urgent, and lasting threat. The Estonian Foreign Intelligence Service assessed in 2024 that Russia is likely anticipating conflict with NATO within the next decade. Estonia invoked NATO Article 4 in September 2025 after three Russian MiG-31s violated Estonian airspace for 12 minutes. On China, Estonia restricts Chinese 5G participation, voted yes on Chinese EV tariffs, and identifies Chinese-linked APTs as central cyber threats. Estonia also withdrew from the Ottawa anti-personnel mine treaty alongside Latvia, Lithuania, Finland, and Poland. This was a serious step toward genuine territorial defense.

STRATEGIC ALIGNMENT

Ukraine Support

Estonia's Ukraine aid shows a consistent pattern of giving well above the non-US NATO average every year: 0.92% of GDP in 2022, peaking at 1.20% in 2023, dipping to 0.17% in 2024, and recovering to 0.54% in 2025. Kiel tracks €0.958B allocated and €1.182B committed (roughly 3% and 3.76% of GDP) top-tier globally alongside Latvia and Denmark. Early transfers included Javelins sent before the full-scale invasion, 36 D-30 howitzers, 24 FH-70 155mm howitzers, Igla MANPADS, drones, and Soviet-caliber ammunition. Estonia effectively transferred much of its artillery stock in 2022, creating real capability gaps it has been backfilling ever since. Estonia co-leads the IT Coalition with Luxembourg, and hosts the CCDCOE whose cyber expertise directly supports Ukrainian defense. For a country of 1.4 million, the contribution is extraordinary.



STRATEGIC ALIGNMENT

Russian Decoupling

Estonia's Russian energy decoupling is complete. It historically relied on domestic oil-shale electricity rather than Russian gas, giving it robust insulation most European allies lacked. Russian gas imports ceased in 2022. The final component was in February 2025 during the Baltic grid synchronization with the Continental European network, ending decades of BRELL integration with Russia and Belarus and eliminating Estonia's last systemic Russian energy dependency. No Rosatom footprint. Estonia has supported every EU Russia sanctions package through the 20th. Estonia attempted to stop a suspected sanctions-busting vessel in May 2025 and Russia briefly sent a fighter jet into NATO airspace in response.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Estonia recorded 83% for staying in NATO, 78% feeling more safe from NATO cooperation, and 69% agreeing their country should defend another NATO ally, all reflecting a public for which alliance membership is existential rather than merely strategic. Eighty percent said Russia's war had affected Estonia's security, the fourth-highest figure in the survey, and Ukraine support stood at roughly 67% combined. Forty-one percent favored increasing defense spending in 2024, a figure that substantially understates actual policy commitment as the government has pledged 5%+ of GDP by 2029. The political leadership has maintained full cross-party consensus on the NATO commitment despite a ruling coalition whose approval has fallen to historic lows ahead of 2026 elections. EKRE has been critical of EU integration and immigration policy but remains firmly within the NATO consensus, meaning no credible mainstream force advocates scaling back alliance contributions.

STRATEGIC ALIGNMENT

Hedging Behavior

Estonia's hedging behavior record is spotless. No BRI exposure, no adversary arms procurement, no high-level Moscow or Beijing engagement during the war period, no obstruction of any NATO or EU position. Estonia downgraded diplomatic relations with Russia after 2022. Arms procurement is entirely Western: HIMARS, IRIS-T SLM, CAESAR, K9 Thunder, Javelin, Spike-LR and Soviet equipment being systematically retired. Estonia pushed for stronger Russia sanctions, triggered Article 4 over Russian airspace violations rather than absorbing them quietly, and restricted Chinese 5G participation.

STRATEGIC ALIGNMENT

Operational Cooperation

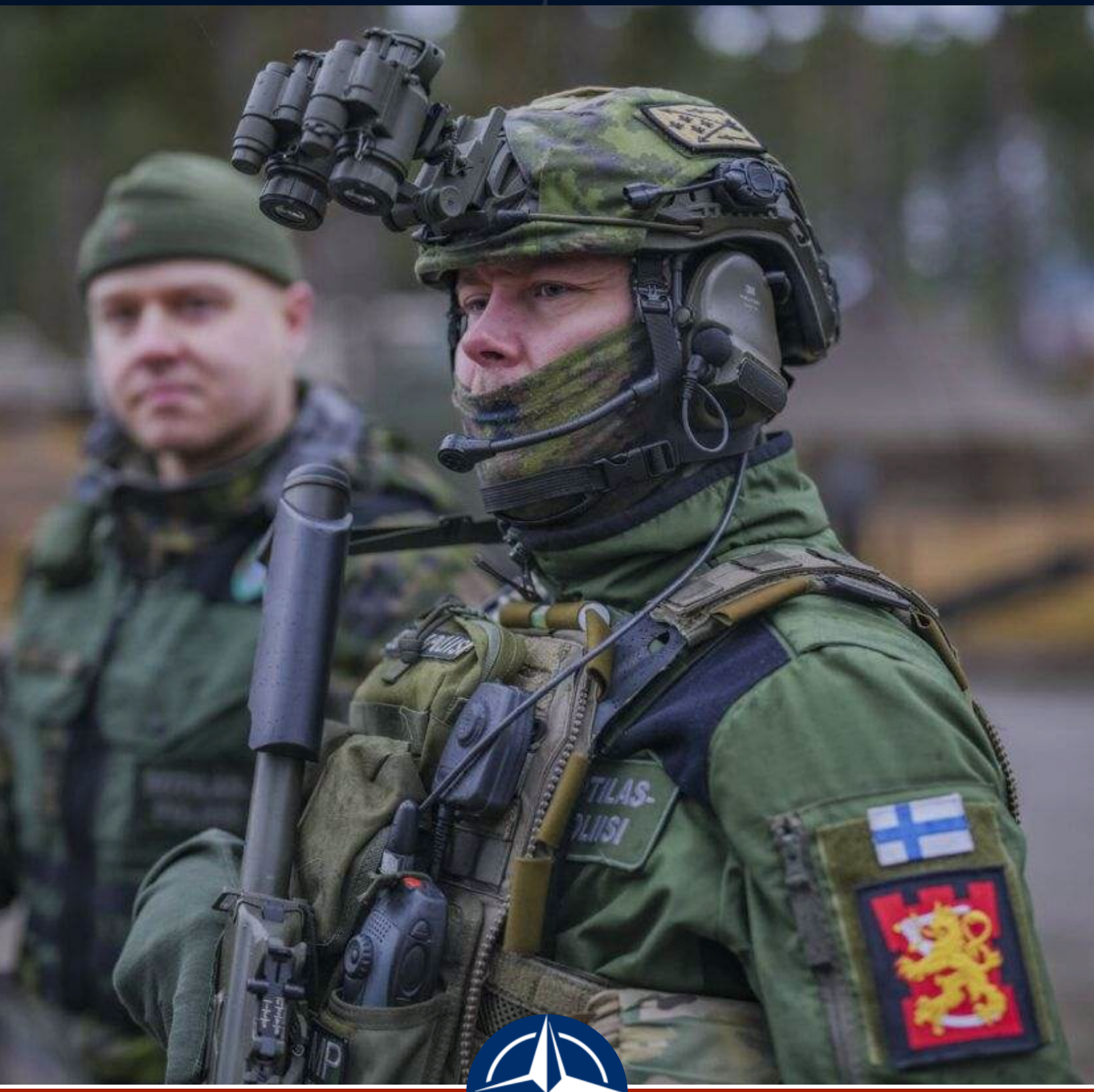
Estonia has contributed to US-led operations in Afghanistan and Iraq, and consistently deploys to NATO missions including KFOR. On recent US operations it has been fully supportive: no obstruction of Operation Epic Fury, full Iran sanctions alignment, and the closest possible bilateral defense relationship through the US-Estonia Defense Cooperation Agreement. The most important operational contribution to NATO is Tapa: hosting contingents of allied troops that are permanently embedded in the FLF Estonia battlegroup alongside British, French, and Danish forces. Ämari hosts continuous NATO air policing. Estonia's HIMARS and incoming Chunmoo deep-strike systems provide one of the few European national capabilities able to strike Russian territory. NATO's CCDCOE in Tallinn is the alliance's primary cyber defense hub.

FINLAND

NATO Country Assessment

— TIER ONE —

DEFENSE SPENDING • POWER PROJECTION • AIR DOMINANCE

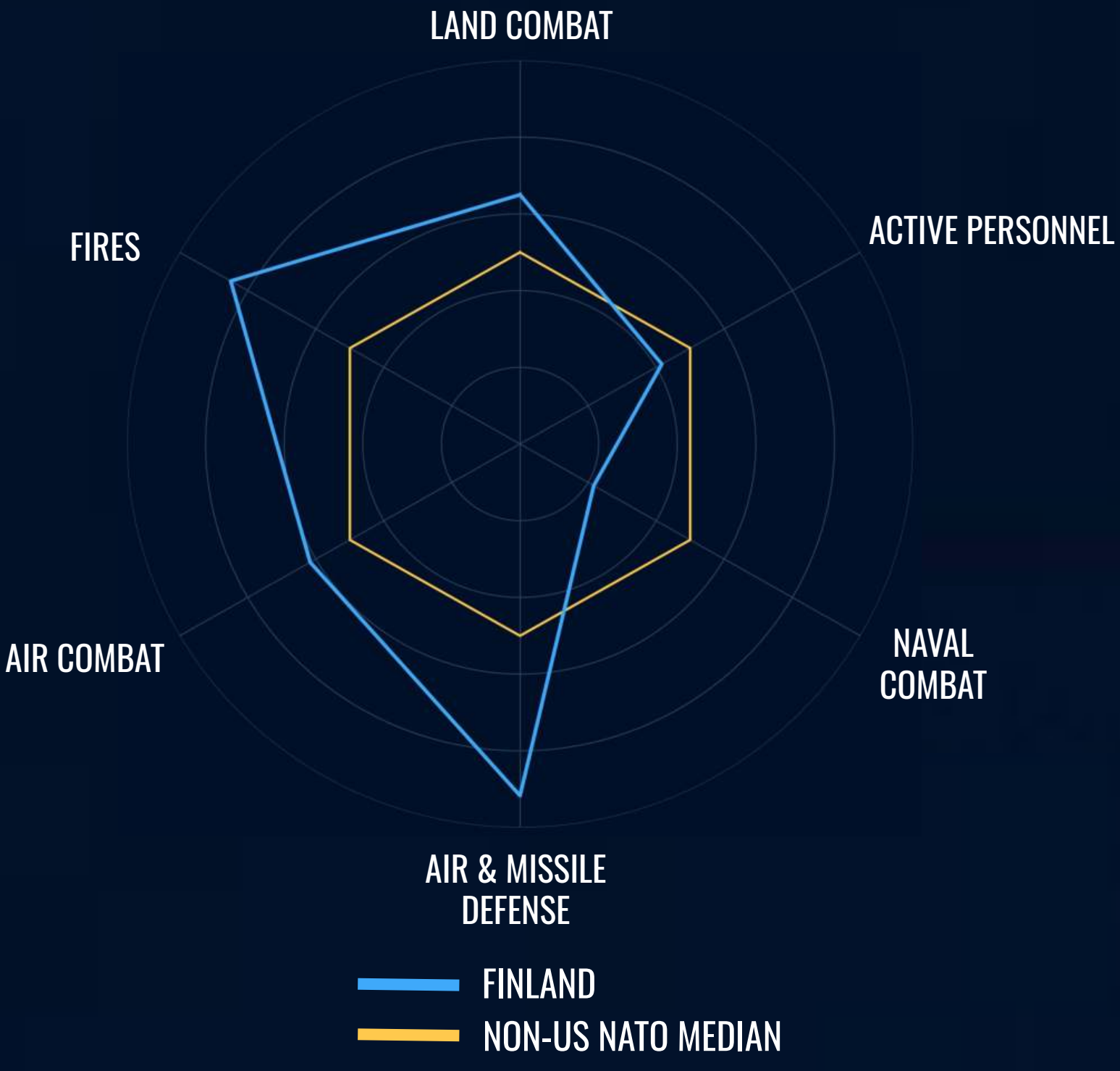


AT A GLANCE

Toplines

- **Committing to Tomorrow's Defense:** from 1.67% of GDP in 2022 to 2.77% in 2025, with a commitment to 3% by 2029, Finland is accelerating defense spending.
- **Strong Partner for American Power Projection:** granting unimpeded US access to 15 facilities, including five near the Russian border, authorized by astounding unanimous parliamentary vote.
- **64 F-35As Under a $10B Contract with AGM-158 JASSM Cruise Missiles:** the largest fighter fleet in Northern Europe when complete and a rare European standoff deep-strike capability.

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

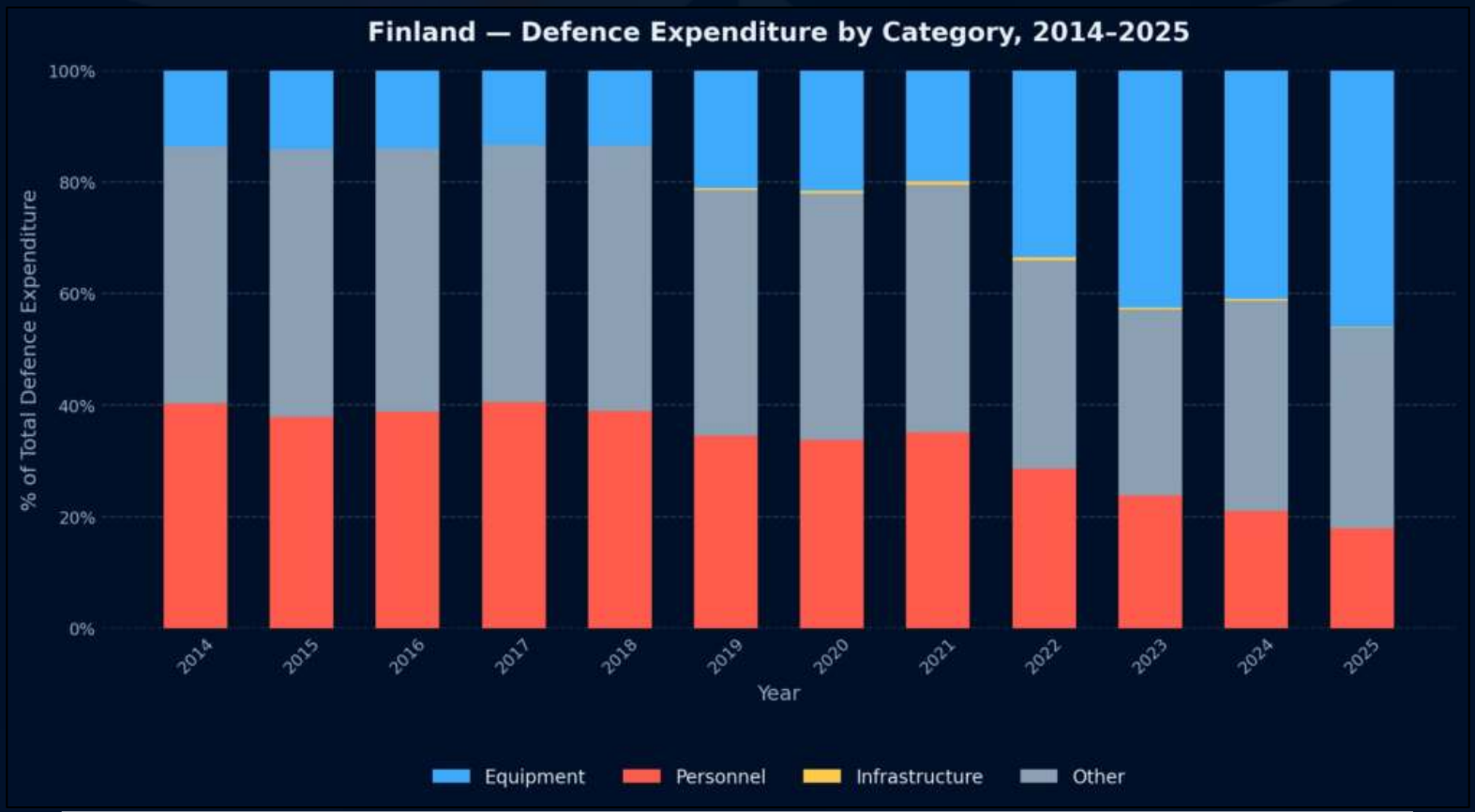
Defense Spending Level

Finland's defense spending trajectory is among NATO's most serious. Finland's investment is roughly in line with the non-US NATO average since 2014, then breaking sharply higher in 2022: 1.67% in 2022, 2.11% in 2023, 2.41% in 2024, and 2.77% in 2025. The government has committed to at least 3% by 2029 and accepted the Hague 3.5% core plus 1.5% framework by 2035. This comes from a country that never fully demilitarized after the Cold War and is now simultaneously pursuing NATO integration, F-35 transition, corvette construction, air defense layering, and ammunition stockpiling. Finland joins NATO with an already strong track record making them an important force multiplier to European deterrence.

MILITARY CONTRIBUTIONS

Equipment Share

Finland's equipment share transformation is significant. Personnel costs fell from roughly 40% in 2014 to approximately 19% in 2025 while equipment surged to roughly 40%+ by 2024–2025, driven by the $10B F-35A program, four Pohjanmaa-class corvettes, David's Sling air defense, and K9 Thunder howitzers all registering simultaneously. The "Other" procurement-adjacent category also remains substantial. Finland entered NATO with a higher equipment share than most Western European allies because it never fully hollowed out its territorial defense posture: the current surge is acceleration from an already serious baseline, not a recovery from neglect.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Finland's personnel picture reflects a force always prudent of the threat it faced. Active military personnel have held relatively stable at roughly 30,500–32,500 throughout 2014–2025, with no dramatic collapse of the kind seen in other countries. Personnel cost share has fallen sharply (from roughly 40% in 2014 to approximately 19% in 2025) not because the force shrank but because the budget grew fast enough that equipment now dominates. The deeper personnel story is the reserve: Finland maintains a 900,000-strong trained reserve fed by universal male conscription, giving it a mobilizable force that dwarfs its active headcount and is larger than most NATO allies' entire military. That reserve structure is the product of decades of consistent investment. Finland never dismantled it during the post-Cold War period when most European allies were cutting equivalent capabilities. NATO accession has added new integration requirements, with Finnish personnel adapting to NATO command frameworks.

MILITARY CONTRIBUTIONS

Capability Modernization

Finland's modernization program is comprehensive and starts from a stronger baseline than most NATO allies. The headline: 64 F-35As under a $10B contract (the largest fighter fleet in Northern Europe when complete) equipped with AGM-158 JASSM cruise missiles giving Finland a rare European standoff deep-strike capability. Air defense is already layered: Patriot PAC-3 MSE, NASAMS II, Crotale NG, and ASRAD, with David's Sling being added for long-range ballistic missile defense. Ground forces are robust: 200 Leopard 2 MBTs, 48 K9 Thunder howitzers, 41 M270 MLRS, and hundreds of additional artillery pieces. Four Pohjanmaa-class corvettes are being built under the Squadron 2020 program, each equipped with ESSM, anti-ship missiles, and torpedoes. Drone and counter-drone procurement was accelerated in April 2026 in direct response to Ukraine war lessons. Finland is upgrading an already serious force.

MILITARY CONTRIBUTIONS

Force Posture

Finland's NATO accession in April 2023 gave the alliance its longest direct land border with Russia at roughly 1,340km. The US-Finland Defense Cooperation Agreement, in force since September 2024, grants US forces unimpeded access to 15 agreed facilities including five near Russia, with pre-positioning of equipment and personnel authorized by unanimous parliamentary vote. NATO's Multi-Corps Land Component Command Northwest became operational at Mikkeli in September 2025, making Finland a NATO command node. NATO Forward Land Forces Finland will be based at Rovaniemi and Sodankylä under Swedish framework leadership. Combined with Swedish accession, the Nordic region has transformed from a gap in NATO's planning architecture into an integrated defense space.

MILITARY CONTRIBUTIONS

Industrial Base

Finland's defense industrial base is strategically significant in several domains. Patria, the state-owned defense prime, produces the AMV 8×8 armored vehicle fielded by Finland, Poland, Sweden, and South Africa, and manufactures F-35 front fuselages and F135 engine maintenance. This makes Finland an important manufacturing partner within the global F-35 supply chain. Rauma Marine Constructions is building all four Pohjanmaa-class corvettes domestically. Finland has substantially expanded domestic ammunition and explosives production since 2022, with stockpile reserves deeper than most NATO allies. On raw materials, Finland holds significant deposits of cobalt, nickel, lithium, and rare earth elements critical to batteries, electronics, and precision munitions. Nokia provides trusted domestic telecom infrastructure reducing exposure to high-risk vendors.

STRATEGIC ALIGNMENT

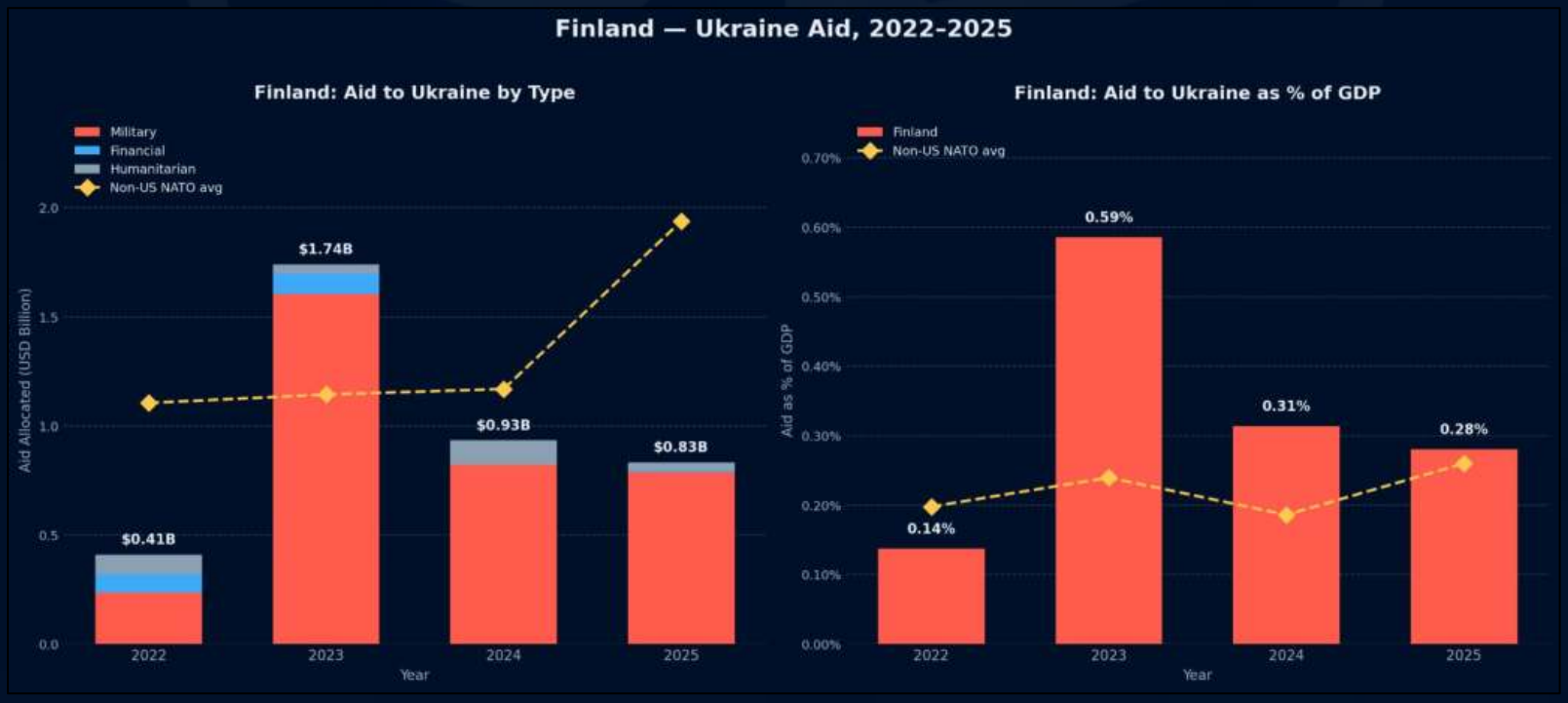
Declared Posture

Finland's declared posture is among the clearest in NATO. The 2024 Foreign and Security Policy Report and 2024 Defence Report explicitly treat Russia's war against Ukraine as driving a long-term existential threat to European security. This is backed by action: 1,340km of Russian border, closed border crossings as hybrid coercion countermeasures, and Ottawa Treaty withdrawal enabling reintroduction of anti-personnel mines. On China, Finland increasingly treats Beijing as a long-term security risk, though PM Orpo's January 2026 Beijing visit and the October 2024 EU EV-tariff abstention place Finland softer than other NATO countries on facing the China threat. Finland's declared strategy and actual investment are unusually well aligned.

STRATEGIC ALIGNMENT

Ukraine Support

Finland's Ukraine aid peaked at $1.74B in 2023 (0.59% of GDP, well above the non-US NATO average) before settling at $0.93B and $0.83B in 2024–2025, still running above the alliance average. Kiel tracks €3.605B allocated and €4.433B committed (1.43% and 1.76% of GDP) substantially military-heavy across 33 packages totaling roughly €3.4B in defense materiel by May 2026. Finland participates across the artillery, F-16, and Drone Coalitions and the Czech Ammunition Initiative. Finland's operational secrecy policy—not disclosing package contents or delivery routes—enabled transfers without political delays, particularly important before NATO accession when Finland was navigating a complex diplomatic environment.



STRATEGIC ALIGNMENT

Russian Decoupling

Finland's Russian energy decoupling was rapid and comprehensive. Before 2022, roughly one-third of Finnish energy came from Russia across oil, gas, coal, electricity, and nuclear. After the invasion, each dependency was cut: Russia terminated gas supply in May 2022 and Finland substituted through alternatives; Russian electricity imports ended; Russian oil was replaced through Western markets; and the Hanhikivi nuclear project with Rosatom was terminated entirely. Finland's limited gas dependence made the transition more manageable than other European countries. Sanctions enforcement has scaled dramatically, with hundreds of investigations annually replacing the pre-war handful.

STRATEGIC ALIGNMENT

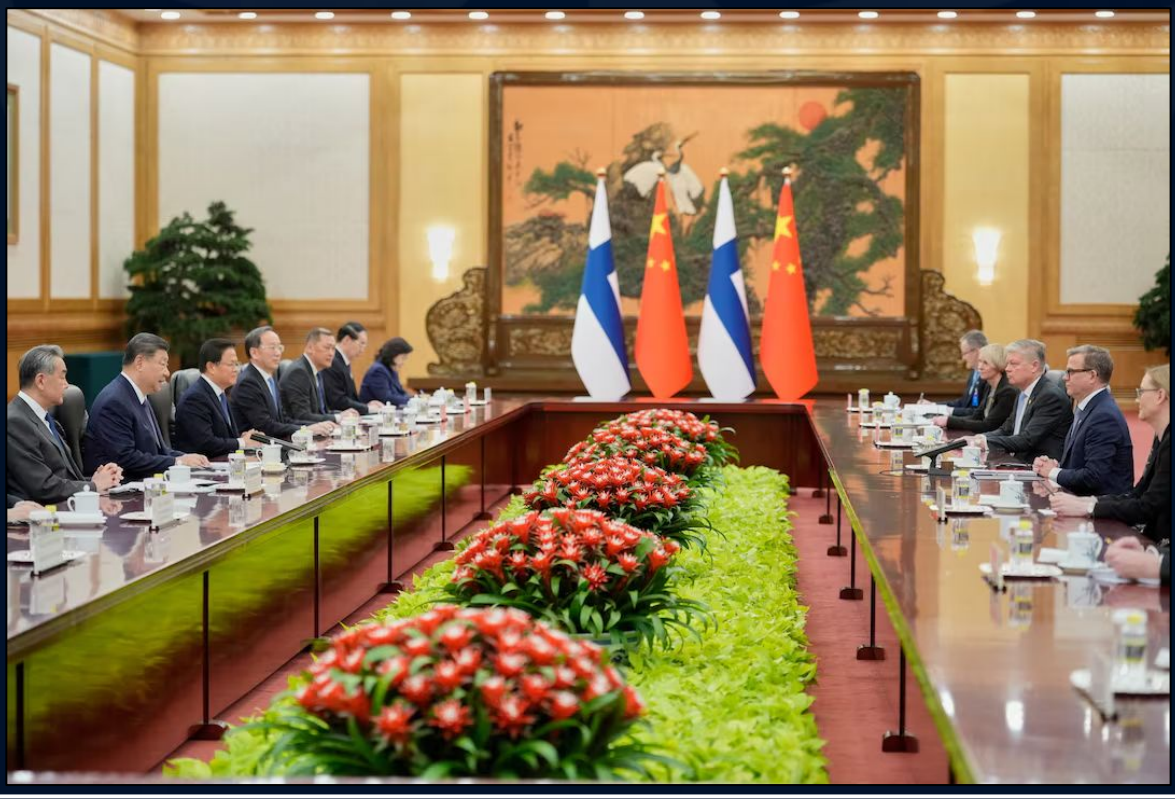
Public Support & Political Resilience

Eighty-three percent of Finns said in 2024 they would vote to stay in NATO, remarkable for a country that formally joined only in April 2023, while 73% agreed Finland should defend another ally and 79% agreed NATO membership makes a foreign attack less likely. Seventy-nine percent said Russia's war had affected Finland's security, among the highest figures in the survey, and Ukraine support stood at around 81% combined. The Orpo government is firmly pro-NATO, and the Finns Party, historically NATO-skeptic, has fully embraced NATO membership as a national security imperative since 2022. The Social Democrats, who governed during the accession decision under Marin, remain committed, leaving essentially no mainstream opposition to NATO membership in Finland. The alignment question has been settled with unusual speed and political consensus.

STRATEGIC ALIGNMENT

Hedging Behavior

Finland's hedging behavior record is strong with a couple worrying developments with China. No BRI participation, no adversary arms procurement, no Moscow or Tehran engagement, no obstruction of EU sanctions or NATO enlargement. Arms procurement is entirely Western: 64 F-35As, David's Sling, K9 Thunder, M270 MLRS, Patria domestic production. The two China signals worth noting: President Stubb's October 2024 Beijing visit and PM Orpo's January 2026 Beijing visit were mostly based on trade rather than hedging against the United States. The October 2024 EU EV-tariff abstention is the softest mark in the record. Neither rises to true counter-alignment: Finland's security posture toward China on telecom, infrastructure, and Arctic access is genuinely hard. However, the high-level Beijing engagement warrants monitoring given Finland's Arctic position and critical minerals profile.



STRATEGIC ALIGNMENT

Operational Cooperation

Finland was not a NATO member during Iraq and Afghanistan but notably still contributed to both as a partner nation, deploying to ISAF and coalition stabilization efforts. Since accession in April 2023, integration has been exceptionally fast. The US-Finland Defense Cooperation Agreement grants access to 15 facilities including five near Russia, with US pre-positioning authorized by unanimous parliamentary vote. NATO's Multi-Corps Land Component Command Northwest became operational at Mikkeli in September 2025, making Finland a command-generating nation. On recent US operations, Finland has not hindered American action: no obstruction of Operation Epic Fury, full Iran sanctions alignment, and active Baltic Sentry participation. For a country that was formally non-aligned three years ago, the speed of operational integration with the United States is remarkable.

LATVIA

NATO Country Assessment

— TIER ONE —

DEFENSE SPENDING • POWER PROJECTION • AIR DOMINANCE

AT A GLANCE

Toplines

- **Legislating Trump's Demands for a Strong NATO:** parliament passed legislation requiring 5% of GDP on defense by 2027, years ahead of the Hague 2035 deadline, and backed by actual budgets reaching 4.91% of GDP in 2026.
- **A European Outpost in Advanced Technologies:** Latvian companies delivered roughly 12,000 drones to Ukraine in 2025 alone, establishing Latvia as a meaningful producer in NATO's most operationally relevant emerging capability.
- **Refusing to Support China's Subversive Activities:** Latvia exited the China-CEE/16+1 format (a Chinese initiative for building economic ties with Central and Eastern Europe) back in August 2022, well ahead of most NATO members, signaling it wasn't interested in deepening economic dependence on Beijing.

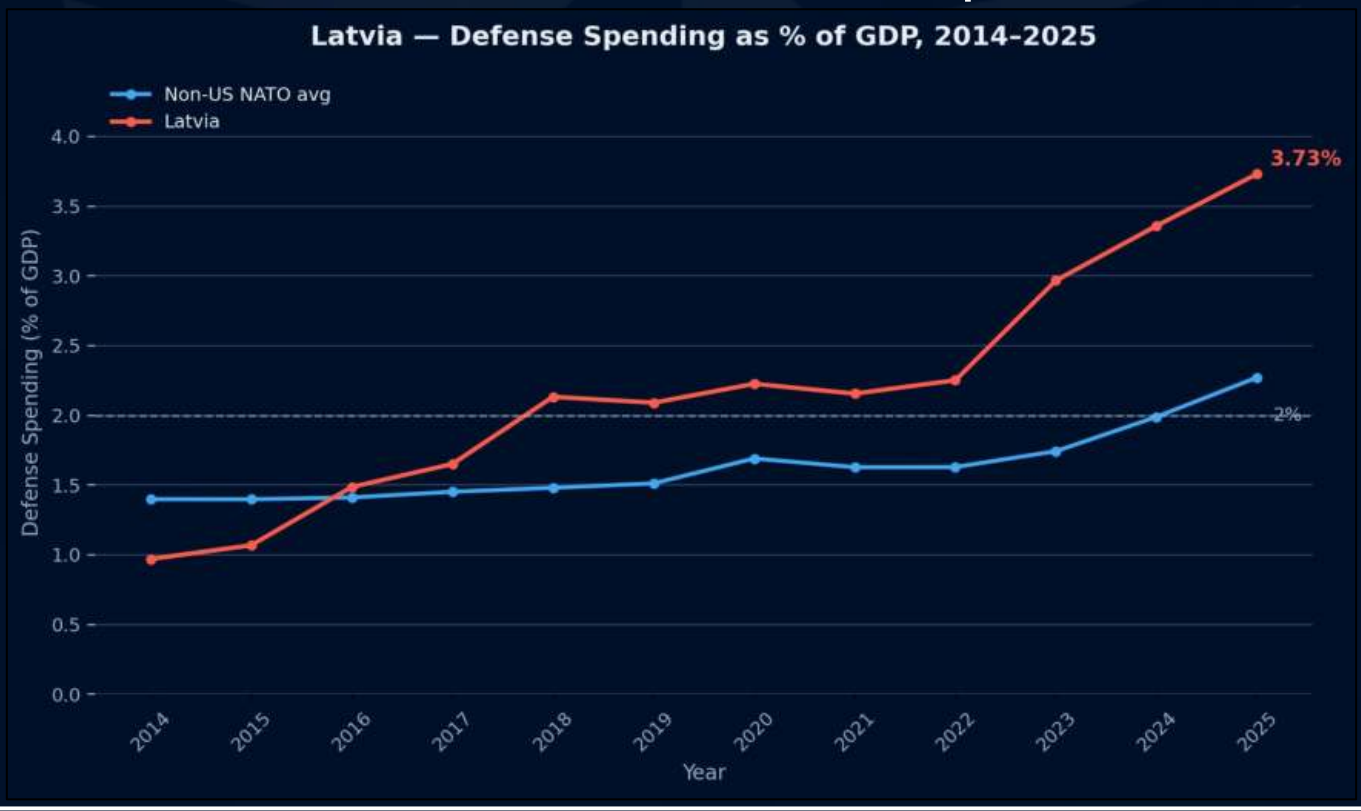
FORCE STRUCTURE AT A GLANCE

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

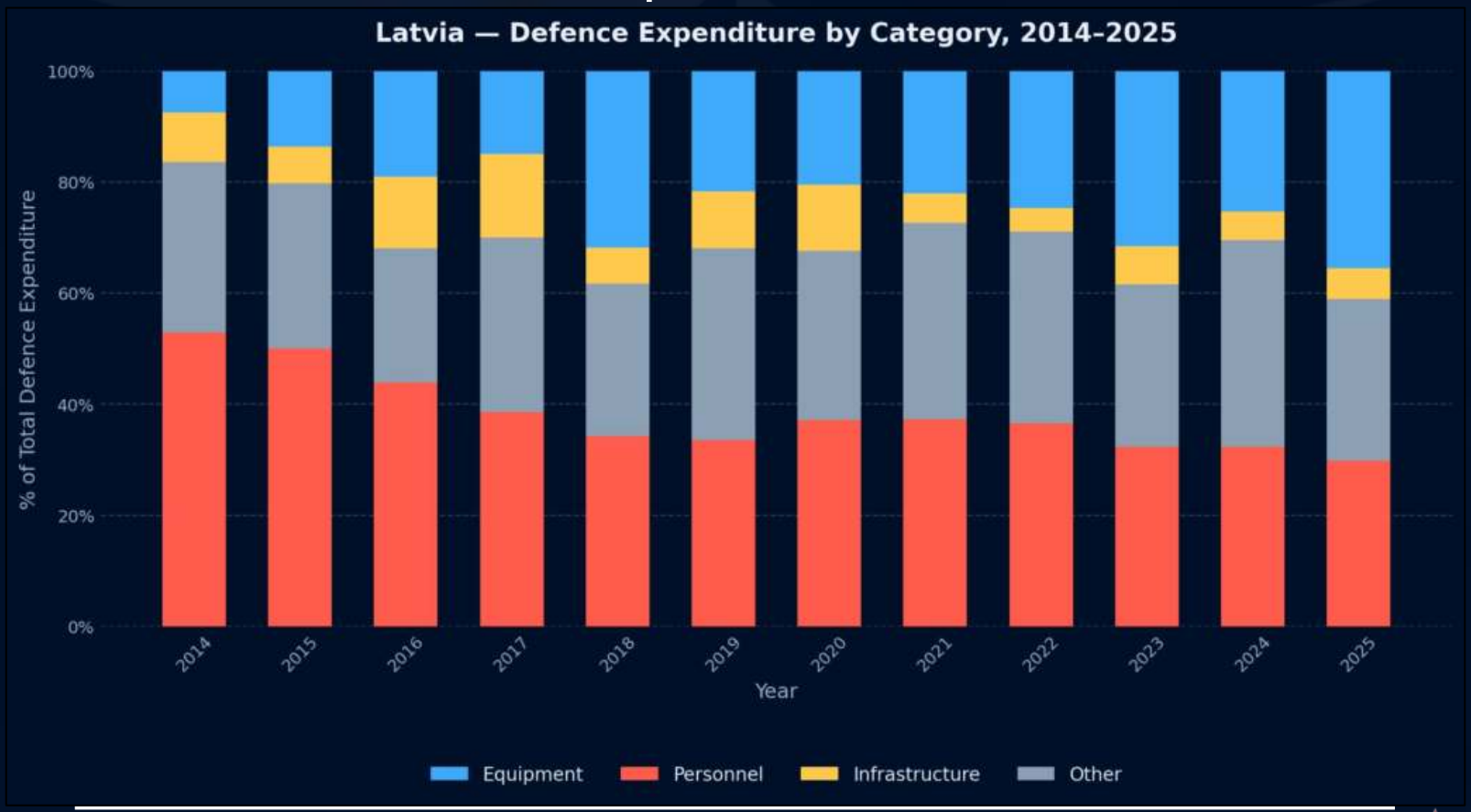
Latvia's defense spending trajectory is among the most aggressive in the alliance. Starting from just 1.0% of GDP in 2014—below even the non-US NATO average—Latvia has accelerated sharply to 3.73% in 2025, third highest in the alliance behind Poland and Lithuania. The 2026 defense budget reaches €2.16B/4.91% of GDP, and in March 2026 the Latvian parliament enacted legislation requiring 5% of GDP from 2027—years ahead of the Hague 2035 framework. This is a statutory obligation backed by enacted budgets, not rhetorical commitment. For a country of 1.9 million with a 214km Russian border and 161km Belarusian border, this represents a genuine whole-of-society decision to treat collective defense as an existential imperative.



MILITARY CONTRIBUTIONS

Equipment Share

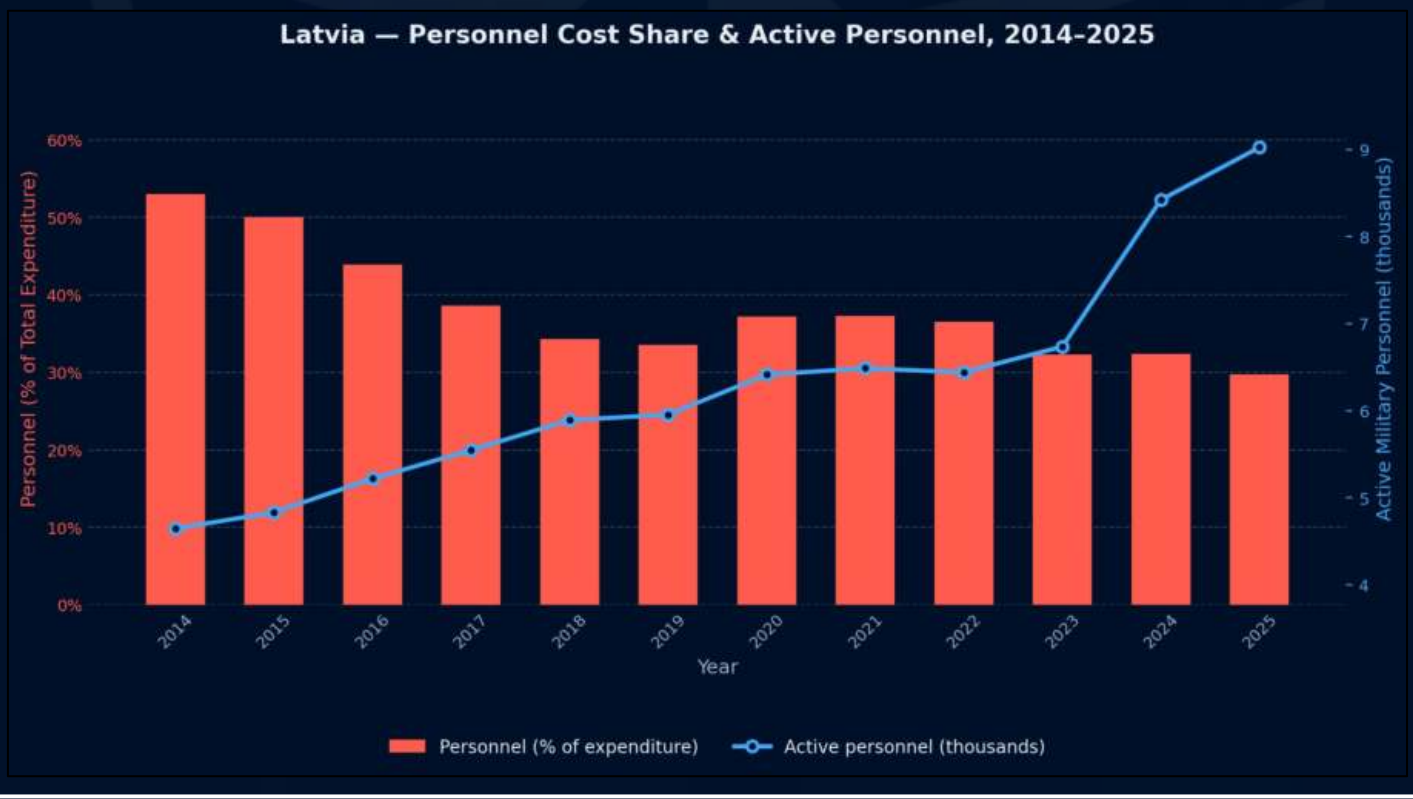
Latvia's equipment share has risen from roughly 7.5% in 2014 to approximately 35% in 2025—well above NATO's 20% benchmark. Personnel costs fell from 53% to 30% over the same period. The data shows equipment surging from 2016 onward as procurement programs began registering in actual expenditure. The constraint is absolute scale: even at nearly 5% of GDP, Latvia's small economy means the total equipment budget remains modest—armor and IFV numbers are thin, with 90 XA-300 APCs and 197 FV107 Scimitars as the primary ground platforms. Latvia is doing the right things with limited resources; the fundamental constraint is GDP, not political will.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Latvia's personnel picture is one of the strongest positive trends in NATO. Active military personnel nearly doubled from roughly 4,900 in 2014 to approximately 9,000 by 2025—driven by restored mandatory military service—while personnel's share of the defense budget fell from 53% to 30% over the same period. More soldiers consuming less of the budget is the ideal modernizing-force trajectory. The National Defence Concept targets 31,000 active and 30,000 reserves long-term—an ambitious expansion for a population of 1.9 million. The €36.5M Sēlija Military Training Area investment shows Latvia building the infrastructure to convert recruited personnel into trained forces rather than just growing headcount. The constraint is scale: even doubling active personnel still leaves Latvia with a small absolute force for the threat it faces, making allied reinforcement essential to any credible defense.



MILITARY CONTRIBUTIONS

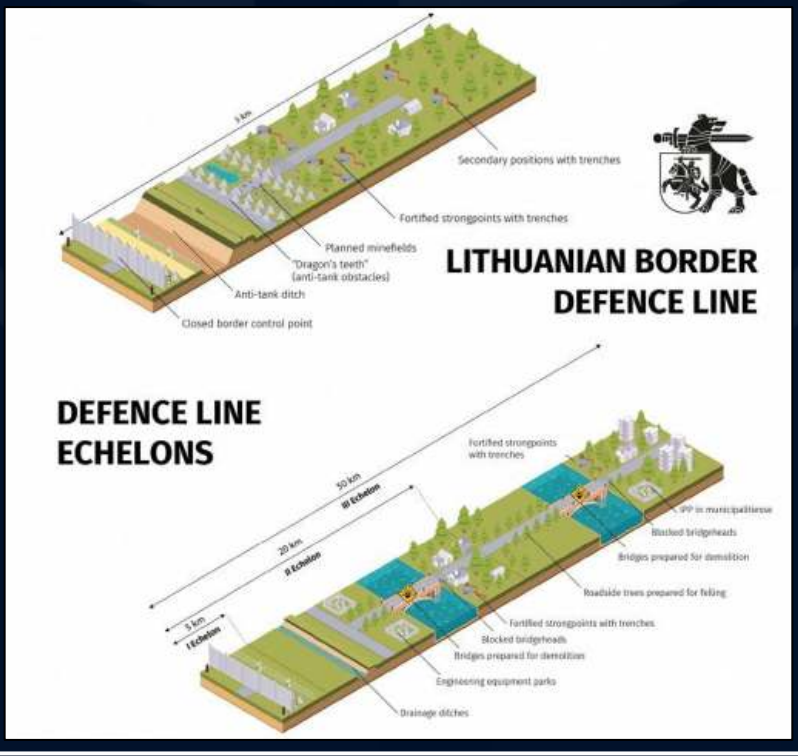
Capability Modernization

Latvia's modernization is focused and threat-informed. On fires, 65 M109A5 howitzers, 18 Archer 155mm systems approved, and 6 HIMARS with ATACMS signed create a layered fires architecture from medium-range to deep-strike precision. On air defense, joint Estonia-Latvia IRIS-T SLM procurement fills the critical medium-range gap, with further investment signaled through a €200M reallocation in 2025. On coastal defense, the March 2026 Naval Strike Missile contract gives Latvia mobile anti-ship capability threatening Russian Baltic Fleet vessels without surface combatants—a smart asymmetric choice. The most significant gap is infantry fighting vehicles: IFV procurement remains a stated priority not yet contracted, leaving ground forces with thin protected transport. The Rheinmetall artillery ammunition plant agreement moves Latvia toward domestic production capacity. Baltic Defence Line construction with Estonia and Lithuania adds physical denial infrastructure along the Russian border.

MILITARY CONTRIBUTIONS

Force Posture

Latvia hosts NATO's first eFP formation to scale to full brigade size—the Canada-led NATO Multinational Brigade Latvia, stood up at Ādaži in July 2024 with 14 contributing nations. Canada plans up to 2,200 persistently deployed troops under Operation Reassurance including 15 Leopard 2A4M tanks and M777 artillery. The Swedish South Scanian Regiment arrived in January 2025 for long-term rotational deployment. From mid-2026, Latvia and Estonia fall under the German-Dutch 1GNC tactical headquarters at Münster, designed to accelerate allied reinforcement to address the Baltics' strategic depth problem. Ādaži Military Base serves as allied brigade headquarters; Lielvārde Air Base supports allied air operations and NATO air policing. Latvia contributes 142 troops to KFOR Kosovo and participates in BALTRON Baltic mine countermeasure operations. The Eastern Border Fortification Plan, enacted March 2024, adds physical denial infrastructure along the Russian and Belarusian borders.



MILITARY CONTRIBUTIONS

Industrial Base

Latvia's defense industrial base is niche-focused but punching above its weight in specific domains. The drone sector is the most distinctive: Latvian companies contracted under the UK-Latvia Drone Coalition delivered approximately 12,000 drones to Ukraine in 2025, establishing Latvia as a meaningful producer in NATO's most operationally relevant emerging capability. The September 2025 Rheinmetall artillery ammunition plant agreement moves Latvia toward domestic large-caliber shell production serving both national stockpiles and Ukraine needs—a critical supply chain contribution given European ammunition shortages. Patria 6×6 licensed production gives Latvia a domestic NATO-compatible protected-mobility platform. Latvia's Baltic Sea position and port infrastructure at Riga and Liepāja are strategically significant for NATO logistics and supply chain resilience. Latvia has no sovereign combat aircraft or major weapons platform design capability but its drone, electronics, and licensed production contributions are proportionally significant for a country of 1.9 million.

STRATEGIC ALIGNMENT

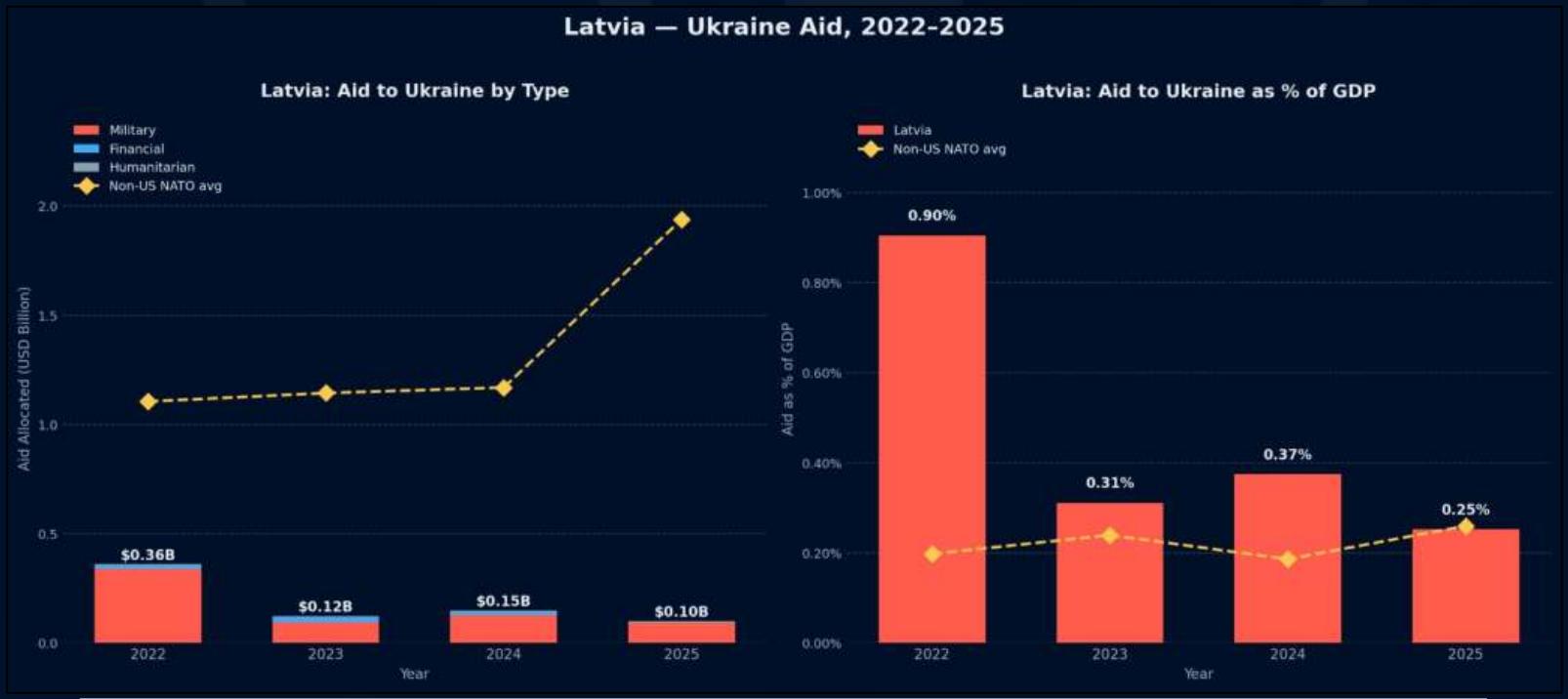
Declared Posture

Latvia's declared posture is among the most explicit and Russia-focused in the alliance. The State Defence Concept 2023-2027 states directly that Russia will remain the main long-term threat to Latvian national security, framing Russia as hostile, opportunistic, and revisionist. Latvia has sustained Russian hybrid pressure including arson, monument desecration, GPS interference, drone incursions, cyberattacks, and sabotage attempts since 2022. On China, Latvia formally withdrew from China-CEE/16+1 in August 2022, voted yes on Chinese EV tariffs, and restricted Chinese telecom from 5G core networks. The May 2026 government transition did not change the strategic line—the new coalition immediately pledged continued Ukraine support. Doctrine and practice are tightly aligned; there are no meaningful caveats.

STRATEGIC ALIGNMENT

Ukraine Support

Latvia's Ukraine aid shows consistent above-average contribution every year: 0.90% of GDP in 2022 settling at 0.25-0.37% in subsequent years. Kiel tracks €0.654B allocated and €0.679B committed roughly 1.94% and 2.02% of GDP—top-tier globally alongside Estonia, Lithuania, and Denmark. Latvia's signature contribution is co-leading the international Drone Coalition with the UK: by early 2025 the coalition had placed contracts for roughly 30,000 drones, with Latvian companies delivering approximately 12,000 in 2025 alone. Direct transfers include 42 Patria 6×6 APCs, CVR(T) reconnaissance vehicles, Stinger MANPADS, TOW missiles, howitzers, and ammunition. Latvia has committed a statutory minimum of 0.25% of GDP annually in military support. For a country with a roughly $50B economy, the proportional burden and Drone Coalition leadership make Latvia far more consequential than its size suggests.



STRATEGIC ALIGNMENT

Russian Decoupling

Latvia's Russian energy decoupling is complete. Russian gas imports halted in 2022, substituted through Klaipėda LNG in Lithuania and the Inčukalns underground storage facility. The February 2025 Baltic electricity grid synchronization with Continental Europe ended decades of BRELL integration with Russia and Belarus, eliminating Latvia's last systemic Russian energy dependency. No Rosatom footprint. Latvia supported every EU Russia sanctions package through the 20th and is a leading push state for tougher shadow-fleet enforcement and frozen-asset use. The decoupling challenge going forward is not energy but maritime hybrid security: shadow-fleet traffic, Baltic cable sabotage risk, GPS interference, and port monitoring. The May 2026 government collapse over drone-defense failures illustrates that defending against hybrid coercion is now more demanding than the energy substitution Latvia already solved.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

In the 2024 NATO polling, 81% of Latvians said they would vote to stay in NATO, 67% agreed Latvia should defend another ally, and 71% agreed NATO membership makes a foreign attack less likely. Eighty-two percent said Russia's war had affected Latvia's security, the third-highest figure in the survey, and Ukraine support stood at around 71% combined. Fifty-four percent favored increased defense spending in 2024, above the alliance average and consistent with Latvia's commitment to 4%+ of GDP in 2026 en route to 5%. Cross-party consensus on NATO is essentially total: New Unity, the National Alliance, and the Social Democrats have all moved firmly into the Western consensus since 2022. The main political risk is the fiscal strain of sustained high defense spending on a small economy, which could generate pressure over a multi-year horizon even among pro-NATO governing parties.

STRATEGIC ALIGNMENT

Hedging Behavior

Latvia's hedging behavior record is spotless. No BRI exposure—Latvia formally withdrew from China-CEE/16+1 in August 2022. Chinese telecoms are restricted from 5G core networks. Arms procurement entirely Western: Patria 6×6, IRIS-T SLM, HIMARS, NSM Coastal Defense, Rheinmetall domestic ammunition, zero adversary procurement. No high-level Moscow, Beijing, or Tehran engagement during the war period; Latvia sharply reduced Russian diplomatic presence after the invasion. Supported Finnish and Swedish NATO accession.

STRATEGIC ALIGNMENT

Operational Cooperation

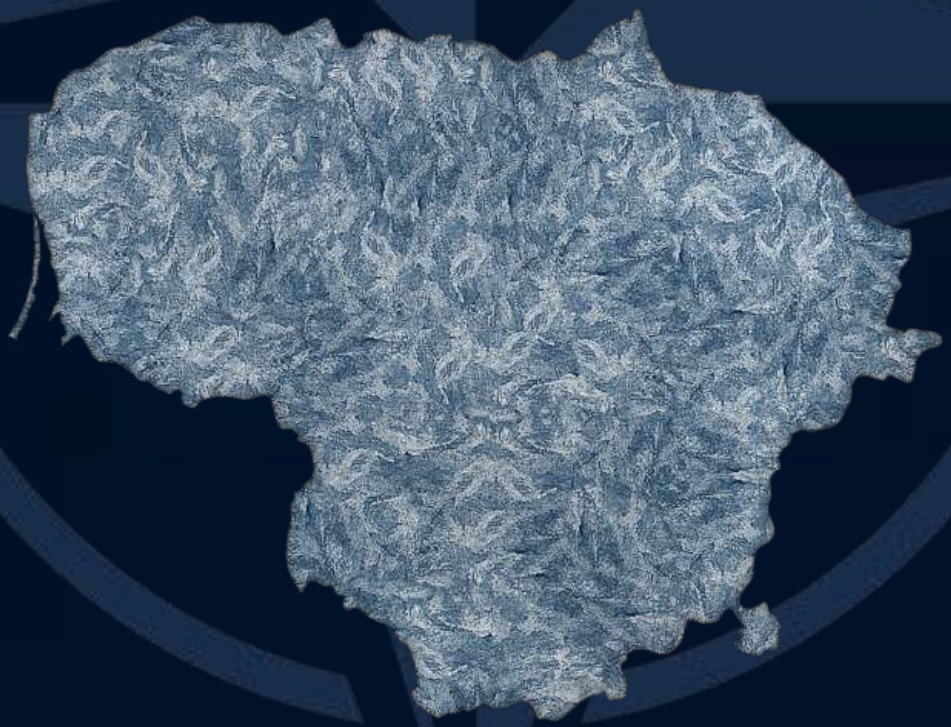
Latvia contributed to Afghanistan under ISAF and has been fully supportive of recent US operations—no obstruction of Operation Epic Fury, full Iran sanctions alignment, and active Baltic Sentry participation. Latvia participates in EU Operation Aspides. The core operational contribution is hosting: the Canada-led NATO Multinational Brigade Latvia at Ādaži anchors NATO's Baltic land-deterrence architecture, with Canada planning 2,200 persistent troops including Leopard 2 tanks. From mid-2026, Latvia and Estonia fall under German-Dutch 1GNC headquarters designed to bring allied mass at speed. The Drone Coalition co-leadership with the UK—roughly 30,000 drones contracted for Ukraine—is Latvia's most distinctive contribution: building Ukrainian drone-warfare capacity at industrial scale through Latvian institutional leadership.

LITHUANIA

NATO Country Assessment

— TIER ONE —

BURDEN SHARING • POLITICAL RESOLVE • CORE DEFENSE



AT A GLANCE

Toplines

- **Embracing The Burden for European Defense:** President Nausėda was the first to commit to the 5% defense spending goal in 2025, with the December 2025 budget delivering ~$5.2B and 5.38% of GDP for 2026, an eightfold spending increase since 2014.
- **Held Firm Against Chinese Economic Coercion:** the first NATO state to exit China-CEE/17+1 in May 2021, absorbing real Chinese trade retaliation after authorizing a Taiwanese Representative Office in Vilnius, without backing down.
- **Fighting the Russian Bear:** Lithuania enforced politically costly Kaliningrad transit restrictions on sanctioned goods despite Russian retaliation threats.

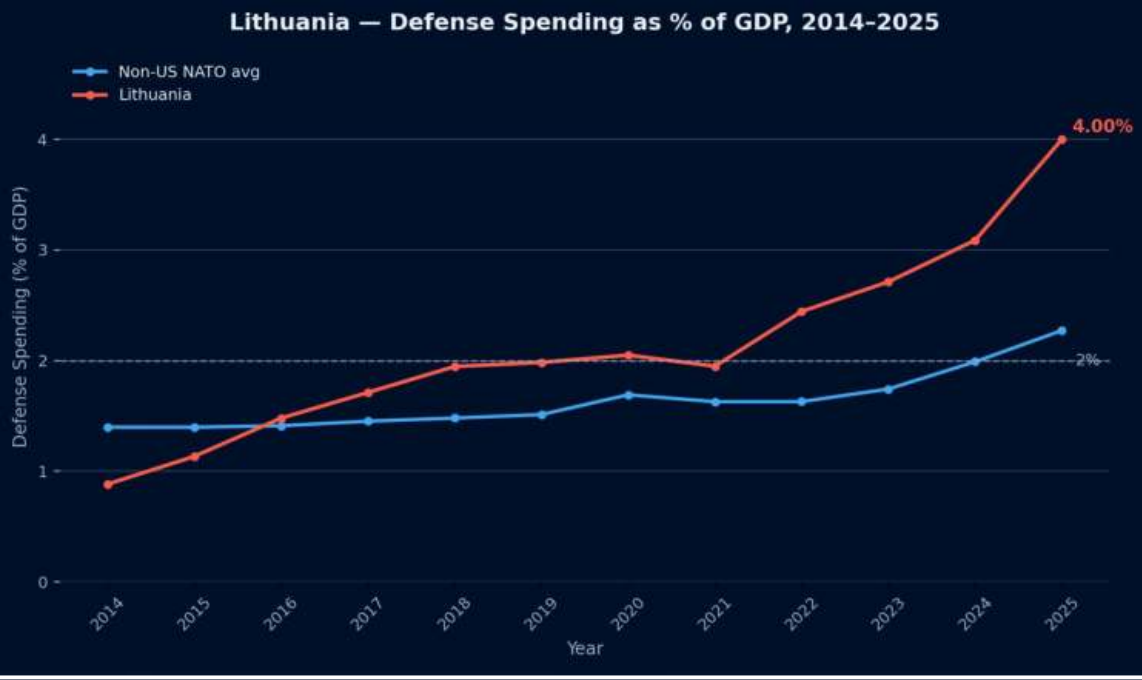
FORCE STRUCTURE AT A GLANCE

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

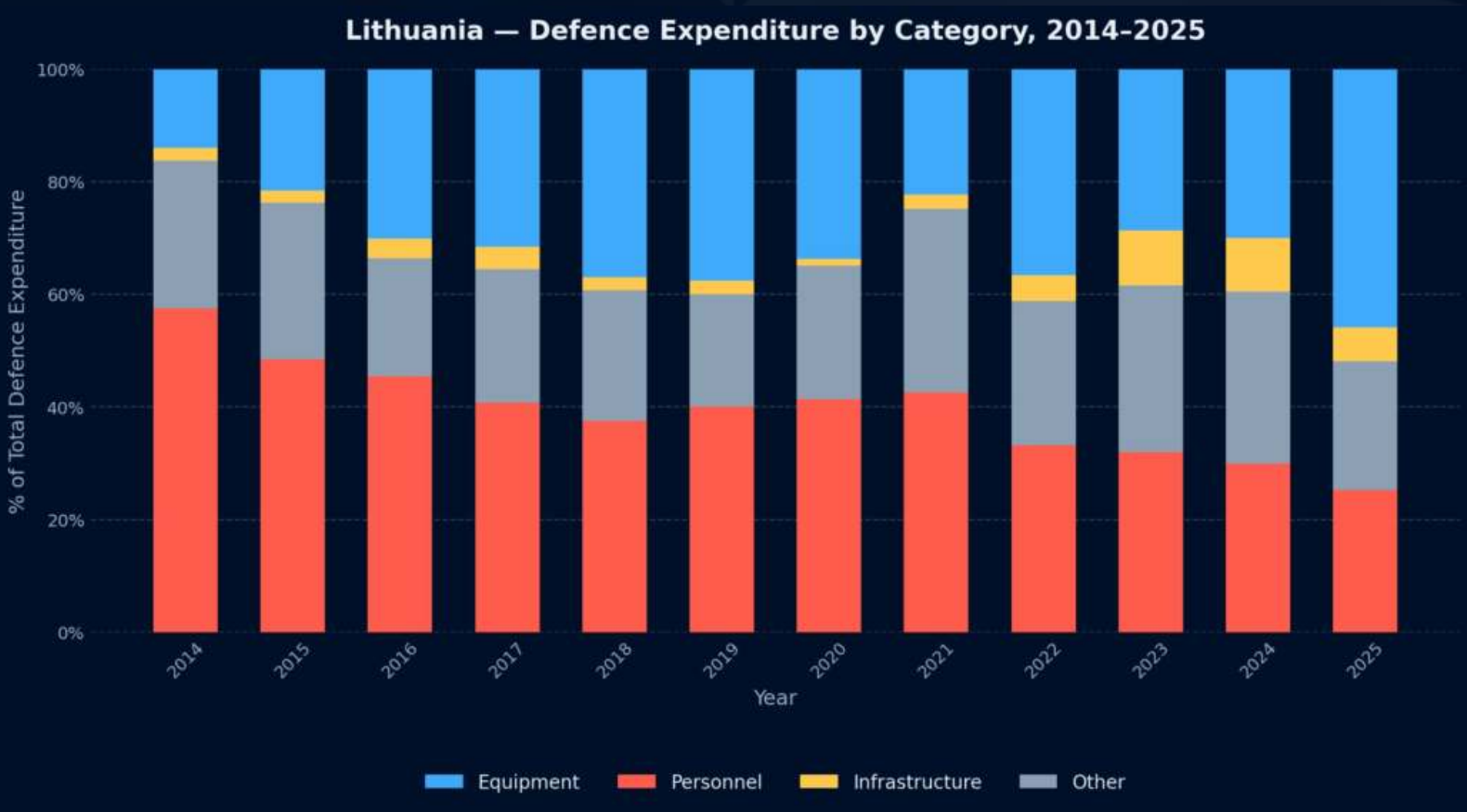
Lithuania has made the most dramatic defense spending commitment of any NATO ally relative to its recent baseline. Spending grew from $427M/0.88% of GDP in 2014 to $3.6B/4.0% of GDP in 2025—an eightfold increase in eleven years. In January 2025, President Nausėda announced Lithuania would commit to 5–6% of GDP annually on defense from 2026–2030, becoming the first NATO ally to formally pledge the 5% goal, and the December 2025 budget delivered: €4.79B/5.38% of GDP in 2026, a 43% increase over 2025 and the largest defense budget in independent Lithuania's history. Lithuania is already above the Hague 3.5% core defense plus 1.5% framework years ahead of the 2035 deadline. For a country of roughly 2.8 million people with a 274km border with Russia's Kaliningrad exclave, a 679km border with Belarus, and the Suwałki Gap as the only land connection between the Baltic states and the rest of NATO, this spending commitment reflects a clear-eyed territorial-existential calculation backed by enacted legislation rather than political aspiration.



MILITARY CONTRIBUTIONS

Equipment Share

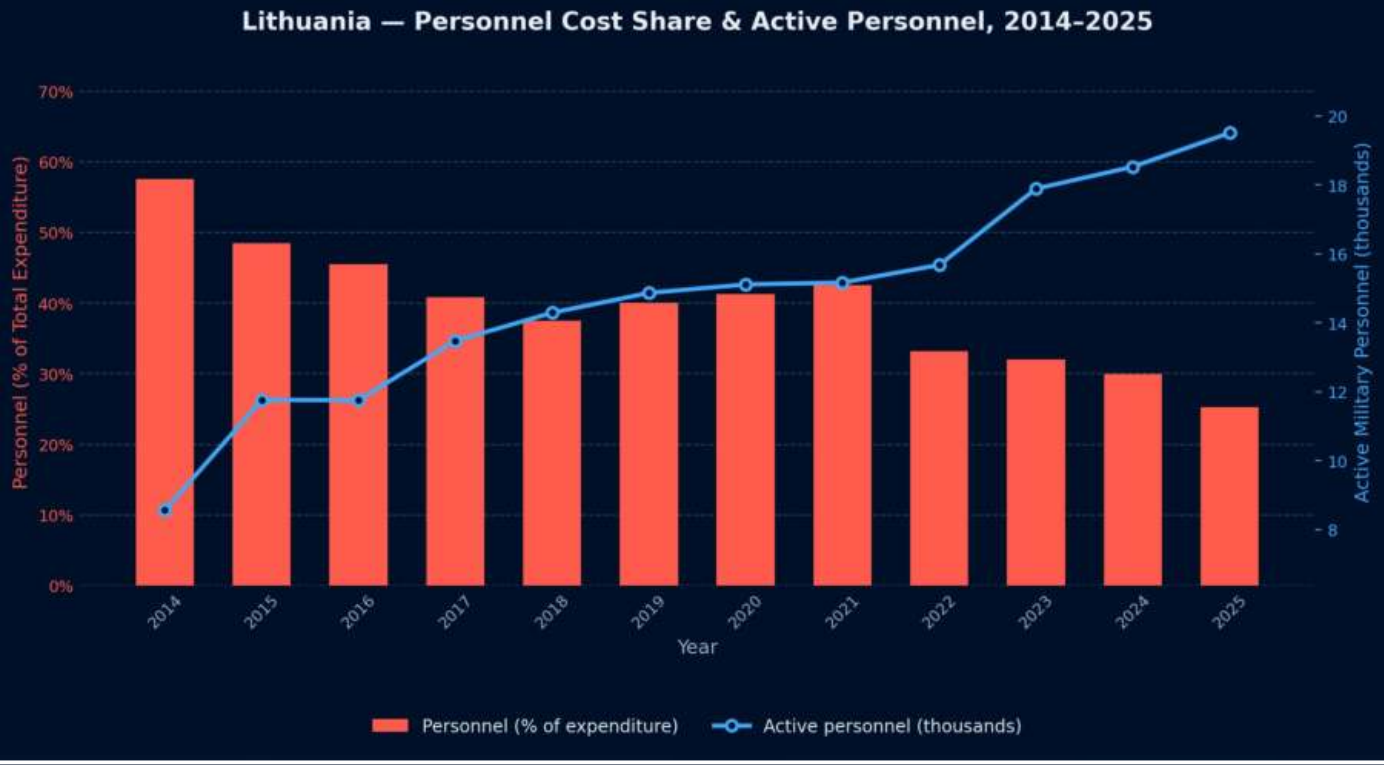
Lithuania's equipment share has risen from roughly 14% of the defense budget in 2014 to 45.8% in 2025—well above NATO's 20% benchmark. The 2026 budget allocates 60% to modernization and equipment, with major line items including €350M for Leopard 2A8 tanks, €375M for CV90 MkIV IFVs, €100M for NASAMS, €100M for CAESAR howitzers, and €70M for HIMARS. At 5.38% of GDP, the budget creates real procurement capacity rather than accounting reclassification.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Lithuania's personnel picture is one of the most positive trends in the alliance. Active military personnel have grown from roughly 8,600 in 2014 to approximately 20,000 by 2025 while personnel's share of the defense budget has fallen from roughly 57% to 25% over the same period. The mandatory service expansion to approximately 5,000 annual draftees is building force depth alongside the equipment surge, creating a growing mobilizable reserve base. Lithuania reintroduced conscription in 2015 and has steadily expanded throughput since—the personnel growth line in the chart reflects that policy compounding over time. The result is a force that is simultaneously growing in headcount, professionalizing through Western equipment integration, and freeing budget space for the procurement programs that define Lithuania's modernization agenda.



MILITARY CONTRIBUTIONS

Capability Modernization

Lithuania's modernization is one of the most rapid and comprehensive in the alliance. On ground forces, 44 Leopard 2A8 tanks give Lithuania its first-ever main battle tank capability, complemented by 100 CV90 MkIV IFVs and existing Boxer Vilkas—the foundation of a full 1st Mechanized Division by 2030. On fires, Lithuania operates 16 PzH 2000 howitzers, has contracted 48 CAESAR Mk II wheeled howitzers making it the second-largest operator after France, and fields 8 HIMARS with ATACMS providing 300km deep strike, with an additional battery added in May 2026. On air defense, NASAMS III, Saab SHORAD, Stinger, Javelin, and counter-drone systems create a layered architecture—critical given Lithuania has no combat aircraft and depends on allied Šiauliai rotations for airspace coverage. The Rheinmetall Baisogala ammunition joint venture beginning production mid-2026 adds sovereign production capacity. The most significant gap is upper-tier air defense and the absence of national combat aircraft.

MILITARY CONTRIBUTIONS

Force Posture

Lithuania's force posture is anchored by three allied presences that make it one of the most heavily forward-defended countries in NATO relative to its size. The German 45th Armored Brigade, activated in Vilnius on May 22, 2025, is the first permanent foreign deployment of a German combat brigade since the founding of the Federal Republic—roughly 4,800 troops plus 200 civilians at full strength by end-2027. The existing NATO Multinational Battlegroup Lithuania with Belgium, Czech Republic, Iceland, Luxembourg, Netherlands, and Norway is being integrated into the brigade structure. US Abrams and Bradley rotations at Pabradė provide a visible American heavy armor presence. Šiauliai Air Base hosts continuous NATO Baltic Air Policing rotations as Lithuania's primary air defense given its lack of national combat aircraft. The three-layer Border Defense Line along the Kaliningrad and Belarus borders adds physical denial depth. Lithuania's Suwałki Gap geography makes it the most strategically critical transit point connecting the Baltic states to Poland and the rest of NATO.

MILITARY CONTRIBUTIONS

Industrial Base

Lithuania's defense industrial base is developing rapidly through foreign joint ventures. The Rheinmetall Baisogala artillery ammunition plant is Lithuania's most significant industrial investment, building sovereign 155mm shell capacity serving both Lithuanian stockpiles and Ukraine. A June 2025 Northrop Grumman medium-caliber ammunition MoU adds a second major NATO industrial partner. The 2024 Defense Industry Law and green-corridor investment framework accelerate permitting for drone manufacturing, counter-UAS, and electronics production. Leopard 2A8 and CV90 programs include domestic assembly and sustainment commitments embedding Lithuanian industry in allied supply chains. Lithuania's Baltic port infrastructure at Klaipėda and the LNG terminal are more relevant to NATO supply chain resilience than domestic mineral deposits. Lithuania has no sovereign platform design capability, but the Rheinmetall plant makes its industrial base structurally more significant than most Baltic peers.

STRATEGIC ALIGNMENT

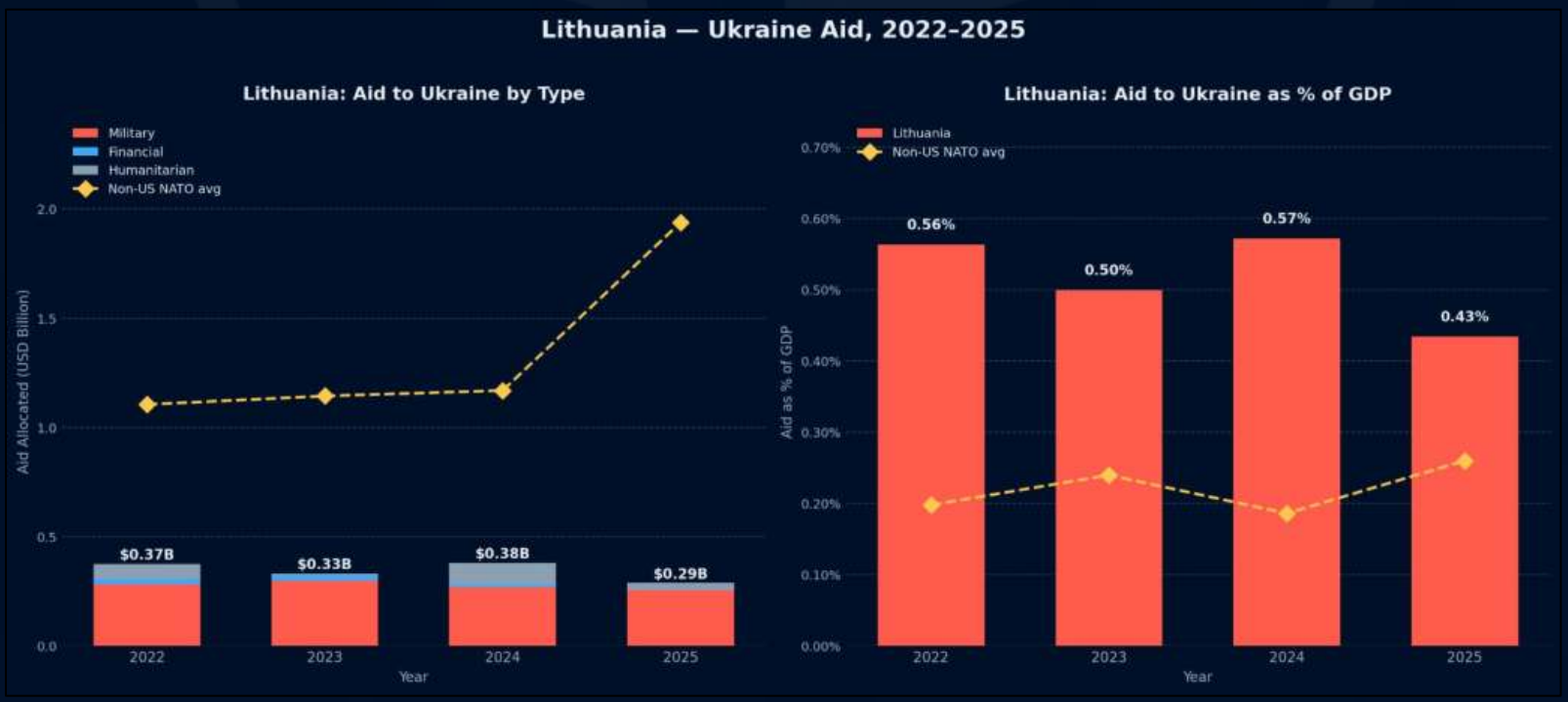
Declared Posture

Lithuania's declared posture is among the most forward leaning in the alliance. The National Security Strategy identifies Russia as an existential threat and warns Moscow could be prepared for broad-scale action against NATO by 2030. Belarus is treated as a hostile Russian proxy having weaponized migration since 2021 and hosted Russian nuclear weapons since 2023. And Lithuania is the only NATO ally with direct lived experience of Chinese economic coercion, having withstood a sustained pressure campaign after authorizing the Taiwanese Representative Office in Vilnius in 2021. Lithuania withdrew from China-CEE/17+1 in May 2021 as the first NATO state to do so, imposed Kaliningrad transit restrictions on sanctioned goods despite direct Russian retaliation threats, and held firm. The 2025 Border Defence Line, Ottawa Treaty withdrawal, and €1.1B counter-mobility plan translate doctrine into concrete investment. Posture documents and policy conduct are tightly aligned.

STRATEGIC ALIGNMENT

Ukraine Support

Lithuania's Ukraine aid chart shows consistent, relatively large contributions every year: 0.56% of GDP in 2022, 0.50% in 2023, 0.57% in 2024, and 0.43% in 2025—roughly double the non-US NATO average throughout. Kiel tracks €1.418B allocated and €1.595B committed (2.52% and 2.84% of GDP) which is top-tier globally alongside Estonia, Latvia, and Denmark. Military support has exceeded $1B since February 2022, codified through a statutory minimum of 0.25% of GDP annually. Lithuania co-leads the Demining Coalition with Iceland, contributes to the Czech Ammunition Initiative, PURL, IT Coalition, Drone Coalition, and Coalition of the Willing. For a country of 2.8 million simultaneously spending 5.38% of GDP on its own defense while facing Russian, Belarusian, and Chinese pressure, Lithuania's proportional Ukraine burden is among the most remarkable in the alliance.



STRATEGIC ALIGNMENT

Russian Decoupling

Lithuania's Russian energy decoupling is complete. Lithuania ended Russian gas imports in April 2022, substituting through the Klaipėda "Independence" FSRU, which now serves as a regional LNG hub for Lithuania, Latvia, Estonia, and Finland. The February 2025 Baltic electricity synchronization with the Continental European grid eliminated the last systemic BRELL dependency. No Rosatom footprint. Lithuania supported every EU Russia sanctions package through the 20th, and its efforts at Kaliningrad transit enforcement—imposing restrictions on sanctioned goods transiting to Russia's Kaliningrad exclave despite direct retaliation threats—is its most distinctive sanctions contribution, requiring political will most NATO allies are never tested on. The residual concern is the Belarusian Astravyets nuclear plant, a safety and coercion risk Lithuania cannot resolve unilaterally.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Lithuania posted 88% for staying in NATO, third-highest in the alliance, 76% willing to defend another ally, and 81% agreeing NATO membership makes a foreign attack less likely. Eighty-four percent said Russia's war had affected Lithuania's security, the second-highest figure in the survey, and Ukraine support stood at 79% combined. The governing coalition is strongly NATO-aligned, with Lithuania committing to among the highest defense spending shares in the alliance at 5%+ of GDP in 2026. The one concern is Nemuno Aušra (Dawn of Nemunas), a right wing party that entered the coalition in 2024 and whose leader has been critical of the pace and cost of Ukraine military support, without directly challenging NATO membership itself. The opposition Social Democrats are also broadly pro-NATO, meaning the mainstream political spectrum is unified.

STRATEGIC ALIGNMENT

Hedging Behavior

Lithuania's hedging behavior record is spotless and demonstrated under real pressure. No BRI exposure—Lithuania was the first NATO state to exit China-CEE/17+1, has minimal Chinese FDI, no Chinese-controlled critical infrastructure, and Chinese telecom restricted from 5G core networks. When China retaliated for the Taiwan Representative Office in 2021—blocking Lithuanian goods at customs and pressuring multinationals to drop Lithuanian suppliers—Lithuania held firm. Diplomatic relations with China have been at chargé d'affaires level since 2021, the lowest in the EU. Arms procurement is entirely Western: Leopard 2A8, PzH 2000, HIMARS, CAESAR, CV90, NASAMS, Black Hawk, C-390—zero adversary procurement. No high-level Moscow, Beijing, or Tehran engagement. Lithuania didn't just maintain a clean record; it absorbed concrete economic costs to defend it, which is a meaningfully higher standard than rhetorical alignment.

STRATEGIC ALIGNMENT

Operational Cooperation

Latvia contributed to Afghanistan under ISAF and has been fully supportive of recent US operations—no obstruction of Operation Epic Fury, full Iran sanctions alignment, and active Baltic Sentry participation. Latvia participates in EU Operation Aspides. The core operational contribution is hosting: the Canada-led NATO Multinational Brigade Latvia at Ādaži anchors NATO's Baltic land-deterrence architecture, with Canada planning 2,200 persistent troops including Leopard 2 tanks. From mid-2026, Latvia and Estonia fall under German-Dutch 1GNC headquarters designed to bring allied mass at speed. The Drone Coalition co-leadership with the UK—roughly 30,000 drones contracted for Ukraine—is Latvia's most distinctive contribution: building Ukrainian drone-warfare capacity at industrial scale through Latvian institutional leadership.

NETHERLANDS

NATO Country Assessment

— TIER ONE —

LEADERSHIP • SAFEGUARDING TECHNOLOGY • SPENDING TURNAROUND

AT A GLANCE

Toplines

- **One of NATO's Sharpest Spending Turnaround:** from roughly 1% of GDP for most of the decade to 2.49% in 2025, with the defense budget more than doubling from $13.9B to $29.1B between 2021 and 2025.
- **Safeguarding the West's Most Important Technology:** the Netherlands coordinated the export restriction on semiconductor technology to China and invoked the Goods Availability Act against a Chinese-owned chip company, among the EU's most assertive economic security actions against China.
- **Taking Command and Accepting Responsibility:** A German-Dutch corps headquarters will take operational control of all NATO forces in Estonia and Latvia by mid-2026—roughly 40,000–60,000 troops. The Netherlands will assume sole command in early 2028.

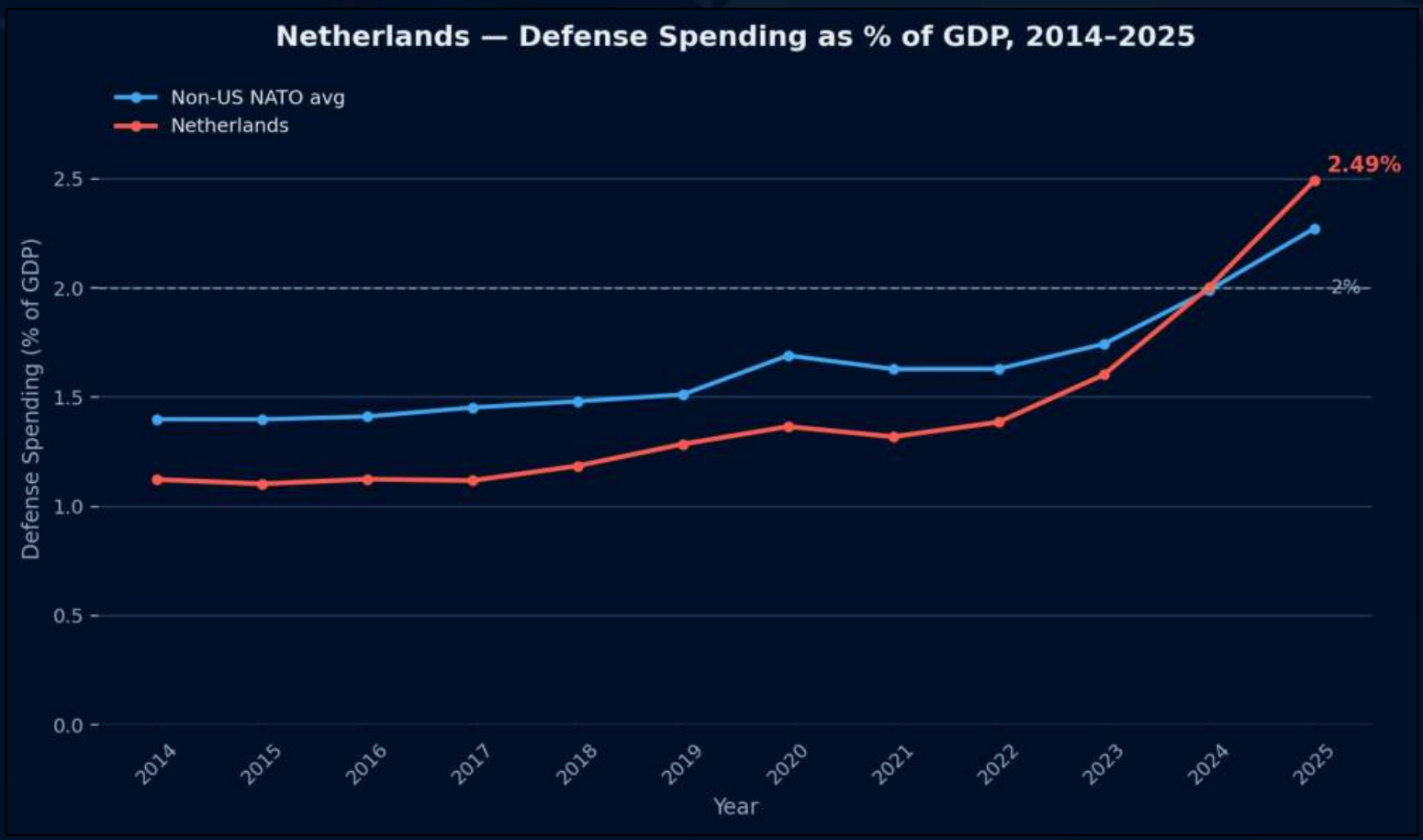
FORCE STRUCTURE AT A GLANCE

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

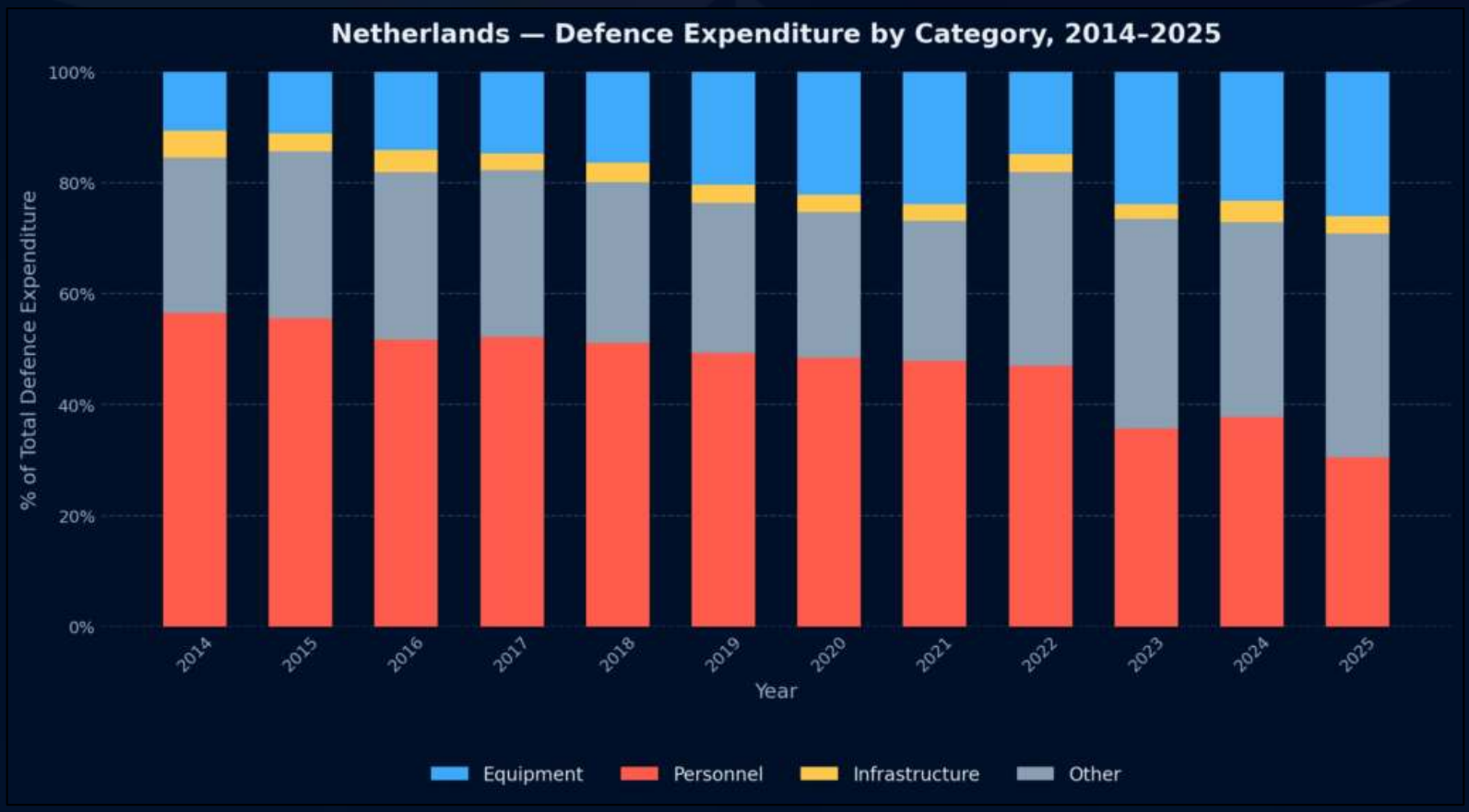
The Netherlands has executed one of the most impressive defense spending turnarounds among major NATO allies. The data shows the Netherlands tracking consistently below the non-US NATO average from 2014 through 2023 (spending just 1.1-1.3% of GDP for most of the decade) before a sharp acceleration to 2.49% in 2025, now essentially matching the alliance average. The defense budget more than doubled from $13.9B in 2021 to $28.1B in 2025, with the 2026 budget rising further. The Netherlands accepted the Hague 3.5% core plus 1.5% framework.



MILITARY CONTRIBUTIONS

Equipment Share

The Netherlands' equipment share has risen dramatically—rising to approximately 26% by 2025, above NATO's 20% benchmark. This clearly shows the prioritization change: personnel costs fell from roughly 57% in 2014 to approximately 30% in 2025 as the budget doubled and equipment investment dominated the surge. The pattern is consistent throughout: the Netherlands is buying the highest-quality variant in each category—Leopard 2A8, F-35A, PAC-3, CV9035 upgrades—rather than cheaper alternatives. The gap is mass: 46 tanks, 52 F-35As, and two brigades represent a capable but thin force relative to Dutch GDP and strategic ambitions, and most of the procurement pipeline is still delivering rather than in service.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

The Netherlands' personnel picture shows a force that bottomed out and is now recovering—active personnel fell from roughly 41,000 in 2014 to approximately 39,200 by 2017-2018 before rebounding to approximately 42,400 by 2025. Personnel costs have fallen from roughly 57% to 31% of the defense budget, not because the force shrank but because the budget doubled faster than headcount. The force is growing at the same time equipment spending surges—the right direction. The challenge is pace: at 42,000 active personnel, the Netherlands remains thin relative to its two-brigade structure, and a tight Dutch labor market creates persistent pressure on filling technical and specialist roles.

MILITARY CONTRIBUTIONS

Capability Modernization

The Netherlands' modernization strategy is comprehensive and well-resourced. On combat aircraft, 52 F-35As are fully operational. On armor, the May 2025 Leopard 2A8 contract for 46 tanks restores a tank battalion after a 14-year absence, with deliveries 2028-2031. On air defense, 18 Patriot PAC-3 launchers and 6 NASAMS II batteries provide layered coverage, with Dutch Patriots forward-deployed to NATO's eastern front and donated to Ukraine. On ground forces, CV9035NL upgrades, Boxer APCs, PzH 2000 howitzers, and PULS rocket artillery address infantry and fires. On naval forces, De Zeven Provincien destroyers, Walrus-class submarines, and new Belgium-Netherlands joint ASW frigates address the growing Russian submarine threat. The gap is mass: ground forces remain thin and the tank absence won't be fully corrected until 2031.

MILITARY CONTRIBUTIONS

Force Posture

The Netherlands hosts only 400 US EUCOM personnel domestically but deploys forward across the alliance: F-35s in Poland for eastern front deterrence, MQ-9 Reapers in Romania, an armored infantry company in Lithuania, an Landing Platform Docks in NATO Standing Naval Forces, and formerly sent 90 personnel for Operation Interflex. The Netherlands hosted the 2025 Hague NATO Summit. The most consequential force posture development is the May 2026 announcement that 1GNC will assume NATO tactical command of Estonia and Latvia by mid-2026, with command rotating to the Netherlands from Germany in early 2028—giving the Netherlands a future corps-level command role for roughly 40,000-60,000 troops on NATO's most exposed front. Dutch brigades operating under German divisional command represent one of NATO's most advanced bilateral military integration arrangements.

MILITARY CONTRIBUTIONS

Industrial Base

The Netherlands' defense industrial base punches above its weight in two critical niches. Thales Netherlands produces the SMART-L naval surveillance radar deployed on Dutch destroyers and exported to allies. Damen Shipyards is a leading global naval shipbuilder. The most strategically significant Dutch asset is ASML—whose extreme ultraviolet lithography machines are the essential bottleneck in global semiconductor manufacturing—with the Dutch-US-coordinated export restriction to China one of the most consequential economic-security interventions by any allied government. Dutch industrial contribution to NATO runs through semiconductors and high-value electronics rather than platform mass production.

STRATEGIC ALIGNMENT

Declared Posture

The 2024 Defence White Paper states explicitly that an attack on NATO is no longer inconceivable, frames the ministry's mission as keeping Russia at bay, and documents Russian espionage targeting the OPCW in The Hague. On China, ASML export controls coordinated with the US and the Nexperia intervention demonstrate willingness to use legal tools against Chinese-owned strategic assets. On Iran, the Netherlands deployed to Operation Aspides and the Eastern Mediterranean during the 2026 Iran war. The minority Jetten coalition government's 66-seat parliamentary base is the principal risk to sustained spending commitments.

STRATEGIC ALIGNMENT

Ukraine Support

The Netherlands' Ukraine aid data shows sustained above-average contribution: 0.13% of GDP in 2022 rising sharply to 0.36% in 2023—well above the non-US NATO average—before stabilizing at 0.30-0.32% in 2024-2025, consistently above the alliance average. Kiel tracks €10.441B allocated and €13.722B committed (1.219% and 1.602% of GDP) placing the Netherlands in the core European group sustaining Ukraine at scale. The signature contribution is F-16 coalition leadership: the Netherlands completed delivery of all 24 promised F-16s by May 2025 and coordinated the multinational coalition with Denmark, Belgium, and Norway. Patriot system donations, a €2B military support commitment in 2024 alone under the March 2024 bilateral security agreement, and a €500M 2025 package round out a contribution defined by high-end capability leadership rather than volume alone. The €3.281B commitment gap and minority government fiscal constraints are the principal concerns.

STRATEGIC ALIGNMENT

Russian Decoupling

The Netherlands' Russian energy decoupling is substantially complete. Russian pipeline gas dependence fell sharply after 2022 through LNG infrastructure at Eemshaven and the Gate terminal, Norwegian supply, and US and Qatari LNG. Dutch refineries shifted from Russian crude after EU sanctions. Borssele nuclear operates on Western fuel with no Rosatom dependence. The toughest challenge is Rotterdam: as Europe's largest port and major oil-refining and gas-trading hub, Rotterdam creates persistent shadow-fleet, dual-use transit, and sanctions-enforcement complexity that Dutch authorities must manage at very high volume. The Netherlands supported every EU Russia sanctions package through the 20th and has been an active push state for shadow-fleet pressure and anti-circumvention measures.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

The Netherlands recorded 82% for staying in NATO and 79% agreeing the country should defend another ally, among the highest figures in the alliance for the latter metric, while 76% agreed NATO membership makes a foreign attack less likely. Fifty-six percent favored increasing defense spending in 2024, and Ukraine support stood at around 66% combined. The PVV (Wilders)-led coalition has kept Dutch policy firmly within the mainstream NATO lane, supported by coalition partners (NSC, VVD, BBB). The hosting of the Hague NATO Summit in June 2025 anchored the Netherlands publicly in the alliance's core, making significant deviation politically costly for the government. The VVD and D66, the strongest NATO advocates, are in opposition but retain influence over the parameters of acceptable policy.

STRATEGIC ALIGNMENT

Hedging Behavior

The Netherlands' hedging behavior record is among the strongest in the alliance. No BRI participation, no adversary arms procurement, no meaningful Chinese-controlled critical infrastructure, no high-level Moscow or Tehran engagement. ASML export controls coordinated with the US and the September 2025 Nexperia intervention—invoking the Goods Availability Act against a Chinese-owned semiconductor company—represent the EU's most assertive economic-security actions against Chinese strategic technology. Former PM Rutte's March 2024 Beijing visit is the one engagement note, but he used it to publicly raise Chinese cyberespionage and urge China to use its influence on Russia—confrontation rather than accommodation. The Nexperia intervention being suspended after Chinese retaliation illustrates the limits of unilateral action, but the willingness to initiate it distinguishes the Netherlands from more cautious European peers.

STRATEGIC ALIGNMENT

Operational Cooperation

The Netherlands contributed to Afghanistan under ISAF—including the demanding Uruzgan province mission 2006-2010 with significant Dutch casualties—and to Iraq coalition operations. On recent US operations, fully supportive: HNLMS Karel Doorman deployed to Operation Aspides, HNLMS Evertsen to the Eastern Mediterranean during the 2026 Iran war. Core contributions: 1GNC assumes NATO tactical command of Estonia and Latvia by mid-2026, with the Dutch taking sole command in early 2028—corps-level responsibility for roughly 40,000-60,000 troops on NATO's front. F-35s forward-deployed to Poland, Patriots on the eastern front, MQ-9 Reapers in Romania, and 90 Interflex personnel training Ukrainians complete a deployment profile spanning every domain simultaneously.

NORWAY

NATO Country Assessment

— TIER ONE —

DEFENSE INVESTMENT • CRITICAL ENERGY • VITAL INTELLIGENCE

AT A GLANCE

Toplines

- **Investing in NATO's Strength:** Norway is the 5th highest defense spender in NATO, backed by a $1.7T sovereign wealth fund and a 12-year, ~$152B Long-Term Defence Plan nearly doubling the annual budget in real terms.
- **A Critical Supplier of European Gas:** Norwegian gas became critical to Russian decoupling for Germany, the UK, France, Belgium, and the Netherlands, while Norway applied every EU sanctions package despite not being an EU member.
- **Irreplaceable Intelligence Contribution on Russia's Northern Fleet:** the Marjata IV vessel provides continuous monitoring of Russian SSBN and naval movements on the Kola Peninsula, a capability no other ally can replicate.

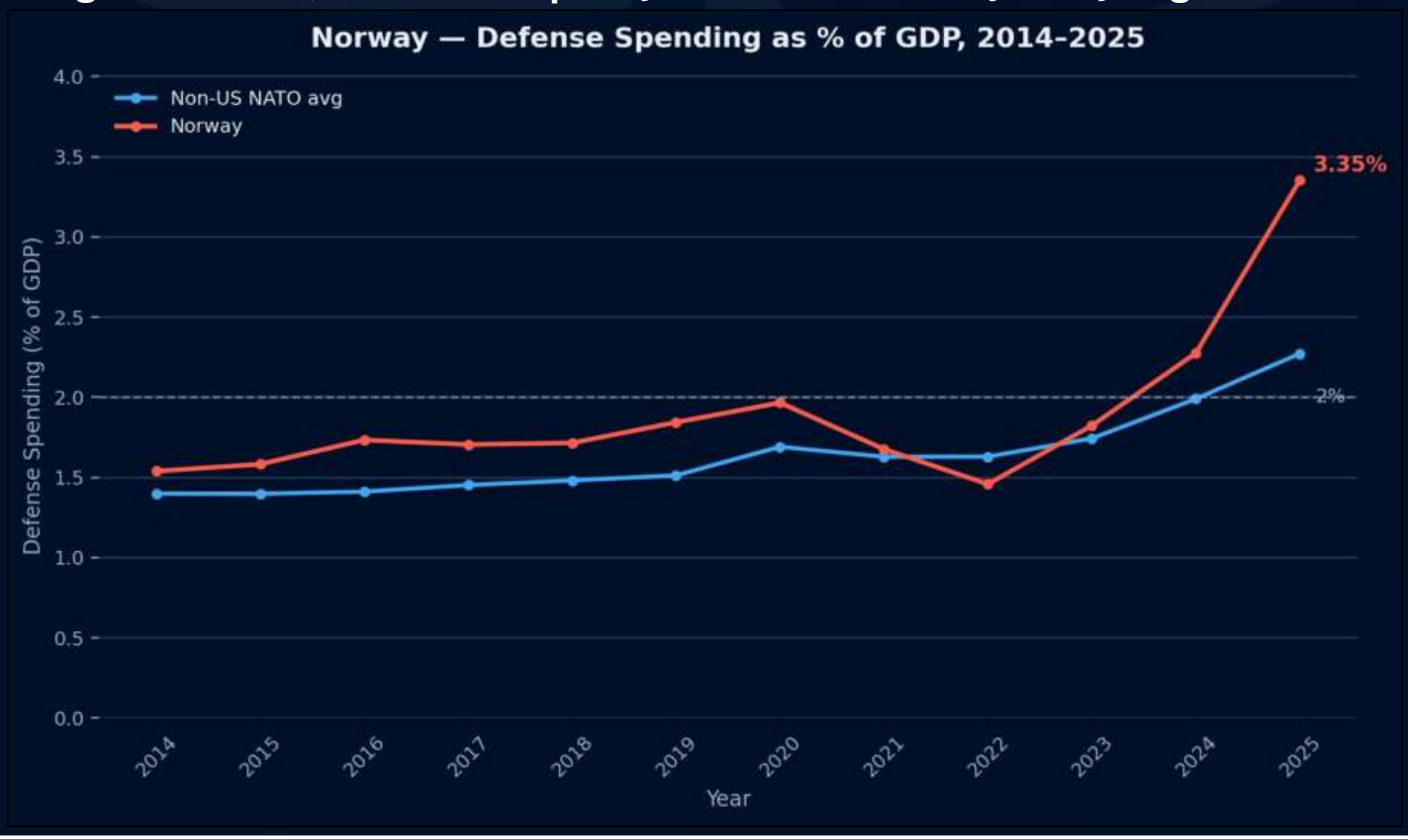
FORCE STRUCTURE AT A GLANCE

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

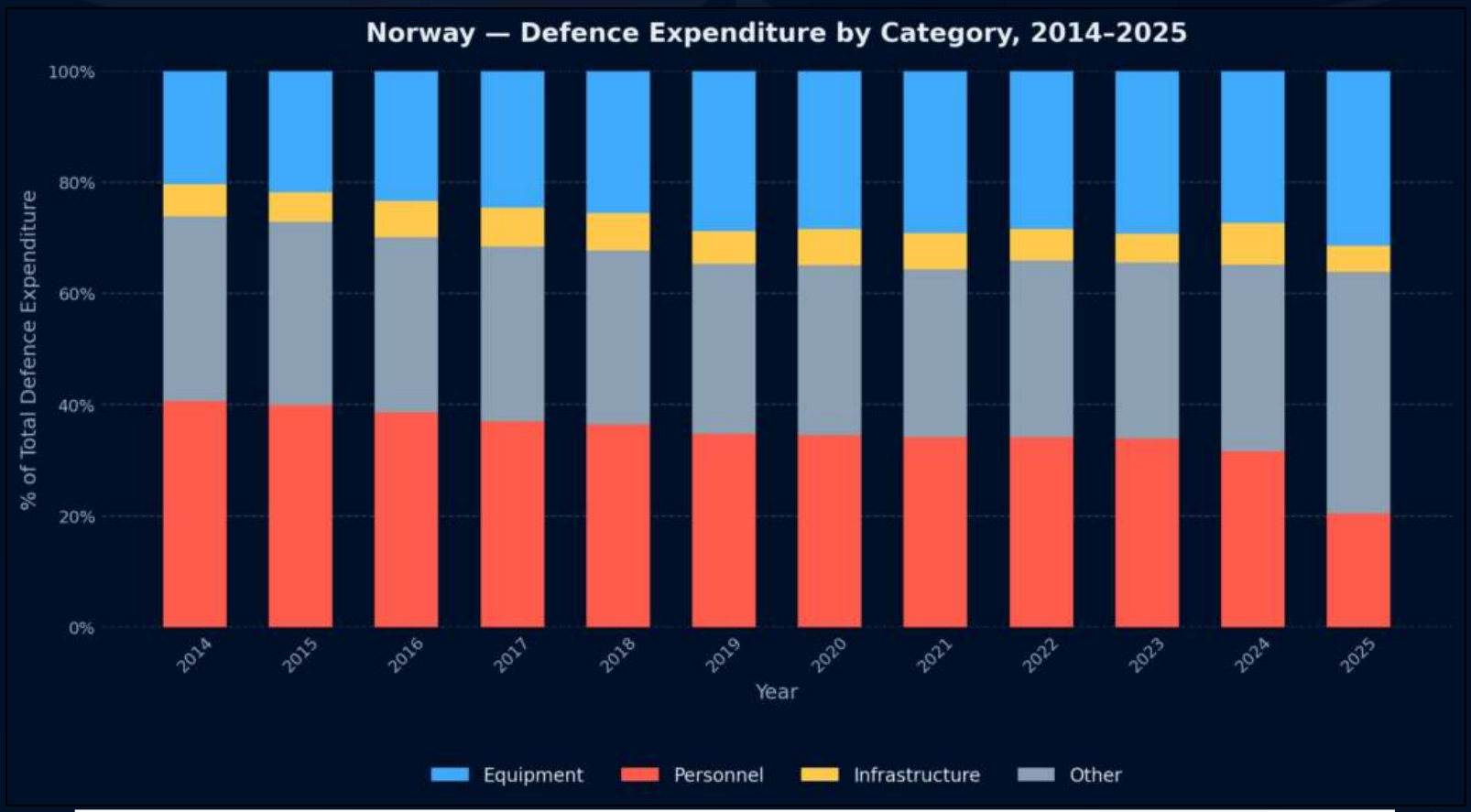
Norway's defense spending trajectory shows sustained above-average investment that has accelerated sharply since 2022. The data shows Norway tracking almost consistently above the non-US NATO average throughout 2014-2025, with a sharp acceleration from roughly 1.45% in 2022 to 3.35% in 2025—fifth-highest in the alliance behind Poland, Lithuania, Latvia, and Estonia. The 2024 Long-Term Defence Plan commits NOK 1,624B over twelve years, nearly doubling the annual defense budget in real terms by 2036, with a March 2026 supplemental adding NOK 115B. Norway accepted the Hague 3.5% core plus 1.5% framework at the June 2025 summit. For a country with a sovereign wealth fund exceeding $1.7T and substantial oil-and-gas revenues, the fiscal capacity to sustain this trajectory is genuine.



MILITARY CONTRIBUTIONS

Equipment Share

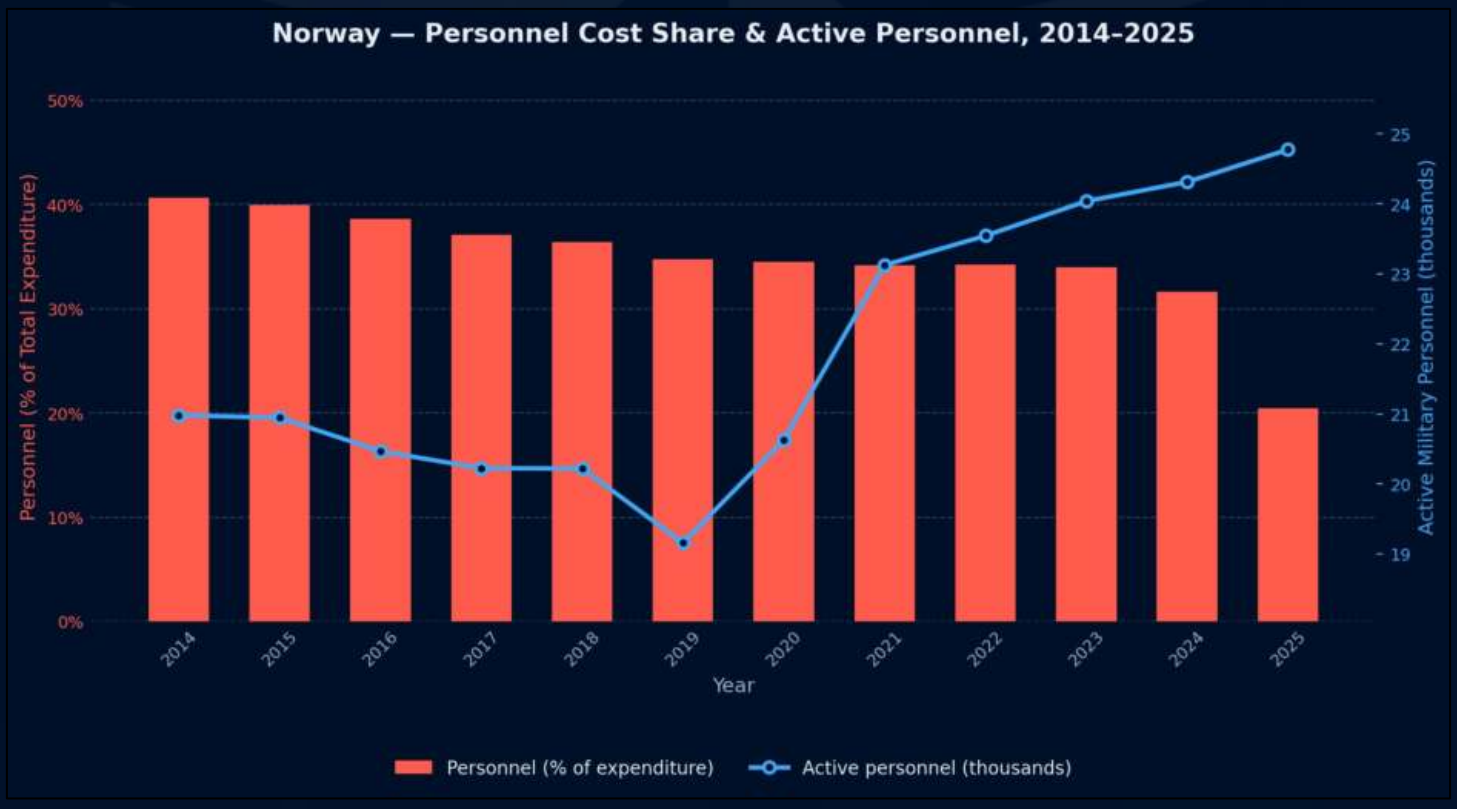
Norway's equipment share has been consistently high throughout the period—running at roughly 20-25% through 2014-2028 before surging to approximately 31% by 2025 as major capital programs dominate the growing budget. Personnel costs have fallen from roughly 41% in 2014 to approximately 21% in 2025, a substantial rebalancing as procurement absorbs the defense surge. Norway's equipment share is well above NATO's 20% benchmark and rising as the Long-Term Defence Plan's capital investment phase accelerates.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Norway's personnel picture shows a force that bottomed out and is now growing substantially. Active military personnel fell from roughly 21,000 in 2014 to approximately 19,200 by 2018-2019 before recovering sharply to approximately 25,000 by 2025. Personnel costs have fallen from roughly 41% in 2014 to approximately 21% in 2025, because the budget more than doubled faster than headcount grew. The Long-Term Defence Plan explicitly targets further personnel expansion: the Finnmark Brigade build-out, Army expansion from one to three brigades, and Home Guard expansion to 45,000 all require sustained recruitment. Norway operates a mixed conscript-volunteer system, with roughly one-third of the force drawn from national service. Chief of Defence Eriksen has publicly stated that Norway needs "more people, more equipment, and more speed," framing personnel growth as equally urgent as capital investment.



MILITARY CONTRIBUTIONS

Capability Modernization

Norway's modernization is serious. On combat aircraft, 52 F-35As were fully delivered in April 2025, armed with Kongsberg JSM cruise missiles providing standoff strike against maritime and land targets. On naval forces, the August 2025 UK-Norway £10B agreement for five Type 26 frigates replaces the current fleet with ASW-optimized surface combatants designed for High North operations. On submarines, six Type 212CD boats are under joint procurement with Germany for early 2030s delivery. On ground forces, Brigade North fields Leopard 2A4 tanks, CV9030N IFVs, and K9 howitzers; the Finnmark Brigade established August 2025 adds a dedicated border force; and the 2024 plan mandates expansion to three brigades total. Five P-8A Poseidons and the Marjata IV intelligence vessel provide persistent monitoring of Russian Northern Fleet activity. The principal gap is time: frigates, submarines, Finnmark Brigade, and long-range air defense all have delivery timelines extending into the 2030s.

MILITARY CONTRIBUTIONS

Force Posture

Norway hosts 1,100 US EUCOM personnel including pre-positioned Marine Expeditionary Unit equipment and a 155mm artillery battalion set. The Norwegian Defence Cooperation Agreement with the US expands access to designated facilities near the Russian border, relaxing Norway's traditional Finnmark restraint in a visible shift toward more active allied presence. The September 2025 US RQ-4 Global Hawk flight from Finnish Lapland over Finnmark and the Barents Sea signaled deepened US-Norwegian intelligence integration. Norway contributes 150 troops to Lithuania's eFP, 2+ F-35s to Poland's air deterrence, and 150 instructors to Operation Interflex. The Marjata IV intelligence vessel provides continuous Kola Peninsula monitoring that serves the entire alliance. All Nordic allies were placed under JFC Norfolk in December 2025, with Norway as the regional High North anchor.

MILITARY CONTRIBUTIONS

Industrial Base

Norway's defense industrial base is among NATO's most strategically valuable relative to country size. Kongsberg produces the Naval Strike Missile, Joint Strike Missile, and NASAMS, the world's most widely deployed medium-range air defense system outside Patriot, in service with 15+ nations including the United States. Nammo provides artillery propellants, shoulder-launched weapons, and rocket motors as a critical NATO munitions supplier since 2022. Norway also holds significant rare earth deposits that are increasingly relevant to NATO's critical minerals agenda. Both companies are embedded in US and European procurement as critical suppliers.

STRATEGIC ALIGNMENT

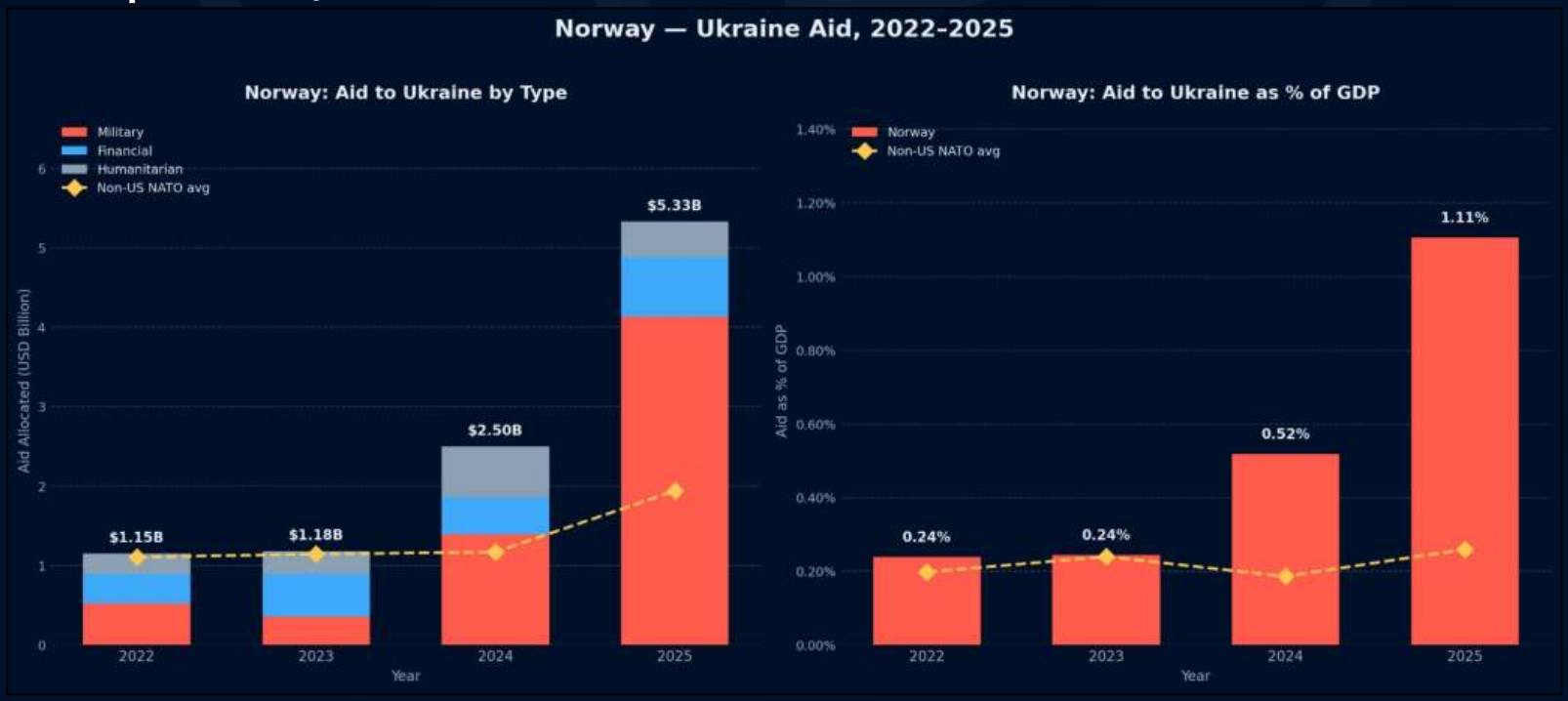
Declared Posture

Norway's declared posture is explicitly Russia-focused. The 2024 Long-Term Defence Plan, May 2025 National Security Strategy, and 2025 White Paper on Total Preparedness collectively frame the current security environment as the most serious Norway has faced since World War II. Norway's 198km land border with Russia in Finnmark and maritime frontage on the Kola Peninsula—home to Russia's Northern Fleet and SSBN nuclear bastion—makes the threat assessment urgent. On China, Norwegian doctrine is increasingly hard-edged in the Arctic context: the National Security Strategy calls for a restrictive policy toward Chinese activity in the High North, Norway blocked the Søre Fagerfjord sale on Svalbard on foreign-acquisition grounds, and 5G core networks are restricted from Chinese vendors. The March 2026 spending supplemental passed with broad political support demonstrates doctrine and spending are aligned across the political cycle.

STRATEGIC ALIGNMENT

Ukraine Support

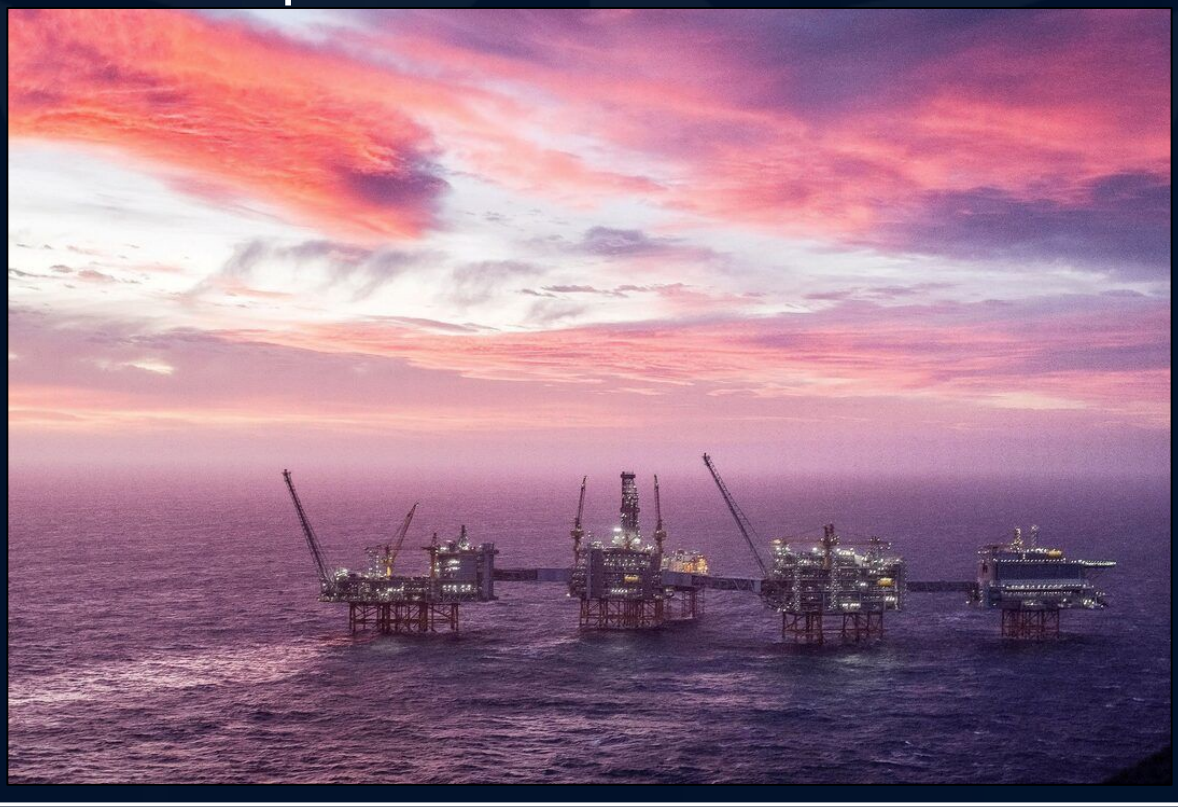
Norway's Ukraine aid data demonstrated sustained commitment: contributions running at $1.15-1.18B (0.24% of GDP) in 2022-2023, before surging to $2.50B (0.52%) in 2024 and $5.33B (1.11%) in 2025, far above the alliance average. Kiel tracks €10.005B allocated and €24.724B committed (2.454% and 6.065% of GDP) the largest commitment-to-GDP ratio in the alliance, driven by the NOK 275B Nansen Support Programme running 2023-2030. Norway was the largest single PURL contributor in 2025 at approximately $835M, and funded NOK 1.4B to backfill Romania's Patriot donation to Ukraine. Major transfers include NASAMS systems, Leopard 2 tanks, F-16s, CV90 IFVs, artillery, and naval mines. The Nansen Programme's multi-year Storting mandate insulates Ukraine support from political cycles.



STRATEGIC ALIGNMENT

Russian Decoupling

Norway had no Russian energy dependence to unwind and has become one of Europe's most important replacement gas suppliers. Norwegian gas infrastructure supplying Germany, the UK, France, Belgium, and the Netherlands became critical to European energy security after 2022. Norway applied every EU Russia sanctions package through the 20th despite non-EU status. The decoupling challenge runs in reverse: Norwegian offshore energy infrastructure has become a priority Russian sabotage target, requiring increased Navy, Coast Guard, and intelligence activity around platforms, pipelines, and cables. Norway is operationally central to High North shadow-fleet monitoring and undersea-infrastructure protection.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

Norway recorded 87% for staying in NATO, 79% willing to defend another ally, and 83% feeling more safe from NATO cooperation, all near the alliance's ceiling. Sixty percent favored increasing defense spending in 2024, already from a position above 2% of GDP, consistent with Norway surpassing the United States in per-capita defense spending in 2026. Eighty percent said Russia's war had affected Norway's security, and Ukraine support stood at around 80% combined. The Støre Labour government is strongly pro-NATO, as are the Conservative Party, the Progress Party, and the Center Party, creating near-total parliamentary consensus. The Red Party and the Socialist Left together represent roughly 10 to 12% of voters and are the only meaningful critics of NATO policy, without governing leverage on core security decisions.

STRATEGIC ALIGNMENT

Hedging Behavior

Norway's hedging record is essentially clean. No BRI participation, no adversary arms procurement, no high-level Moscow or Tehran engagement, no obstruction of any NATO or EU consensus position. Norway blocked Chinese-linked acquisition at Søre Fagerfjord on Svalbard and restricts Chinese telecom from 5G core networks. The National Security Strategy explicitly calls for a restrictive approach to Chinese Arctic activity. The one monitoring note is Svalbard itself: the 1920 Svalbard Treaty gives Russia and China legal rights to conduct research and economic activity on the archipelago that Norway cannot simply restrict—creating a persistent vulnerability that Oslo is managing actively but cannot eliminate through policy alone.

STRATEGIC ALIGNMENT

Operational Cooperation

Norway contributed to Afghanistan under ISAF including combat operations in Helmand, and to Iraq coalition operations. On recent US operations, Norway has been broadly supportive—participating in Operation Inherent Resolve, contributing to Operation Aspides, and maintaining full Iran sanctions alignment without public obstruction of Epic Fury. The core operational value is geographic and intelligence-based. The Marjata IV provides continuous monitoring of Russia's Northern Fleet and SSBN movements—a contribution to allied anti-submarine warfare no other ally can replicate. All Nordic allies were placed under JFC Norfolk in December 2025, with Norway as the High North anchor. The Finnmark Brigade, established August 2025, creates the first dedicated Norwegian ground force for the Russian border since the Cold War. Norway contributes to NATO Forward Land Forces Finland, Lithuania's eFP, and Poland's air deterrence. Within the High North and North Atlantic, Norway's contributions are strategically irreplaceable.

POLAND

NATO Country Assessment

— TIER ONE —

HIGHEST DEFENSE SPENDING • GROUND FORCES • EASTERN SHIELD

WAT
WAT

AT A GLANCE

Toplines

- **NATO's Highest Defense Spender:** Spending at 4.48% of GDP on defense makes Poland NATO highest defense spender with the budget nearly tripling from ~$16B in 2022 to ~$46B in 2025.
- **Building the Largest Land Army in NATO Europe:** active personnel nearly tripled from ~100,000 (2014) to ~235,000 (2025), targeting 300,000 to fight a high-intensity war on Polish soil without waiting for allied reinforcement.
- **Anchors NATO's Entire Eastern Deterrence Architecture:** hosts the US Army's V Corps Forward Headquarters, ~10,000 US troops, Aegis Ashore BMD, and is building the $2.5B, 700km East Shield border fortification system.

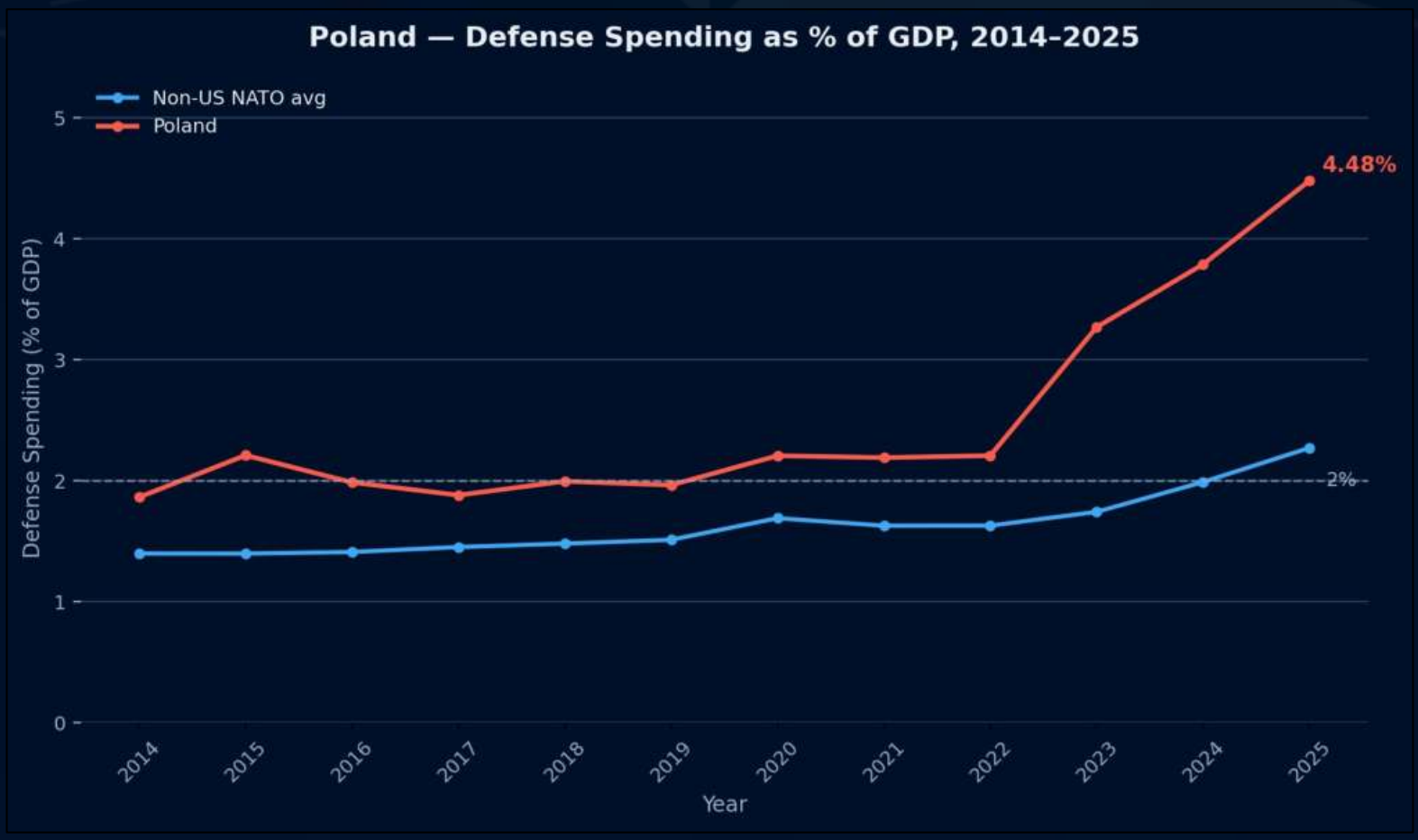
FORCE STRUCTURE AT A GLANCE

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

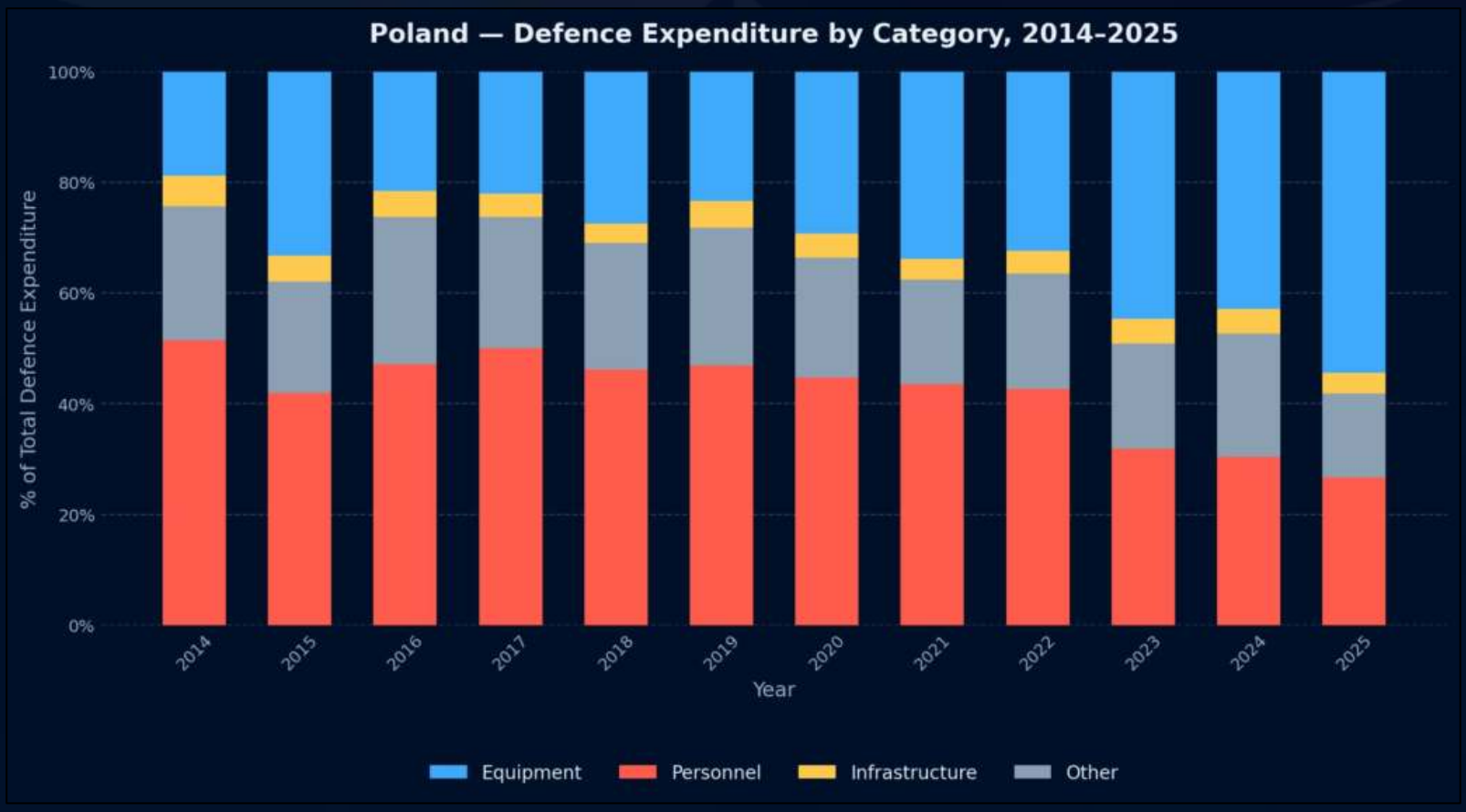
Poland's defense spending trajectory is unmatched in the alliance. Its budget nearly tripled between 2022 and 2025, reaching 4.48% of GDP—the highest in NATO, even ahead of the United States. In absolute terms, Poland's 2025 defense budget stands at approximately $44 billion, up from around $16 billion in 2022. Warsaw signed the Hague 5% pledge without hesitation and has consistently outpaced its own commitments. Poland was the only NATO member to already meet the new 3.5% threshold in 2024, a target the rest of the alliance is working toward for 2035.



MILITARY CONTRIBUTIONS

Equipment Share

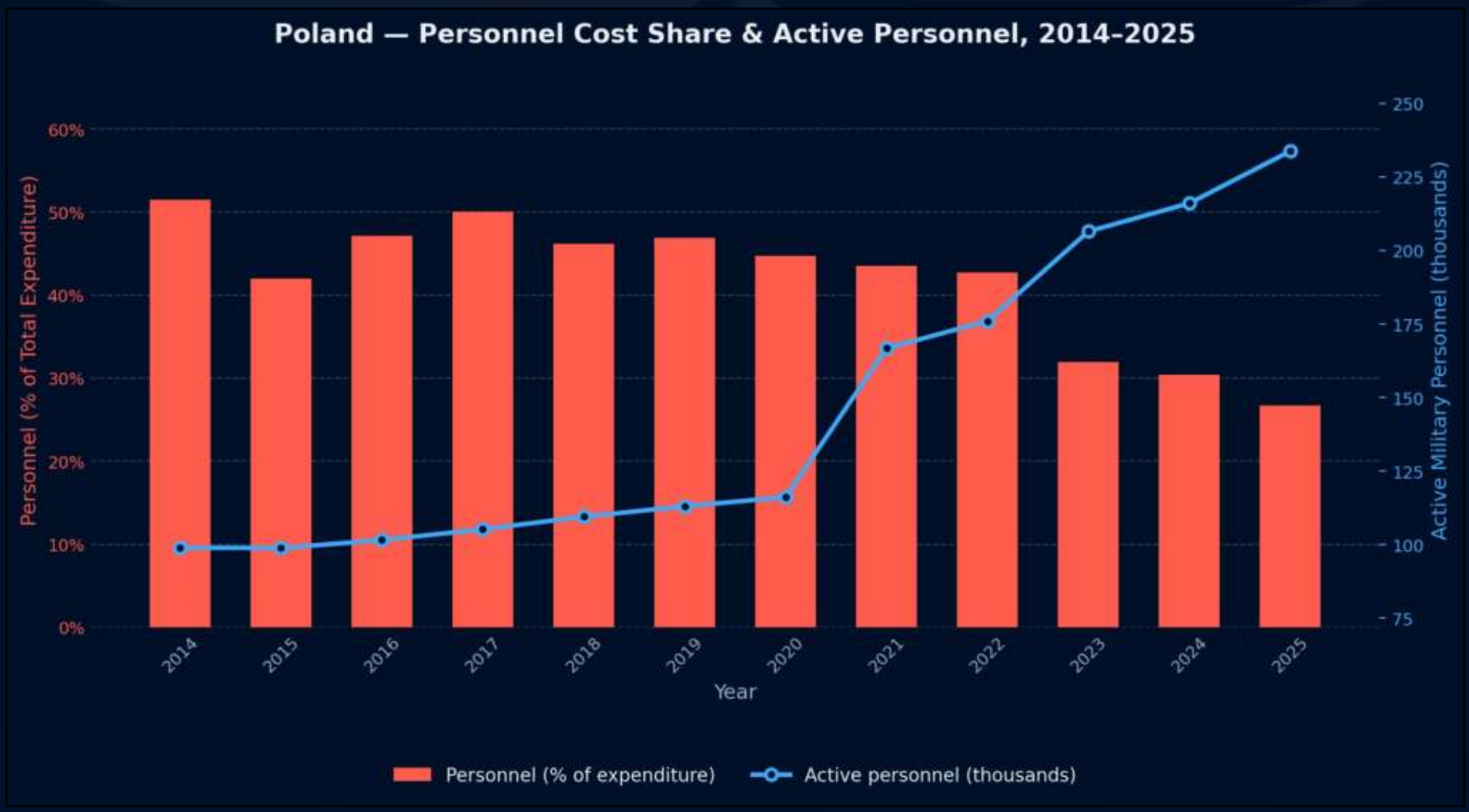
Poland devotes 54% of its defense budget to major equipment and related R&D—nearly triple NATO's 20% guideline and the highest equipment share in the entire alliance. Personnel costs, at 26.7%, are disciplined and proportionate. This ratio reflects a deliberate strategic choice: Warsaw is not simply paying soldiers, it is buying combat power. By comparison, most Western European allies—Germany, France, Italy—cluster around or below the 20% equipment threshold, and several fell short even of that in recent years.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Poland's personnel cost share has fallen sharply (from ~52% in 2014 to ~27% by 2025) as the defense budget has grown faster than personnel costs, freeing an increasing share for equipment. Active personnel have risen dramatically, from ~100,000 in 2014 to ~235,000 by 2025, the steepest expansion of any NATO ally in absolute terms. Poland reintroduced voluntary basic military training and has aggressively expanded the Territorial Defence Force as a reserve and mobilization base alongside the regular army. The target is 300,000 active personnel—the largest land force in Europe outside Turkey and the largest in NATO's European eastern front—driven by an explicit strategic judgment that Poland must be able to fight a high-intensity land war on its own territory without waiting for allied reinforcement.



MILITARY CONTRIBUTIONS

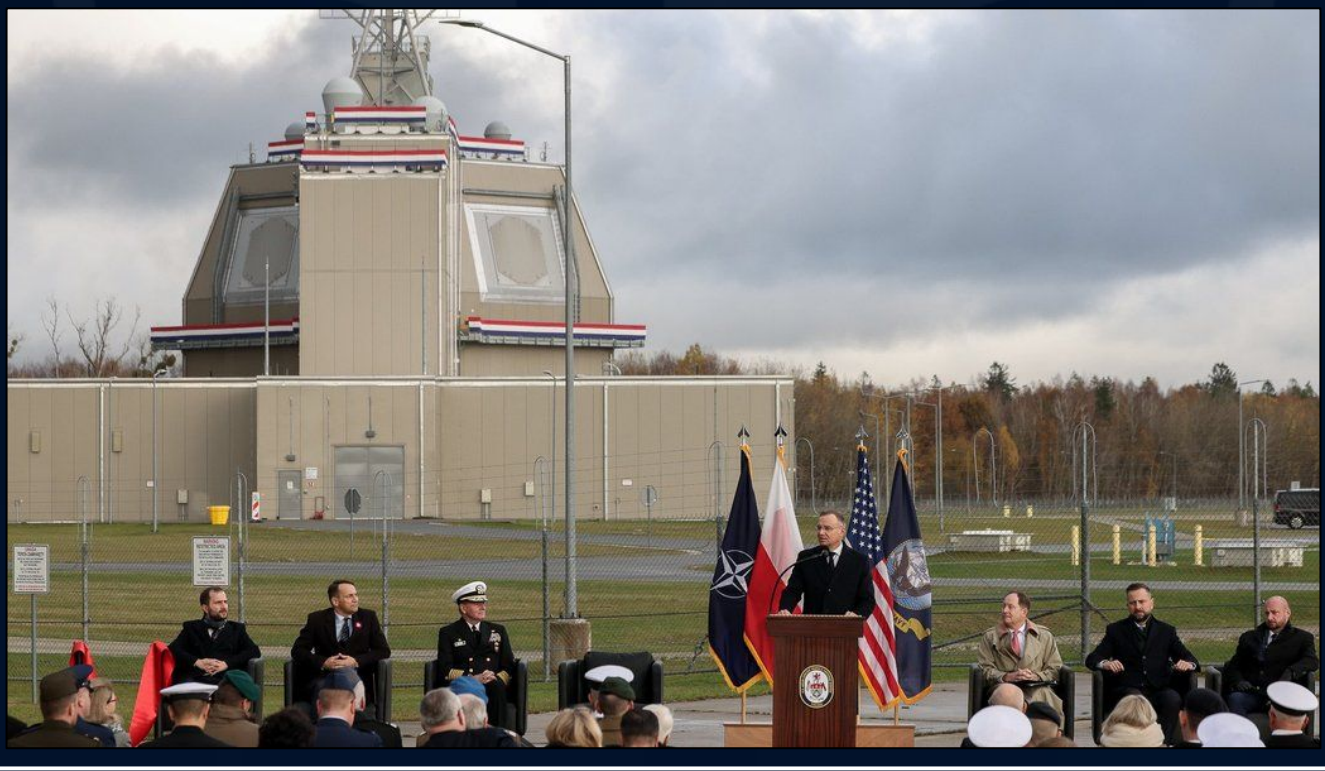
Capability Modernization

Poland's modernization strategy is organized around an ambitious strategic logic: building the most capable land-warfighting force in NATO Europe, with the mass, equipment, and fires depth to fight a high-intensity war on Polish territory without waiting for allied reinforcement. The armored fleet is approaching 900 MBTs across Abrams, Leopard 2, and K2 platforms—exceeding 1,100 by 2030, more than Germany, France, the UK, and Italy combined. The air force is transitioning to an all-Western fleet anchored by 32 F-35As, making Poland the first Eastern European fifth-generation operator. HIMARS and JASSM-ER cruise missiles with ranges exceeding 900km provide deep-strike capability most European allies lack entirely. Patriot PAC-3 MSE addresses the air defense gap that RussiA's missile campaign against Ukraine exposed. Poland has allocated $662M to domestic 155mm ammunition production targeting 150,000 rounds annually by 2028. Poland is undergoing a massive investment reflecting hard lessons from Ukraine that most European allies have not internalized.

MILITARY CONTRIBUTIONS

Force Posture

Poland has become the hub of NATO's eastern deterrence architecture. It hosts approximately 10,000 US troops, the V Corps Forward Headquarters—the US Army's senior land command in Europe—a Combat Aviation Brigade, and the Aegis Ashore ballistic missile defense site at Redzikowo. Warsaw hosts NATO's Enhanced Forward Presence battlegroup and the Multinational Corps Northeast headquarters, and has forward-deployed allied forces—German Patriot batteries, Dutch and Norwegian F-35s—on its territory precisely because it has made itself the credible anchor of the eastern front. Poland also contributes troops to NATO missions in Latvia, Romania, Kosovo, Lebanon, and Iraq simultaneously. In 2024, it launched construction of the East Shield—a $2.5 billion, 700-km border fortification system along its borders with Russia and Belarus, targeted for completion in 2028.



MILITARY CONTRIBUTIONS

Industrial Base

Poland's defense industrial base is undergoing rapid transformation, consolidating under the state-owned Polish Armaments Group (PGZ), which encompasses over 60 companies spanning ammunition, armored vehicles, missiles, and electronics. Three new ammunition facilities are under construction; a BAE Systems partnership will enable a 16-fold increase in 155mm production capacity, targeting 150,000 rounds annually. PGZ has contracted to deliver nearly 300,000 rounds of 155mm ammunition to the Polish armed forces by 2029. Poland also secured the largest single allocation from the EU's SAFE defense loan program—$51 billion, nearly one-third of the $176 billion fund—to finance continued modernization. South Korean technology transfer agreements attached to K2 tank and K239 Chunmoo contracts are building domestic production competency for future indigenous variants, reducing long-term import dependency.

STRATEGIC ALIGNMENT

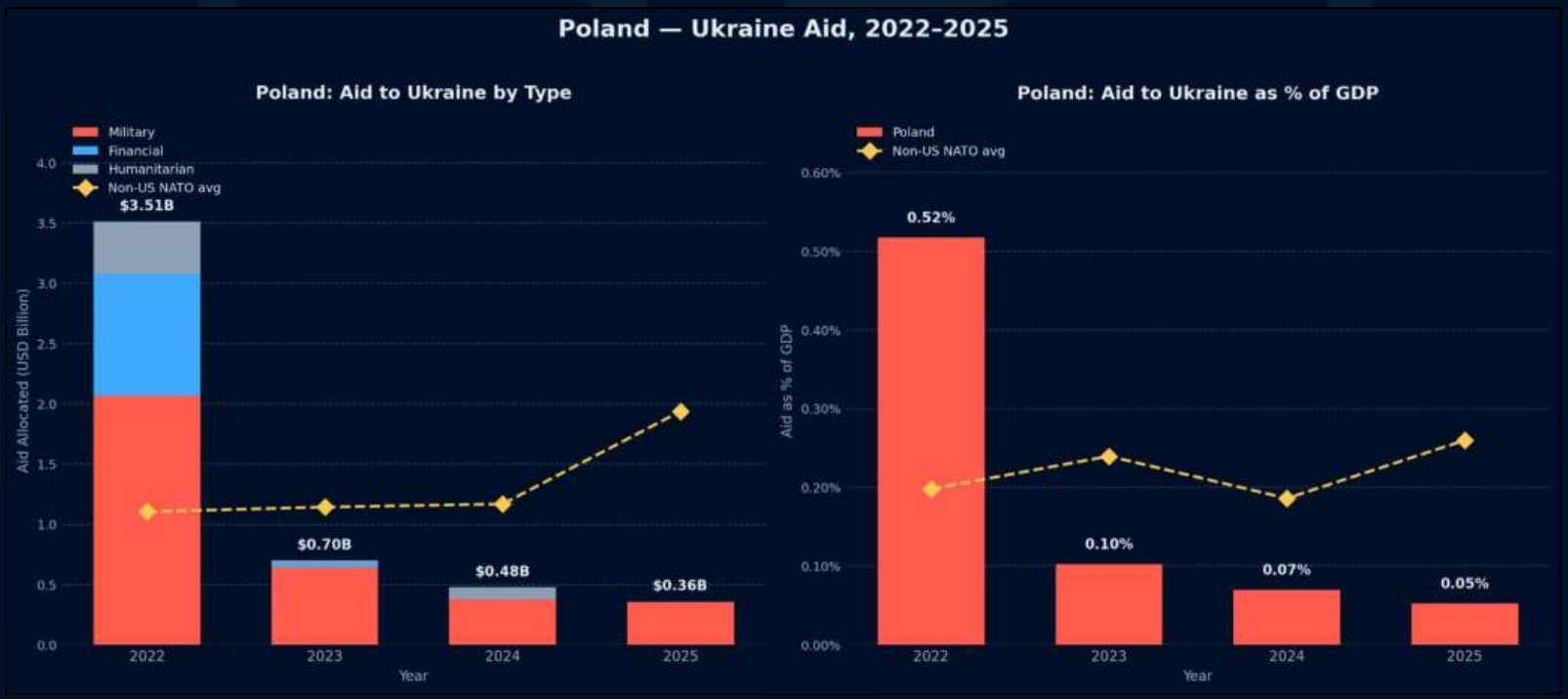
Declared Posture

Poland's governing strategy document remains the 2020 National Security Strategy. On Russia, it aligns tightly with NATO 2022—naming "the neo-imperial policy of the Russian Federation" as the most serious threat. On China, it diverges by under-specification: China is mentioned only as a factor in great-power rivalry, with no characterization comparable to NATO's "systemic challenges" framing. On Iran, the document is largely silent—a notable divergence from NATO 2022's proliferation language.

STRATEGIC ALIGNMENT

Ukraine Support

Poland is a near top-tier Ukraine donor. Bilateral commitments reached 0.52% of GDP in 2022—among the highest in the alliance—placing Poland in the leading cluster alongside the Nordics and Baltics. Poland was the second-largest bilateral supporter globally in early-war tallies, providing military equipment and platforms rather than financing. Poland transferred tanks, artillery, aircraft, ammunition, and air defense systems transferred at scale in the war's most critical early phase. Delivery performance has been strong—Eastern European donors including Poland delivered over 80% of pledged heavy weapons, outperforming Western European allies on follow-through. Since 2024, Poland has shifted toward EU-routed financial support mechanisms, with bilateral figures declining as the early equipment surge completed, but the cumulative contribution to Ukrainian survival in 2022–2023 is among the most consequential of any ally.



STRATEGIC ALIGNMENT

Russian Decoupling

Poland has executed a near complete Russian energy decoupling program—Russian gas fell from ~52% of imports in 2015 to zero by 2024, coal from ~60% to zero, and oil from ~90% to effectively zero, driven by Baltic Pipe completion and LNG terminal expansion. However, Poland has been slow to cut imports of liquefied petroleum gas (LPG) from Russia—with recent action rectifying early slowness. Overall energy import dependence rose as substitutes replaced Russian sources, but the structural dependence on Moscow is gone. On sanctions enforcement, Poland has built a strong legal architecture including the April 2022 Sanctions Act and February 2025 anti-circumvention amendments with criminal penalties of 3–15 years, operating as a frontline enforcer alongside the Baltics. The structural bottleneck is corporate criminal liability requiring prior individual conviction before entities can be prosecuted—limiting prosecution counts and creating a gap that EU Directive 2024/1226 transposition is meant to close.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Poland recorded 91% for staying in NATO, second only to Albania, with 82% feeling more safe from NATO cooperation and 76% agreeing Poland should defend another ally, consistently near the top of the alliance across all survey years. Eighty-six percent said Russia's war had affected Poland's security, the highest figure in the entire survey, and Ukraine support stood at around 70% combined. Fifty-three percent favored increasing defense spending in 2024, substantially understating Poland's actual commitment of 4.7% of GDP in 2026. The Tusk coalition government maintains record defense spending and is among the most vocal advocates for Ukraine within NATO, while the opposition PiS was itself a strong NATO hawk in government and continues to support the alliance in opposition. The only notable dissent comes from Konfederacja, at roughly 10 to 12% of voters, which opposes military aid to Ukraine but remains outside government without leverage on core security decisions.

STRATEGIC ALIGNMENT

Hedging Behavior

Poland's hedging behavior is low: no Russian, Chinese, Iranian, or DPRK arms purchases; early action against Huawei in 5G (2020 framework legislation; formal phase-out via NIS2 transposition in 2024); no PM or Presidential visits to Moscow or Tehran since 2020; and while Poland is a BRI signatory, there have been no major new infrastructure deals and Chinese FDI stock totals only ~ €2.5bn (2000–2024). The one outlier is Duda's June 2024 state visit to Beijing, where he endorsed a 2024–2027 Comprehensive Strategic Partnership Action Plan and publicly affirmed BRI cooperation. However, the Tusk government skipped the Third Belt and Road Forum in October 2023.

STRATEGIC ALIGNMENT

Operational Cooperation

Poland's operational record is among the strongest of any post-Cold War NATO member. Warsaw was one of just four nations to join the initial invasion of Iraq in 2003, subsequently led the Multinational Division Central-South, deployed 33,000 troops to Afghanistan over the course of that mission, and lost 63 soldiers across both theaters. Polish forces were consistently more willing to engage in combat than most NATO allies. However, Poland issued only diplomatic condemnation of Houthi attacks and contributed no ships, aircraft, or personnel to Operation Aspides, leaving the naval burden to smaller allies like Belgium, Denmark, and the Baltic states. On the 2026 Iran conflict, Tusk's government explicitly ruled out sending forces to the Persian Gulf or Strait of Hormuz, with Poland initially excluded from the 35-state Hormuz security coalition before Sikorski joined the diplomatic track at the last minute.

SWEDEN

NATO Country Assessment

— TIER ONE —

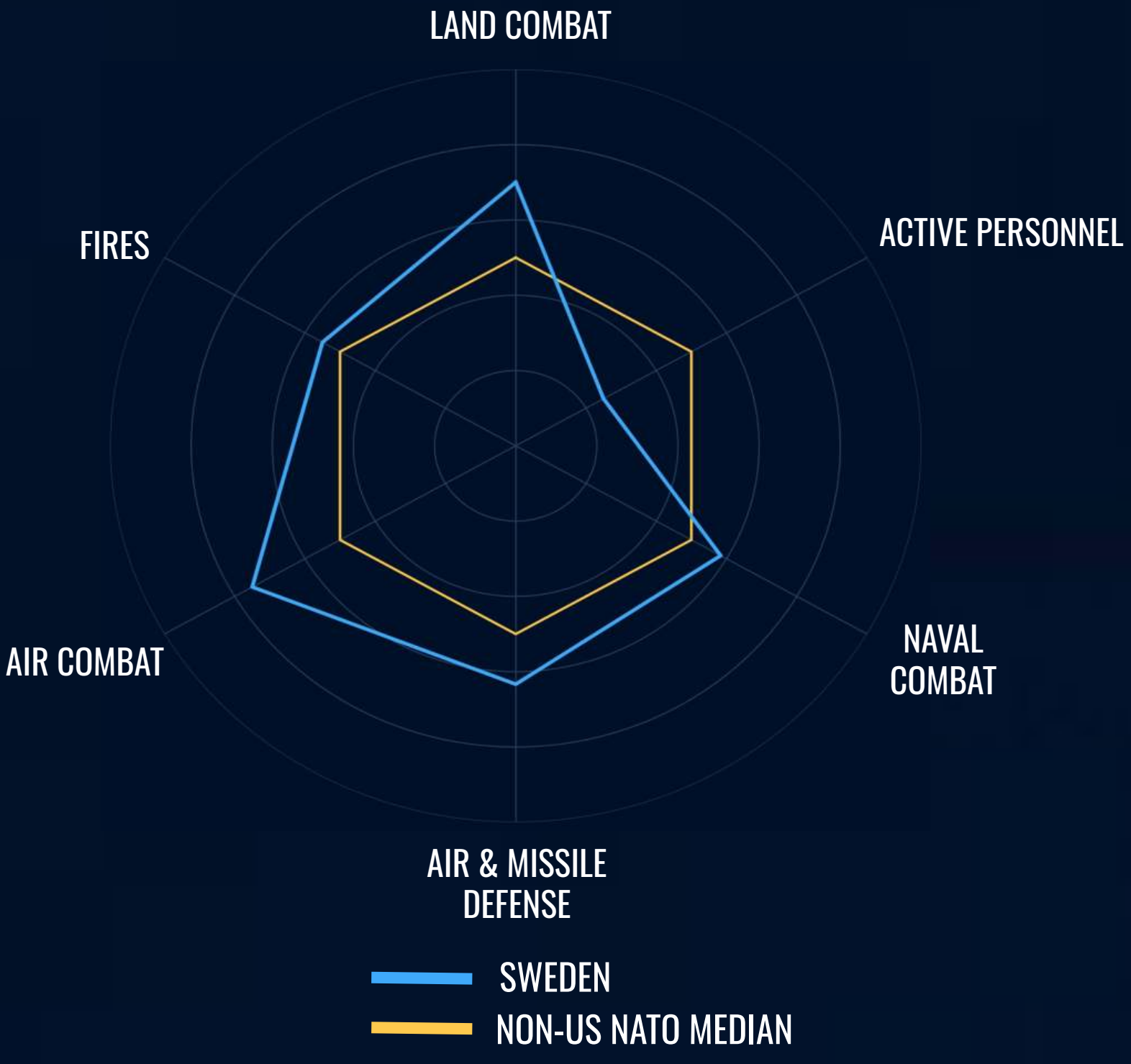
RAPID DEFENSE GROWTH • UKRAINE SUPPORT LEADER • BALTIC SECURITY

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

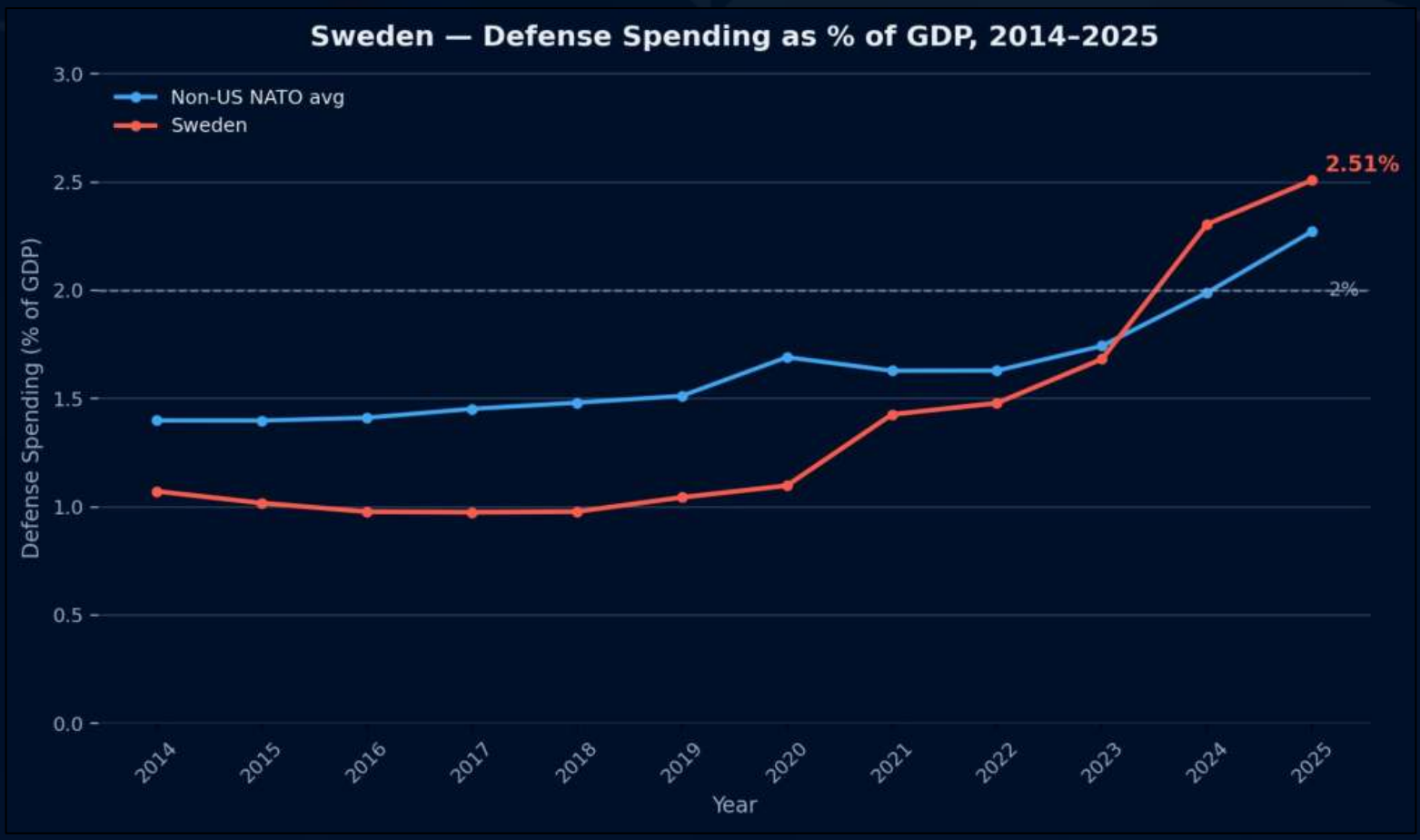


This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

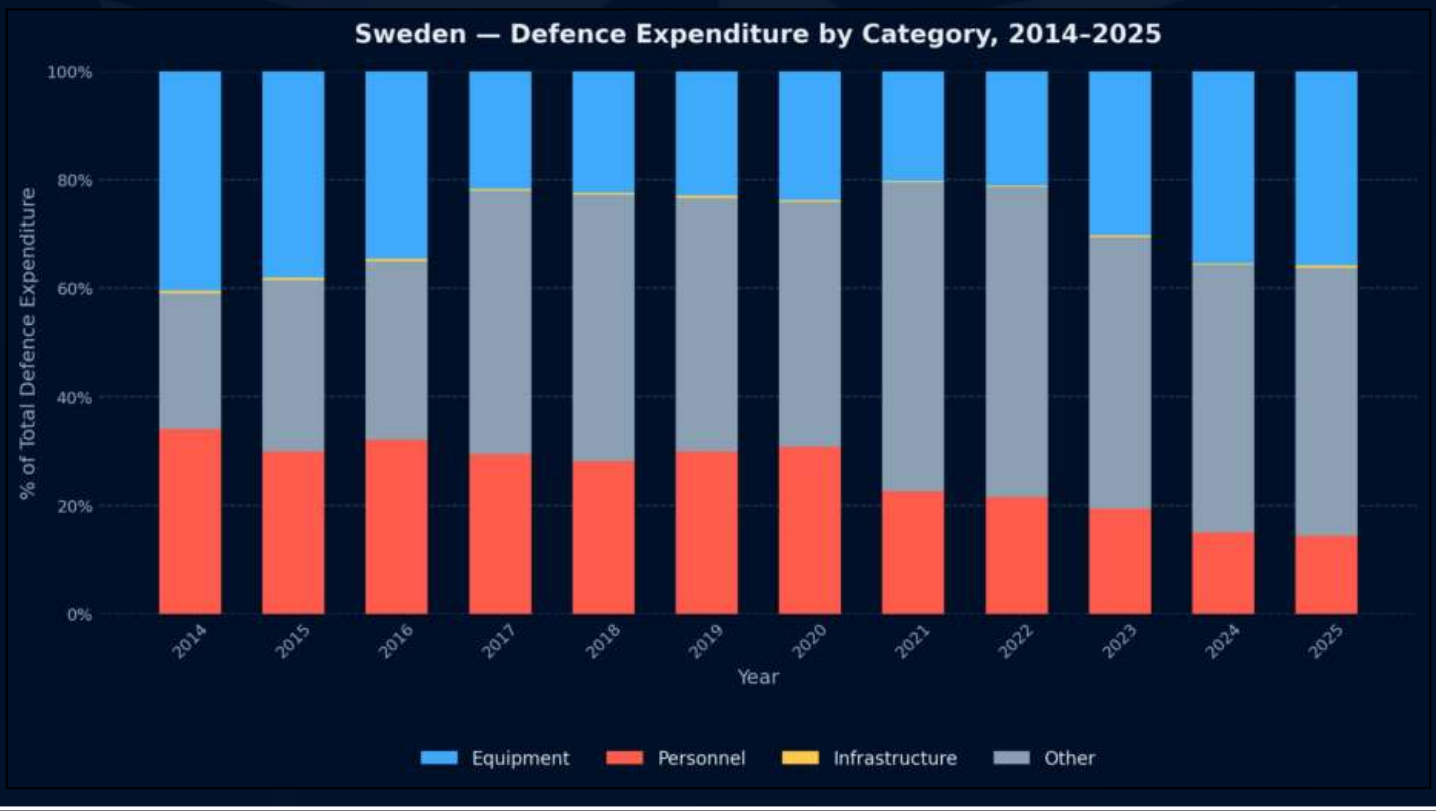
Sweden's defense spending trajectory since NATO accession in March 2024 is among the most accelerated in the alliance. Sweden reached 2.51% of GDP in 2025, having roughly doubled its defense budget since 2020. The 2026 budget raised spending by SEK 26.6B—an 18% single-year increase—with forecast spending 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.



MILITARY CONTRIBUTIONS

Equipment Share

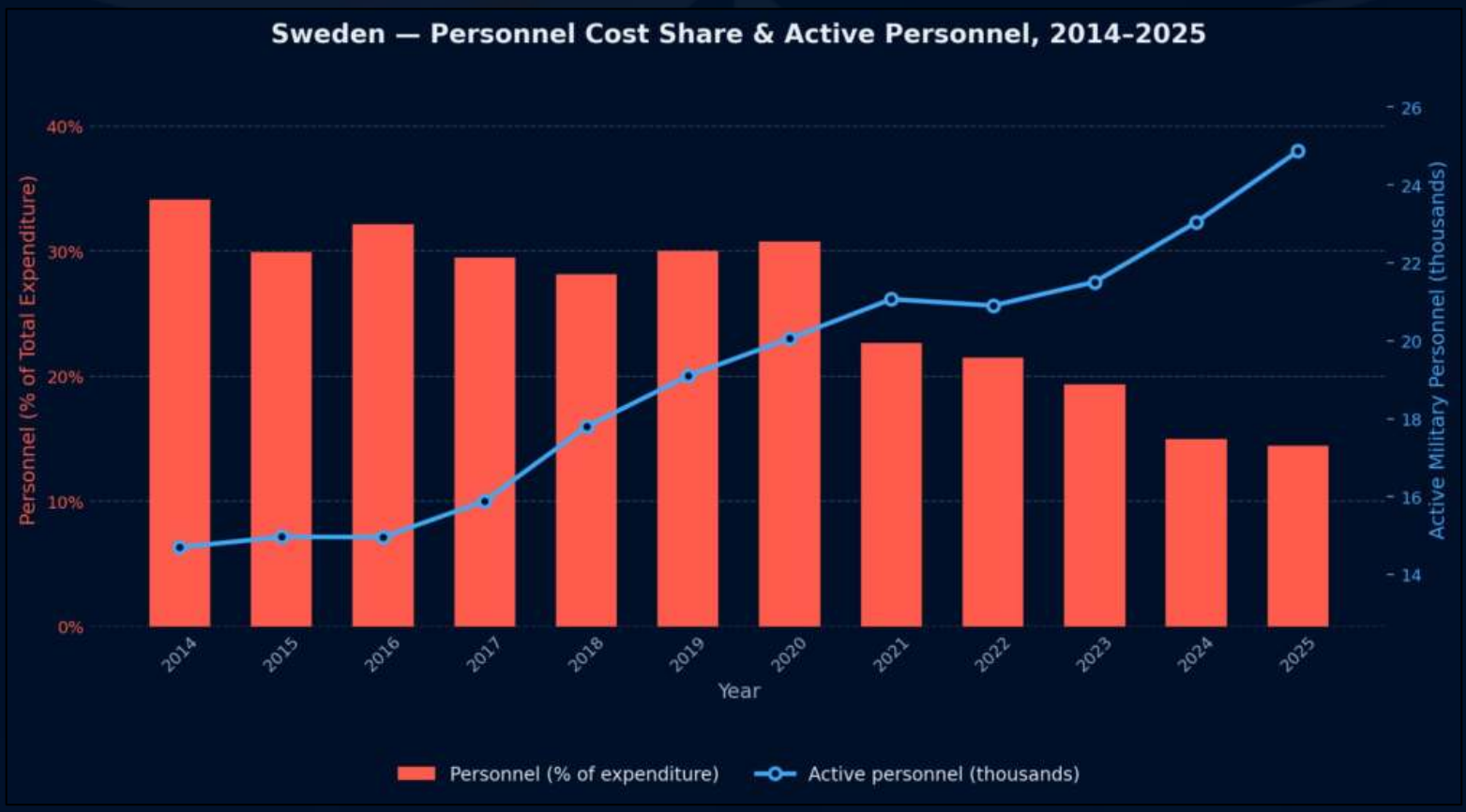
Sweden's equipment share reflects one of the most sophisticated defense-industrial nations in the alliance investing heavily in its own platforms and in NATO-aligned procurement. Sweden's equipment share fell from over 40% in 2014 to around 20-23% through 2017-2022, then surged sharply to ~35% by 2024-2025 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.



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

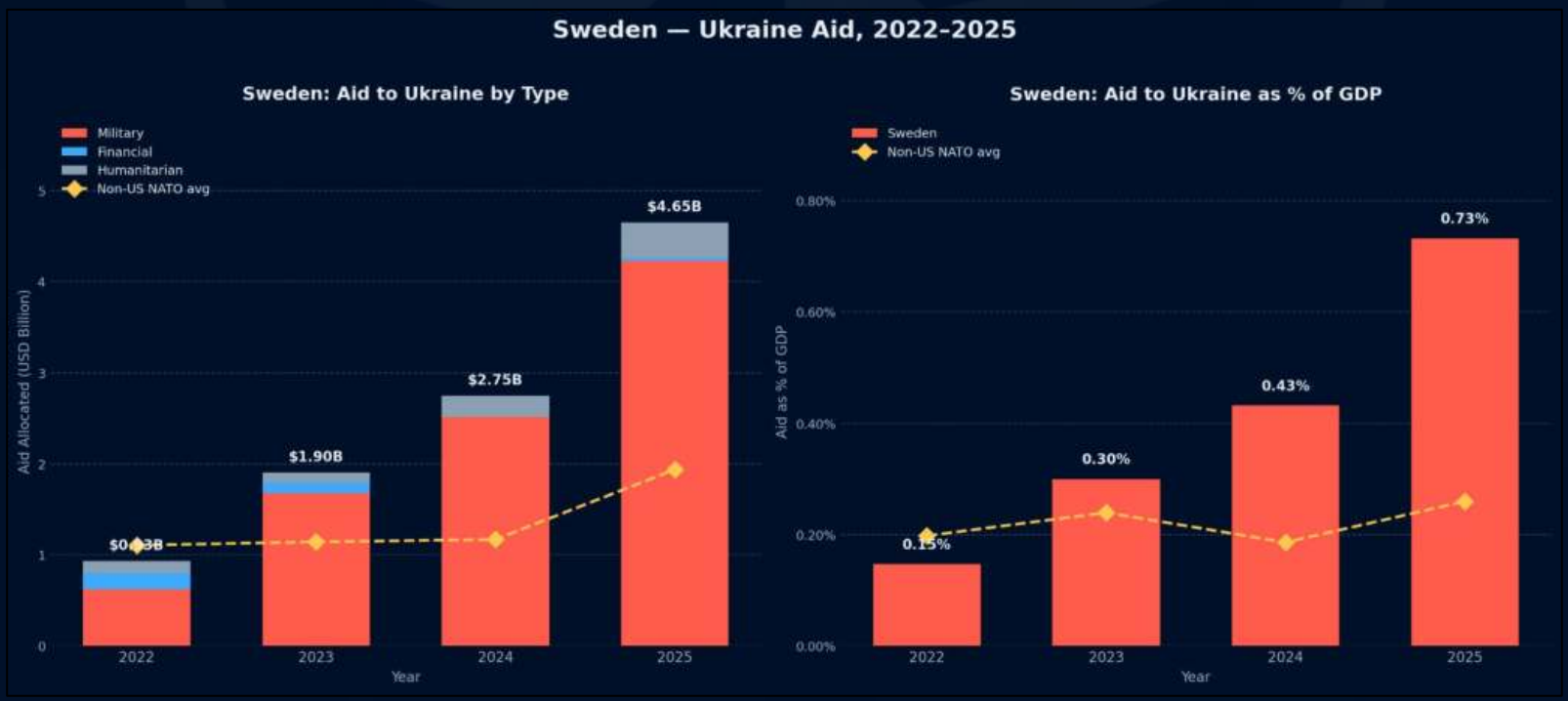
Declared Posture

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.



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.

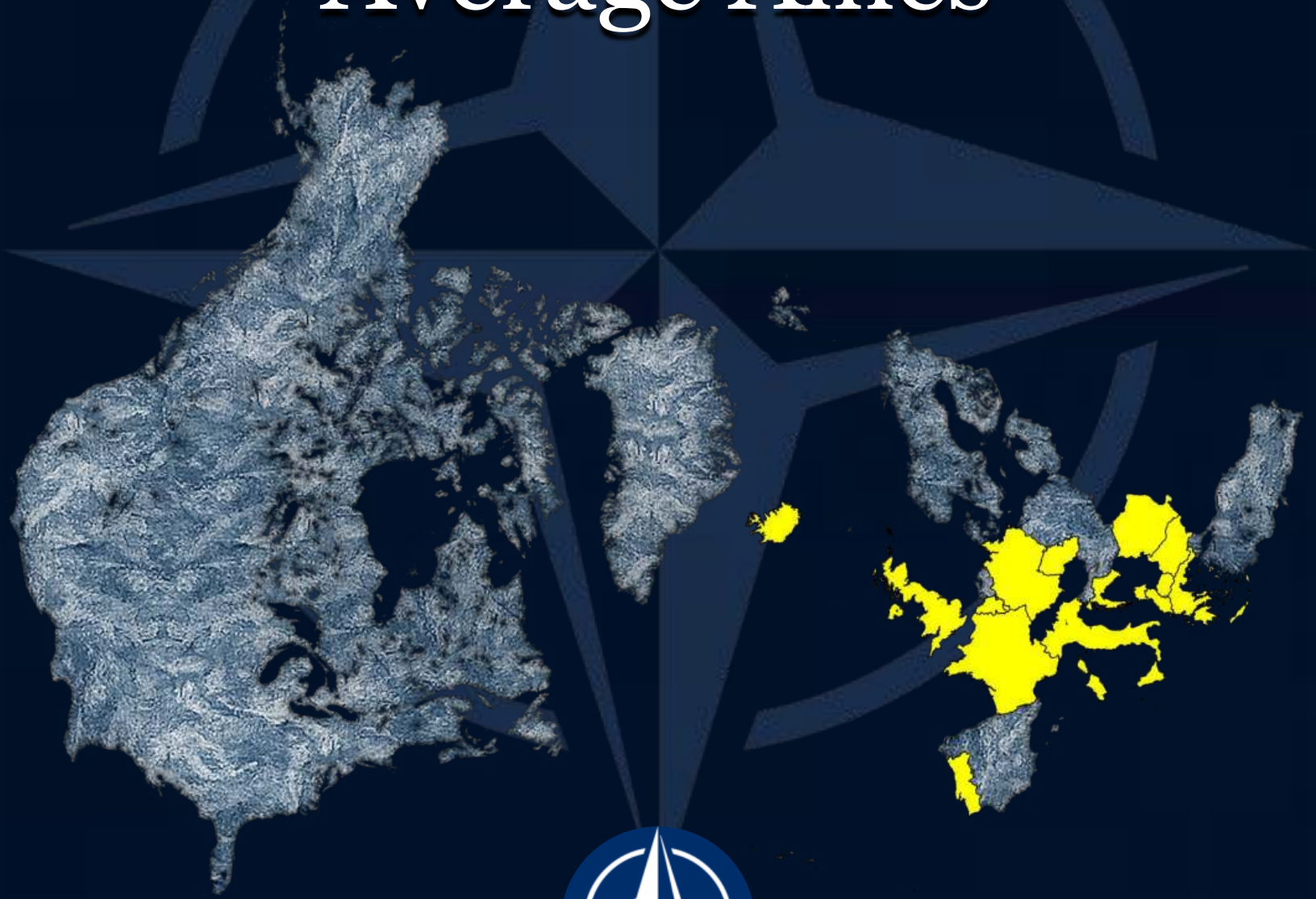
TIER 1

Policy Recommendations

1. **Priority Access to Advanced US Defense Technology:** Tier 1 allies receive first consideration for co-development programs, next-generation platform sales, and defense industrial partnerships currently reserved for the closest US partners.
2. **Forward Basing Preference:** US rotational and permanent force presence prioritized toward Tier 1 hosts.
3. **Senior voice in NATO command and planning:** Preference in nominations for senior NATO command positions, framework nation roles, and strategic planning processes.
4. **Enhanced Bilateral Security Assurances:** Reinforced extended deterrence commitments, nuclear consultation mechanisms, and joint contingency planning above standard bilateral channels.
5. **Trade and Economic Preference:** Favorable treatment in US trade negotiations, tariff schedules, critical minerals agreements, and defense supply chain programs making

TIER 2

Average Allies



TIER 2

At A Glance

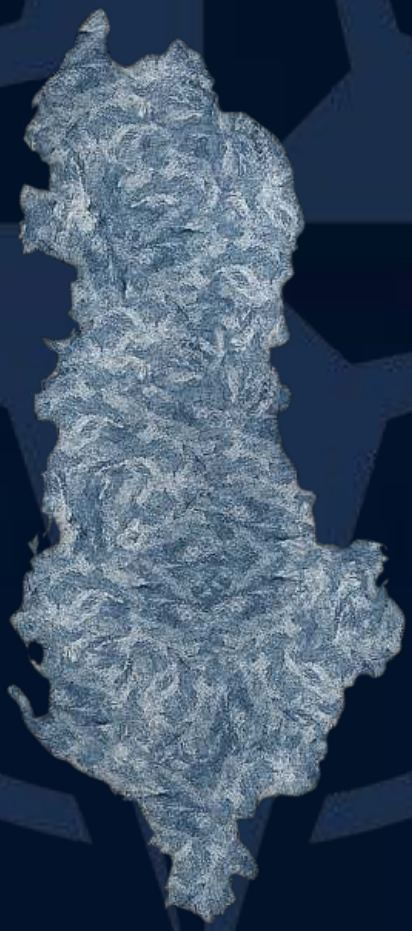
Tier 2 allies are good partners. They meet alliance expectations without consistently exceeding them, contributing meaningfully to collective security but rarely leading across multiple domains. These countries require more pushing from Washington and NATO leadership to fulfill their obligations than Tier 1 allies do, and they have identifiable shortfalls that demand continued accountability. That said, they broadly accept that Europe must contribute more to the alliance—the gap is one of ambition and urgency, not fundamental commitment. Expect solid basing access, a reasonably modern military, and general alignment with NATO's threat assessment. The task with Tier 2 allies is sustained pressure and targeted incentives to close the distance between adequate and excellent—the policy recommendations reflect that tension.

ALBANIA

NATO Country Assessment

—TIER TWO—

CAPABILITY MODERNIZATION • NATO UNITY • LATE TO 2%



AT A GLANCE

Toplines

- **Equipment Spending Transformed on a Modest Budget:** Equipment share surged from 16.5% (2014) to 42.1% (2025)—one of the strongest such shifts in the alliance—while personnel costs fell from 68% to 33%. But with a total defense budget of only $570M, the absolute numbers remain small.
- **2% of GDP—Barely, and Late:** Albania only crossed NATO's minimum threshold in 2025, after years below the non-US alliance average. Legislation now commits to 2.5% by 2029.
- **Among NATO's Most Politically Reliable Allies:** 98% public support for NATO membership, multiparty political consensus, and Albania will host the 2027 NATO Summit — the first Western Balkans country to do so.

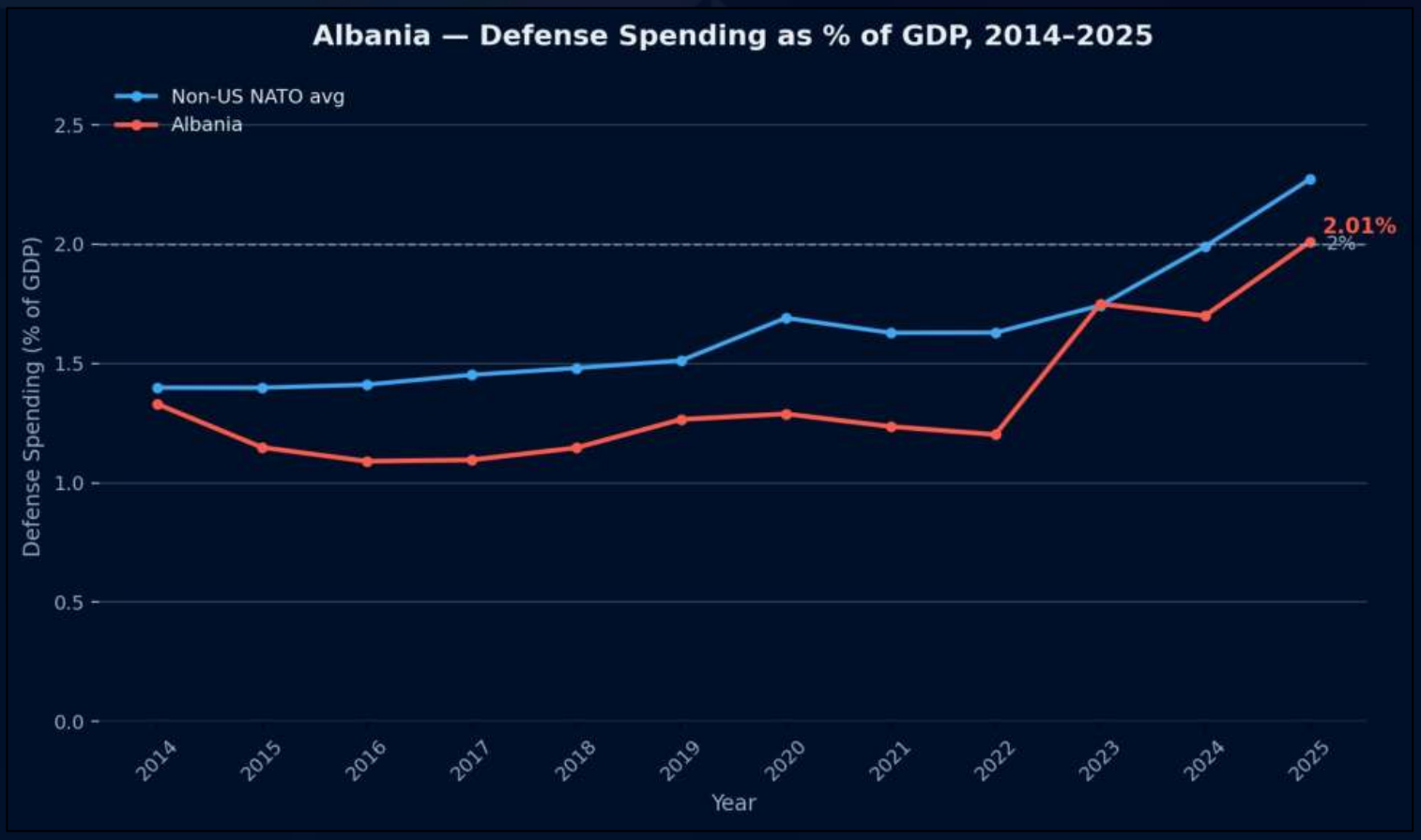
FORCE STRUCTURE AT A GLANCE

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

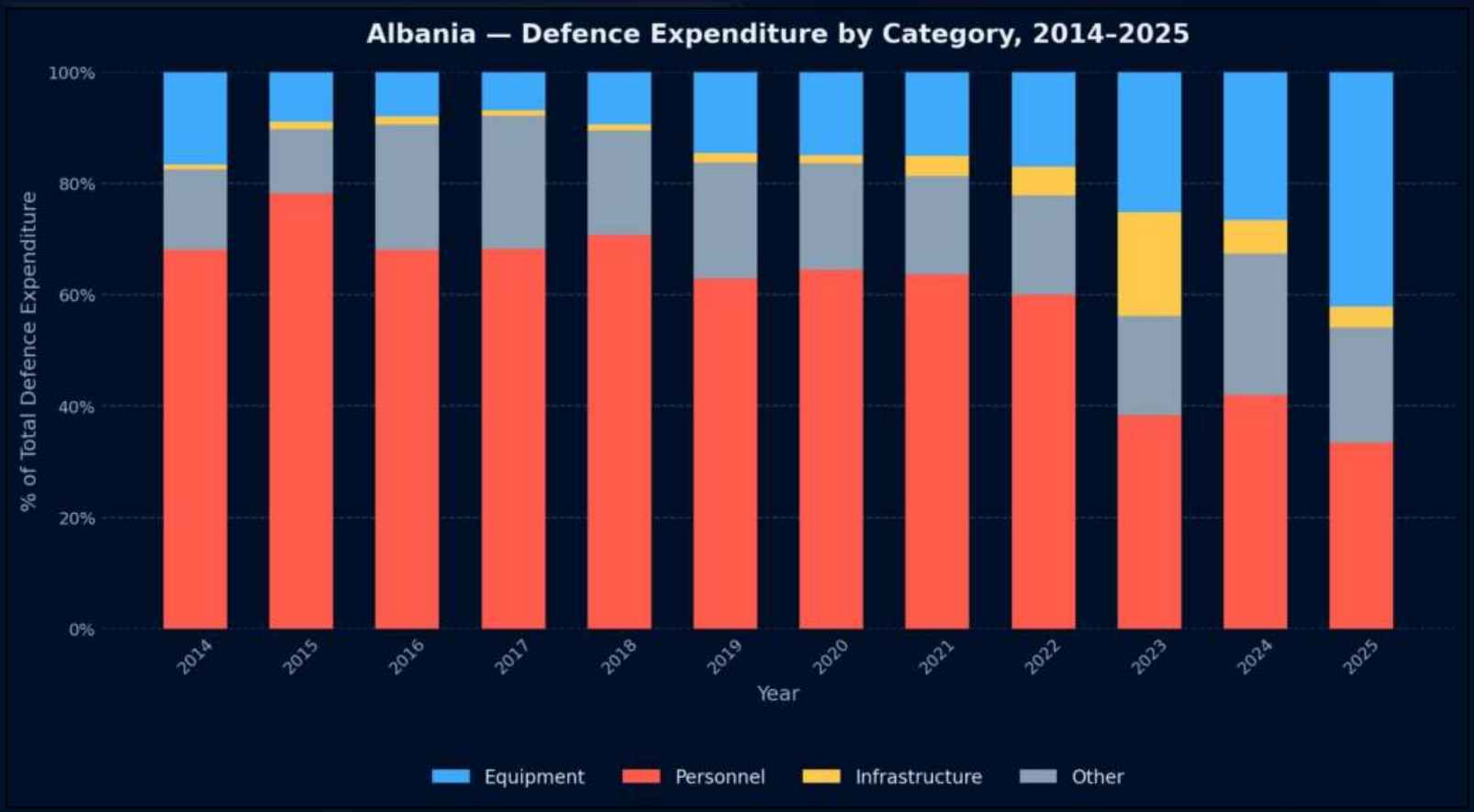
Albania crossed NATO's 2% GDP threshold for the first time in 2025, reaching $570M. That follows over a decade of spending near 1% of GDP. The trajectory is now accelerating: cumulative spending for 2025–2029 is projected at ~$2.2B—nearly double the $1.4B total from 2020–2024. Legislation passed in 2024 commits Albania to 2.5% of GDP by 2029. Both as a percentage of GDP and in absolute terms, Albania remains one of NATO's smallest defense budgets. But the direction and legal commitment are trending positive.



MILITARY CONTRIBUTIONS

Equipment Share

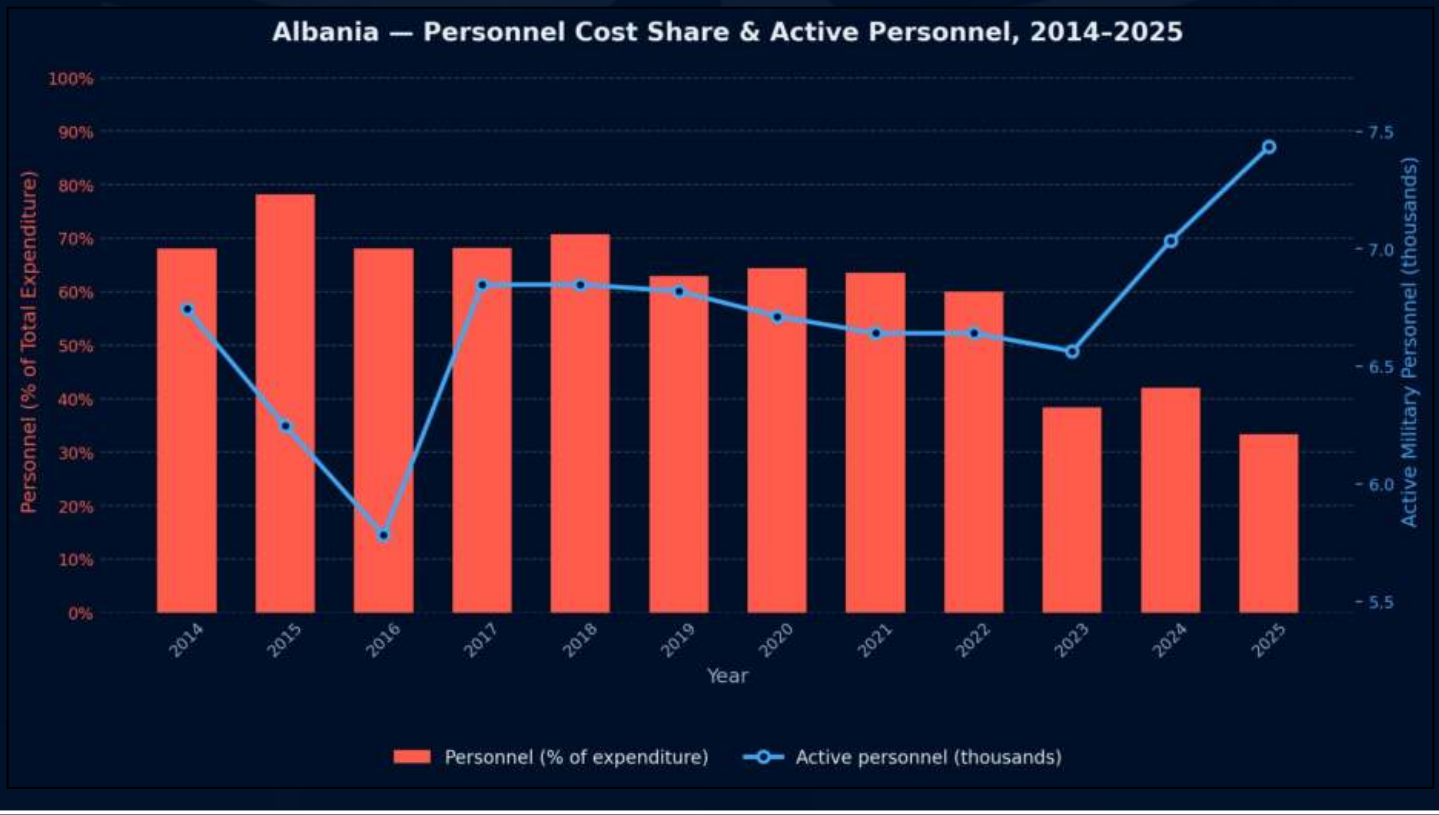
Albania's equipment share tells a story of structural reform within limited resources. The share of defense spending allocated to equipment rose from 16.5% in 2014 to 42.1% in 2025. This is an impressive transformation that tracks closely with the alliance's push to move money away from salaries and toward hardware. This is one of Albania's strongest indicators that they are taking the military rejuvenation of NATO seriously. Few NATO members have achieved this magnitude of equipment-share growth over the same period.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

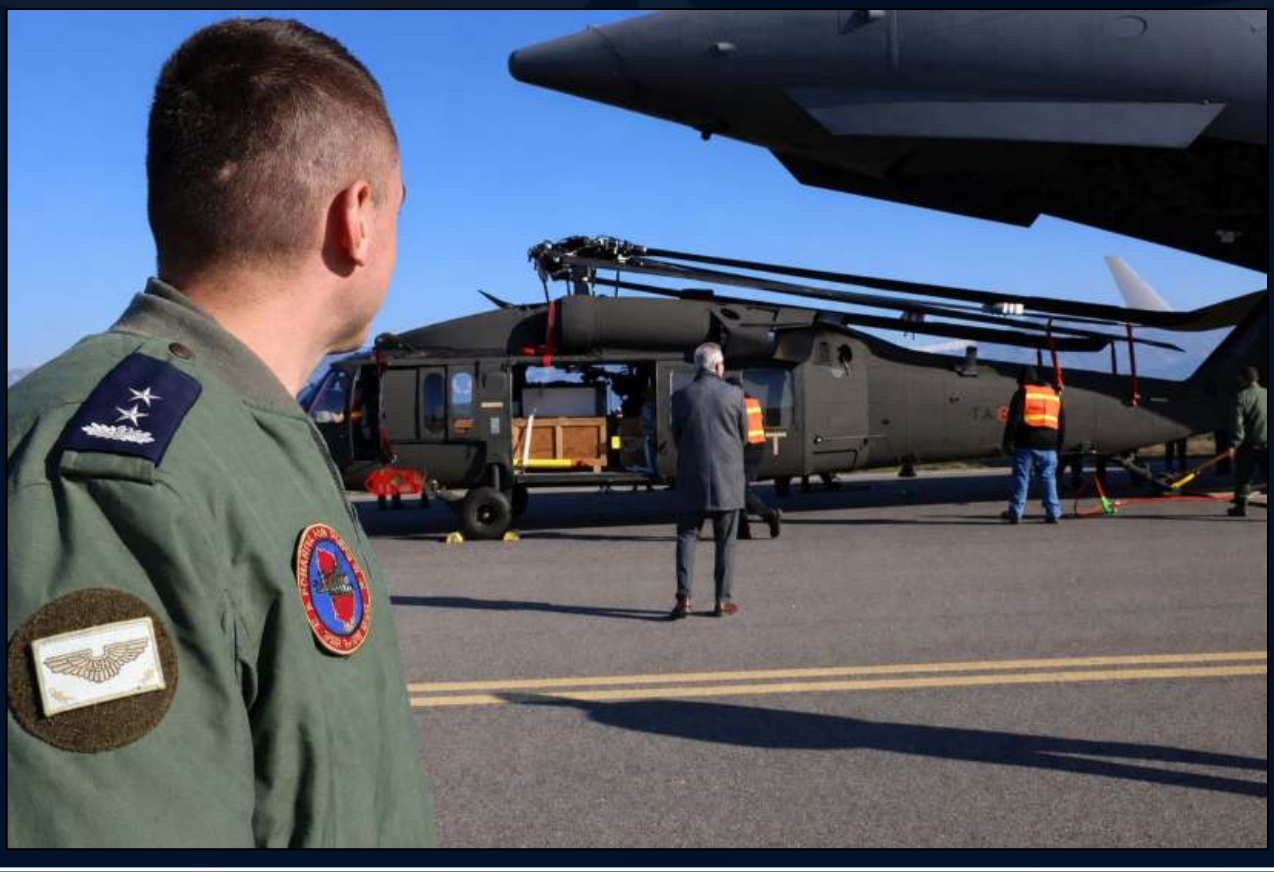
Personnel costs fell from approximately 68% of the defense budget in 2014 to 33% in 2025 while still recruiting a larger force. In NATO terms, this is a significant quality improvement: Albania has dramatically reduced the portion of its budget consumed by wages while building a larger military, indicating a strengthening force. The remaining 33% personnel share is still meaningful for a small, labor-intensive force, but the trajectory brings Albania close to alliance norms on this metric. The absolute budget remains small, so even 42% equipment share still equals limited capital in gross dollar terms.



MILITARY CONTRIBUTIONS

Capability Modernization

Albania's modernization program starts from a very low baseline with no fixed-wing combat aircraft, no organic air defense, aging Soviet-era inventory, but recent procurements show meaningful progress. Key acquisitions since 2020: 3 Bayraktar TB2 strike drones at Kuçovë; Thales Ground Master 400 Alpha air defense radars (Albania's first national air surveillance capability); 40 US-surplus MaxxPro Plus MRAPs; a late-2025 Elbit Systems deal covering ATMOS 155mm howitzers, SPEAR mortars, and tactical drones; 35 Javelin anti-tank missiles; and UH-60 Black Hawks arriving from January 2024. Short-range air defense remains the most significant unaddressed gap.



MILITARY CONTRIBUTIONS

Force Posture

Albania's force posture reflects a small ally punching above its weight in allied deployments. Active contributions include 256 troops in Kosovo, 40 troops in Latvia's Enhanced Forward Presence (eFP), 30 troops in Bulgaria's eFP, and 31 troops in Bosnia-Herzegovina. On the hosting side, Albania's signature contribution is Kuçovë Air Base which was reopened on 4 March 2024 following a €50M NATO-funded initiative. It is the alliance's first tactical airbase in the Western Balkans, capable of hosting F-16s and other allied aircraft. Naval infrastructure at Porto Romano and Pashaliman is also developing into an Adriatic access node, with the September 2025 visit of the US Sixth Fleet flagship USS Mount Whitney signaling growing military relevance. Albania does not host permanent US forces or a major US basing presence, but Kuçovë represents a meaningful forward-posture contribution to American power projection.

MILITARY CONTRIBUTIONS

Industrial Base

Albania's defense industrial base is minimal but low labor costs and active investor interest make it an attractive partner. The centerpiece is the Elbit Systems agreement at Rubik, which envisions domestic drone and artillery production with Israeli technical support. On the naval side, the April 2026 Fincantieri-KAYO joint venture at Pashaliman will produce and maintain small and medium naval vessels. The state-owned KAYO company also has a separate Italian shipbuilding joint venture for coastal patrol vessel production. Domestic ammunition production is targeted for 2026. Albania is not yet a meaningful participant in EU defense programs due to its non-EU status. The industrial base is a long-run development story, not a current capability.

STRATEGIC ALIGNMENT

Declared Posture

Albania's strategic posture documents like the National Security Strategy, the Military Strategy, the Long-Term Development Plan PAZH 2024–2033, and the January 2025 10-year bilateral security cooperation agreement with Ukraine demonstrate an Albania closely align with NATO's 2022 Strategic Concept. On Russia, Albanian explicitly identifies Russian aggression as a direct European and Western Balkans security problem, and Prime Minister Edi Rama has been among the more vocal Western Balkans leaders in support of Ukraine. On China, Albania's defense documents identify Chinese influence in the Western Balkans as a security concern; Albania is not part of the China-CEE 14+1 format and has moved toward restricting Chinese telecom participation in critical networks. On Iran, Albania is one of NATO's most sharply aligned states: it hosts the MEK at Camp Ashraf-3, severed diplomatic relations with Tehran in September 2022 following state-attributed cyberattacks, and maintains an active cyber-defense hardening program with US and NATO assistance.

STRATEGIC ALIGNMENT

Ukraine Support

Albania sits outside the Kiel Institute's comparable tracking framework, which limits precise GDP-percentage comparisons to the alliance median. Albania has donated $66 million in direct military and security assistance support, supplemented by unvalued in-kind military aid including artillery shells, ammunition, Soviet-era stocks, fuel, and maintenance services. More significant than the volume is the diplomatic architecture: Albania was the first Western Balkans state to sign a 10-year security cooperation agreement with Ukraine, opened its first embassy in Kyiv in January 2025, committed to English-language training for Ukrainian F-16 pilots and technicians, and hosted the Ukraine–Southeast Europe Summit in Tirana in February 2024. Albania is a small country that will always be structurally limited in contributions, yet its outsized diplomatic assistance is impressive.

STRATEGIC ALIGNMENT

Russian Decoupling

Albania had minimal Russian energy exposure before 2022 and faces no meaningful withdrawal cost. Domestic hydropower typically accounts for over 90% of electricity production, there is no Russian pipeline-gas dependence, and Albania hosts the Trans-Adriatic Pipeline transporting Azeri gas to Italy as part of the Southern Gas Corridor. Russian energy imports were never significant. On sanctions enforcement, Albania has aligned with every EU Russia sanctions package from the 6th through the 20th, a notable act for a non-EU candidate country.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

In the 2024 NATO polling, Albania recorded the highest support for staying in NATO in the alliance at 98%, and 78% said their country is more safe as a result of NATO cooperation. Albania also led the alliance on increased defense spending support at 81% favoring an increase, and Ukraine support stood at approximately 86% combined, the highest total in the survey. Sixty-three percent agreed Albania should defend another NATO ally if attacked. The government under Edi Rama is firmly pro-NATO and Albania is preparing to host the 2027 NATO Summit, while the main opposition Democratic Party is equally pro-NATO, leaving no major parliamentary force challenging alliance membership or its Ukraine posture.

STRATEGIC ALIGNMENT

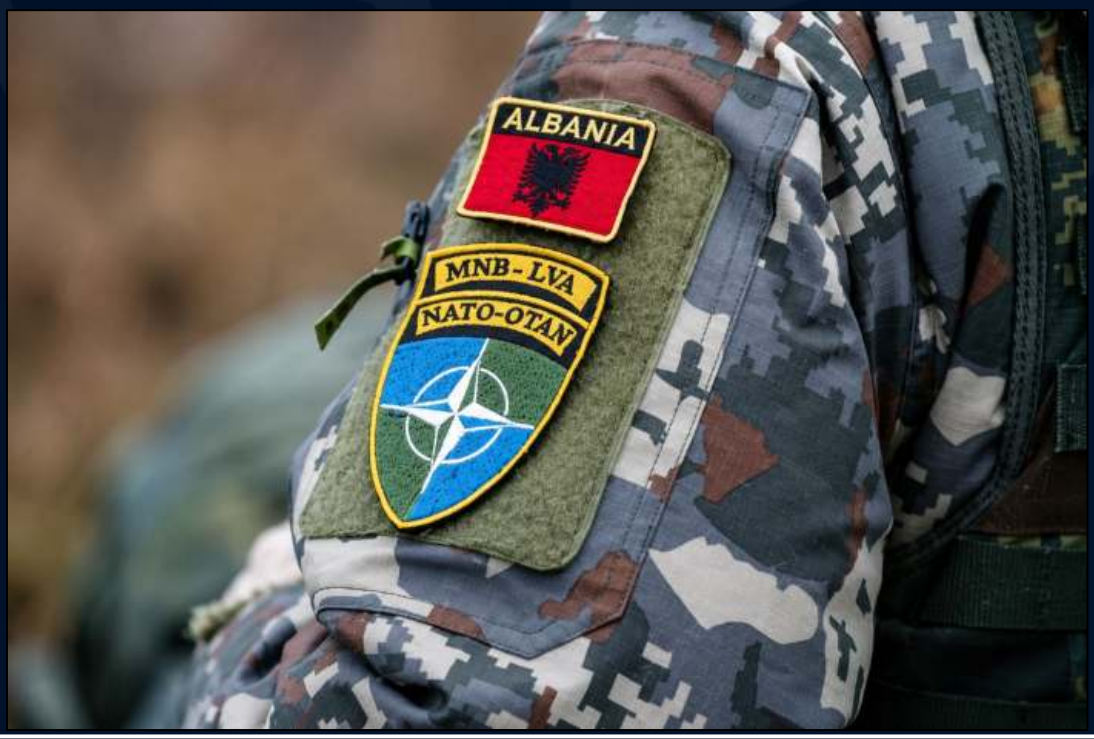
Hedging Behavior

Albania's hedging behavior is clean across every relevant dimension. There is no meaningful Belt and Road participation, no involvement in the China-CEE 14+1 format, no Chinese-controlled critical infrastructure, and a trajectory toward restricting Chinese telecom participation in 5G and critical networks. Arms procurement is entirely US, Israeli, Turkish, and Italian-sourced with no procurement from Russia, China, Iran, or North Korea. There are no documented high-level outbound state visits to Moscow, Beijing, or Tehran during the war period. Albania has not obstructed Finnish or Swedish NATO accession, and has not obstructed the EU's Russia sanctions packages. Albania recognizes that its future is secured in a strong NATO and Western alliance, not hedging with rival adversaries.

STRATEGIC ALIGNMENT

Operational Cooperation

Albania has participated in NATO and US operations well beyond what its force size would suggest. It contributed to ISAF in Afghanistan and the coalition in Iraq, demonstrating early willingness to deploy alongside major allies. KFOR Kosovo contributions have been continuous since accession, politically significant given Albania's relationship with Kosovo's Albanian majority. Albania contributes troops to NATO Multinational Brigade Latvia and Multinational Battlegroup Bulgaria, giving it simultaneous Baltic and Southeastern Flank presence. The signature infrastructure contribution is Kuçovë Air Base that provides allied F-16 and aircraft access. Porto Romano's growing maritime relevance, underscored by the USS Mount Whitney visit in September 2025, adds an important Adriatic access node. Albania participates in Defender Europe and Western Balkans exercises. Force size bounds what Albania can contribute, but its deployment record and hosting infrastructure represent a consistently willing ally.



Belgium

NATO Country Assessment

—TIER TWO—

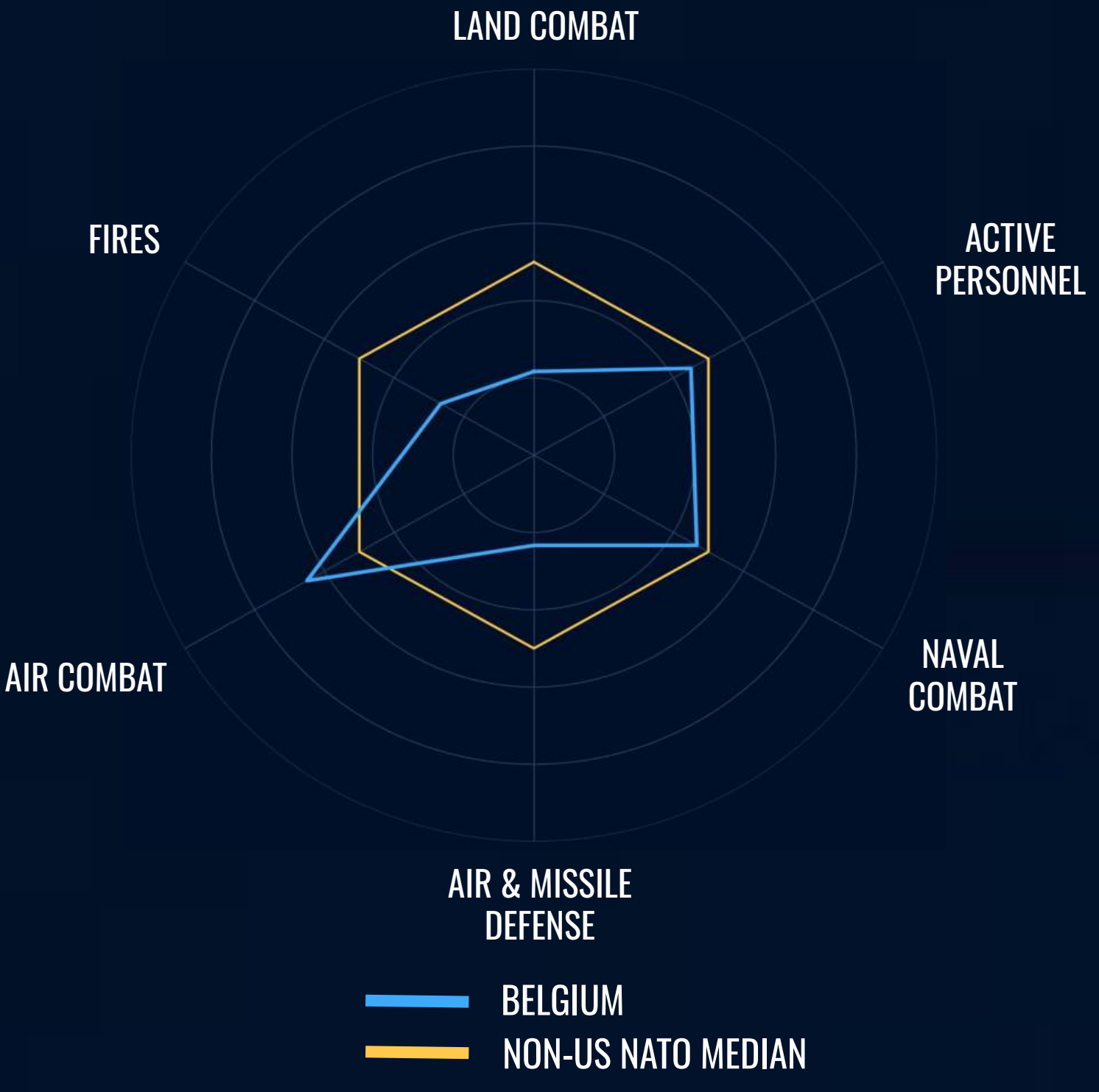
ALLIANCE HEADQUARTERS • SUSTAINED UKRAINE SUPPORT • RUSSIAN ENERGY

AT A GLANCE

Toplines

- **Real and Sustained Ukraine Support:** The F-16-to-Ukraine commitment (up to 53 aircraft by end-2029) is one of the most consequential material contributions any ally has made, and Belgium has backed it with a sustained €1B+ annual military aid pledge.
- **NATO's Home Base:** hosting NATO HQ, SHAPE, US EUCOM personnel, and B61 nuclear weapons at Kleine Brogel makes it the alliance's political and command spine in a way no other ally replicates.
- **Belgium Remains Europe's Second-Largest Importer of Russian LNG as of Late 2025**: spending €1.4 billion on Russian LNG imports between January and September 2025—exceeding its €1.2 billion in military aid to Ukraine over the same period.

FORCE STRUCTURE AT A GLANCE



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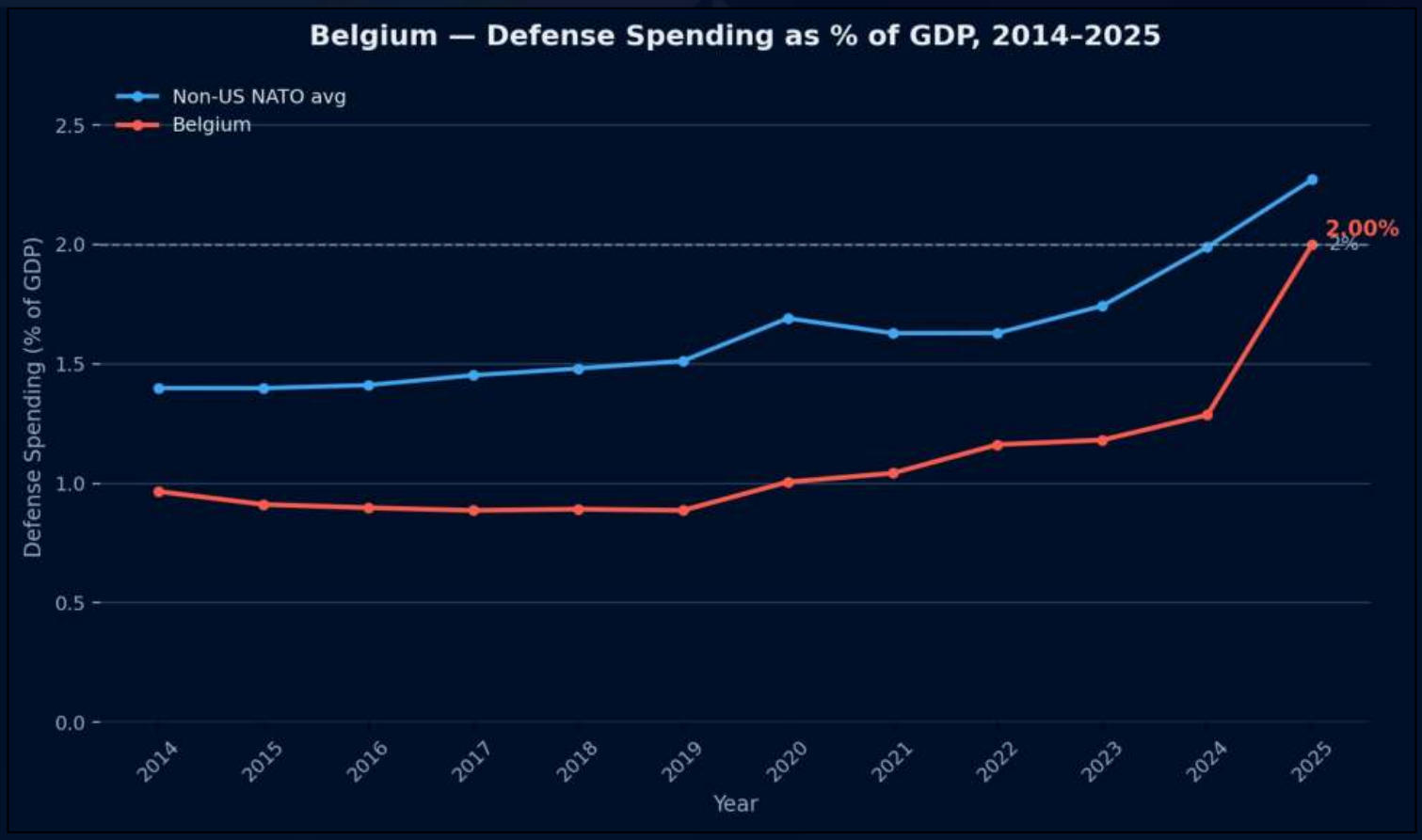
MILITARY CONTRIBUTIONS

Defense Spending Level

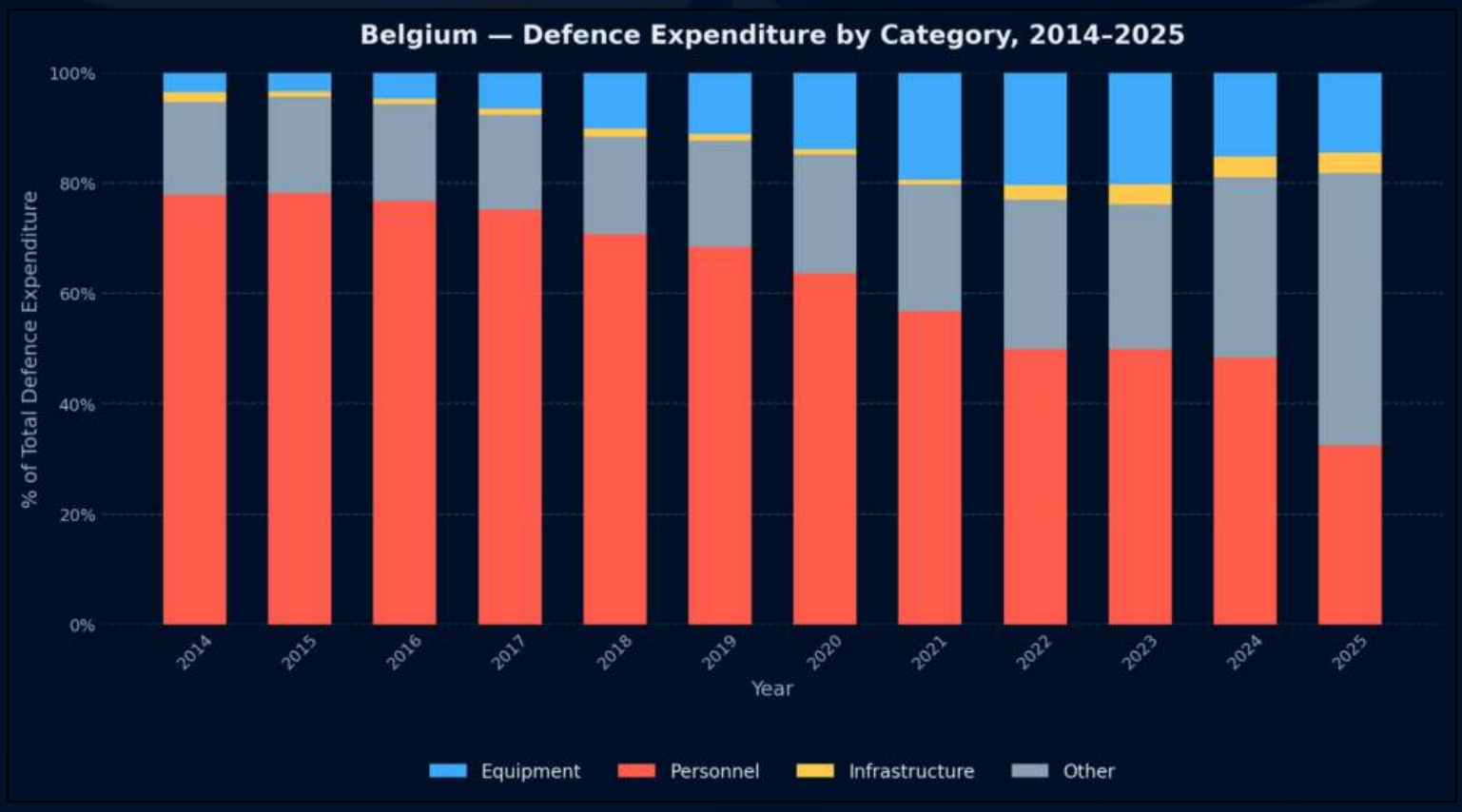
Belgium's defense spending trajectory is one of the most dramatic reversals in NATO's recent history, if belated. NATO figures show expenditure at just 0.97% of GDP in 2014, barely improving through the decade, reaching 1.29% in 2024 before a sharp 59% jump to 2.00% in 2025, The De Wever government accelerated the original 2029 timeline for reaching 2% into 2025 through an additional roughly €4B defense boost, and Belgium accepted the Hague framework commitment to 3.5% core defense plus 1.5% defense-related spending by 2035. In absolute dollar terms, Belgium is now a mid-major NATO spender, but the decades of chronic underinvestment mean it is rebuilding from a hollowed-out baseline.



MILITARY CONTRIBUTIONS

Equipment Share

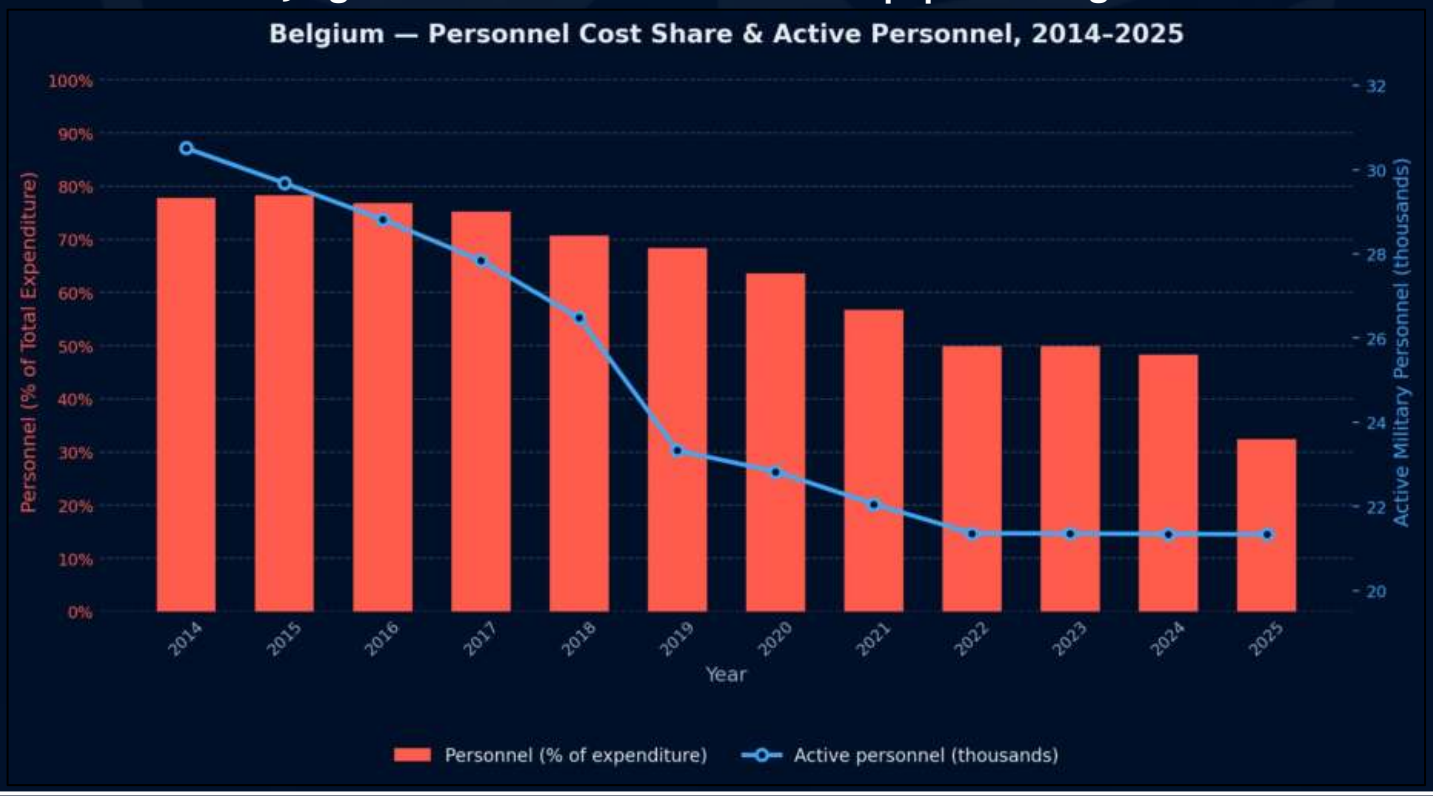
Belgium's equipment share trajectory is a promising but incomplete. For most of the past decade, equipment investment was essentially negligible—barely registering in the budget while personnel consumed roughly 78–79% of total expenditure in 2014–2015. That began shifting around 2021–2022, and by 2025 equipment share has settled to roughly 15% of the budget, while personnel has fallen to approximately 32%. The 2025 procurement surge (F-35 additions, NASAMS, frigates, 1,500 combat vehicles, MQ-9Bs) is now visibly registering in actual expenditure rather than remaining a paper commitment. Belgium spent decades as NATO's clearest example of a personnel-heavy, equipment-light budget; that structural imbalance is now being corrected.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Belgium's personnel cost share has fallen dramatically from roughly 78% of total defense expenditure in 2014 to approximately 32% in 2025, but not solely due to other investments. Active military personnel collapsed in parallel, dropping from around 31,000 in 2014 to roughly 21,500 by 2022, driven by a wave of retirements and a failure to recruit replacements. Almost 15% of newly recruited service members leave within their first year, and experts have argued Belgium needs to massively expand personnel to credibly contribute to NATO deterrence. The De Wever government is now treating the collapse as an emergency, with plans to recruit 2,800 new soldiers annually and double the total military workforce by 2035 through a voluntary service year and a new Cyber Force. The falling personnel cost share is therefore not a story of a professionalizing and specializing force. Rather, it is a story of a force that shrank through neglect and is now attempting to rebuild from a weakened baseline at the same moment it is trying to execute its most ambitious equipment surge in decades.



MILITARY CONTRIBUTIONS

Capability Modernization

Belgium is modernizing from a badly degraded baseline across every domain, but upcoming procurements tell of imminent modernization. The air force is in transition: 12 F-35As operational, ~50 legacy F-16s still flying, with the total F-35 order expanded to 45 and the entire F-16 fleet pledged to Ukraine. The F-35As already carry Belgium's NATO nuclear-sharing mission at Kleine Brogel. The most glaring gap is air defense. Belgium currently has no Patriot and no national area air defense whatsoever, despite committing €4B+ to fix it (10 NASAMS, 3 long-range/anti-ballistic systems, 20 Skyrangers). On land, the army fields a single mechanized brigade of 9,500 troops with no tanks though Strategic Vision 2025 calls for a 7,800-strong medium brigade with 1,500 combat vehicles by 2030. Naval modernization is the most concrete: two new ASW frigates contracted with Damen and Thales in 2023, a third added under the new strategy. Belgium is a country whose modernization plan is real and comprehensive, though almost entirely undelivered.

MILITARY CONTRIBUTIONS

Force Posture

Belgium's force posture value is disproportionate to its military size because of what it hosts rather than what it deploys. NATO's political headquarters sits in Brussels and SHAPE is at Casteau, making Belgium the institutional and command core of the entire alliance. Belgium also hosts approximately 1,150 US EUCOM personnel and roughly 10–15 US B61 nuclear gravity bombs at Kleine Brogel Air Base. On forward deployments, Belgium contributes approximately 200 troops to Lithuania's eFP battlegroup and 300 troops to Romania's eFP. A mine hunter rotates through NATO's Standing Naval Mine Countermeasures Group. Belgium was the first ally to conduct Baltic Air Policing at Šiauliai in 2004 and has rotated through 16 air-policing missions over 20 years with nearly 200 interceptions; Belgian F-16s began Iceland Air Policing in 2025. The ports of Antwerp-Bruges and Zeebrugge are operationally central to NATO reinforcement logistics for US and allied equipment movements into Europe.

MILITARY CONTRIBUTIONS

Industrial Base

Belgium's most significant defense industrial asset is FN Herstal, one of the world's premier small arms manufacturers that produces the M249 SAW and M240 machine gun used by the US Armed Forces and dozens of allied militaries. Beyond FN Herstal, the industrial base is limited, and Belgium acknowledges it: the STAR plan under Strategic Vision 2025 explicitly targets domestic investment in armored vehicles, artillery, and munitions—sectors where Belgium currently depends entirely on imports. Belgium hosts critical NATO supply chain infrastructure through its port complex at Antwerp-Bruges and Zeebrugge, which serve as primary entry points for US and allied equipment flowing into Europe, though Chinese-linked port stakes in that logistics corridor remain an unresolved vulnerability. Belgium is not a significant ASAP or EDIRPA munitions producer.

STRATEGIC ALIGNMENT

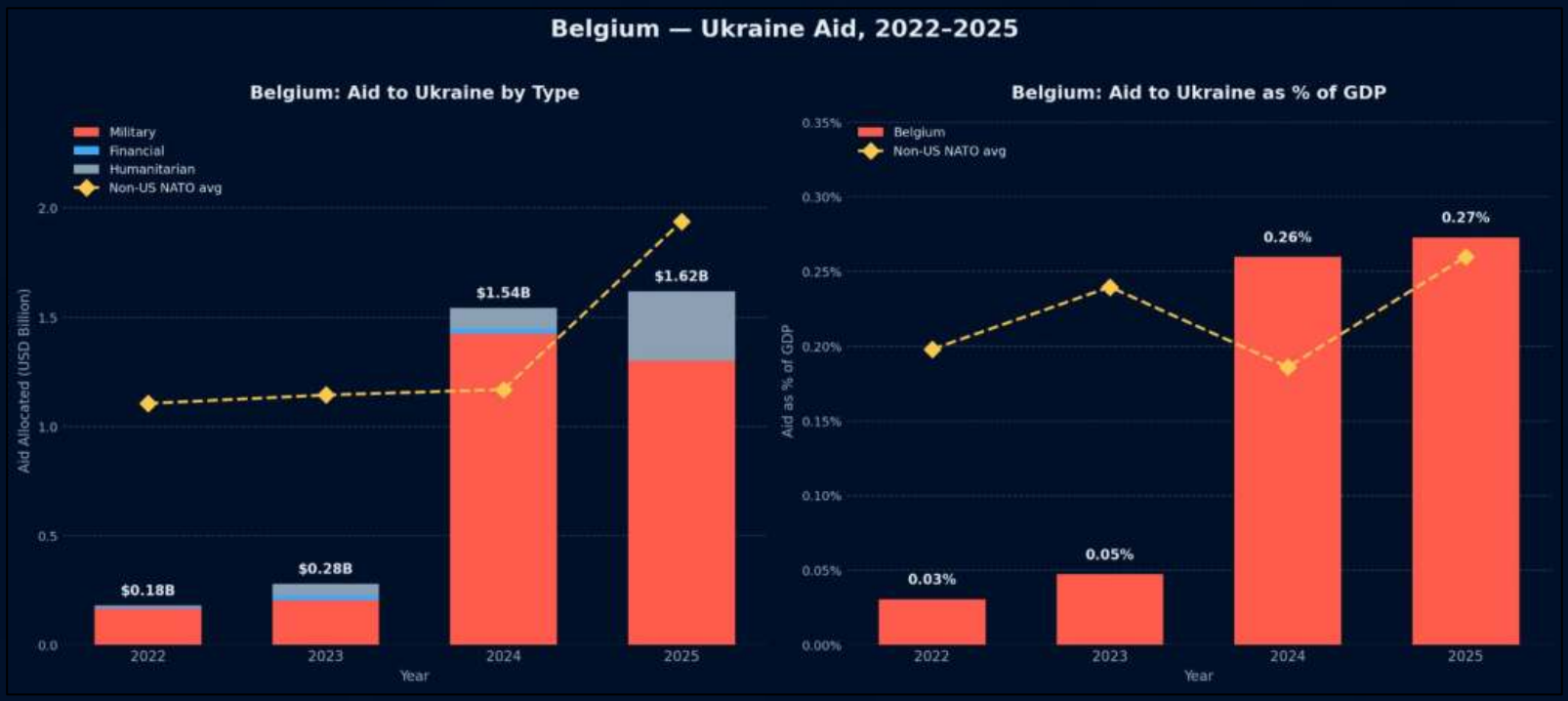
Declared Posture

Belgium's strategic posture is anchored in two documents: the 2021 National Security Strategy and the Strategic Vision Defence 2025, which explicitly frames Belgium's defense transformation as preparation for large-scale conflict and territorial defense. On Russia, the doctrine is aligned with NATO's 2022 Strategic Concept. On China, former Foreign Minister Lahbib's public framing of China as simultaneously "partner, rival, and potential enemy" is the clearest official statement of Belgium's position, though still short of the hardline Baltic or Polish posture. On Iran, Belgium's declared posture is sanctions-based and EU-aligned, with no independent operational doctrine. Overall, Belgium's declared strategy places it firmly in the NATO and EU mainstream.

STRATEGIC ALIGNMENT

Ukraine Support

Belgium has committed €4.488B in total bilateral support to Ukraine since February 2022, with Kiel tracking €3.182B allocated and €3.710B committed (roughly 0.63–0.74% of GDP). The De Wever government pledged at least €1B per year in military aid, delivered €1.1B in 2025, and approved another €1B package in April 2026. The headline military commitment is F-16 transfers: originally 30 aircraft, now reported as up to 53 by end-2029, tied to F-35 transition timelines. Belgium's most strategically distinctive Ukraine role runs through Euroclear: at end-2024, Euroclear held €183B in sanctioned Russian assets, generating €6.9B in annual interest and €1.7B in Belgian corporate tax revenue, with windfall proceeds already flowing to Ukraine financing mechanisms. F-16 delivery timing and a €0.528B commitment gap are the main concerns.



STRATEGIC ALIGNMENT

Russian Decoupling

Belgium's energy decoupling is more complicated than most Western European allies because of Zeebrugge's role as a major LNG terminal. Belgium aligned with EU coal, crude, and oil-product bans and has implemented restrictions on Russian LNG re-export and transshipment from Zeebrugge. However, as of October 2025, Belgium remained Europe's second-largest importer of Russian LNG over the first eight months of the year at 2.3 million metric tons, behind only France. Belgium's most strategically important decoupling contribution is Euroclear: €183B in immobilized Russian assets as of end-2024, with windfall mechanisms already generating billions for Ukraine financing. On sanctions enforcement, Belgium has aligned through all 20 EU packages, and Belgian police conducted meaningful enforcement action in the diamond sector in March 2024. The De Wever government has revoked the nuclear phase-out law and is pursuing domestic nuclear extension and potential new build under Western frameworks.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

In the 2024 NATO polling, 77% of Belgians said they would vote to stay in NATO, while 45% supported increasing defense spending, a notable shift for a country that long trailed on contributions. Sixty-five percent agreed Belgium should defend another ally if attacked, 65% agreed NATO membership makes a foreign attack on their country less likely, and Ukraine support stood at roughly 64% combined, just above the alliance median. The De Wever government has committed Belgium to meeting the 2% target and accepted the Hague 5% framework, and the governing New Flemish Alliance supports NATO hawkery and is not a political constraint on spending increases. Vlaams Belang, at roughly 25% of Flemish voters, remains ambivalent on Ukraine solidarity and is susceptible to anti-establishment frames that can undercut solidarity, but has not positioned itself as anti-NATO. The PCP (Communists) is the one force that explicitly opposes NATO membership, but at consistently below 5% of the vote it carries no governing leverage.

STRATEGIC ALIGNMENT

Hedging Behavior

Belgium's hedging behavior is broadly clean with one significant unresolved exposure. There is no formal Belt and Road participation, no wartime high-level engagement with Moscow or Tehran by the De Wever government, and no adversary arms procurement—the entire modernization program runs through American and European companies. Huawei has been structurally displaced from Belgian 5G core infrastructure, the 2023 Royal Decree institutionalizes that posture, and Belgian prosecutors launched an aggressive enforcement action against alleged Huawei-linked political interference in the European Parliament in March 2025. The principal counter-alignment concern is COSCO-linked minority stakes in Antwerp-Bruges and Zeebrugge. This is not a formal BRI alignment problem, but Antwerp-Bruges is a strategically critical NATO logistics and military-mobility hub, making Chinese-linked infrastructure stakes in that environment qualitatively more serious than ordinary portfolio investment. The port exposure is unresolved and carries alliance-wide consequences.

STRATEGIC ALIGNMENT

Operational Cooperation

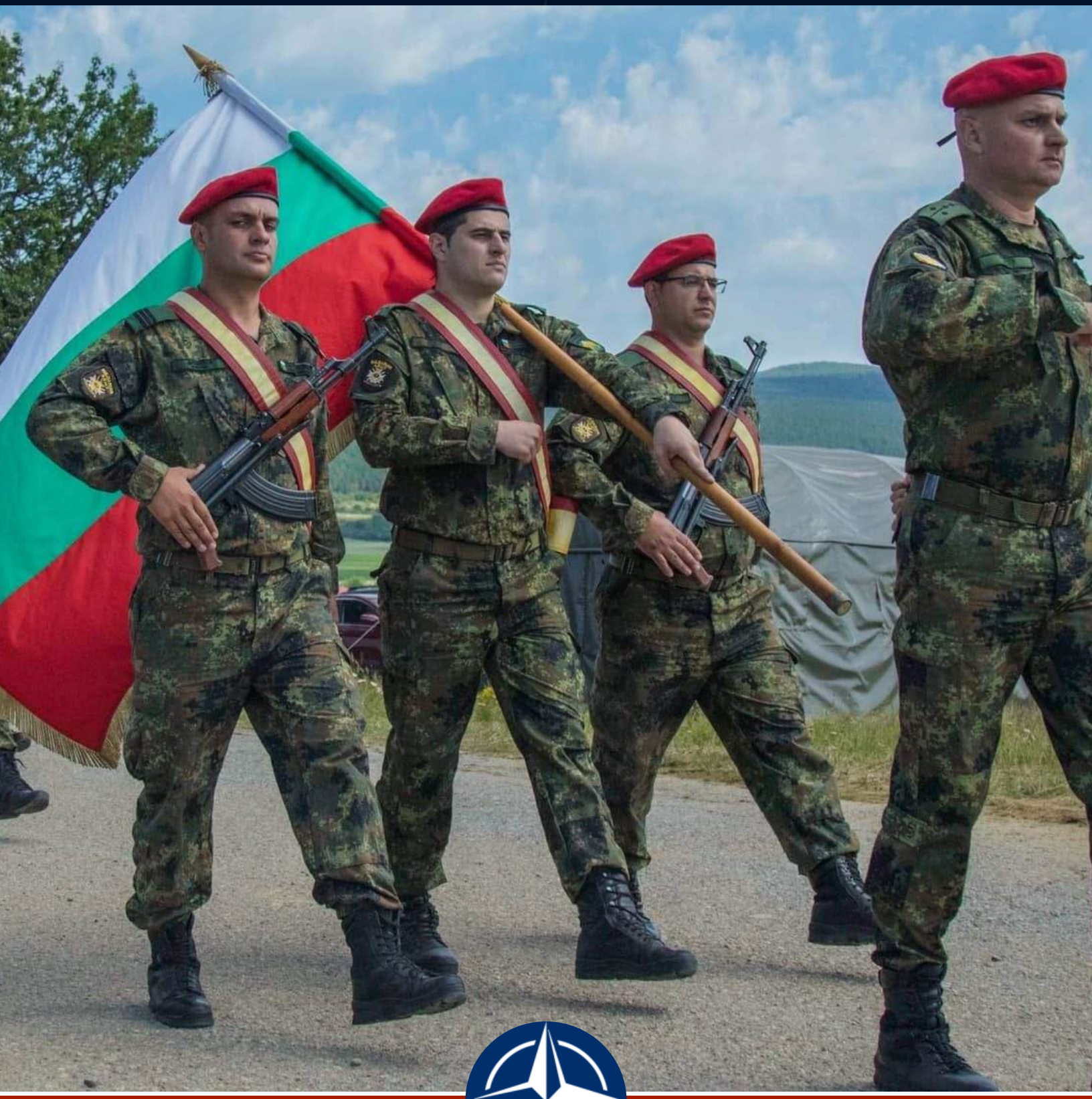
Belgium's operational value to the US and NATO is primarily institutional and logistical rather than combat based. Brussels hosts NATO's political headquarters and SHAPE. Kleine Brogel Air Base hosts US B61 nuclear weapons under NATO sharing arrangements, with Belgian F-35As now carrying the nuclear delivery mission. Antwerp-Bruges and Zeebrugge are the primary entry points for US Army rotational and surge deployments into Europe, making Belgian port infrastructure operationally critical to any major reinforcement scenario. On deployed contributions, Belgium has conducted 16 Baltic Air Policing rotations over 20 years with nearly 200 interceptions, rotates into Lithuanian and Romanian eFP battlegroups, and contributes to NATO Standing Naval Forces with niche mine-warfare capability. On Iran, Belgium aligned with EU snapback sanctions and the E3 framework but took no direct operational role during Operation Epic Fury. Belgium neither facilitated nor obstructed US strike operations—it did not follow Spain, France, or Italy in denying overflight or basing access, but also did not provide the kind of direct operational support Romania and Portugal offered.

Bulgaria

NATO Country Assessment

—TIER TWO—

BLACK SEA ACCESS • PRIORITY ALIGNMENT • WEAK SPENDING SUPPORT



AT A GLANCE

Toplines

- **Bulgaria's Black Sea Access Gives America Irreplaceable Value:** founding membership in the MCM Black Sea Task Group, the Port of Varna grain transit corridor, and its proposed Maritime Coordination Center at Varna position it as NATO's primary southeastern maritime anchor.
- **Aligning With NATO and American Priorities:** the 2025 National Defence Strategy formally designated Russia as Bulgaria's foremost threat, expelled Russian intelligence officers, and named China as a destabilizing actor.
- **Public Support for Collective Defense is Among the Weakest in the Alliance**: only 46% say Bulgaria should defend another ally if attacked and just 59% would vote to stay in NATO.

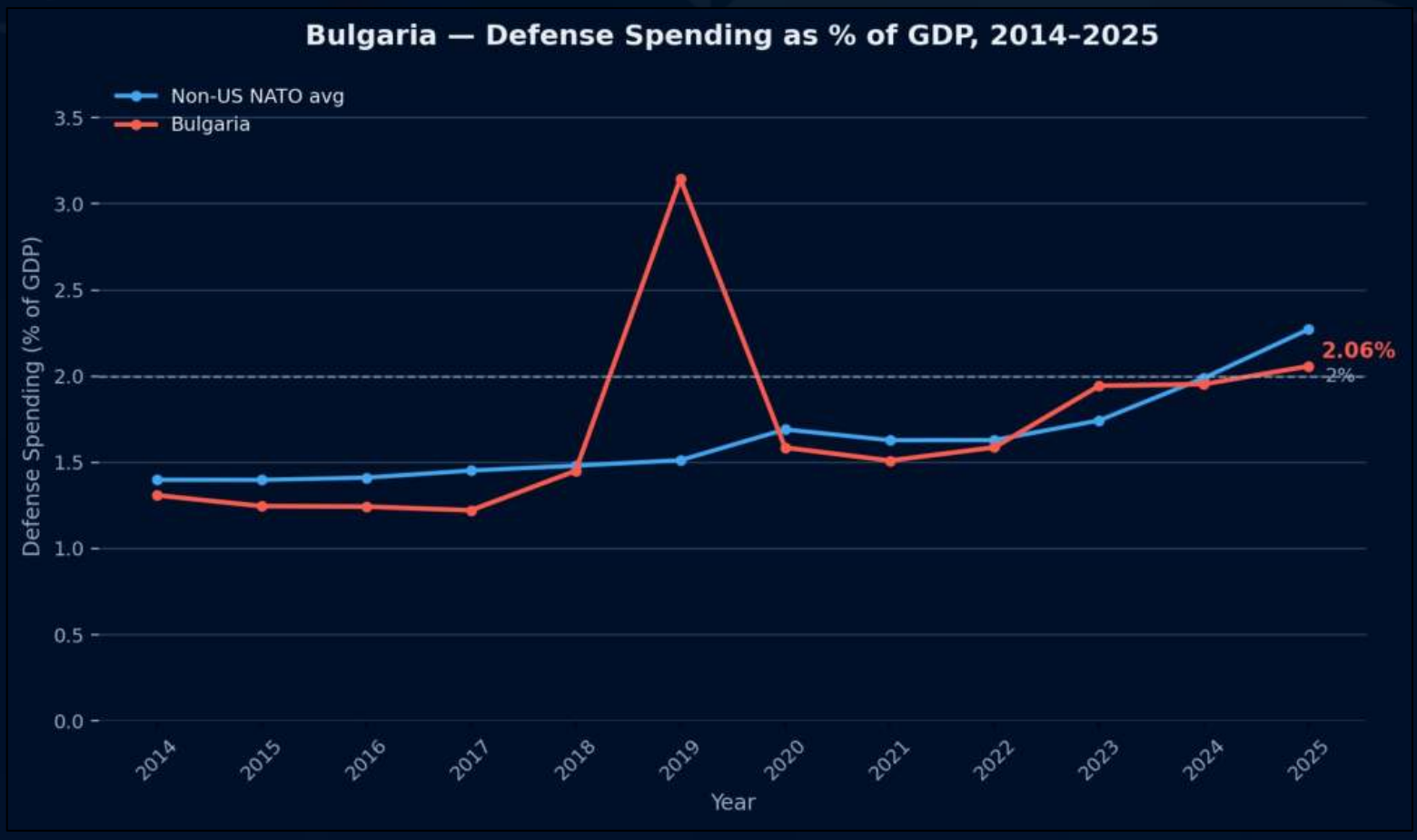
FORCE STRUCTURE AT A GLANCE

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

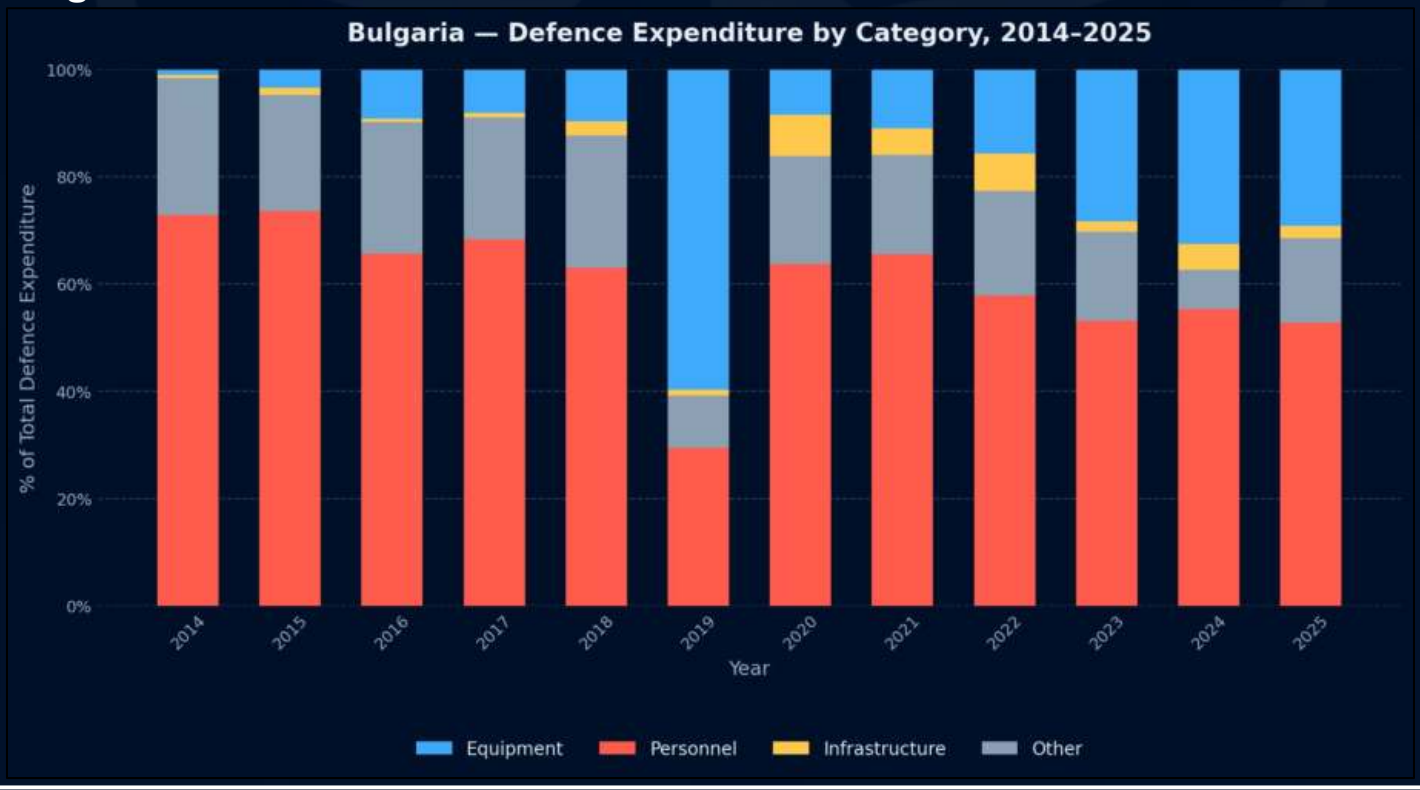
Bulgaria's defense spending trajectory reflects a country that spent well below NATO's 2% floor for most of the post-Cold War era before a recent acceleration. NATO figures show Bulgaria clearing 2% of GDP in 2025, at roughly 2.06%, a year later than sometimes reported. The Radev government's May 2026 statement supporting Bulgaria's move toward the 5% Hague framework is a positive signal, but it comes from a prime minister who spent years opposing defense investment and Ukraine military support as president, making implementation the test. Sustaining the spending trajectory under coalition-budget pressures and a historically Russia-accommodating government creates meaningful risk.



MILITARY CONTRIBUTIONS

Equipment Share

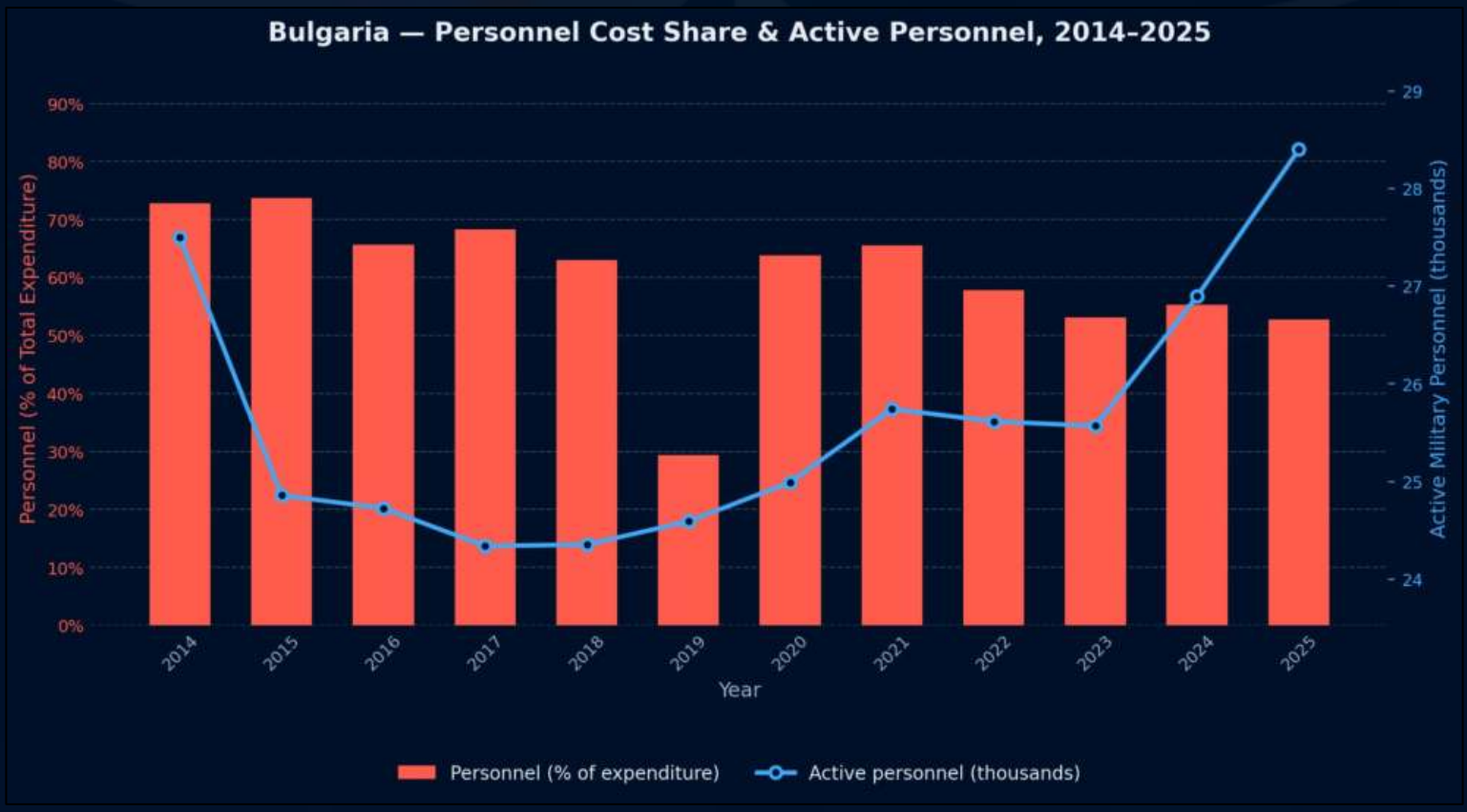
Bulgaria's equipment share tells a story of growing investment after decades of neglect. Personnel costs ran at roughly 60–75% of the defense budget through 2014–2018, leaving almost nothing for procurement. The 2019 spike in equipment share is due to major procurement decisions, primarily the F-16 Block 70 contract. Since 2020, equipment share collapsed back to single digits in 2020-2021 after the 2019 spike, then climbed steadily from 2022 onward, reaching a peak of 32.5% in 2024 before easing slightly to 29% in 2025. This is a genuine structural shift driven by the $2B+ F-16 program, the $1.37B Stryker contract, IRIS-T air defense, and MMPV corvette construction. Personnel costs have fallen to approximately 52–55% by 2025, still high but declining. Simultaneously, Bulgaria still maintains Soviet-era MiG-29 and Su-25 fleets alongside incoming F-16s, with legacy maintenance costs projected at $68M in 2026 alone. The equipment share improvement is real but reflects compressed catch-up spending.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Bulgaria's personnel picture is one of the more encouraging trends in its defense profile. Active military personnel bottomed out at roughly 24,000 in 2017–2018 and has since recovered to approximately 28,000 by 2025. Crucially, this force expansion is happening while personnel's share of the total defense budget is falling, from roughly 70–73% in 2014 to approximately 52% in 2025. This combination of more soldiers consuming a smaller share of the budget is exactly what a modernizing force should look like: defense spending is growing fast enough that equipment investment is expanding even as the headcount rises. The risk is the Radev government's budget posture over 2026–2027. If spending growth slows, the personnel rebuild and equipment surge will compete rather than complement each other, and the gains of the past three years could erode quickly.



MILITARY CONTRIBUTIONS

Capability Modernization

Bulgaria's modernization is real with areas for improvement. The headline program is 16 F-16 Block 70s across two contracts. On the ground, the $1.37B Stryker program delivers 183 AFVs replacing Soviet BMPs, with first arrivals in February 2026. Air defense is being addressed through a 2024 IRIS-T SLM contract with options for up to six total batteries by 2032, replacing legacy S-300 and S-200 systems. And a $82.7M Javelin purchase in March 2025 adds modern anti-armor capability. Naval modernization includes two domestically built MMPV corvettes, plus seven Tripartite MCM vessels transferred from Belgium and the Netherlands. The key gaps include 155mm artillery replacement remains uncontracted, and short-range air defense beyond the first IRIS-T battery is unfilled. Every major program has experienced delays; the direction is right but execution lags.

MILITARY CONTRIBUTIONS

Force Posture

Bulgaria's force posture is anchored by hosting and Black Sea geography rather than large forward deployments. Bulgaria hosts the Italy-led NATO Multinational Battlegroup Bulgaria at Novo Selo, which achieved full operational capability in December 2022 and comprises over 1,000 personnel from NATO countries. In January 2026, Bulgaria signed an agreement with Italy for the joint construction and use of a permanent NATO military base to replace the current rotating presence, converting a temporary arrangement into enduring infrastructure. Bulgaria also maintains the Graf Ignatievo Air Base as a platform for allied air-policing rotations during the MiG-29 transition gap. On forward deployments, Bulgaria contributes troops to the NATO Multinational Brigade Latvia and KFOR Kosovo. Bulgaria's Black Sea positioning makes it a founding member of the MCM Black Sea Task Group with Romania and Turkey, and it has proposed hosting a multinational Black Sea Maritime Coordination Center at Varna.

MILITARY CONTRIBUTIONS

Industrial Base

Bulgaria's defense industrial base is primarily export-oriented in legacy sectors (small arms and ammunition) without domestic design or production capability for major platforms. The most strategically significant development is the domestic construction of two MMPV corvettes, helping restore local shipbuilding capacity. Bulgaria joined the EU 155mm shell-production coalition in 2023, a meaningful strategic direction shift. On raw materials, Bulgaria hosts several deposits of critical minerals: it holds copper deposits and has historically been a significant non-ferrous metals producer, with potential relevance to ammunition and electronics supply chains as the alliance scales industrial production. Overall, Bulgaria remains import-dependent for all significant modern platforms but the direction is toward greater NATO integration.

STRATEGIC ALIGNMENT

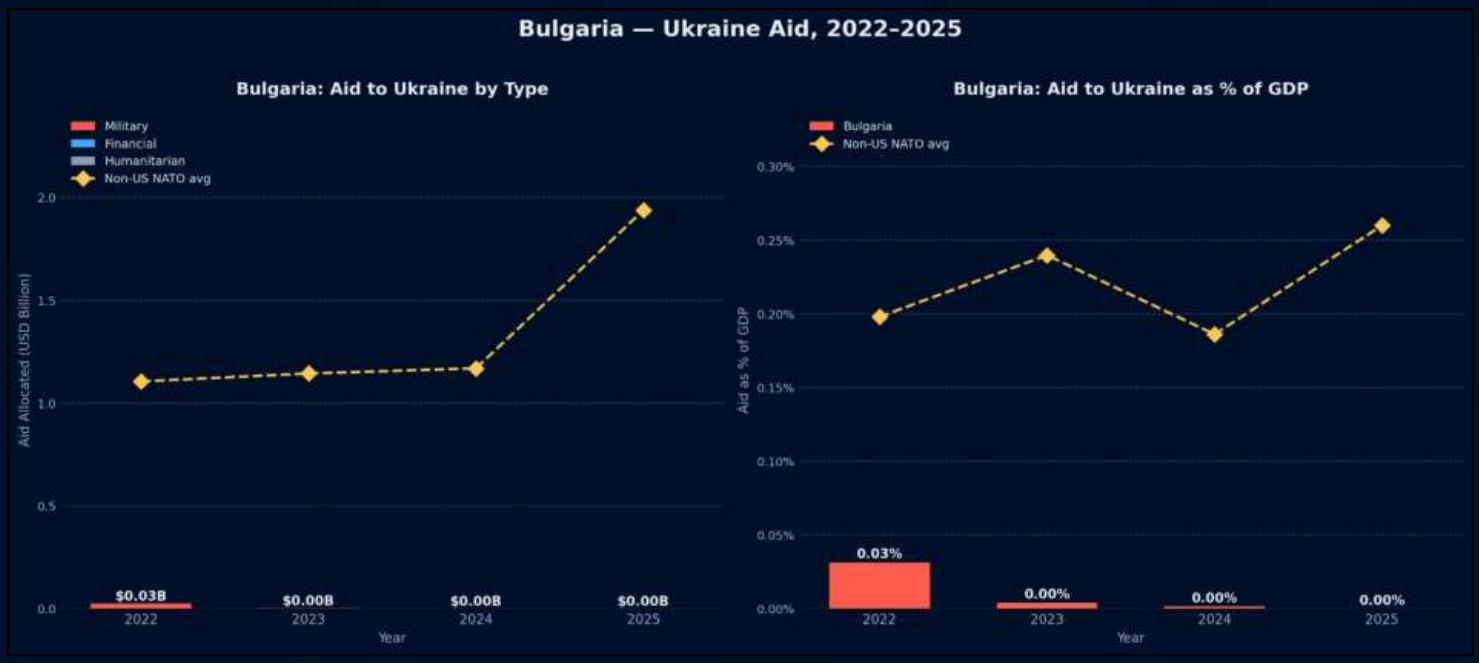
Declared Posture

Bulgaria's declared posture underwent a significant transformation in March 2025 with the adoption of the National Defence Strategy. For the first time Bulgaria designated Russia as the biggest threat to national security. The State Agency for National Security has identified Russia as the "main generator" of regional and global threats, and Bulgaria expelled two Russian intelligence officers and arrested a Bulgarian civil servant for Russian espionage in 2024. On China, the 2025 strategy names China as an external actor sustaining Balkan instability, a meaningful escalation from prior policy. However, the April 2026 election of Rumen Radev undermines recent doctrine. Radev's prior record of Russia accommodation and active opposition to Ukraine military support creates a concerning gap between the 2025 doctrine's language and the likely policy instincts of the government now executing it.

STRATEGIC ALIGNMENT

Ukraine Support

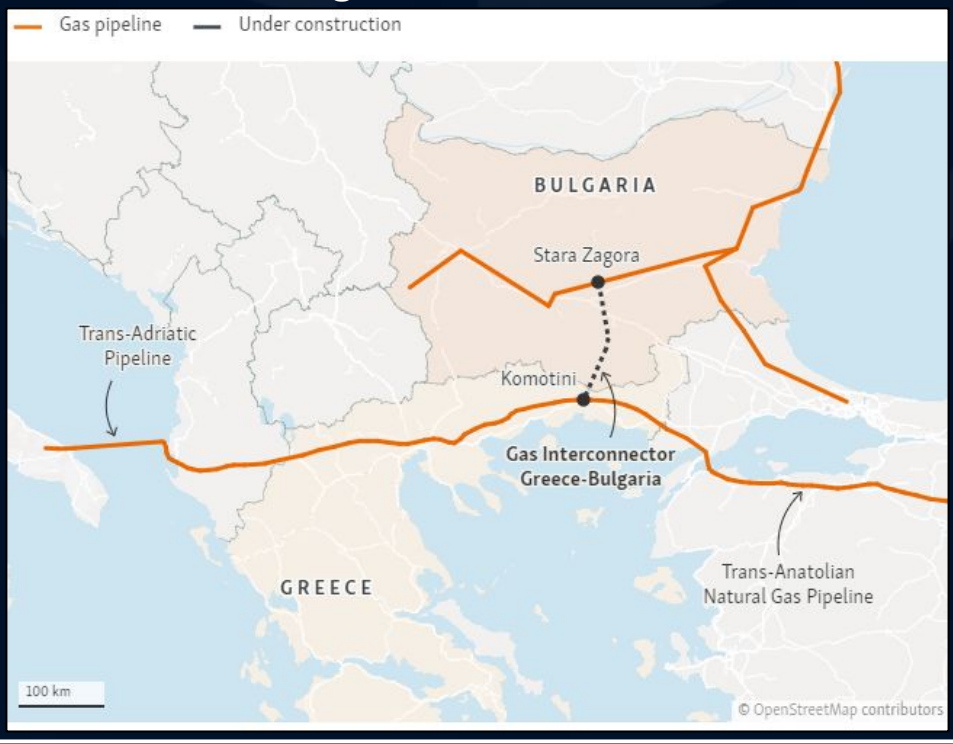
Bulgaria's Ukraine support doesn't show up in the formal Kiel Institute's tracking because most of it was done through intermediaries. Bulgaria secretly supplied roughly 30% of Ukraine's Soviet-caliber ammunition needs and up to 40% of diesel during the critical early months of the war. Formal aid packages continued through 2024, with a seventh package announced in December 2024; Bulgaria explicitly excluded S-300 and MiG-29 transfers, retaining those systems for its own defense needs. Bulgaria joined the EU 155mm shell-production coalition in 2023. The April 2026 Radev victory is the largest risk factor: Radev consistently and publicly opposed military support to Ukraine, and the covert early-war ammunition channel was built specifically to work around his resistance. Future military aid, shell-production commitments, and EU Ukraine-financing votes are now watch-list items. Bulgaria's geographic contribution (Black Sea mine countermeasures, Port of Varna grain transit, overland logistics routes) represents a structural Ukraine-support role that persists largely independent of government posture.



STRATEGIC ALIGNMENT

Russian Decoupling

Bulgaria's Russian decoupling record is more complicated. On gas, the Petkov government's rapid pivoting to the Greece-Bulgaria interconnector commissioned in October 2022, eliminated roughly 95% Russian gas dependence—a genuinely significant achievement. The harder case is oil. Bulgaria's Russian-owned Burgas refinery (processing 190,000 barrels per day and worth roughly 7–9% of Bulgarian GDP) actually increased its Russian crude share from 70% pre-war to 93% in 2023, generating an estimated €1.1B in Kremlin tax revenue before parliament banned Russian crude imports from March 2024. On nuclear, Bulgaria has replaced Russian fuel supplier TVEL at its Kozloduy plant with the American Westinghouse and planned future reactor expansions will use Westinghouse as well. On sanctions, Bulgaria supported every EU Russia sanctions package through the 20th without obstruction. The new Radev government introduces risk to enforcement, though no formal sanctions rollback has occurred.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

Bulgaria presents an interesting picture: 61% of Bulgarians favored increasing defense spending in 2024, the second highest in the alliance, yet only 59% said they would vote to stay in NATO, the second-lowest. Just 46% agreed Bulgaria should defend another NATO ally if attacked, and Ukraine support was among the weakest in the survey at around 47% combined. The mainstream GERB-led coalition is nominally pro-NATO but has a long history of accommodating Russian business interests, and the openly pro-Russia Vazrazhdane (Revival) party, polling above 10%, uses Ukraine policy as a voter mobilization tool. Russia favorability in Bulgaria runs higher than in virtually any other member state. The combination of relatively high defense spending appetite and simultaneously low collective defense intention makes Bulgaria one of the more domestically uncertain members of the Central European states.

STRATEGIC ALIGNMENT

Hedging Behavior

Bulgaria's hedging behavior is cleaner than its domestic politics suggest. Zero adversary arms procurement, no high-level Moscow or Beijing visits by sitting government heads, no obstruction of Finnish or Swedish accession, and no meaningful Chinese critical infrastructure footprint. The primary vulnerability is the Lukoil Burgas refinery (Russian-owned, worth 7–9% of Bulgarian GDP) which remains unresolved despite the March 2024 crude import ban, representing the most significant Russian infrastructure footprint inside any NATO member. The April 2026 Radev election landslide is the largest near-term counter-alignment risk in Bulgaria's profile. Radev spent his presidential tenure opposing Ukraine military support, maintaining pro-Russian rhetoric, and resisting Western pressure on energy decoupling. Future aid decisions, sanctions enforcement intensity, and operational access are all more uncertain. Radev's May 2026 decision to limit US aircraft basing over a visa dispute signals he is willing to use operational access as a bargaining chip. Radev could create real friction.

STRATEGIC ALIGNMENT

Operational Cooperation

Bulgaria has a strong track record of supporting US-led operations. It contributed forces to both Iraq and Afghanistan under US command, and has hosted US and NATO rotational forces at Novo Selo and Graf Ignatievo for years. The January 2026 agreement with Italy to convert the NATO Multinational Battlegroup Bulgaria into a permanent base locks in real commitments. Bulgaria is a founding member of the MCM Black Sea Task Group with Romania and Turkey, taking its first command rotation in January 2025—the most operationally consequential post-2022 Black Sea initiative. Graf Ignatievo continues to host allied air policing rotations. The 16 F-16 Block 70s and 198 Strykers lock Bulgarian air and land forces into US-origin platforms relying on NATO interoperability. Bulgaria did not participate in Operation Aspides, Operation Prosperity Guardian, or Operation Epic Fury, and Radev's May 2026 basing dispute is an early warning that operational access may become more transactional under the new government.

Croatia

NATO Country Assessment

—TIER TWO—

ANSWERING NATO CALL • DOMESTIC DEFENSE INVESTMENT • FALTERING ON UKRAINE

HRVATSKA

AT A GLANCE

Toplines

- **Answering the Call to Take Responsibility for European Defense:** Croatia's modernization program includes Rafales, Leopard 2A8s, Caesars, HIMARS, and Bayraktar TB2s that represents a generational equipment upgrade, and Croatia is now policing its own airspace for the first time since independence.
- **Investing in Domestic Defense Resilience:** DOK-ING's acquisition by Rheinmetall and KONČAR's €125M counter-drone contract signal Croatia's emergence as a credible defense-industrial contributor, with domestic 155mm ammunition production now approved.
- **Liability in Rejecting Trump's Call for Europe to Support Ukraine**: President Milanović's veto of Croatian participation in NATO's Ukraine training command (NSATU) is a concrete obstruction, and his 2024 re-election means this friction is enduring.

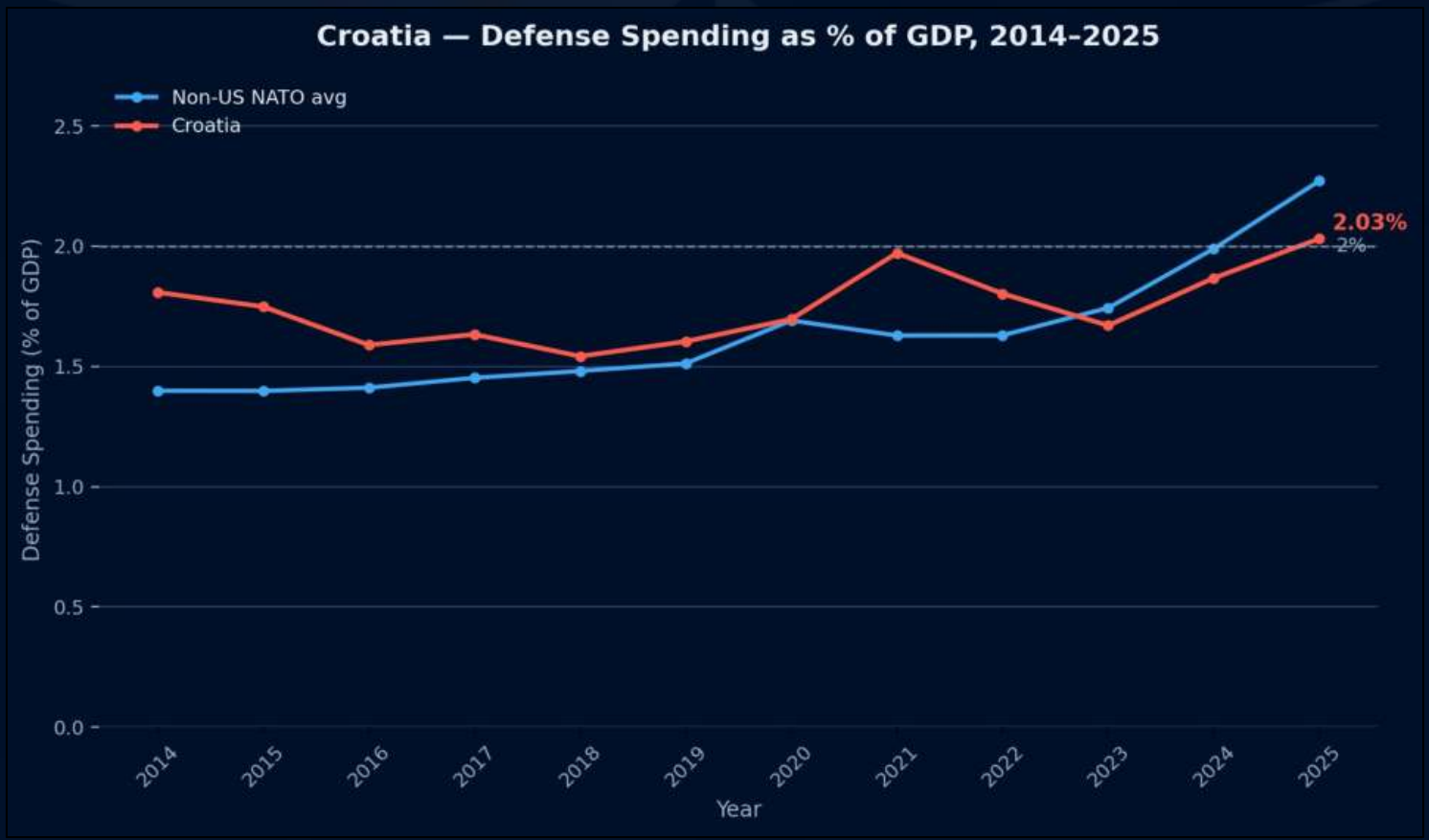
FORCE STRUCTURE AT A GLANCE

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

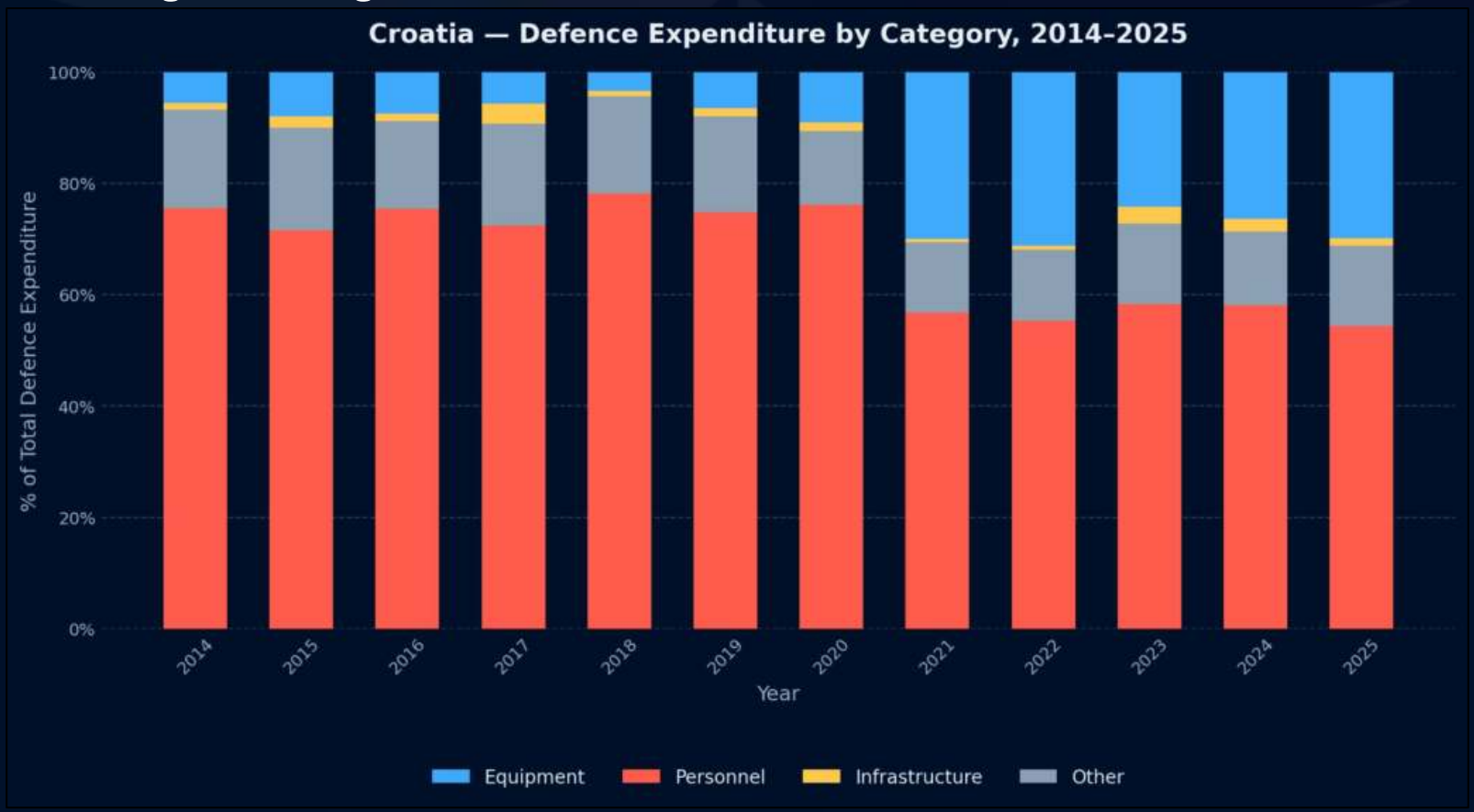
Croatia's defense spending tells a relatively mixed story. It spent below NATO's 2% floor for most of its membership—only crossing the threshold in 2025 at 2.03%—but consistently outspent the non-US NATO average until recently, meaning Croatia was outperforming the average NATO ally. The 2026 budget reached €1.626B (2.08% of GDP), up 20.9% year over year, with plans for 2.5% by 2027 and 3% by 2030. For a country of under 4 million people, the trajectory should be celebrated. The caveat is absolute scale—€1.626B remains modest, smaller than some single procurement programs elsewhere in the alliance—and Defense Minister Anušić's own framing of the current push as correcting fifteen years of neglect suggests the baseline was weaker than the relative spending figures imply.



MILITARY CONTRIBUTIONS

Equipment Share

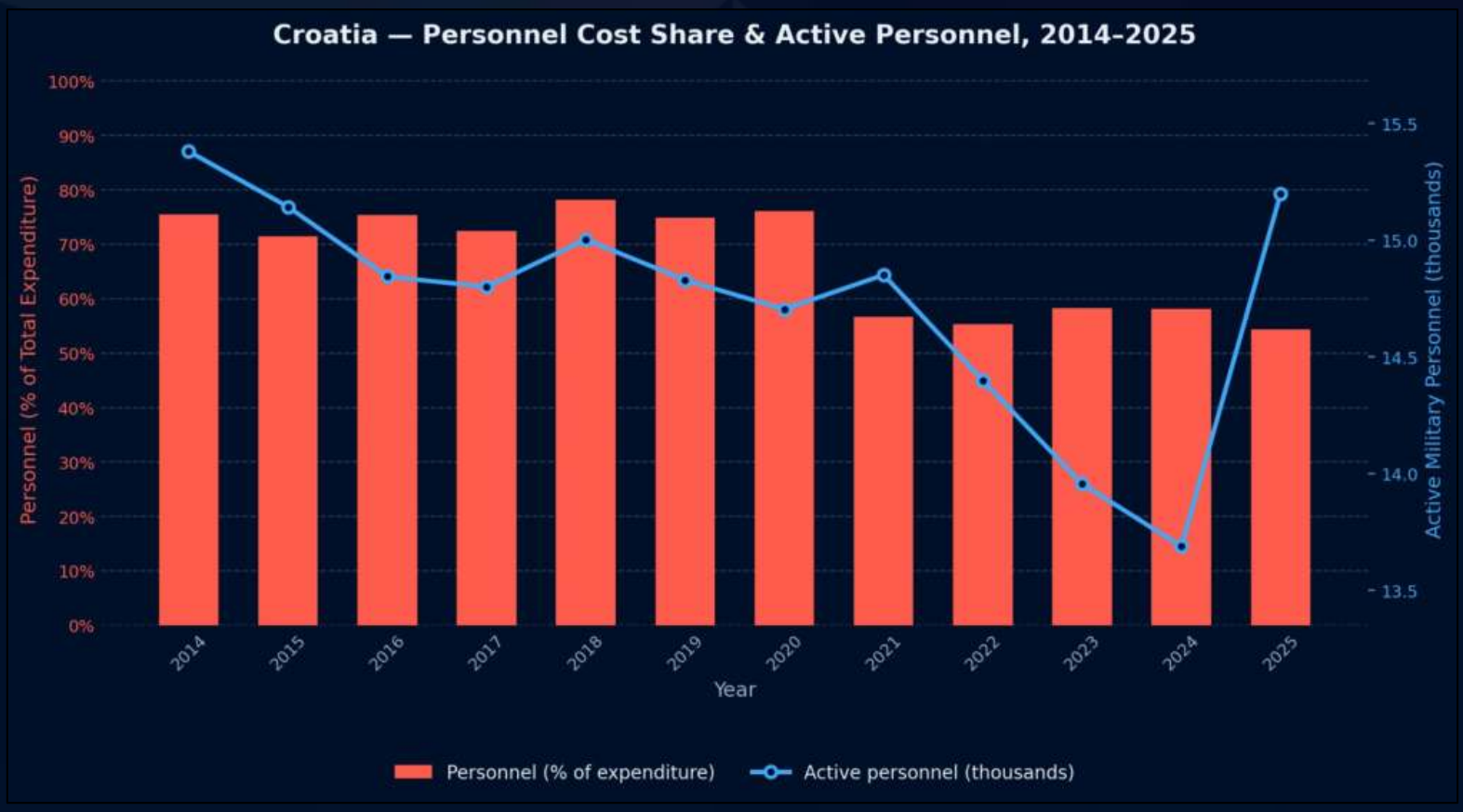
Croatia's equipment share transformation is one of the most dramatic in the alliance. From essentially negligible equipment investment in 2014 (under 6% of the defense budget) equipment share has risen to roughly 30% by 2025, well above NATO's 20% benchmark. The chart shows the inflection point clearly: from 2021 onward, equipment spending surged as the Rafale, Caesar, HIMARS, Leopard 2A8, and Bayraktar procurement programs began registering in actual expenditure. At roughly 30%, Croatia now sits comfortably above the NATO equipment-share guideline and ahead of many alliance members who have struggled to reach 20%. The transition is ongoing but the equipment trajectory is among the strongest modernization stories in NATO's southern sector.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Croatia's active military numbers declined steadily from roughly 15,500 in 2014 to a low of approximately 13,700 in 2024 before jumping sharply to around 15,200 in 2025. This was driven by the November 2025 reintroduction of mandatory two-month military service, which Croatia had abolished in 2008. Personnel costs as a share of the budget have fallen from roughly 75% in 2014 to approximately 54% in 2025, a critical rebalancing. The conscription revival is significant. Croatia is explicitly trying to rebuild a mobilizable reserve base that atrophied over seventeen years of all-volunteer force structure.



MILITARY CONTRIBUTIONS

Capability Modernization

Croatia's modernization is compressing a generational equipment uograde into a short window. Croatia completed delivery of 12 Rafale F3-R fighters in April 2025 and began policing its own airspace for the first time in January 2026. Behind it: 44 Leopard 2A8 tanks, 18 Caesar Mk2 howitzers, 8 HIMARS systems, Bayraktar TB2 drones, and a €125M counter-UAS contract. Conscription was reinstated in November 2025, growing active personnel from 13,688 to 15,200. The critical gap remains air defense: no Patriot, no NASAMS, no medium or long-range coverage. This leaves Croatia dependent on allied systems. Defense Minister Anušić has framed the entire program as correcting fifteen years of neglect, and the procurement list suggests he means it.

MILITARY CONTRIBUTIONS

Force Posture

Croatia's force posture is modest in scale but geographically distributed across NATO's eastern front. Active contributions include 69 troops with an artillery battery in Poland's eFP, 152 troops in KFOR Kosovo, and 67 in Hungary's eFP. Croatia also hosts the NATO Multinational Special Aviation Program and training center, providing allied aviation training in the Adriatic region. Croatia does not host permanent US military bases.

MILITARY CONTRIBUTIONS

Industrial Base

Croatia's defense industrial base is limited but has two critical assets. DOK-ING's robotic demining vehicles are deployed in Ukraine (assembling 8 machines and supplying 3,630 spare parts in 2024 alone, with localization above 30%) and the March 2026 Rheinmetall majority acquisition integrates DOK-ING into a major NATO industrial prime, opening a pathway for unmanned ground systems expansion. KONČAR's €125M counter-drone contract marks its emergence as a sophisticated electronics prime. The March 2025 approval of domestic 122mm and 155mm ammunition production is the most strategically significant industrial decision, shifting Croatia toward a potential supplier role for national stocks and Ukrainian needs. Additionally, participation in Caesar, Leopard 2A8, and HIMARS programs embeds Croatian industry in allied supply chains at the component level, but sovereign platform design capability remains absent.

STRATEGIC ALIGNMENT

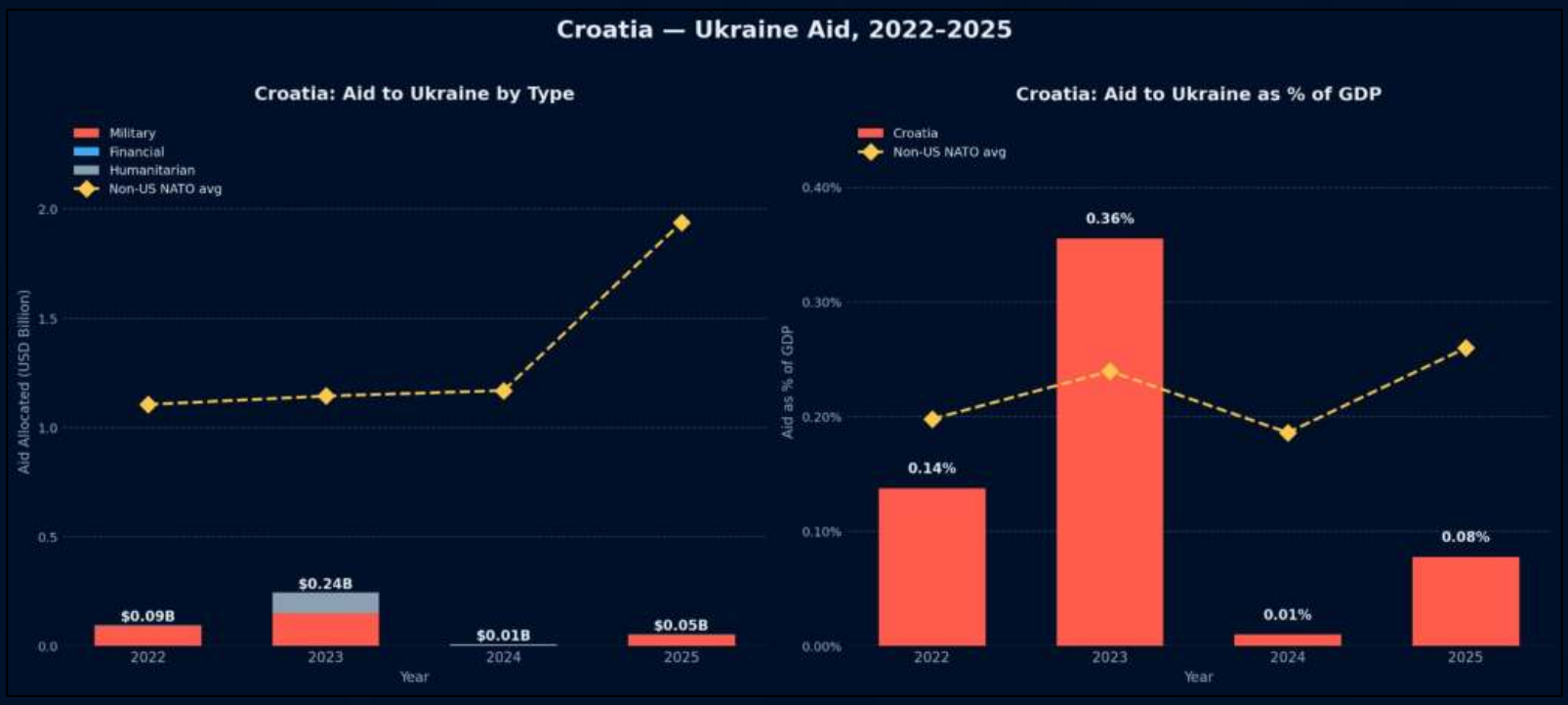
Declared Posture

Croatia's strategy documents are all outdated. Its National Defence Strategy dates to 2002—predating NATO accession, Crimea, and the full-scale invasion—and the 2017 National Security Strategy does not explicitly name Russia or China as threats. By post-2022 alliance standards, this is a significant doctrinal gap. The Plenković government has compensated through action rather than updated doctrine, backing EU sanctions, delivering 14+ Ukraine aid packages, and executing Croatia's most ambitious procurement program in history. On China, Croatia abstained on the October 2024 EU EV tariff vote, placing it in the trade-cautious cluster. Croatia does not participates in EU Operation Aspides. The conduct is stronger than the doctrine suggests, but Croatia remains overdue for a declaratory strategy document.

STRATEGIC ALIGNMENT

Ukraine Support

Croatia's Ukraine aid peaked at 0.36% of GDP in 2023 before dropping sharply. Croatia fell below the non-US NATO average in 2024 and recovering only modestly to 0.08% in 2025. The headline Kiel figures (€0.355B allocated, €0.360B committed) understate the significance of Croatia's donation. Croatia donated its entire Mi-8/Mi-17 helicopter fleet, transferred 30 M-84 tanks and 30 M-80 IFVs linked to its Leopard 2 transition, and DOK-ING demining systems are actively deployed in Ukraine. Fourteen aid packages delivered through October 2025 with a 15th in preparation. The defining constraint is Milanović's presidential veto: his October 2024 veto blocked Croatian officers from NATO's Ukraine training command, and his opposition to weapons transfers creates a persistent gap the Plenković government cannot override without a two-thirds parliamentary majority it doesn't have.



STRATEGIC ALIGNMENT

Russian Decoupling

Croatia has minimal Russian energy exposure and has become a critical regional diversification asset. The Krk Island LNG terminal now supplies non-Russian gas to Hungary, Slovakia, Slovenia, and Austria, making Croatia an important node to European decoupling. The Krško nuclear plant and JANAF Adriatic oil pipeline reinforce Croatia's role as a Central European energy hub. Croatia has supported every EU Russia sanctions package through the 20th without obstruction. The caveat: Krk's strategic value depends on downstream consumers maintaining the political will to keep using non-Russian routes.

STRATEGIC ALIGNMENT

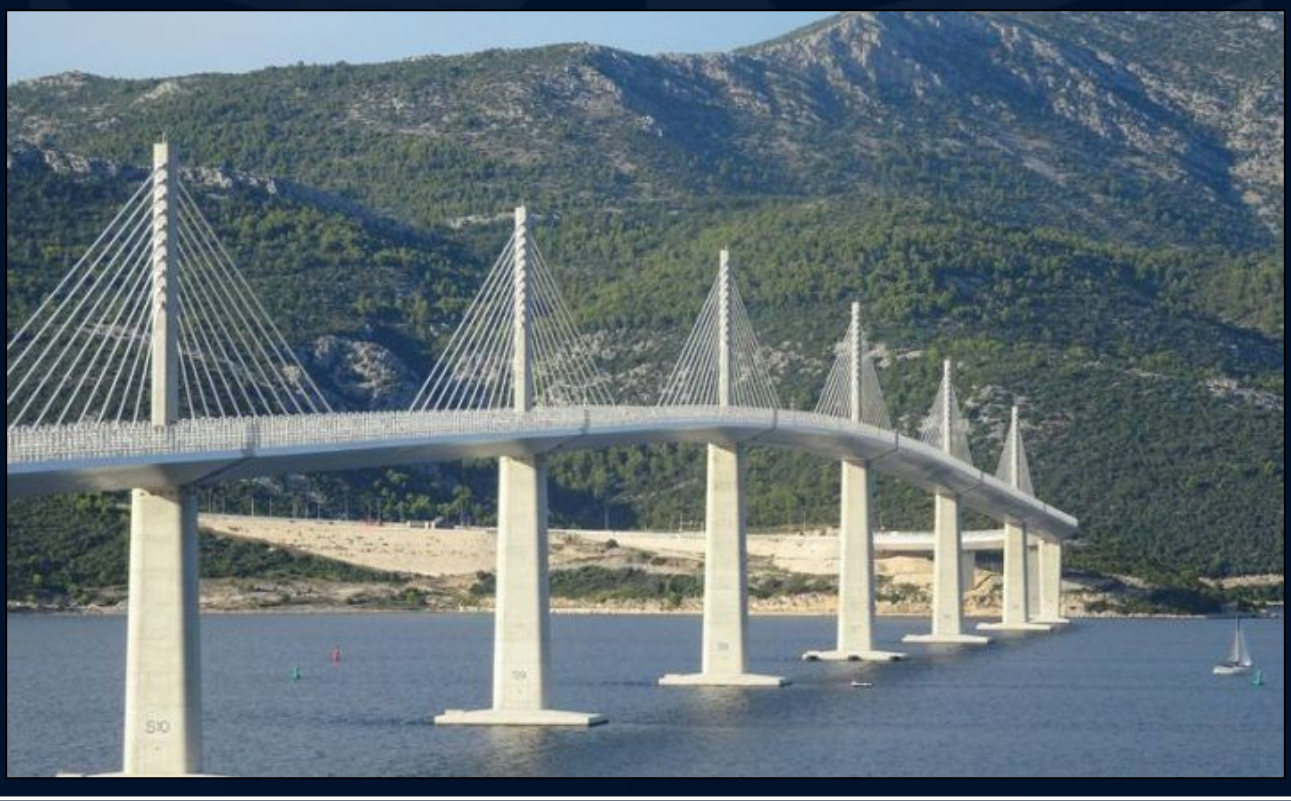
Public Support & Political Resilience

In the 2024 NATO polling, 77% of Croats said they would vote to stay in NATO, 59% agreed Croatia should defend another ally if attacked (below the alliance median of 63%), and Ukraine support was middling at around 53% combined. Sixty-eight percent agreed NATO membership makes a foreign attack less likely, but only about 63% said Russia's war had affected their country's security, lower than most Central European neighbours. The HDZ government under Plenković is a reliable NATO member that has increased defense spending toward 2%, while the main opposition SDP is also broadly pro-NATO, sustaining a mainstream consensus. The principal complication is President Milanović, who has repeatedly questioned NATO solidarity and Ukraine policy from a constitutionally weaker role, producing a split-executive dynamic that muddies Croatia's external messaging without fundamentally altering government policy. Milanović's 2024 re-election to the presidency means this friction will persist for the duration of the assessment period.

STRATEGIC ALIGNMENT

Hedging Behavior

Croatia's hedging behavior record at the government level is clean. Plenković has made multiple visits to Ukraine, visited Washington in May 2025 to strengthen US-Croatia ties, backed all EU Russia sanctions through the 20th package, and pursued exclusively Western arms procurement. No PM-level visits to Moscow, Beijing, or Tehran during the war period. The Pelješac Bridge, built by China Road and Bridge Corporation, is the most visible Chinese infrastructure footprint on EU territory, though EU-funded and Croatian-owned. The counter-alignment risk is Croatian President Zoran Milanović. He opposes standard alliance support for Ukraine and often undermines alliance goals. His obstruction is institutionally directed rather than reflecting actual diplomatic engagement with Moscow—but the damage to Croatian alliance credibility is real regardless.



STRATEGIC ALIGNMENT

Operational Cooperation

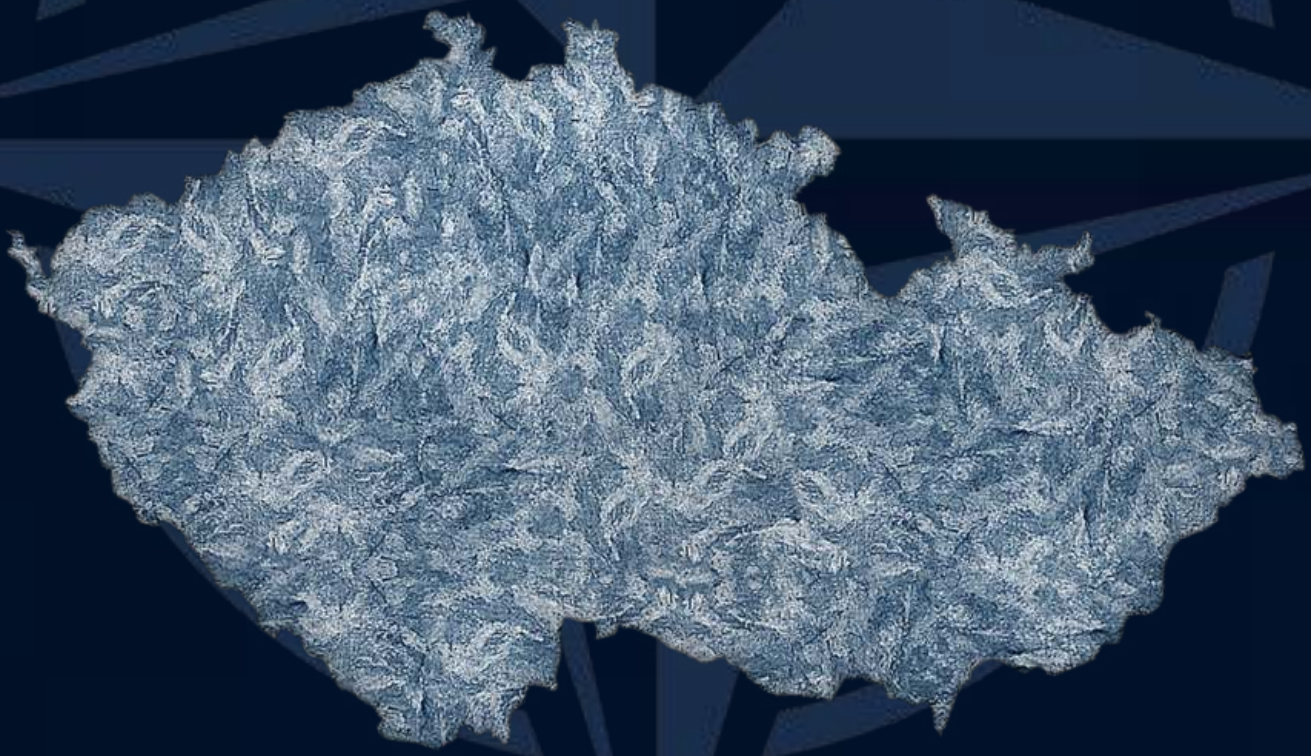
Croatia has a track record of contributing to US-led and NATO operations beyond its immediate neighborhood. It deployed forces to Afghanistan under ISAF and contributed to coalition operations in Iraq. Current forward deployments span Poland's eFP with an artillery battery, KFOR Kosovo, and Hungary's eFP. Croatia does not participate in EU Operation Aspides in the Red Sea. On the 2026 Iran war, Croatia's response reflected the same Plenković-Milanović split that has defined its Ukraine policy, with the prime minister broadly aligned with US positions while Milanović sought distance from the conflict. Croatia had no public role in Operation Epic Fury and does not participate in Operation Prosperity Guardian. The sharpest operational gap remains NSATU: Milanović's refusal to approve Croatian participation in NATO's Ukraine training command is an alliance liability that no procurement program can offset. The Rafale fleet, now policing Croatian airspace independently from January 2026, gives Croatia genuine NATO-interoperable air-combat capability for the first time.

Czech Republic

NATO Country Assessment

—TIER TWO—

ARMING EUROPE • CONFRONTING CCP • CHEATING ON DEFENSE



AT A GLANCE

Toplines

- **Arming Europe for a New Age:** The Czech Ammunition Initiative is the single most consequential industrial contribution any small or mid-sized NATO ally has made during the war with roughly 4.4 million large-caliber rounds delivered by early 2026, credited with shifting the Russia-Ukraine artillery exchange ratio from 10:1 to roughly 2:1.
- **President Pavel Stands on Principle and Takes on China:** he was the first elected European head of state to call Taiwan's president, met the Dalai Lama in July 2025, and serves as a strong counterweight to domestic leaders trying to undermine NATO vision for a strong Europe.
- **Cheating on Defense Commitments**: The Babiš government is gaming NATO's defense accounting, claiming 2.06% of GDP while NATO's own figures put the real number closer to 1.78%, a credibility problem that US officials and President Pavel have called out publicly.

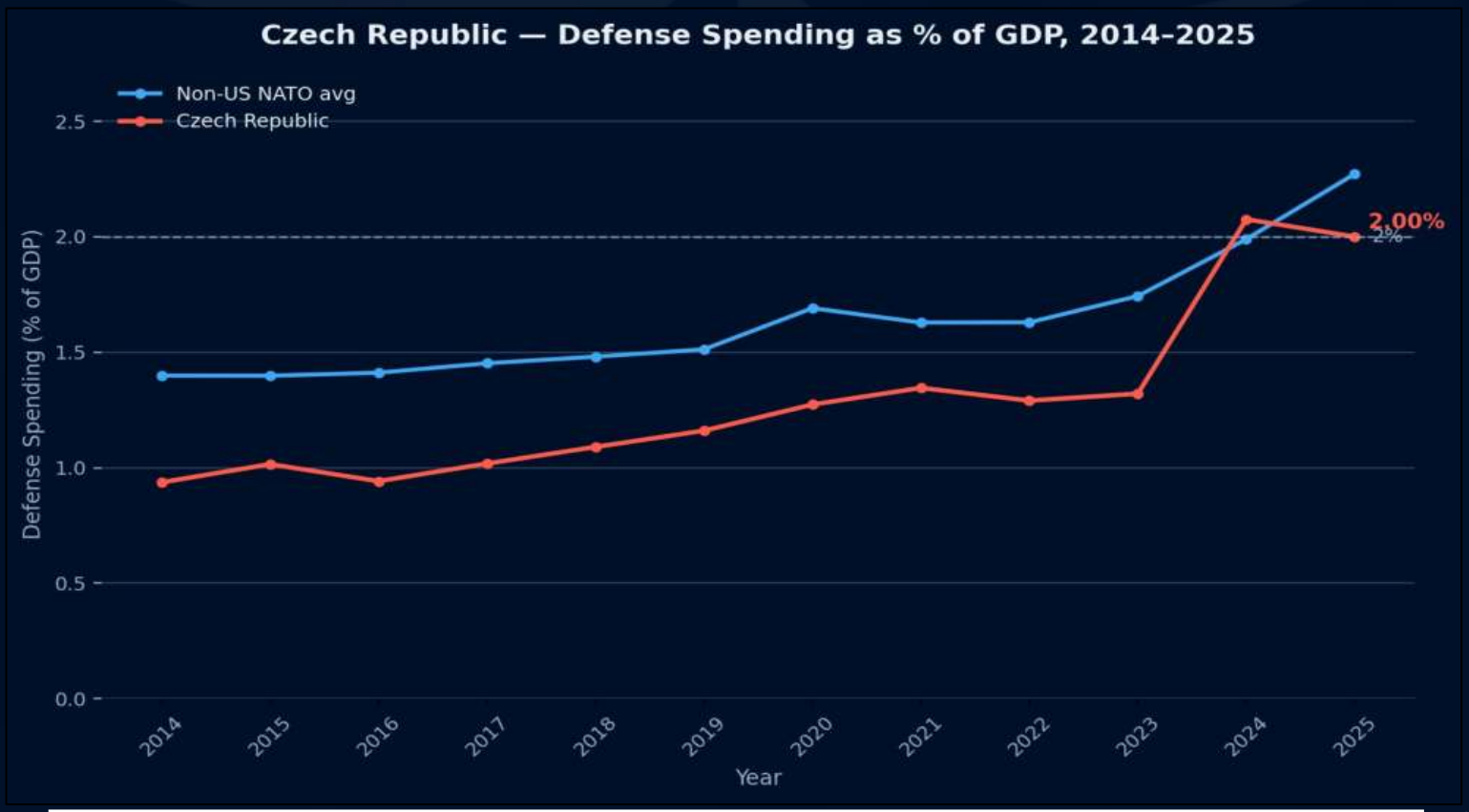
FORCE STRUCTURE AT A GLANCE

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

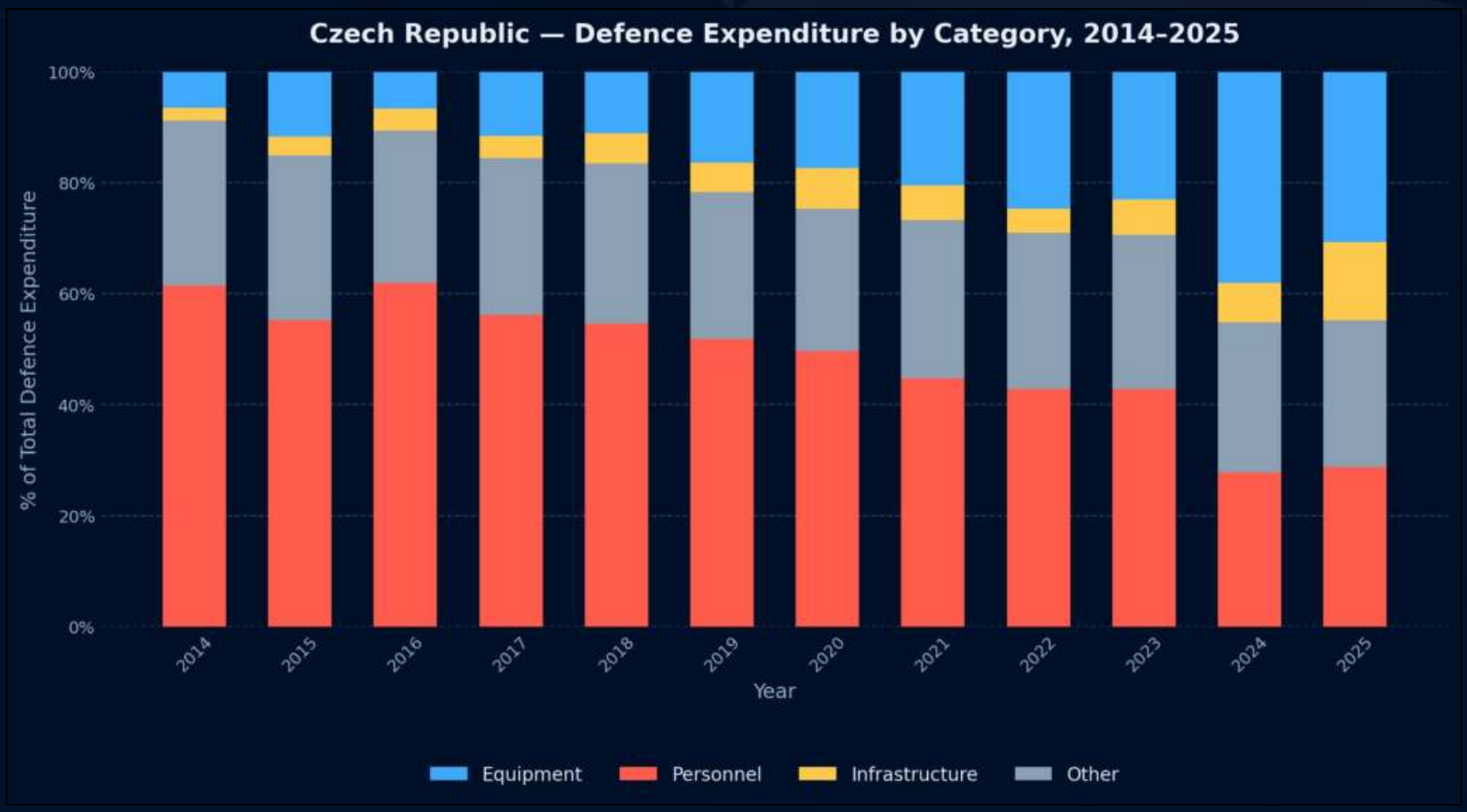
The Czech Republic reached NATO's 2% floor in 2024 for the first time in twenty years. The chart shows the trajectory clearly: spending tracked well below the non-US NATO average for most of the past decade before a very sharp acceleration in 2024 due to a new statutory requirement. The Fiala government committed to 3% by 2030, and Defense Minister Černochová stated publicly that 2% is insufficient given the Russian threat. The new Babiš government has inflated the defense budget on paper by counting spending that NATO doesn't recognize as defense—meaning Prague claims 2.06% of GDP but NATO's own accounting puts the real figure closer to 1.78%, below the Czech Republic's own legally mandated floor. President Pavel and US officials have publicly called this out. The law requiring 2% still exists and Babiš can't easily repeal it, but he appears to be gaming the accounting rather than meeting the spirit of the commitment.



MILITARY CONTRIBUTIONS

Equipment Share

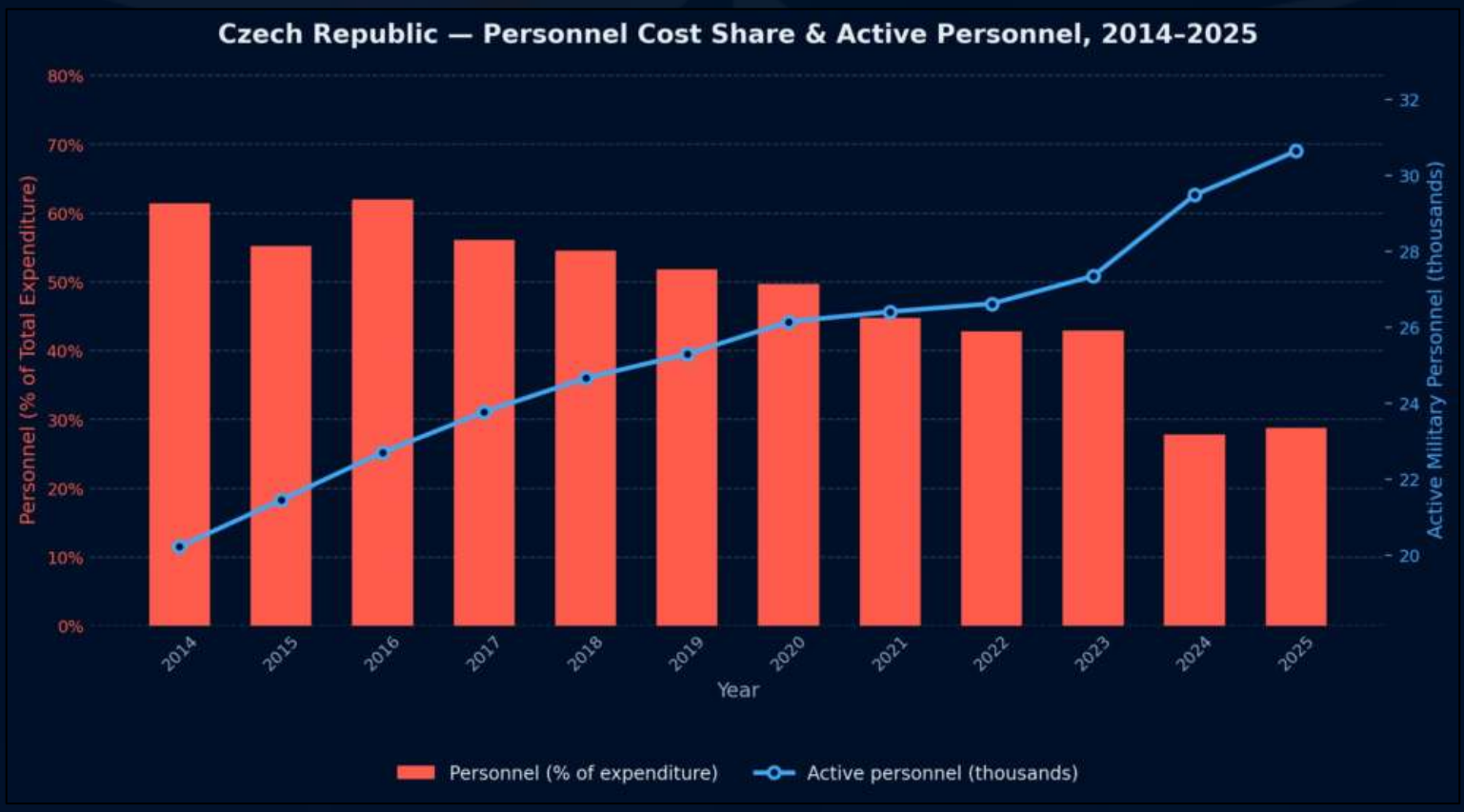
The Czech Republic's equipment share transformation is one of the most dramatic in the alliance. Personnel costs fell from roughly 62% in 2014 to approximately 29% in 2025—one of the steepest decline in NATO—while equipment share surged to roughly 40%+ by 2024–2025, well above NATO's 20% benchmark. The trend is clear: from 2021 onward, equipment investment accelerated sharply as the F-35A contract ($6.6B), CV90 MkIV IFV program ($2.2B, 207 vehicles), and Leopard 2A8 procurement (44 tanks) began registering in actual expenditure. The Czech Ammunition Initiative adds a further equipment-share dimension through defense-industrial throughput for Ukraine-bound artillery shells. If spending growth slows, the procurement pipeline funding the F-35, CV90, and Leopard programs through the decade comes under pressure.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

The Czech Republic's personnel picture is one of the strongest positive trends in its defense profile. Active military personnel has grown steadily and consistently from roughly 20,000 in 2014 to approximately 31,000 in 2025—a 50% increase over a decade—while personnel's share of the defense budget has fallen dramatically from roughly 62% to approximately 29% over the same period. The Czech Republic is simultaneously growing its headcount and freeing budget space for equipment. The sharp drop in personnel cost share in 2024–2025 reflects the procurement surge dominating the budget rather than any reduction in force size or salaries.



MILITARY CONTRIBUTIONS

Capability Modernization

The Czech Republic's modernization program is among the most comprehensive in Central Europe. The major procurement is a $6.6B contract for 24 F-35As signed January 2024 with deliveries 2029–2035 and Czech industry embedded in the global F-35 supply chain. Behind it: 246 CV90 MkIV IFVs ($2.2B, all delivered by 2030, 207 assembled domestically) replacing the entire Soviet BMP-2 fleet, and 44 Leopard 2A8 tanks approved in September 2025 with an option for up to 77 total by 2031. The critical unresolved gap is air defense: aging Soviet SA-6 and Strela systems with no signed replacement contract, leaving the Czech Republic without a credible modern air defense layer despite identifying it as a priority in the 2023 Security Strategy.

MILITARY CONTRIBUTIONS

Force Posture

The Czech Republic's force posture punches above its size through structural NATO integration rather than mass. The 4th Rapid Reaction Brigade is affiliated with Germany's 10th Armored Division, embedding Czech forces in German divisional logistics and fires they cannot generate independently. Eastern front deployments include a mechanized company in Slovakia, 100 troops in Lithuania, and specialist electronic warfare and SAM units in Latvia. The Czech Republic served as framework nation for NATO's Multinational Battlegroup Slovakia from April 2022 to July 2024. Regular Baltic and Iceland Air Policing rotations complete an active profile for an inland Central European state.

MILITARY CONTRIBUTIONS

Industrial Base

The Czech Republic has one of Central Europe's most capable defense industrial bases and has become a critical NATO supply chain node since 2022. Including the Excalibur Army for armored vehicle production, Tatra for military trucks, and multiple ammunition producers that have dramatically expanded output. The Czech Ammunition Initiative has delivered roughly 4.4 million artillery rounds through early 2026, the most significant industrial output of any small or mid-sized NATO ally during the war. VOP CZ will assemble 207 of 246 CV90 MkIV vehicles domestically, embedding Czech state industry in a NATO IFV program.

STRATEGIC ALIGNMENT

Declared Posture

The Czech Republic's 2023 Security and Defence Strategies are among the strongest strategy documents in Central Europe. Russia is explicitly named as the most serious threat, with language preparing for a possible protracted high-intensity war. On China, the 2023 Security Strategy identifies Beijing as a systemic challenge to the international order, backed by concrete action: APT31 cyberattack attribution in 2025, DeepSeek restrictions in high-risk public-sector contexts, and NÚKIB warnings on Chinese data transfers. The critical caveat is the December 2025 Babiš transition: the doctrine hasn't been rewritten and President Pavel remains a strong counterweight, but the governing coalition's proximity to the Orbán-linked Patriots for Europe bloc creates a growing gap between strong declared strategy and the government's actual political conduct.

STRATEGIC ALIGNMENT

Ukraine Support

Kiel's figures—peaking at $0.27B in 2022 and 2025 with a trough of $0.09B in between—consistently place the Czech Republic well below the non-US NATO average, but substantially undercount real contributions because Kiel tracks only formally declared government-to-government aid. Total Czech state expenditure on Ukraine reached roughly $3.65B through late 2025 when refugee hosting, development support, EU-channeled financing, and commercial defense-industry exports are included. The defining contribution is the Czech Ammunition Initiative: roughly 4.4 million large-caliber rounds delivered by early 2026, credited with shifting the Russia-Ukraine artillery ratio from 10:1 in Russia' favor in early 2024 to roughly 2:1 by 2025. The Babiš government's refusal to contribute new Czech budget funds to Ukraine is a serious concern.

STRATEGIC ALIGNMENT

Russian Decoupling

The Czech Republic has undergone one of NATO's most complete Russian energy decoupling programs. Pre-2022, roughly 50–58% of Czech crude came via the southern Druzhba pipeline. The TAL-PLUS pipeline upgrade doubled western import capacity to roughly 8 million tonnes annually, enabling Prague to halt Druzhba crude entirely in March 2025. On nuclear fuel, the American Westinghouse completed first deliveries to Temelín and Dukovany in June 2025, replacing Russian TVEL supply. On sanctions, the Czech Republic backed every EU package through the 20th and enacted a national Czech Sanctions Act in January 2023 allowing Prague to designate individuals beyond EU listings.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

In the 2024 NATO survey, 73% of Czechs said they would vote to stay in NATO, 57% agreed the Czech Republic should defend another ally if attacked, and 60% agreed NATO membership makes a foreign attack less likely, all near or slightly below the alliance median. Defense spending support was moderately low at 31% favoring an increase, below the survey average. The Fiala government has been among the most operationally committed members in Central Europe, providing substantial military aid to Ukraine and pushing spending toward 2%, and the full right-of-center coalition maintains strong support on NATO. The primary opposition risk is ANO (Babiš), the single largest party by vote share, which is nominally NATO-supportive but less enthusiastic on Ukraine aid. The SPD (Okamura), at roughly 5 to 8% of the electorate, is openly hostile to NATO's Ukraine posture but lacks governing leverage.

STRATEGIC ALIGNMENT

Hedging Behavior

The Czech Republic's hedging behavior record is strong but carries a transitional political risk under Babiš. On China, the Zeman-era investment push produced almost no lasting strategic dependence. President Pavel is the quintessential allied leader. His January 2023 call with Taiwan's president was the first by any elected European head of state, and his July 2025 Dalai Lama meeting triggered a Chinese diplomatic suspension—genuine independence at real political cost. The new Babiš government is now walking that back, stabilizing Beijing relations and retreating from Taiwan contacts. Arms procurement is entirely Western: F-35A, CV90 MkIV, Leopard 2A8, zero adversary procurement. The principal concern is Babiš's alignment with the Orbán-led Patriots for Europe political bloc which is the EU's most Russia-accommodating faction. There is no concrete policy divergence yet, but Slovakia's trajectory under Fico shows how quickly rhetoric can translate into active obstruction of sanctions, Ukraine aid, and alliance consensus.

STRATEGIC ALIGNMENT

Operational Cooperation

The Czech Republic has a strong track record of supporting US-led operations like contributing forces to Afghanistan under ISAF and Iraq coalition operations. The Czech-led NATO Multinational Battlegroup Slovakia from April 2022 to July 2024 was its largest sustained deployment since Afghanistan. Regular Baltic and Iceland Air Policing rotations demonstrate sustained airspace contribution from an inland state. On recent US operations, the Czech Republic imposed no obstruction—no access denials, no public statements against Operation Epic Fury or Red Sea operations—while also not participating directly.

France

NATO Country Assessment

—TIER TWO—

DEFENSE INDUSTRY • TAKING THREATS SERIOUSLY • UNDERMINING SECURITY

6820734

AT A GLANCE

Toplines

- **A Defense Industrial Force Multiplier:** France independently manufactures a complete fighter, nuclear submarine, ballistic missile, nuclear warhead, and naval cruise missile, and recently overtook Russia as the world's second-largest arms exporter.
- **Taking the Threat Seriously:** France's 2025 National Strategic Review represents its sharpest doctrinal shift on Russia since the Cold War, explicitly naming Russia as the most direct threat and warning of open warfare risk by 2030.
- **Undermining European Security**: France blocked US military aircraft overflights during Operation Epic Fury—undercutting the Trump Administration's efforts to secure lasting peace in the region.

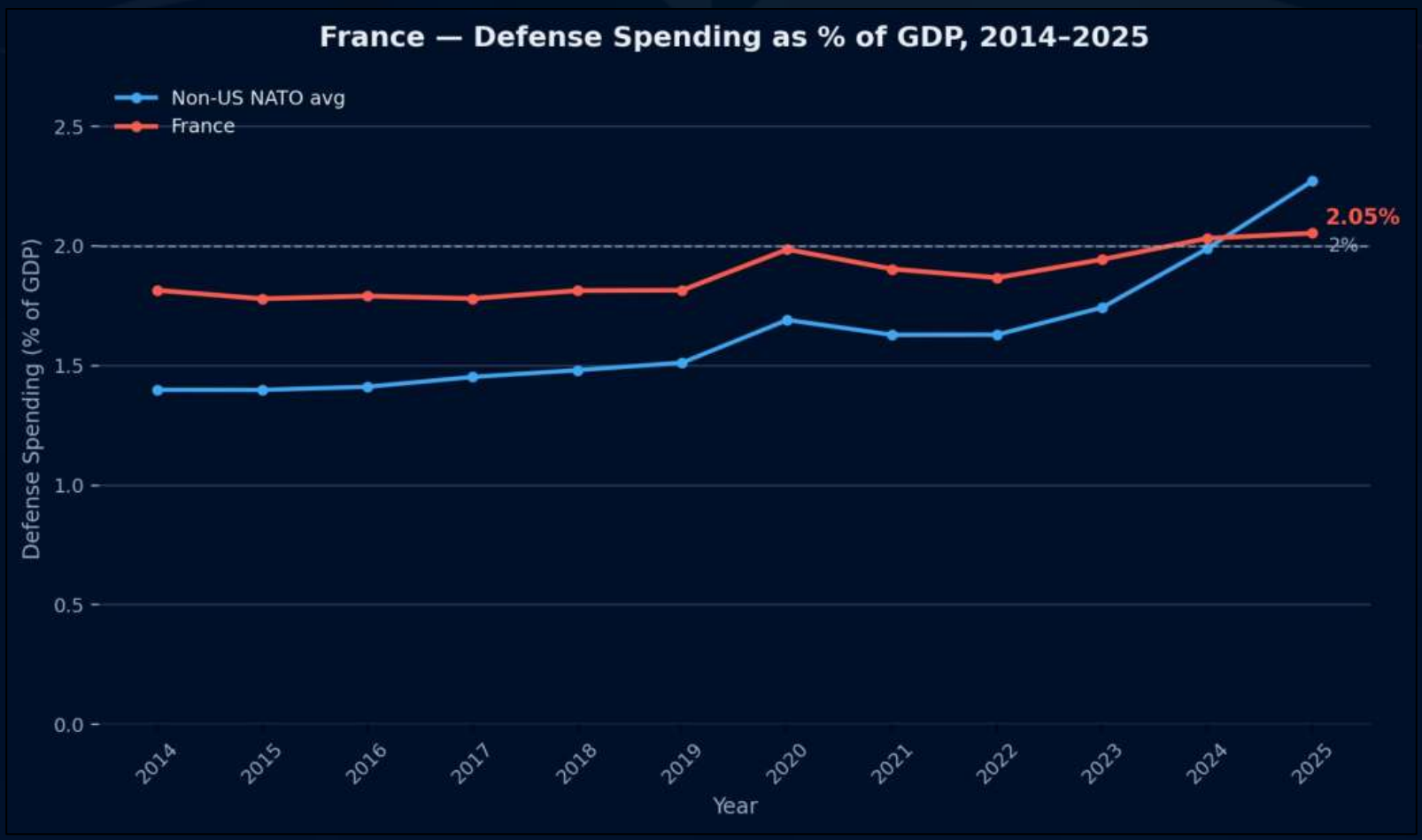
FORCE STRUCTURE AT A GLANCE

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

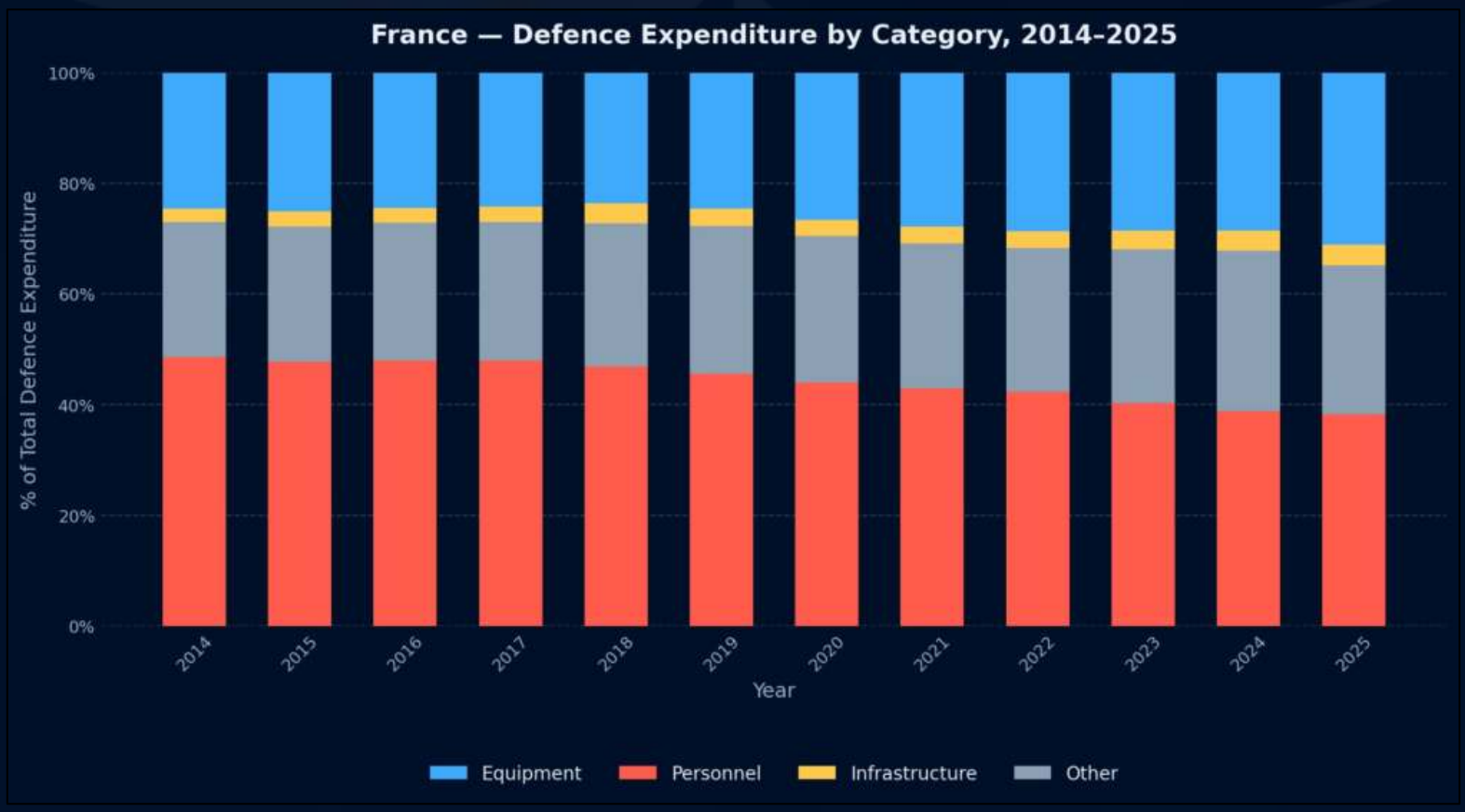
France's defense spending has been largely consistent over the years. France has consistently spent above the non-US NATO average but right below the 2% threshold. But as the non-US NATO average surged post-2022, France has been overtaken, sitting at 2.05% in 2025 while the alliance average hit 2.5%. France is now below the NATO average for the first time. At $70B in 2025, France is Europe's third-largest absolute defense spender, with Macron targeting €63.3 billion ($74 billion) in defense spending by 2027 and €76.3 billion ($89.1 billion) by the end of the decade—roughly 2.6% of GDP. France's budget is large enough to sustain a nuclear deterrent, carrier strike group, global deployments, and Rafale production simultaneously, but the spending trajectory falls short of new alliance norms.



MILITARY CONTRIBUTIONS

Equipment Share

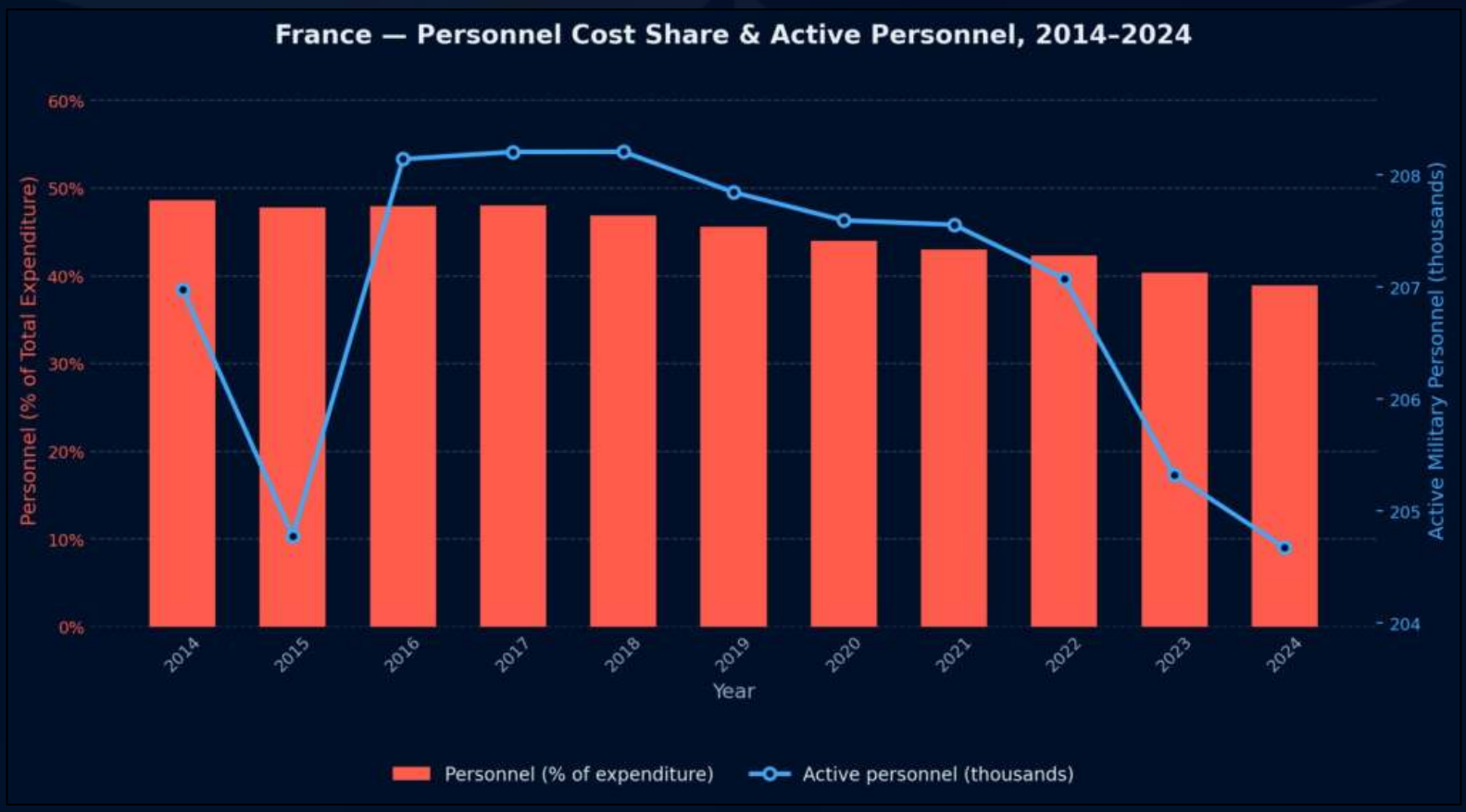
France's equipment investment is one of the strongest in NATO. It has held at roughly 25-30% of the defense budget throughout 2014-2025—well above NATO's 20% benchmark. France never went through the equipment-share collapse that afflicted countries like Belgium, the UK, or Germany. No other European ally sustains France's breadth of sovereign platform production simultaneously. The constraint is that France's equipment budget is largely consumed sustaining existing high-end capability across nuclear, carrier, fighter, and ground systems simultaneously. This leaves limited fiscal space to expand capacity or accelerate modernization at the pace the current threat environment demands.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

France's personnel numbers show a force that has been slowly shrinking. Active military personnel peaked at roughly 208,000 in 2016-2018 before modestly declining steadily to approximately 205,000 by 2025. Personnel cost share has fallen from roughly 49% in 2014 to approximately 39% in 2025, partly reflecting the declining headcount and partly the growing equipment budget. France maintains a professional all-volunteer force without conscription, and at roughly 205,000 active personnel it is large in absolute terms but increasingly thin relative to its global commitments across nuclear operations, carrier strike, Africa deployments, domestic counter-terrorism, and Eastern Front contributions simultaneously. The chart's gradual personnel decline is the quiet story behind France's capability-mass tension: a force that is qualitatively exceptional but structurally stretched.



MILITARY CONTRIBUTIONS

Capability Modernization

France's modernization is concentrated on nuclear, air power, and naval precision strike. On nuclear, the M51.3 SLBM entered service in October 2025 with improved range and penetration, the ASMPA-R nuclear cruise missile entered service in 2023, and the ASN4G hypersonic nuclear missile is in development for 2035. On combat aircraft, France is transitioning to an all-Rafale fleet by 2035 with 109 currently in service and aiming for 225 by 2035. On air defense, 60 SAMP/T launchers make France Europe's most significant non-US air defense operator outside Germany. On naval strike, France is the only European NATO ally besides the UK capable of launching long-range naval precision strikes through the MdCN cruise missile on frigates and Suffren-class submarines. France also operates Europe's first dedicated signals intelligence satellite constellation. Still, ground force depth and air-defense missile stockpiles lag behind what the current threat environment demands.

MILITARY CONTRIBUTIONS

Force Posture

France maintains roughly 30,000 personnel deployed worldwide, a global posture no other European NATO ally approaches. Permanent deployments include Djibouti (1,500 troops, Bab-el-Mandeb access), UAE at Al Dhafra (750 troops), and Jordan (300 troops). France leads NATO's Enhanced Forward Presence battlegroup in Romania with 750 troops, tanks, artillery, and a SAMP/T battery, and contributes 350 troops to FLF Estonia. France is one of the only European NATO allies with a permanently deployed carrier strike group capable of simultaneous Atlantic, Mediterranean, and Indo-Pacific projection. The tension is that France's global posture has not been sufficiently reoriented toward European territorial defense as the Eastern Front threat has intensified.

MILITARY CONTRIBUTIONS

Industrial Base

France's defense industrial base is uniquely self-sufficient. It independently manufactures a complete fighter jet (Dassault Rafale), nuclear submarine (Naval Group), ballistic missile (ArianeGroup), nuclear warhead (CEA/DAM), and naval cruise missile (MBDA). France recently overtook Russia as the world's second-largest arms exporter by SIPRI ranking, with over 300 Rafales sold to eight countries financing domestic production. SAMP/T production is expanding following Danish and other export orders. On raw materials and supply chains, France holds meaningful reserves of rare earth processing capacity through ORANO, uranium mining interests across Africa and Kazakhstan, and is investing heavily in domestic battery and critical minerals processing through the France 2030 industrial plan to reduce Chinese supply chain dependence in defense-relevant sectors. French industrial capacity is high-end but limited. Caesar deliveries to Ukraine strained French stockpiles, SCALP-EG inventory has been drawn down, and MBDA missile production faces the same output problem as the broader European defense industry.

STRATEGIC ALIGNMENT

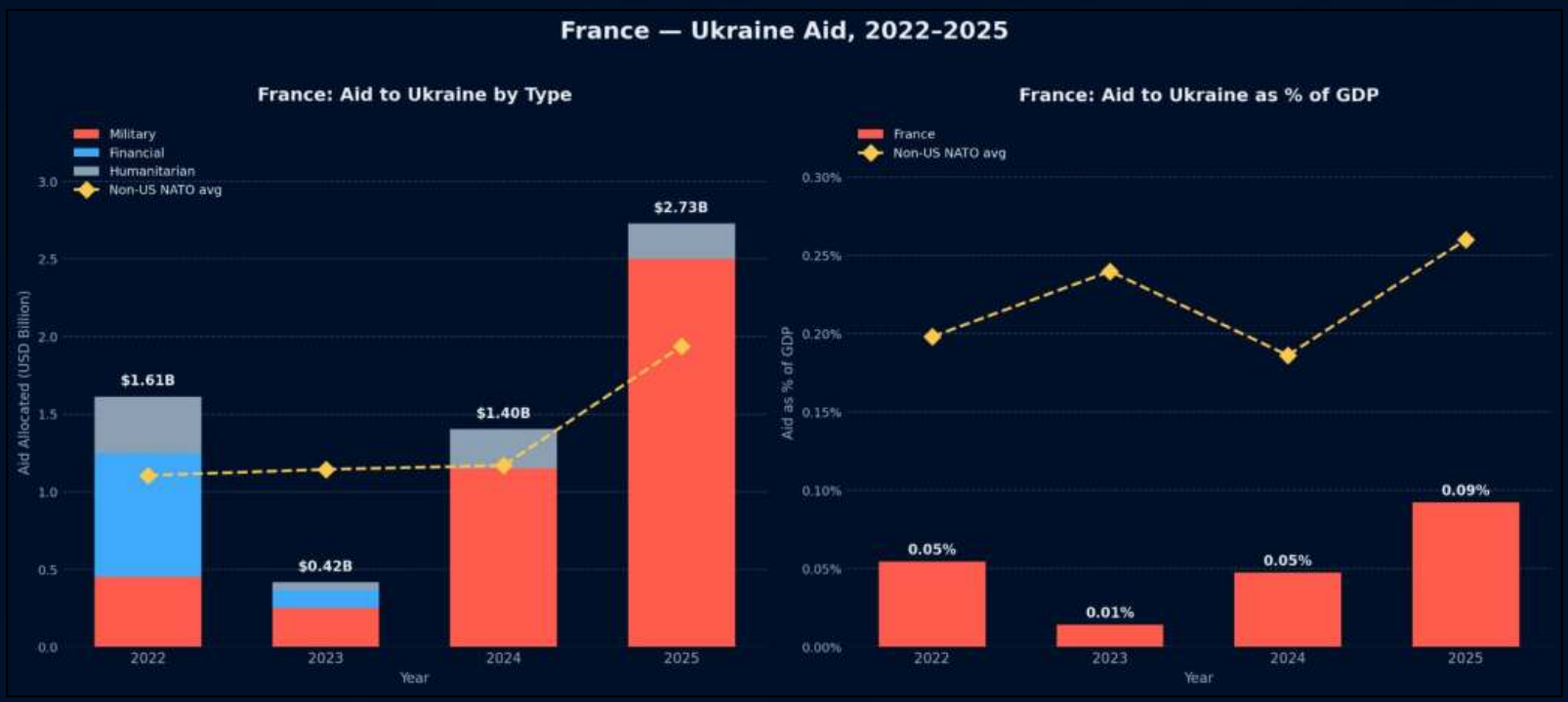
Declared Posture

France's 2025 National Strategic Review is France's sharpest doctrinal shift on Russia since the Cold War. The review explicitly names Russia as the most direct threat to France and Europe, warns of a risk of open warfare against the heart of Europe by 2030, and identifies Russian sabotage, cyber, and disinformation as present threats. Macron's nuclear deterrence shift, opening structured consultations and exercises with European partners while preserving exclusive French decision-making, is a major European deterrence signal. On China, France voted yes on Chinese EV tariffs and the strategic review identifies Chinese rare-earth control and cyber operations as strategic vulnerabilities, but Macron's three high-level China visits since April 2023 and his 2023 Taiwan strategic-autonomy comments create persistent ambiguity that allies find frustrating. On Iran, France's blocking of Operation Epic Fury overflights is the most consequential operational break with Washington in the current period. The 2025 RNS represents genuine doctrinal convergence with NATO on Russia; the Iran posture represents the most significant divergence.

STRATEGIC ALIGNMENT

Ukraine Support

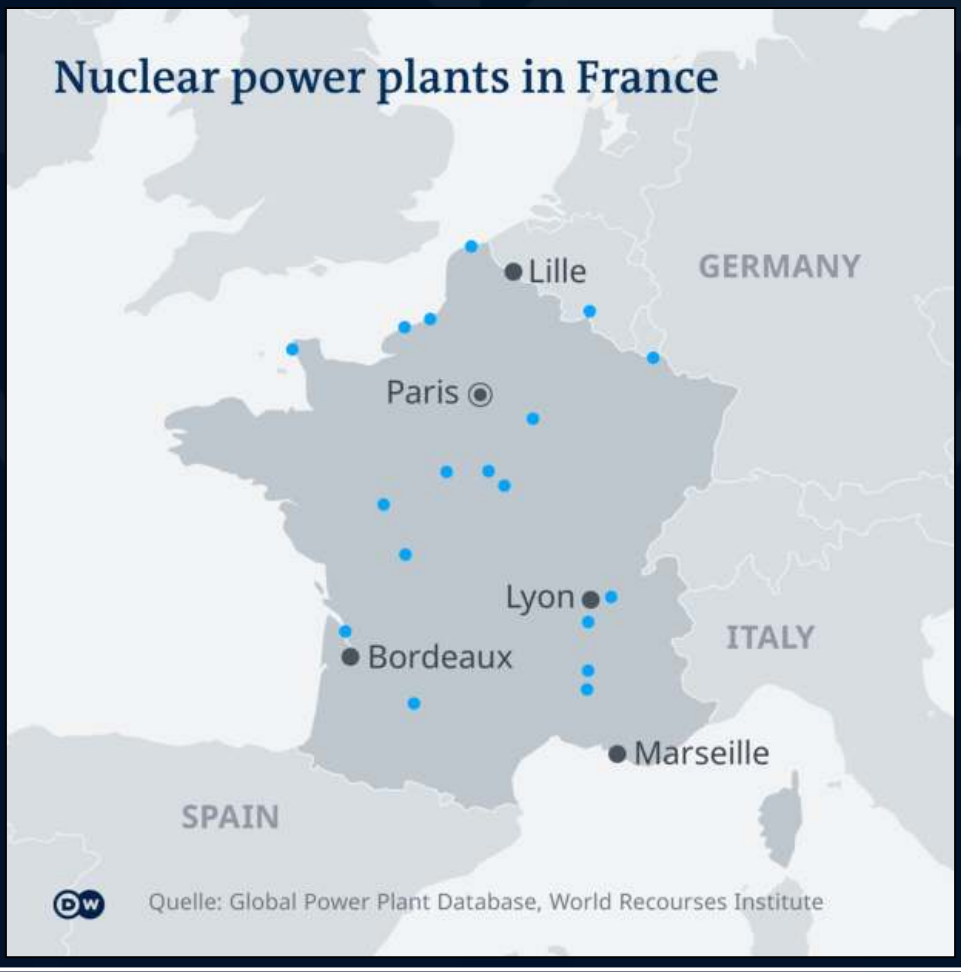
France's Ukraine aid reveals the gap between rhetoric and commitment. Absolute volumes are significant: $1.61B in 2022, dropping to $0.42B in 2023, recovering to $1.40B in 2024, and surging to $2.73B in 2025. But as a share of GDP, France has never exceeded 0.09% in any single year—consistently well below the non-US NATO average. Kiel tracks €7.907B allocated and €10.322B committed, 0.316% and 0.413% of GDP cumulatively. High-end transfers are real like Mirage 2000 fighters, SAMP/T air defense jointly with Italy, SCALP-EG cruise missiles, Caesar howitzers among the earliest Western artillery deliveries, and AASM Hammer guided bombs. France co-leads the Coalition of the Willing with the UK. The gap between France's self-image as a leading Ukraine supporter and its GDP-share contribution is one of the more striking disconnects in the alliance.



STRATEGIC ALIGNMENT

Russian Decoupling

France's Russian energy decoupling is largely complete. Its nuclear-heavy electricity mix provided structural insulation from Russian gas dependence that Germany and Austria lacked, Russian crude was substituted rapidly after 2022, and France operates a fully independent nuclear cycle with no Rosatom dependence. The one significant gap is Russian LNG: Russian-origin LNG continued arriving at French terminals in 2024-2025, and TotalEnergies' continued stake in Russia's Yamal LNG project is the most important remaining corporate decoupling concern. LNG exports remain a critical financial channel that still benefits the Russian energy sector. The EU's LNG phase out timeline will close this gap progressively. France supported every EU Russia sanctions package through the 20th without obstruction.



STRATEGIC ALIGNMENT

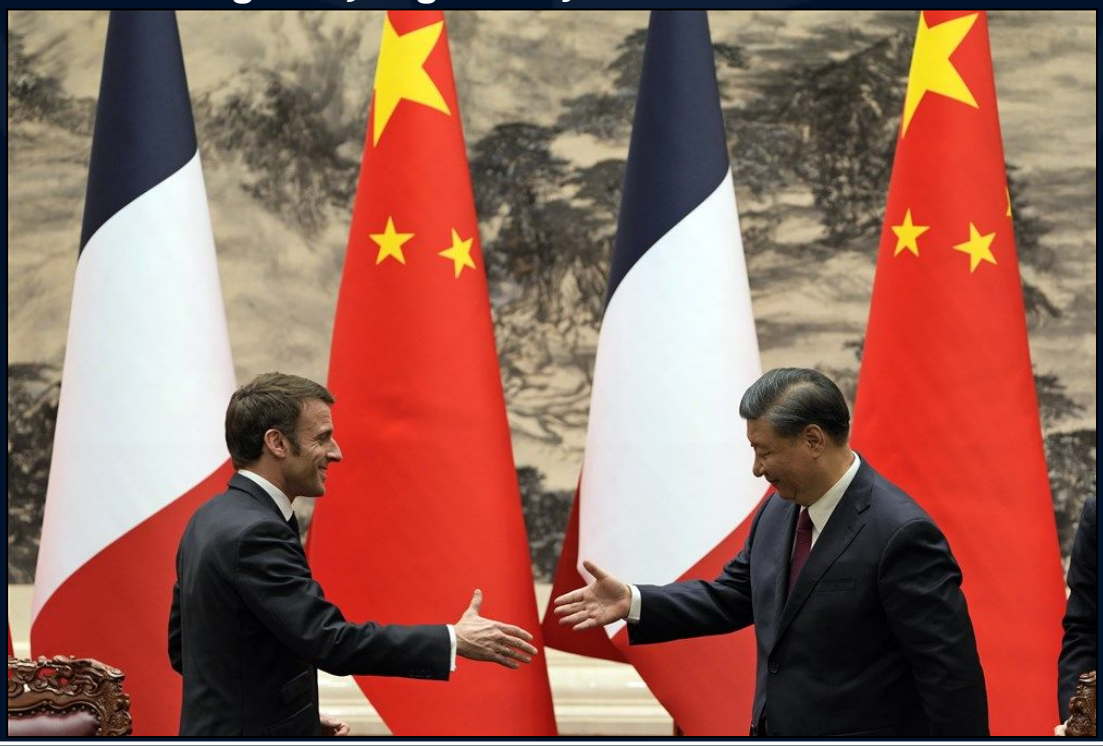
Public Support & Political Resilience

France recorded only 61% for staying in NATO in 2024, one of the lowest figures in the alliance, and just 50% felt more safe due to NATO cooperation, tied for the lowest figure. Only 56% agreed France should defend another ally if attacked, and Ukraine support stood at roughly 56% combined, below most Western European partners. President Macron's coalition is formally pro-NATO but has complicated alliance messaging through calls for European strategic autonomy and ambiguous Russia diplomacy, while the Rassemblement National, at roughly 30 to 35% of voters, has moderated but retains historic ties to Moscow and has opposed arms shipments to Ukraine. La France Insoumise, with roughly 10 to 15% of voters, is openly anti-NATO and anti-Ukraine aid, meaning together the two main opposition forces encompass roughly half the electorate with varying degrees of NATO scepticism. France is the one large ally where public NATO support, governing coalition messaging, and the composition of the opposition all simultaneously create a drag on alliance reliability.

STRATEGIC ALIGNMENT

Hedging Behavior

Unfortunately, France's hedging behavior record is mixed. The positives: no BRI exposure, no adversary arms procurement, yes vote on Chinese EV tariffs, full EU Russia sanctions support, no obstruction of Finnish or Swedish accession. The concerns are also real. On China, Macron's post-Beijing April 2023 comment that Europe should not be a "vassal" of the US on Taiwan and should avoid being "caught up in crises that are not ours" drew sharp rebukes from frontline allies and Washington. France has held three high-level China summits since 2023 to reinforce a strategic-autonomy posture that NATO's eastern members find genuinely frustrating. On Iran, the Operation Epic Fury overflight refusal is the most consequential mark: blocking US military aircraft is not rhetorical autonomy but concrete operational obstruction that affected allied military planning. France is not actively undermining the alliance, but the Iran and China postures are real frictions that distinguish it from unambiguously aligned major allies.



STRATEGIC ALIGNMENT

Operational Cooperation

France has an uneven track record of supporting US-led operations. It contributed forces to Afghanistan under ISAF and was a significant coalition partner in Iraq, and has maintained one of the broadest global military footprints of any NATO ally across Africa, the Middle East, and the Indo-Pacific. In the Indo-Pacific, France is a genuine resident power with territories in the Pacific and Indian Ocean, contributing to freedom of navigation and regional security in ways no other European ally can match. On recent US operations, the record is mixed. France participated in EU Operation Aspides in the Red Sea and moved naval assets toward Cyprus during the 2026 Iran war. But France refused to allow US military aircraft to overfly French territory during Operation Epic Fury. This obstruction seriously affected US strike planning and placed France alongside Spain and Italy in undermining regional security. On Venezuela, France has been cautious about supporting US pressure. For Washington, the question is whether an ally that blocks overflights during an active US military operation can be relied upon when operational stakes are highest.

Germany

NATO Country Assessment

—TIER TWO—

BURDEN SHARING • GROWING COURAGE & FORCE • CAPABILITY CONCERNS

AT A GLANCE

Toplines

- **Internalizing the US's Vision on Burden-Sharing:** Germany has made the most dramatic strategic reversal of any major European ally, going from 1.49% of GDP in 2022 to 2.4% in 2025 and exempting defense from its constitutional debt brake.
- **Abandoning Caution for Leadership on Ukraine Support:** Germany is Ukraine's largest absolute military supporter in Europe at €25B allocated, has backed every EU sanctions package through the 20th, and the Merz government has actively pushed for stronger use of frozen Russian assets.
- **Large Army, Low Capability:** Despite being Europe's largest defense spender in absolute terms, Germany ranks 28th out of 32 NATO allies on equipment share, signaling a military lacking meaningful capability.

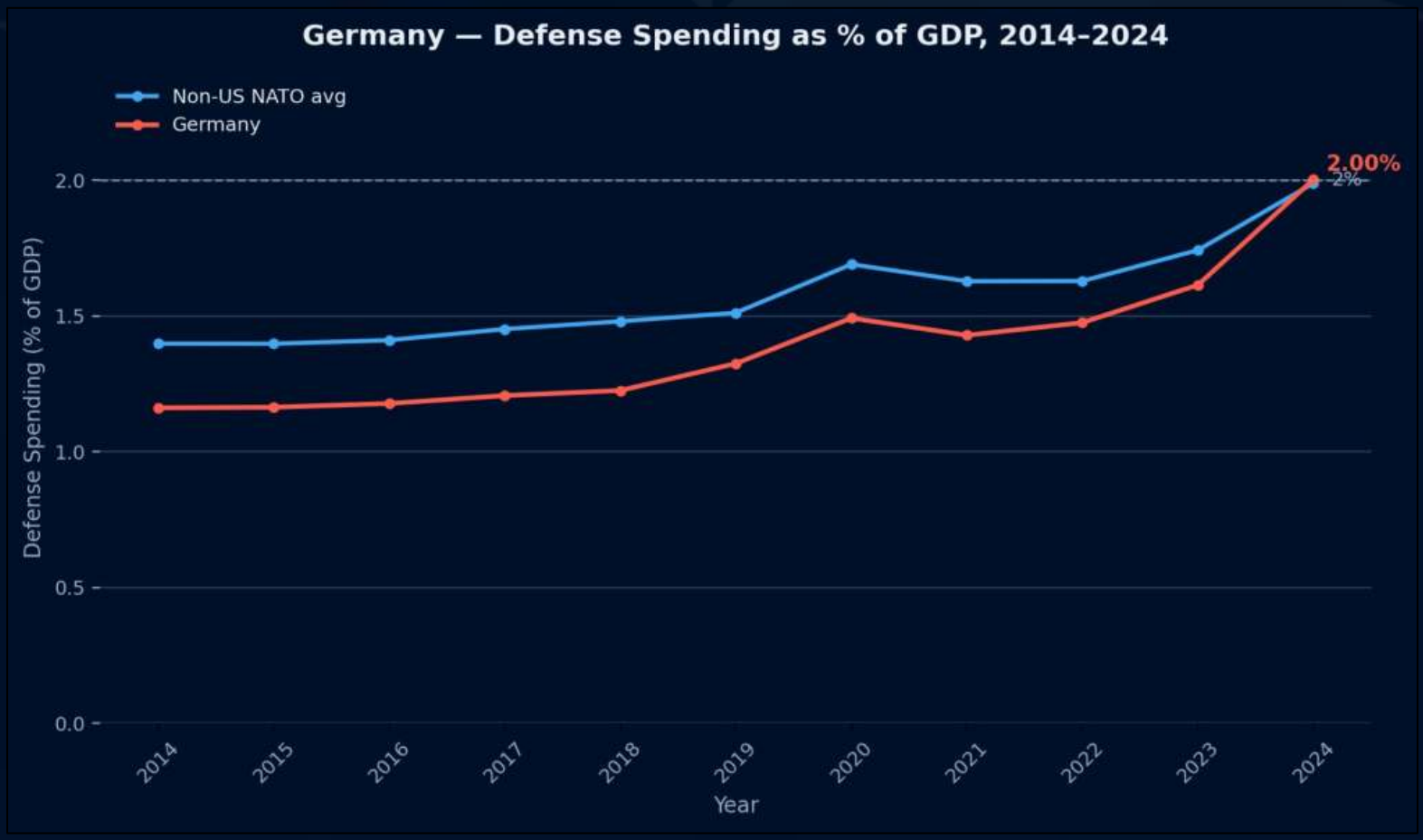
FORCE STRUCTURE AT A GLANCE

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

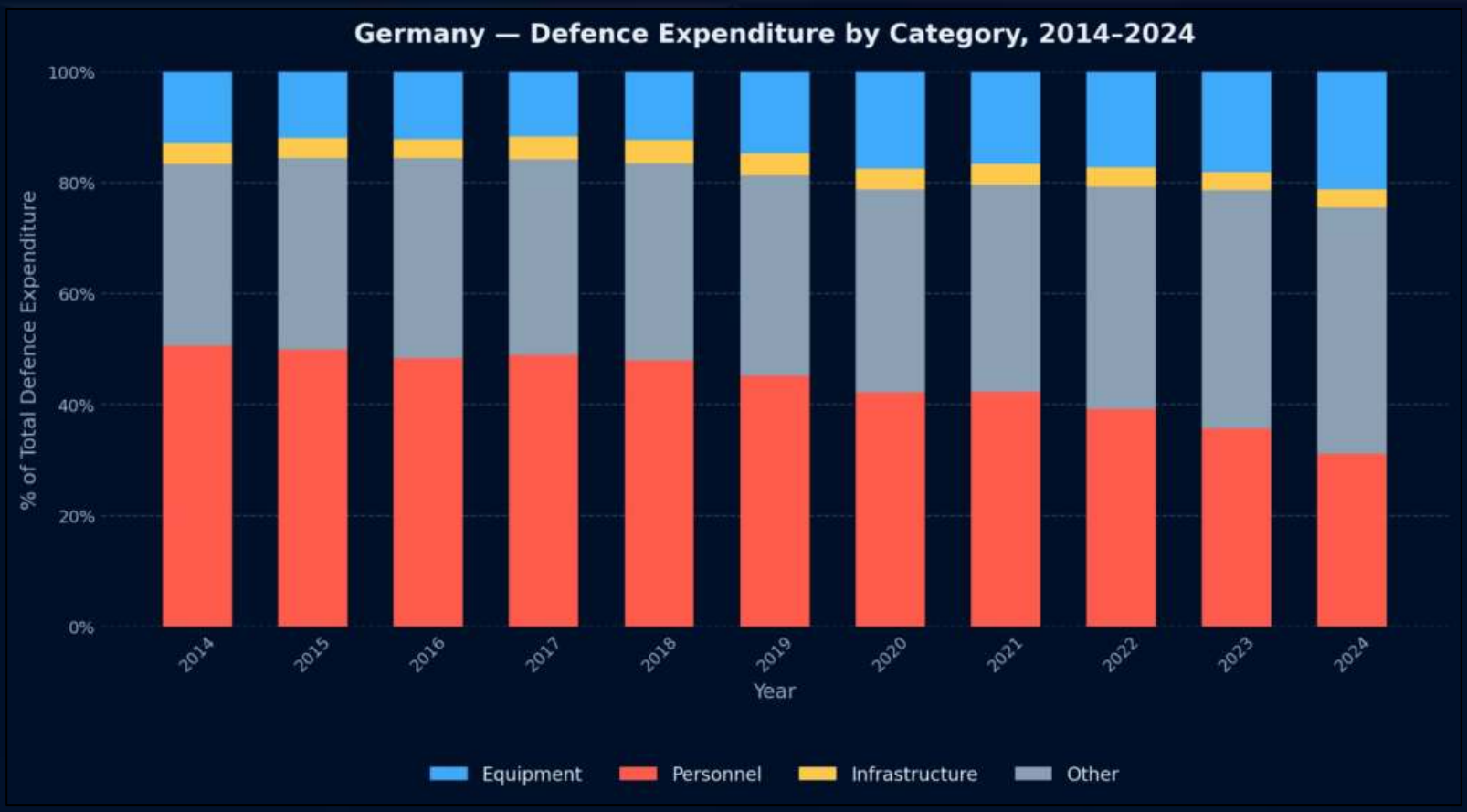
Germany has undergone a significant defense spending reversal in recent years. After decades of deliberate underinvestment (spending just 1.49% of GDP in 2022) Germany crossed 2% for the first time in 2024 and will reach an estimated 2.4% in 2025. This translates into roughly $114B, making it Europe's largest absolute defense spender at 19% of total European defense expenditure. The tension is that years of underinvestment created capability deficits that spending alone cannot quickly reverse. For a country of Germany's size, industrial capacity, and geographic centrality to NATO's eastern front, the gap between absolute volume and proportional commitment remains the central assessment challenge.



MILITARY CONTRIBUTIONS

Equipment Share

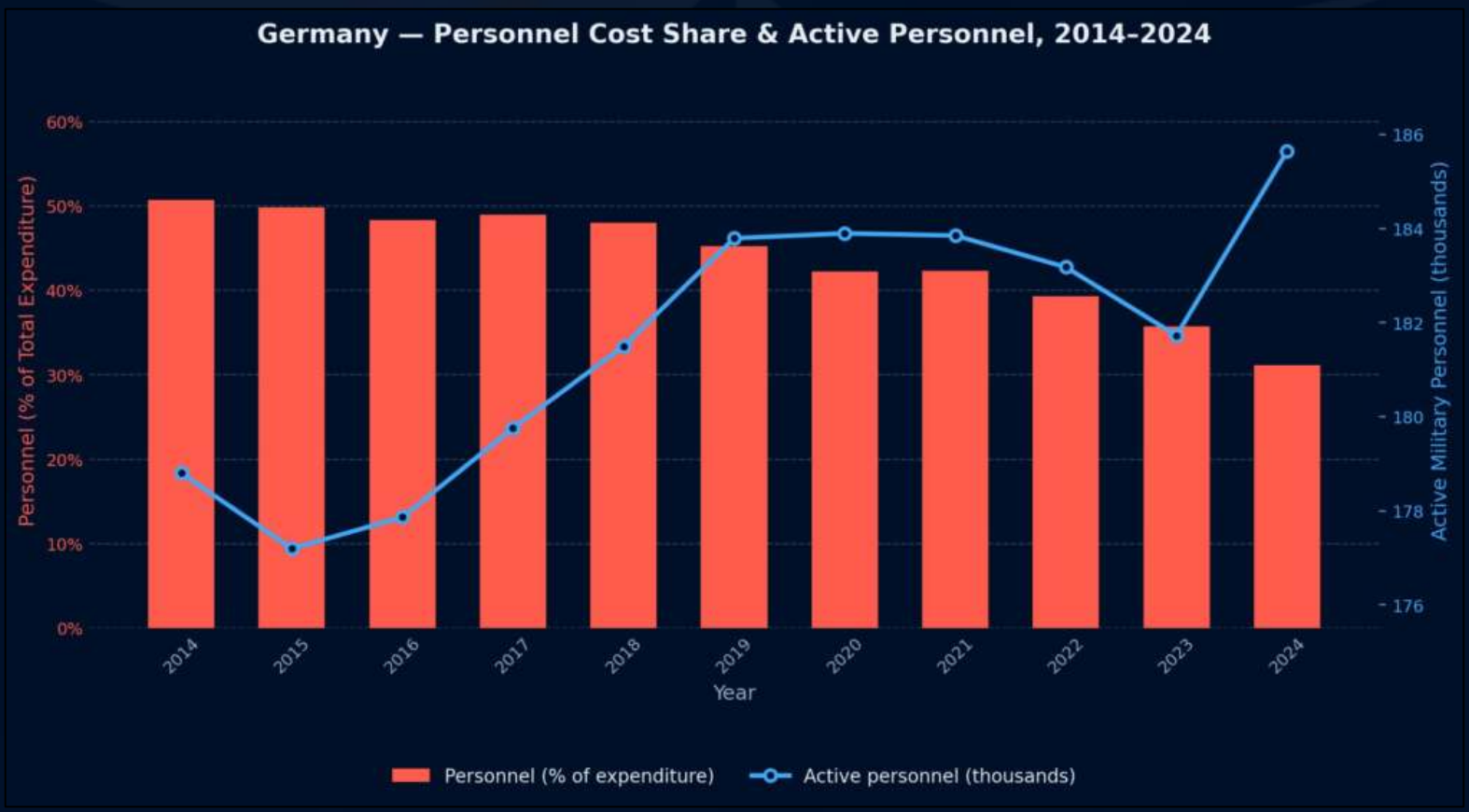
Germany's equipment share crossed NATO's 20% benchmark for the first time in 2024. Personnel costs falling from roughly 50% to 32%, with equipment and "Other" procurement categories rising as the $108B Bundeswehr special fund flows into hardware. The progress is real but the ranking is not: at just over 20%, Germany sits 28th out of 32 NATO allies on equipment share. For Europe's largest absolute defense spender and a country hosting more US military infrastructure than any other ally, barely clearing a benchmark most allies crossed years ago is an underwhelming result. The direction is right; the scale is not yet commensurate with Germany's strategic weight.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Germany's spending quality picture reflects the structural legacy of a military built around personnel and institutional overhead rather than deployable capability. Personnel costs have historically consumed a disproportionate share of the defense budget, and the German armed forces have simultaneously struggled to recruit enough soldiers to meet their own targets. Active personnel grew modestly from 183,179 in 2022 to 186,413 in 2025, well short of the ministry's stated expansion goals. The 2025 Parliamentary Commissioner's report cited over 20,000 vacant positions and an armed forces described as "aging and shrinking." The combination of high personnel costs and a recruitment shortfall means Germany is paying significantly for a force that is neither growing nor particularly ready.



MILITARY CONTRIBUTIONS

Capability Modernization

Germany's modernization has genuine strengths and serious weaknesses. The clear strength is air defense: roughly 70 Patriot PAC-3 launchers (the largest Patriot fleet in Europe) plus three IRIS-T SLM batteries, with a European Patriot missile manufacturing facility beginning production in 2027. On combat aircraft, 35 F-35As were contracted in 2022 for roughly $8.4B, with first deliveries in 2026 replacing the Tornado in NATO's nuclear-sharing role. The weaknesses are significant. Armor production is running at roughly 33 Leopard 2A8 tanks per year through 2030—a rate at which rebuilding German armor to 2004 levels would take decades. The Future Combat Air System was formally cancelled on June 8, 2026, after nine years and repeated failed attempts to resolve intellectual property and workshare disputes between Dassault and Airbus—leaving both Germany and France without a clear sixth-generation fighter pathway. Germany is modernizing, but not fast enough or at sufficient scale for Europe's largest defense spender.

MILITARY CONTRIBUTIONS

Force Posture

Germany's force posture has two dimensions: forward deployment and rear-area hosting. On the forward side, Germany activated Panzerbrigade 45 in Lithuania in April 2025—the first permanent German brigade-sized foreign deployment in postwar history—with full operational capability of roughly 4,800 soldiers planned for 2027. Germany has led NATO's eFP battlegroup in Lithuania since 2017 and maintains Patriot batteries in Poland. On hosting, Germany is NATO Europe's indispensable rear-area hub: roughly 35,000 US troops are stationed there, including EUCOM and AFRICOM headquarters at Stuttgart, US Army Europe and Africa at Wiesbaden, and Ramstein Air Base—infrastructure that supports not just European operations but US military activity across the Atlantic, Africa, and the Middle East.

MILITARY CONTRIBUTIONS

Industrial Base

Germany's defense industrial base is one of the most strategically important in Europe. Rheinmetall has scaled 155mm artillery ammunition production from 70,000 rounds annually to 1.1 million, with a new plant targeting 1.5 million rounds per year by 2028. This is the single most important European contribution to NATO's munitions sustainment problem outside the United States. Military truck production grew from 600 to 4,500 units annually. KNDS Deutschland has restarted new-build Leopard 2 production after a 33-year gap. A four-nation consortium placed an order for 1,000 PAC-2 GEM-T missiles in April 2024 with Germany establishing the production facility. For raw materials, Germany's chemical and metals industrial base underpins much of European munitions and precision components production. The liability is that several critical multilateral programs remain stalled, representing a genuine gap in European defense industrial coordination that Germany's scale should be able to close.

STRATEGIC ALIGNMENT

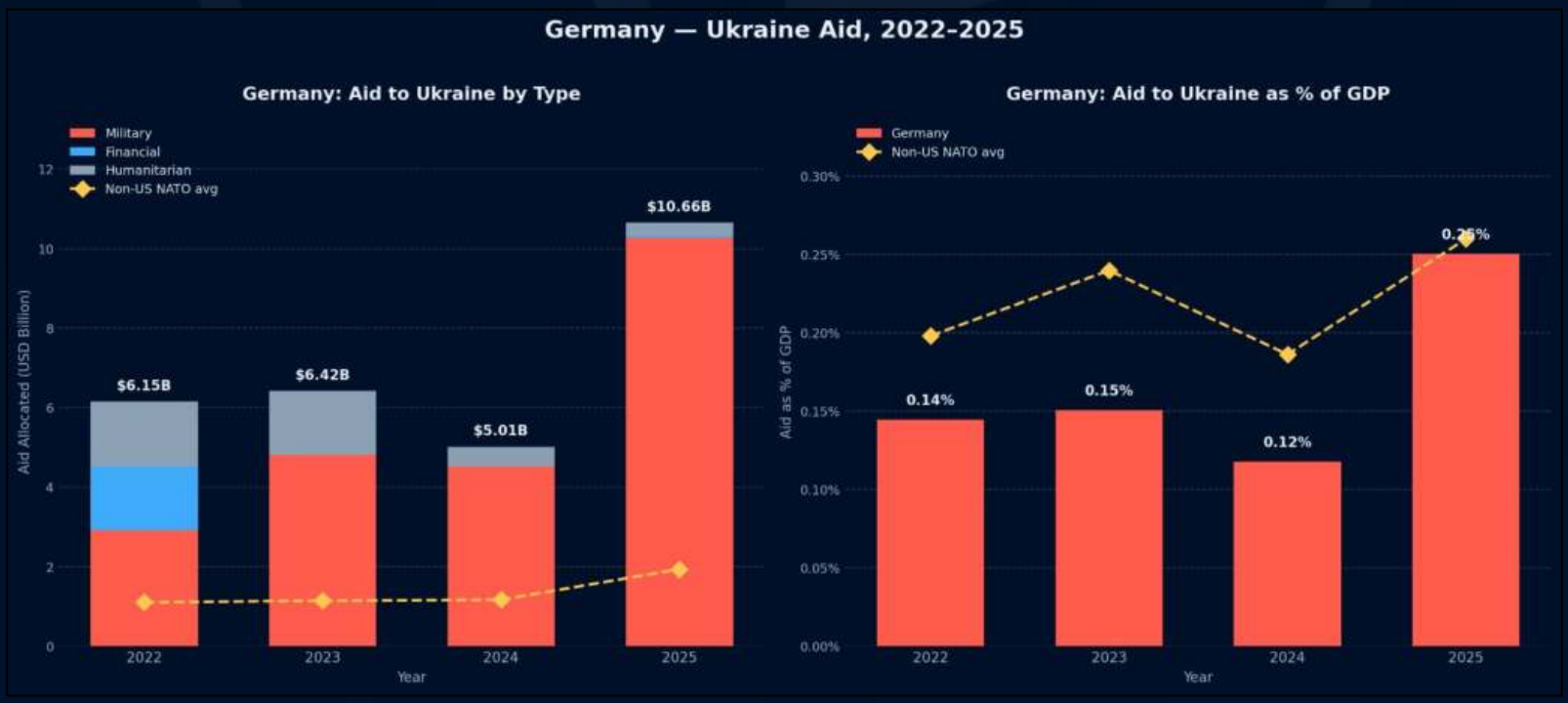
Declared Posture

Germany's strategic posture is anchored in a cluster of documents produced since 2022 that collectively represent the most comprehensive reorientation of German national security thinking in the postwar period. The 2023 National Security Strategy identifies Russia as the most serious threat to Europe and anchors German security firmly in NATO. The Merz government has pledged to build the Bundeswehr into Europe's strongest conventional army, and defense spending above 1% of GDP has been exempted from Germany's constitutional debt brake. On China, Germany's 2023 China Strategy hedges by adopting the convoluted partner/competitor/systemic rival framework. Germany's declared posture on Russia is among the more serious with notable strategy deficiencies with China.

STRATEGIC ALIGNMENT

Ukraine Support

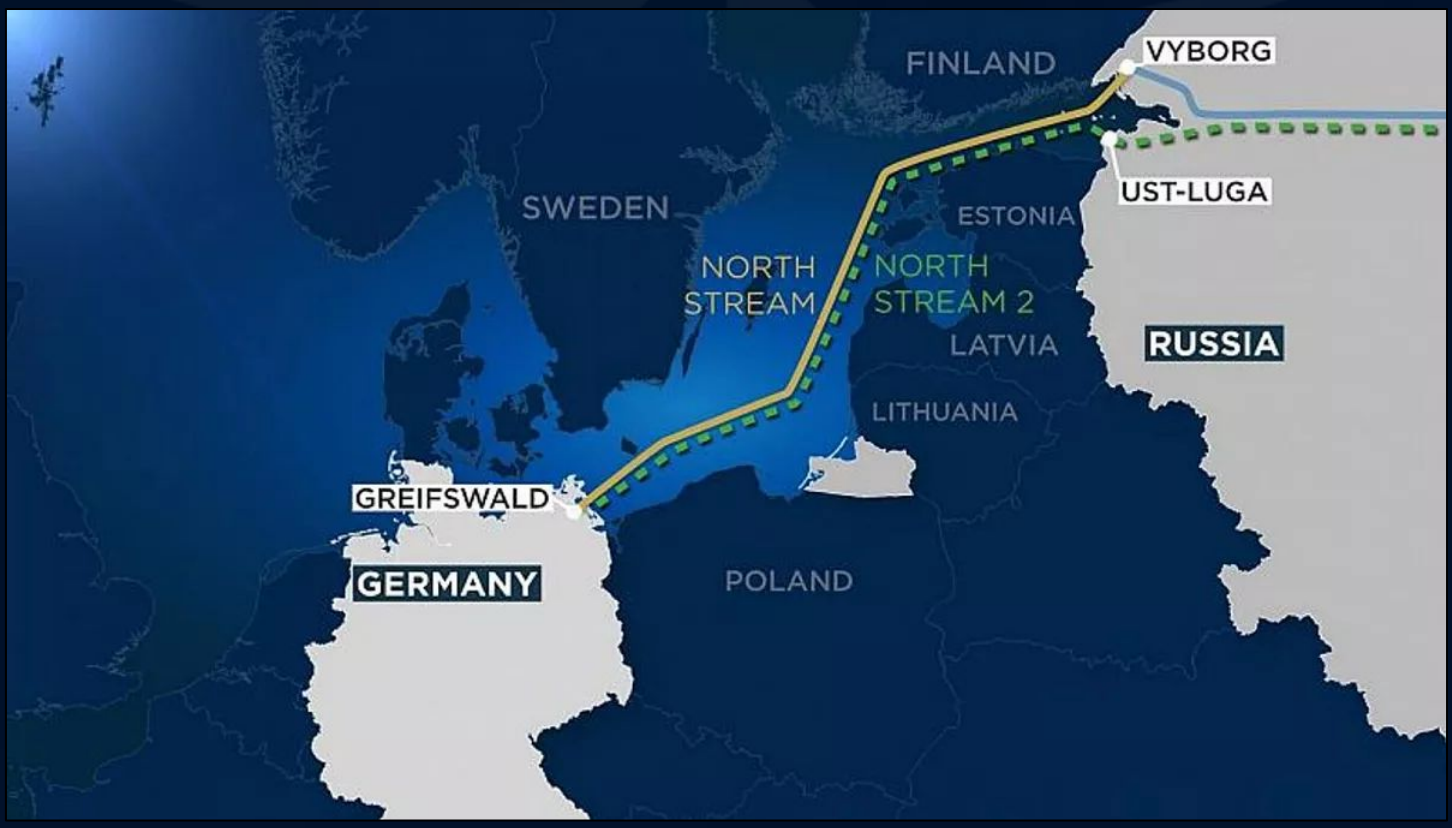
Germany is Ukraine's largest absolute military supporter in Europe, with €25.295B allocated and €47.232B committed (0.702% and 1.311% of GDP) though a €21.9B commitment gap, overwhelmingly military, remains the central concern. High-value contributions include Patriot systems, IRIS-T SLM and SLS platforms, Gepard anti-aircraft guns, 18 Leopard 2A6 tanks, Marder IFVs, PzH 2000 howitzers, MARS II MLRS, and substantial ammunition. The 2026 military aid trajectory is rising toward €11.5B. The most significant caveat is Taurus: Germany has declined to transfer its long-range cruise missile even after the UK and France delivered comparable systems, making it one of the most cautious major donors on strategic strike. A May 2025 joint long-range weapons production track inside Ukraine partially addresses the gap without resolving the political signal.



STRATEGIC ALIGNMENT

Russian Decoupling

Germany entered 2022 as Europe's most consequential Russian energy dependency case: roughly 55% of gas, one-third of oil, and a major share of coal came from Russia. The decoupling was fast and forced. Nord Stream 2 certification was suspended on 22 February 2022, Russian pipeline gas stopped flowing by late August 2022, and Germany rapidly built LNG import terminals at four locations. By 2025, German LNG terminals supplied around 10% of domestic gas consumption. Germany backed every EU sanctions package through the 20th and the Merz government has actively pushed for stronger use of frozen Russian assets for Ukraine. The residual concern is Russian-origin LNG still potentially entering European systems through Mukran/Rügen pending the EU phase out targeted for 2027. The prewar strategic misjudgment was severe; the post-2022 correction has been real but energy-intensive German industry continues to pay the price.



STRATEGIC ALIGNMENT

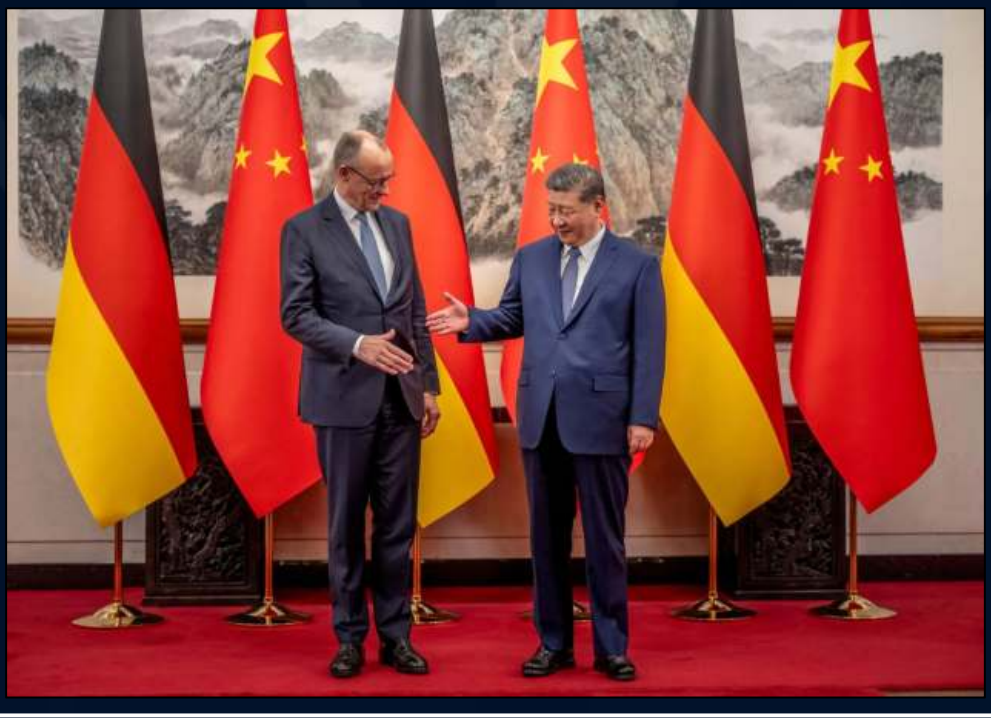
Public Support & Political Resilience

Seventy-seven percent of Germans said in 2024 they would vote to stay in NATO, with 54% favoring increased defense spending, a significant shift from Germany's pre-2022 baseline. Sixty-five percent agreed Germany should defend another ally if attacked, and 62% agreed NATO membership makes a foreign attack less likely. The CDU/CSU-led government under Merz has committed to 3.5% direct defense plus 1.5% for the Hague 5% framework, marking a genuine strategic reorientation for the largest European economy, while the SPD accepted the formal policy shift but retains internal tensions over the pace of rearmament. The AfD is polling at roughly 20% nationally and running on a platform that could adjust German NATO policy if it came to power. The continued relevance of AfD puts the future of Germany's NATO orientation into question.

STRATEGIC ALIGNMENT

Hedging Behavior

Germany's hedging behavior record is broadly positive with one significant China concern. No Moscow visits by any chancellor since the full-scale invasion, no BRI participation, no adversary arms procurement, and FDI screening has been strengthened with Chinese semiconductor acquisitions blocked in 2022. The China liability is real. Scholz's November 2022 Beijing visit—the first by a G7 leader after COVID reopening—drew sustained criticism from European allies for the signal it sent at a critical moment in the war. COSCO holds a 24.99% stake at the Port of Hamburg, restricted below a blocking minority but still a sensitive infrastructure exposure. Germany voted no on Chinese EV tariffs in October 2024, driven by auto-sector dependence on the Chinese market—a clear example of economic exposure constraining declared de-risking policy. 5G Chinese component phaseout is underway but slower than UK or Baltic standards. Germany's counter-alignment problem is not open alignment with Beijing but structural economic dependence that repeatedly pulls German policy softer than its declared posture on China.



STRATEGIC ALIGNMENT

Operational Cooperation

Germany contributed forces to Afghanistan under ISAF and participated in coalition operations in Iraq, though with significant caveats on combat rules of engagement that generated allied friction. Germany did not provide a kinetic contribution or basing support during Operation Epic Fury. The core operational value Germany provides is institutional and geographic. Ramstein Air Base, EUCOM and AFRICOM headquarters at Stuttgart, US Army Europe and Africa at Wiesbaden, and Landstuhl medical infrastructure make Germany the irreplaceable rear-area hub for all US and NATO operations across Europe, Africa, and the Middle East—infrastructure that cannot be quickly replicated elsewhere. The Lithuania brigade, reaching roughly 4,800 soldiers by 2027, is Germany's most significant forward deployment in postwar history. Germany hosts NATO's NSATU at Wiesbaden, coordinating military equipment and training for Ukraine. GermanY leads the European Sky Shield Initiative. Germany did not obstruct Operation Epic Fury, has participated in Operation Aspides since Feb 2024, and is prepping a possible Hormuz role but hasn't joined the UK-France Hormuz coalition. The operational profile is indispensable by virtue of what runs through German territory; cautious by virtue of what Germany declines to project beyond it.

Greece

NATO Country Assessment

—TIER TWO—

BOOSTING CAPABILITY • STRENGTHENING SECURITY • WEAK SUPPORT

AT A GLANCE

Toplines

- **Bolstering European Capability:** Greece is one of NATO's most consistent defense spenders, never dipping below 2% of GDP since 2014 and currently sitting at 2.85%, well above the alliance average.
- **Contributing to the US-NATO Shared Security:** Greece commands EU Operation Aspides from Larissa with frigates deployed to the Red Sea and provided basing access during Operation Epic Fury.
- **Weak Public Support:** Public support for collective defense is among the weakest in NATO—only 51% say Greece should defend another ally if attacked—and the KKE party openly advocates NATO withdrawal, giving Greece one of the largest parliamentary constituencies for outright alliance exit of any member state.

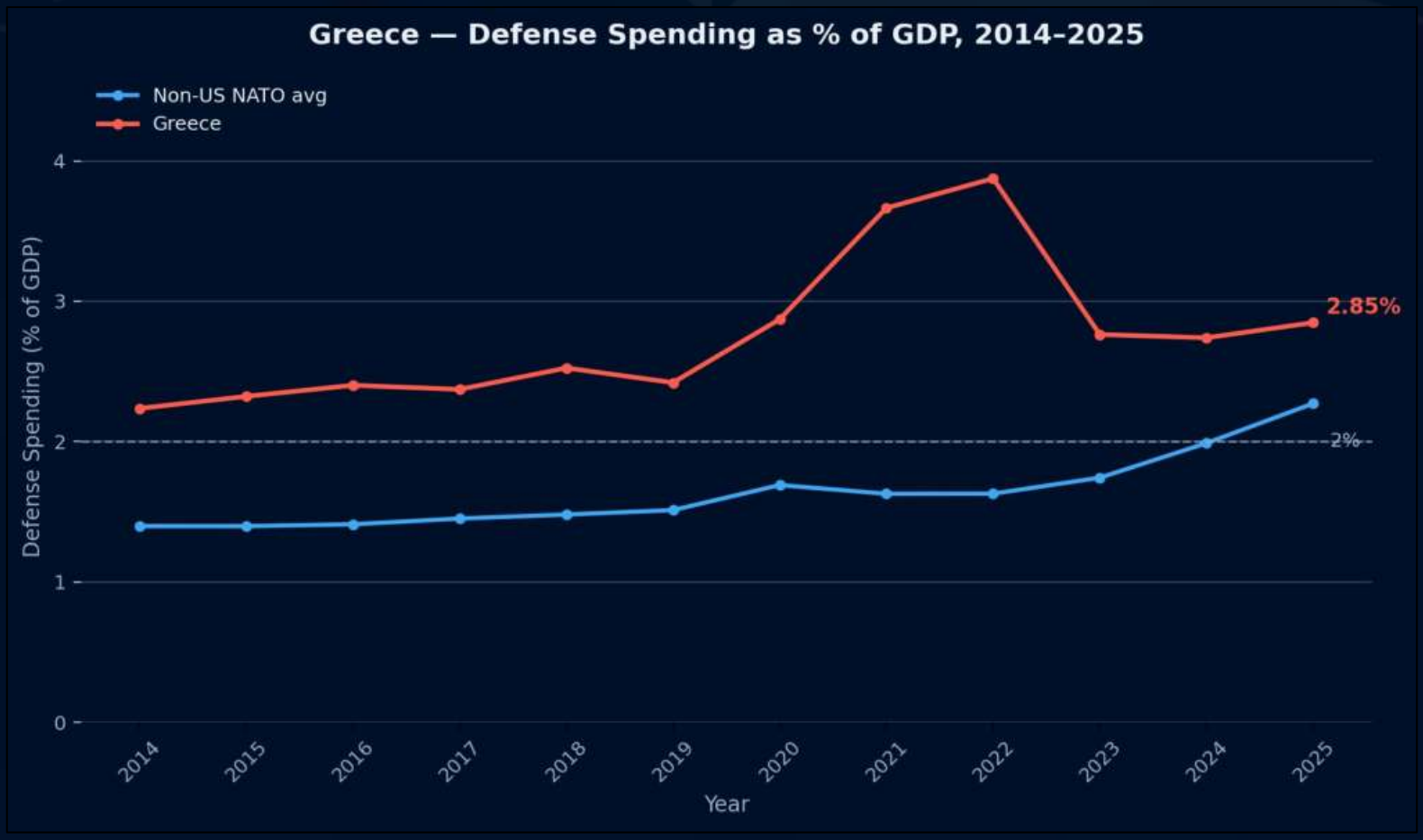
FORCE STRUCTURE AT A GLANCE

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

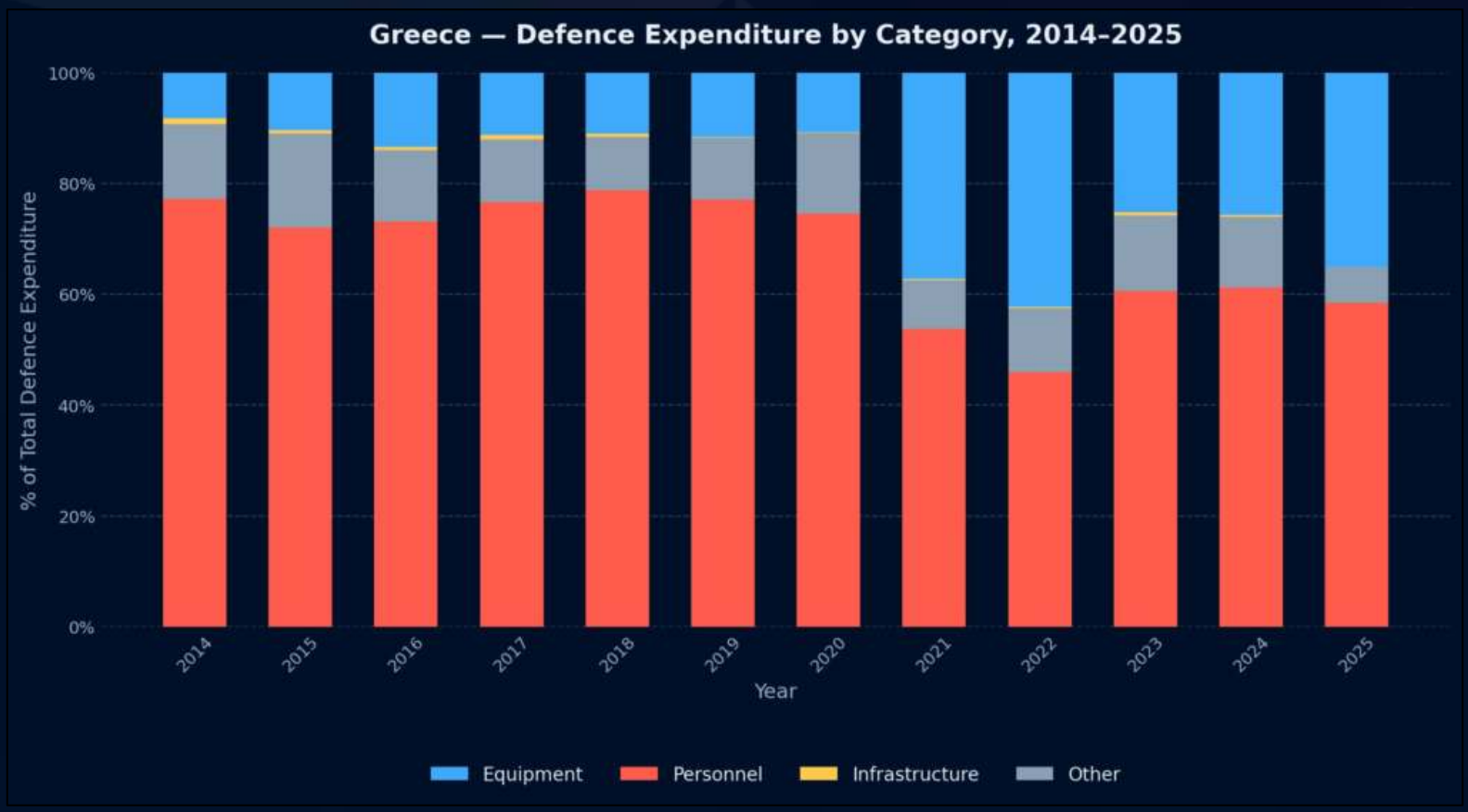
Greece is one of NATO's most consistent high defense spenders. Greece has spent above 2% of GDP every single year since 2014—never dipping below the NATO floor even during the depths of its financial crisis—and has consistently run at roughly double the non-US NATO average throughout the period. Spending peaked at roughly 3.9% of GDP in 2022 before settling at 2.85% in 2025, still well above the alliance average of 2.5%. The April 2025 announcement of a €25B twelve-year Long-Term Defense Armaments Plan commits Greece to sustained high investment through 2036. Greece accepted the Hague 3.5% core plus 1.5% framework from a considerably higher baseline than most allies.



MILITARY CONTRIBUTIONS

Equipment Share

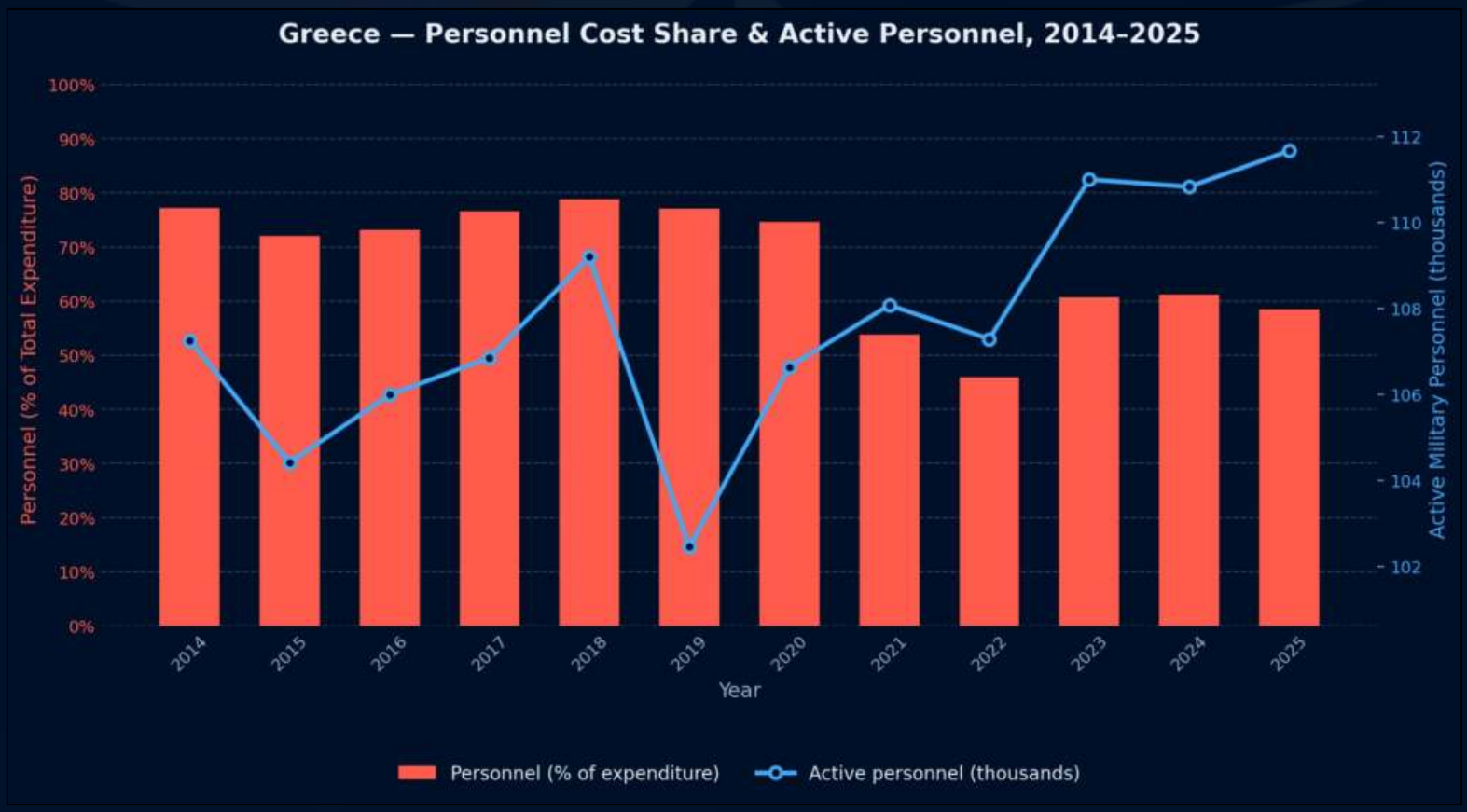
Greece's equipment share has transformed dramatically since 2021. After running at roughly 10% of the defense budget through 2014-2020, equipment surged to roughly 35-40% by 2022-2025 as major procurement programs began registering in actual expenditure—one of the more dramatic equipment shifts in the alliance. The investment is real: 24 Rafales delivered, 20 F-35As contracted with an option for 20 more, three FDI Belharra frigates under construction, 83 F-16 Viper upgrades, and a roughly €3B Achilles Shield layered air defense package. The constraint is ground forces: 1,385 MBTs dominated by legacy Leopard 1, M48, and M60 platforms with no tank modernization contract signed. Greece's equipment surge is concentrated in air and naval domains while the ground force remains unreformed.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Greece's personnel picture is large, expensive, and growing. Personnel costs ran at roughly 72-78% of the defense budget through 2014-2020—among the highest in NATO—before falling to approximately 59% by 2025 as the equipment surge absorbed more of the enlarged budget. Active military personnel have grown from roughly 104,000 in 2014 to approximately 112,000 by 2025, rising steadily since 2023. Greece maintains one of the larger conscript-based forces in the alliance, which ensures mass but generates high personnel cost burdens that historically crowded out equipment investment. The post-2021 equipment surge represents Greece finally breaking out of that trap, but at 59% personnel costs the structural tension between mass and modernization has not been resolved.



MILITARY CONTRIBUTIONS

Capability Modernization

Greece's modernization is among the most needed in NATO. On combat aircraft, 20 F-35As contracted with an option for 20 more, 24 Rafales already delivered, and ongoing F-16 Viper upgrades create one of the most capable tactical air forces in the Eastern Mediterranean. On naval forces, four Belharra FDI frigates equipped with Aster 15/30 air defense and MdCN naval cruise missiles represent a major capability upgrade. On air defense, the March 2026 Achilles Shield approval adds David's Sling, Barak MX, and SPYDER to an existing inventory already including 36 Patriot launchers and 12 S-300PMU1 systems—creating one of the most sophisticated national air defense architectures in the alliance. On fires, 36 M270 MLRS with ATACMS provides genuine long-range precision strike. The significant gap is ground forces: no contract has been signed to replace the legacy Leopard 1, M48, and M60 tanks that dominate the fleet.

MILITARY CONTRIBUTIONS

Force Posture

Greece hosts two of NATO's most strategically valuable Mediterranean facilities. Souda Bay on Crete is a deep-water port capable of hosting carrier strike groups, nuclear submarines, and amphibious forces, with 1,200 US EUCOM personnel including a helicopter battalion. The 2021 MDCA update expanded US access to Souda Bay, Larissa, Alexandroupoli, and Stefanovikeio. Alexandroupoli has become NATO's primary alternative logistics ingress for the eastern front after Turkey closed the Bosphorus under Montreux, linked by the 2024 Harmonized Military Mobility Corridor connecting Thessaloniki, Alexandroupoli, Varna, and Constanța. Ground contributions include UNIFIL Lebanon, KFOR Kosovo, and Bosnia-Herzegovina. Active force of approximately 112,000 is substantial relative to a population of 10 million.

MILITARY CONTRIBUTIONS

Industrial Base

Greece's defense industrial base is limited but has two areas of genuine relevance. Hellenic Shipyards at Skaramangas provides naval maintenance and overhaul capacity for allied vessels in the Eastern Mediterranean. Intracom Defense Electronics produces defense electronics and communications systems with allied export markets. On raw materials, Greece holds significant deposits of bauxite, nickel, chromite, and rare earth elements—including one of Europe's largest identified rare earth deposits in the Evros region—that are increasingly relevant to NATO's critical minerals supply chain as the alliance seeks to reduce Chinese dependence. The €25B twelve-year defense plan includes a 25% local content requirement in foreign contracts, which will push Greek industry toward greater defense integration from a currently constrained baseline. Greece has no sovereign combat aircraft or major platform design capability, but its raw materials profile may prove more strategically valuable than its manufacturing base.

STRATEGIC ALIGNMENT

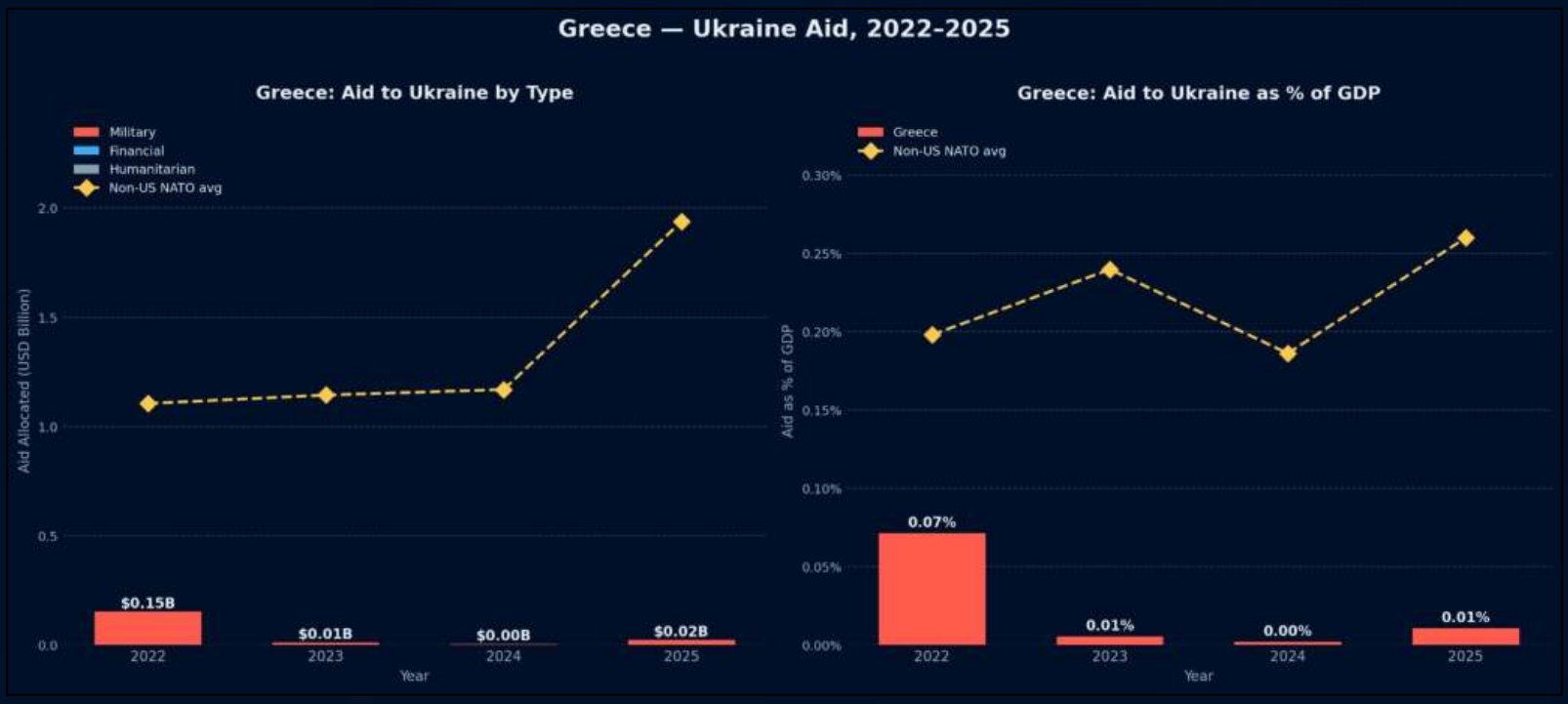
Declared Posture

Greece's declared posture presents NATO's most complicated alignment picture. Defense Minister Dendias explicitly identified Turkey as Greece's principal threat in 2025-2026 strategy statements, and the €25B Achilles Shield defense plan is organized primarily around deterring Turkish airpower, naval forces, and missiles in the Aegean. On Russia, Greek doctrine aligns with NATO 2022 at the rhetorical level and Greece has held with EU and NATO consensus on Ukraine despite significant domestic pro-Russian sentiments from both left and right. On China, the Mitsotakis government has shifted toward de-risking rhetoric since 2022 without pursuing divestment of COSCO's 67% Piraeus stake—the largest Chinese-controlled critical infrastructure asset in NATO Europe. On Iran, Greece commands EU Operation Aspides from Larissa and aligns with EU sanctions. The defining tension is that Greece's doctrine is organized around a NATO ally as its primary threat, translating to a complicated scenario for NATO.

STRATEGIC ALIGNMENT

Ukraine Support

Greece's Ukraine aid figures tell a clear story: $0.15B in 2022 (0.07% of GDP), collapsing to $0.01B in 2023, essentially zero in 2024, and $0.02B in 2025—consistently far below the non-US NATO average every year. Kiel tracks just €0.169B allocated total, placing Greece near the bottom of NATO donors by proportional measure. Direct transfers have included RPGs, missiles, M114 howitzers, and surplus Soviet-era equipment. The defining constraint is Greece's refusal to transfer Patriot or S-300 air defense to Ukraine despite US and EU pressure, with Mitsotakis publicly refusing in April-May 2024 citing Turkey-deterrence requirements. Greece's most important Ukraine contributions are geographic and institutional rather than financial: Alexandroupoli port serves as NATO's primary alternative logistics route to the eastern front when Turkey's Bosphorus closure blocks direct sea access, and the Kalamata flight training center is training Ukrainian F-16 pilots. These are real and in some cases irreplaceable contributions—but they are infrastructure value, not aid intensity.



STRATEGIC ALIGNMENT

Russian Decoupling

Greece's Russian energy decoupling is one of the most problematic among NATO members. Pre-2022 Russian gas dependence was roughly 40%. After the invasion, dependence rose rather than fell: by mid-2024, Russian gas imports were estimated at roughly 60% of Greek consumption, driven by displaced Russian flows taking Mediterranean routes through TurkStream. This is a serious decoupling failure that distinguishes Greece from virtually every other Western NATO ally. The Alexandroupoli LNG terminal, operational October 2024, creates an alternative supply platform for Bulgaria and the wider Balkans, but cancellation of a second planned terminal signals slowing momentum. On oil, Greek refineries shifted away from Russian crude rapidly in 2022-2023. On sanctions, Greece supported every EU package through the 20th, but Greek-owned tankers have been repeatedly flagged for Russian oil cargo and oil-price-cap evasion—a persistent enforcement gap in one of Greece's most politically sensitive industries.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Greece recorded 70% for staying in NATO in 2024, though only 51% agreed Greece should defend another NATO ally if attacked, one of the lowest figures in the survey, and only 51% agreed NATO membership makes a foreign attack less likely. NATO favorability has historically been capped below 50% in Greece, and concern about war in NATO countries was among the alliance's lowest at 65%. The New Democracy government (Mitsotakis) is formally a loyal NATO member but navigates alliance politics largely through the lens of Greek-Turkish bilateral tensions, periodically creating friction with Washington and Brussels. SYRIZA nominally accepts NATO membership but has historically been hostile to NATO military operations and is ambivalent on Ukraine support, while the Communist KKE, consistently polling around 8 to 10%, calls openly for Greek withdrawal from NATO. Greece is one of the only NATO members with a parliamentary constituency of that scale explicitly advocating outright exit from the alliance.

STRATEGIC ALIGNMENT

Hedging Behavior

Greece's hedging behavior record is mixed, with one concern that stands out across the entire assessment. COSCO holds a 67% controlling stake in Piraeus Port Authority, the largest Chinese-controlled critical infrastructure asset in NATO Europe. Xi Jinping called Piraeus the "dragon head" of the Belt and Road during his 2019 visit. The Mitsotakis government has resisted further Chinese expansion since 2022 and a December 2025 US Ambassador statement publicly raised divestment for the first time, but Athens has not pursued it. Arms procurement is aggressively Western: F-35, Rafale, FDI Belharra, F-16 Viper, Israeli Hellenic Dome and SPIKE. No high-level Moscow or Tehran engagement during the war period. Greek-Turkish tensions complicate alliance dynamics continuously but have not produced Russia-policy breaks. Huawei presence is less restricted than harder China-security states. COSCO-Piraeus opens one of NATO's largest ports to Chinese influence and subversion, creating deep vulnerability for NATO.

STRATEGIC ALIGNMENT

Operational Cooperation

Greece has a strong track record of supporting US-led operations. It contributed forces to Afghanistan under ISAF and coalition operations in Iraq, and Souda Bay on Crete has served as a critical US forward operating site supporting Mediterranean and Middle East operations for decades—hosting permanently forward-deployed US naval assets and supporting operations across the region. On recent US operations, Greece has been broadly cooperative. It commands EU Operation Aspides from Larissa with Greek frigates deployed to the Red Sea, making Greece the operational anchor for freedom-of-navigation responses. On Operation Epic Fury, Greece provided basing access and did not obstruct US operations, placing it in the positive Iran-access column. Alexandroupoli has become structurally critical to NATO Eastern Front logistics since 2022, serving as the primary Bosphorus-workaround route for moving US and allied troops and equipment toward Bulgaria and Romania. The Kalamata flight training center supports allied and Ukrainian F-16 pilot training. The notable gaps are Greece's refusal to transfer Patriot or S-300 to Ukraine despite US pressure, and a ground force eastern front contribution that does not match its financial investment—high-end assets are reserved for Aegean deterrence against Turkey rather than NATO's collective eastern requirements.

Iceland

NATO Country Assessment

—TIER TWO—

GIUK GAP LYNCHPIN • NORTH ATLANTIC LAUNCHPAD • SUBVERSION RISK

AT A GLANCE

Toplines

- **NATO Bastion in the North Atlantic:** Keflavík Air Base is NATO's most consequential single installation in the North Atlantic and the primary hub for surveillance, North Atlantic ASW operations, Atlantic logistics, and allied air policing.
- **Securing America's Eastern Shore:** The GIUK Gap is the choke point through which all Russian submarines must transit to reach the Atlantic, and Iceland's Air Defence System and Control and Reporting Center provide continuous radar coverage feeding directly into NATO air and missile defense architecture.
- **Urgent Need to Defend Against Subversion:** Iceland lacks a national security investment screening mechanism to safeguard against vulnerability to Chinese strategic investment in Arctic infrastructure, geothermal resources, ports, and rare earths at precisely the moment allied concern about Chinese dual-use investment is highest.

MILITARY CONTRIBUTIONS

Defense Spending Level

Iceland is NATO's only member with no standing military forces and no Ministry of Defence, making traditional defense-spending metrics inapplicable. This does not mean that Iceland is not important to the alliance. NATO Secretary General Rutte's November 2025 visit to Iceland underscored the expectation of expanded contribution calling Iceland "the eyes and ears" or the alliance in the Arctic. The Frostadóttir government's November 2025 first formal defense policy represents a historic doctrinal milestone, beginning to formalize Iceland's defense architecture for the first time.

MILITARY CONTRIBUTIONS

Equipment Share

This criterion is not applicable to Iceland in the conventional sense. Iceland's 250 coast guard personnel operate two offshore patrol vessels and three helicopters. The October 2025 Germany-Iceland defense cooperation agreement enabling German frigates, submarines, and maritime patrol aircraft to operate from Icelandic ports adds allied equipment to Icelandic basing rather than adding Icelandic equipment to the alliance inventory. Iceland's "equipment share" is the infrastructure it maintains and hosts for allied use, not national weapons procurement.

MILITARY CONTRIBUTIONS

Manpower & Recruitment

Iceland is the only NATO member with no standing army, navy, or air force, relying instead on the Icelandic Coast Guard (Landhelgisgæslan) for territorial defense and maritime patrol. Total uniformed personnel number only in the low hundreds, dwarfed by every other ally even on a per-capita basis, and there is no conscription, recruitment pipeline, or reserve force of the kind found elsewhere in the alliance. Because Iceland has no military to recruit for, its defense "manpower" debate centers almost entirely on Coast Guard staffing levels, civil preparedness, and whether to expand the small Crisis Response Unit, rather than on conscription or force generation in the conventional NATO sense.

MILITARY CONTRIBUTIONS

Capability Modernization

Iceland has no defense procurement program in the conventional sense. Its modernization story is entirely about infrastructure hosting and surveillance system upgrades. Keflavík's rebuilding after the 2006 US withdrawal corrected a serious capability gap that Russia exploited through increased submarine activity in the North Atlantic. Iceland's Air Defence System and Control and Reporting Center provide continuous radar coverage. These are infrastructure investments that enable allied capability and extend operational capacity.

MILITARY CONTRIBUTIONS

Force Posture

Iceland's force posture is entirely defined by what it hosts and enables rather than what it deploys. Keflavík Air Base is NATO's most significant installation in the North Atlantic and a primary hub for allied air policing, US Navy P-8 maritime patrol, transatlantic logistics, and North Atlantic surveillance. The IADS provides continuous radar coverage of the GIUK Gap and feeds into NATO air and missile defense architecture. The Coast Guard provides maritime surveillance, search-and-rescue, and undersea-infrastructure awareness across an enormous maritime area. Iceland contributes to NATO Forward Land Forces Finland and to NATO Multinational Brigade Latvia—contributions that are staff and personnel based rather than combat formations. Iceland contributes personnel to NSATU in Wiesbaden. The 1951 US-Iceland Defence Agreement provides the foundational bilateral framework for US defense of Iceland and allied access. Iceland hosts NATO Dynamic Mongoose, one of the alliance's premier anti-submarine warfare exercises. The operational reality is that Iceland is more strategically important than its force posture in conventional terms would suggest, because the GIUK Gap is the choke point through which all Russian submarines must transit to reach the Atlantic.

MILITARY CONTRIBUTIONS

Industrial Base

Iceland has no defense industry. There is no relevant industrial base assessment beyond noting that Iceland's technology sector contributes to NATO cyber cooperation frameworks. The complete absence of a defense industrial base is not a policy failure for Iceland—it is a structural reality of having a small population and no armed forces.

STRATEGIC ALIGNMENT

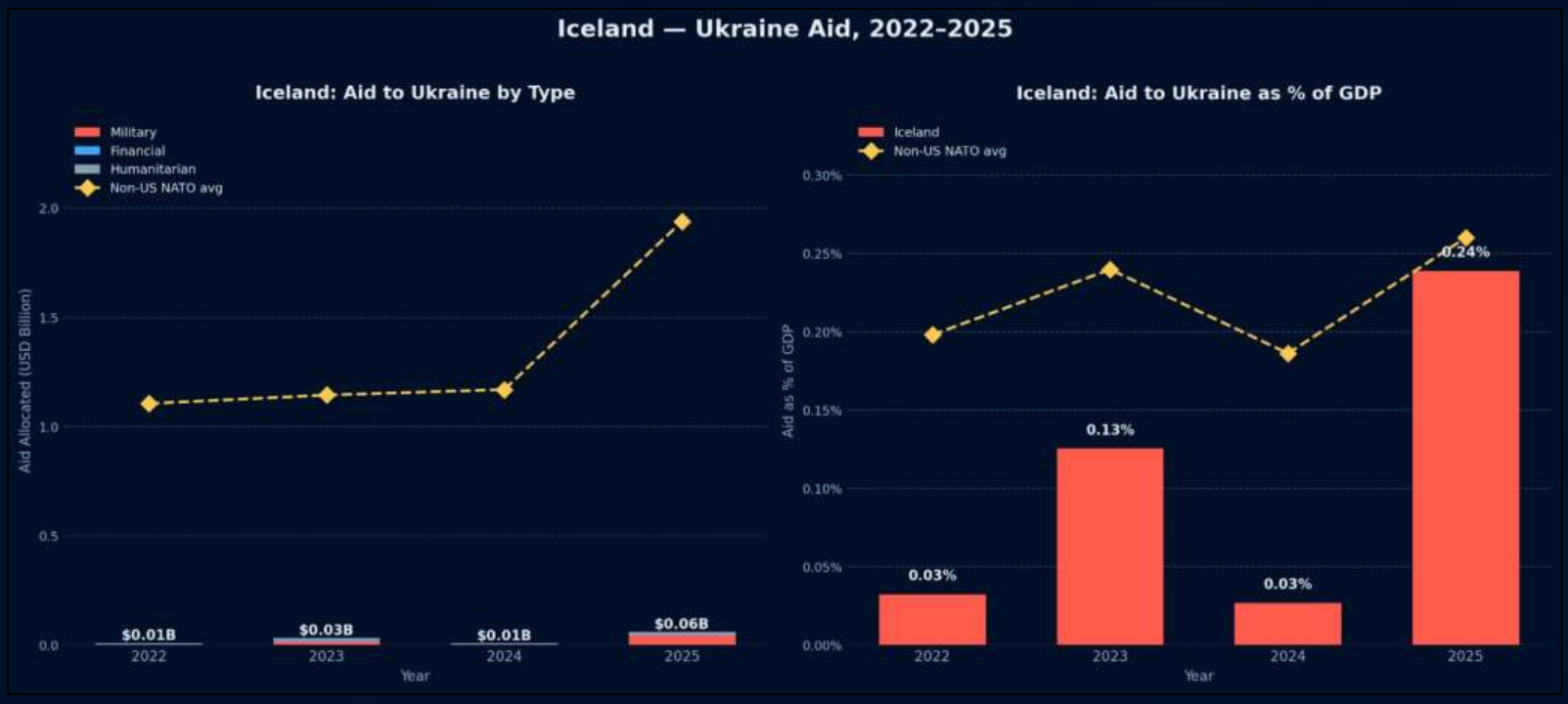
Declared Posture

Iceland's declared posture is strongly aligned with NATO's threat assessment despite having no military to operationalize it. The 2023 Parliamentary Resolution on National Security Policy identifies Russia's aggression, Arctic security, critical infrastructure, and the rules-based international order as central concerns. The November 2025 first formal defense policy is a historic milestone—the first time Iceland has presented a defense policy to parliament—it formalizes Iceland's need to strengthen civil preparedness, host-nation support, air surveillance, cyber resilience, and NATO cooperation. Foreign Minister Gylfadóttir explicitly framed Russia's invasion as a fundamental threat to the international legal system underpinning Icelandic security. Iceland was the first NATO member to suspend embassy operations in Russia, effective August 1, 2023. On China, the 2023 policy and subsequent debate treat Arctic security, Chinese polar shipping interest, and strategic investment as concerns, but Iceland's 2013 China FTA—the first China signed with any European country—remains a structural trade-exposure caveat. Iran is peripheral. The Frostadóttir government's pro-NATO, pro-Ukraine posture and May 2026 parliamentary vote on an EU accession referendum reinforce the alignment trajectory.

STRATEGIC ALIGNMENT

Ukraine Support

Iceland is a disproportionately consistent Ukraine supporter for a country with no military. Kiel figures show €0.098B allocated and €0.102B committed (approximately 0.45–0.47% of GDP) above the NATO median by proportional measure for a country that cannot transfer weapons from national inventories because it has none. The Althingi adopted a long-term Ukraine support program for 2024–2028, locking in a multi-year framework. Iceland contributes more than €8M to PURL, supports the Czech Ammunition Initiative and Danish defense-industry model, has pledged a mobile field hospital, and provides prosthetics funding for wounded Ukrainians. For a country of 390,000 people with no military, participating in these coalitions is a genuine contribution.



STRATEGIC ALIGNMENT

Russian Decoupling

Iceland's Russian energy decoupling is structurally complete and has been for decades. Iceland's electricity generation is overwhelmingly domestic hydroelectric and geothermal with no Russian energy dependence of any kind.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Iceland recorded 76% for staying in NATO in 2024, though only 42% agreed Iceland should defend another NATO ally if attacked, reflecting the unique position of an ally with no standing military. Seventy-one percent agreed NATO membership makes a foreign attack less likely, and 73% considered NATO important for their country's future security, suggesting the public understands the deterrence value of membership. Defense spending appetite was the lowest in the survey at 19% favoring an increase, consistent with Iceland having no defense budget in the conventional sense. The governing coalition is formally pro-NATO and there is no significant political force calling for withdrawal, with policy debate centering on civilian and infrastructure contributions rather than military spending.

STRATEGIC ALIGNMENT

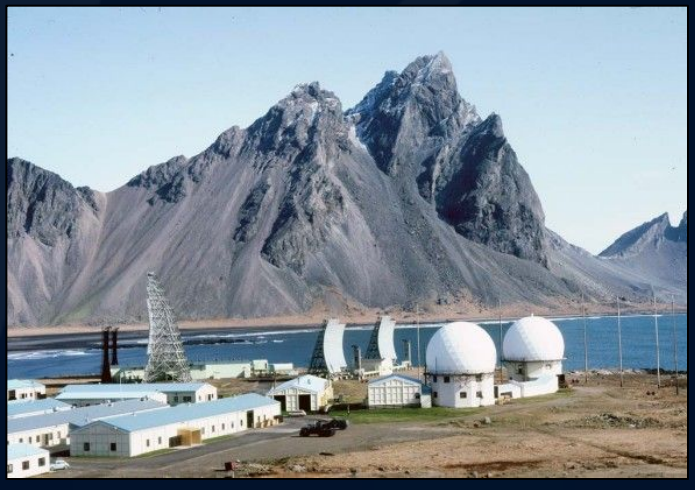
Hedging Behavior

Iceland's hedging behavior record is clean across all major dimensions with one structural China caveat. There is no BRI participation, no high-level Moscow, Beijing, or Tehran engagement during the war period, and no obstruction of any NATO or EU consensus position. Iceland moved against Moscow by suspending embassy operations. The 2013 China FTA is the main concern: signed before the current NATO de-risking environment, it remains in force and reflects a more permissive China trade posture than most NATO peers are moving toward. Chinese investor interest in Icelandic Arctic infrastructure, geothermal resources, ports, rare earths, and dual-use connectivity is a recurring concern, and Iceland lacks an automatic national-security investment-screening mechanism comparable to CFIUS, creating genuine vulnerability to strategic investment risk. Iceland has restricted Chinese telecom participation in line with broader NATO concerns. The investment-screening gap and China FTA are meaningful concerns, but are not indicative of active hedging against the United States and NATO.

STRATEGIC ALIGNMENT

Operational Cooperation

Iceland's operational cooperation contribution is unique in NATO and cannot be evaluated against conventional metrics. Keflavík Air Base is NATO's primary North Atlantic air operations hub—the most geographically critical basing asset for GIUK Gap surveillance, North Atlantic ASW operations, transatlantic logistics, and allied air policing across the High North. The July 2025 US nuclear submarine docking at Keflavík was a deliberate deterrence signal to Russia. The October 2025 Germany-Iceland defense cooperation agreement adds German naval and maritime patrol access to Icelandic ports, expanding the basing architecture beyond the bilateral US framework. NATO's Helguvík fuel facility investment, targeted for 2029 completion, converts Keflavík from a rotational support hub into a sustained operational base. The IADS and NATO Control and Reporting Center provide continuous radar coverage of the GIUK Gap, directly supporting tracking of Russian Northern Fleet submarines and bombers approaching the North Atlantic. Iceland hosts NATO Dynamic Mongoose, one of the alliance's premier ASW exercises. The Coast Guard provides maritime surveillance, search-and-rescue, and undersea-infrastructure awareness. Iceland contributes personnel to NSATU in Wiesbaden, to NATO Forward Land Forces Finland, and to NATO Multinational Brigade Latvia. Iceland co-leads the Demining Coalition with Lithuania. Iceland is not part of EU Operation Aspides or Operation Prosperity Guardian and had no Operation Epic Fury role. Iceland's operational value is entirely concentrated on the North Atlantic, GIUK Gap, and Arctic Circle.



ITALY

NATO Country Assessment

—TIER TWO—

BASING HUB • REVERSING CHINESE INFLUENCE • UNDERMINED EPIC FURY

AT A GLANCE

Toplines

- **A Critical Hub for American Power:** Italy hosts the largest US military presence in southern Europe—NSA Naples, Aviano's nuclear weapons, the 173rd Airborne at Vicenza, Sigonella—making it foundationally indispensable for American power projection across the Mediterranean, North Africa, and Middle East in ways that cannot be quickly replicated elsewhere.
- **Reversing Chinese Encroachment:** Meloni's December 2023 BRI withdrawal was the most significant single strategic correction any NATO ally has made on China—reversing Italy's status as the only G7 member inside Beijing's flagship infrastructure program.
- **Sabotaging Western Shared Interests:** Italy refused US overflight for offensive operations during the 2026 Iran war, actively impeding US strike planning when operational stakes were highest.

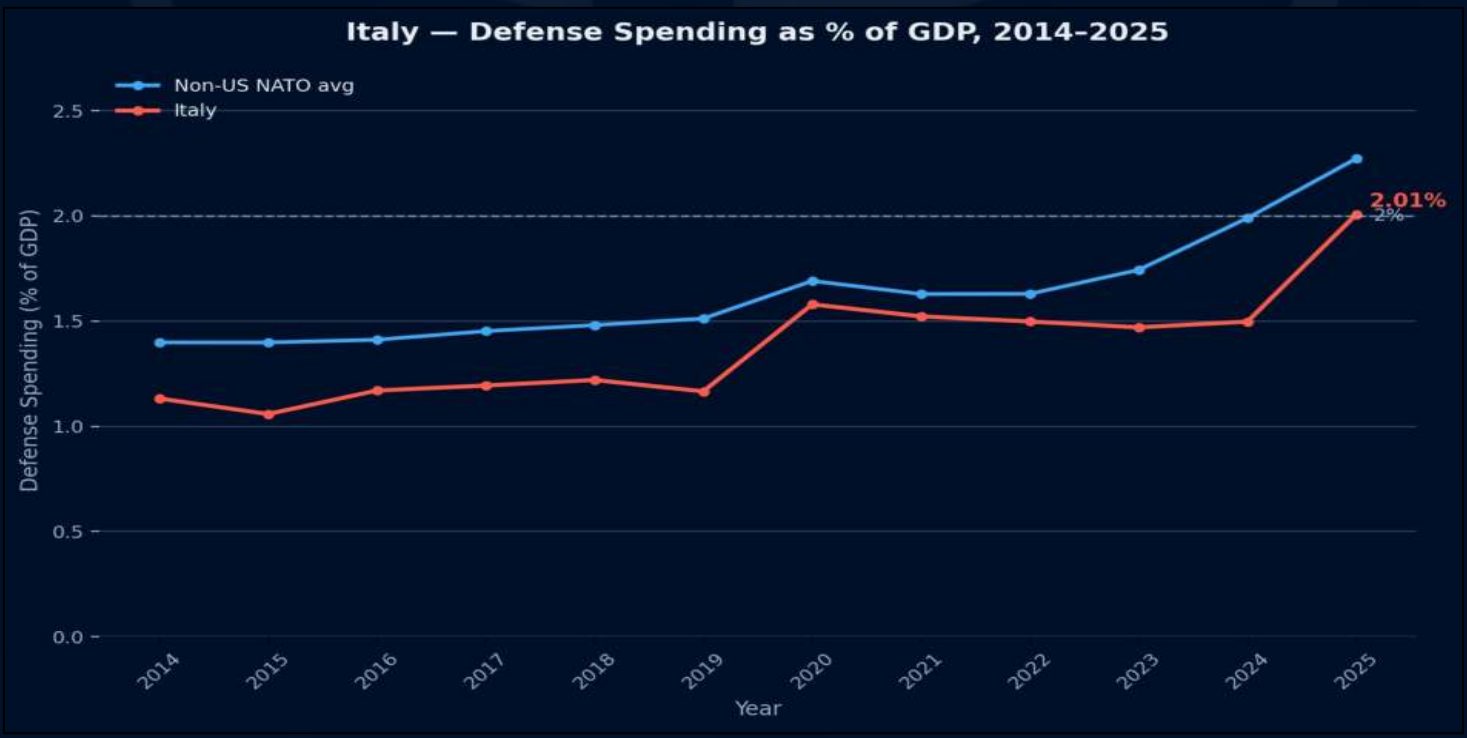
FORCE STRUCTURE AT A GLANCE

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

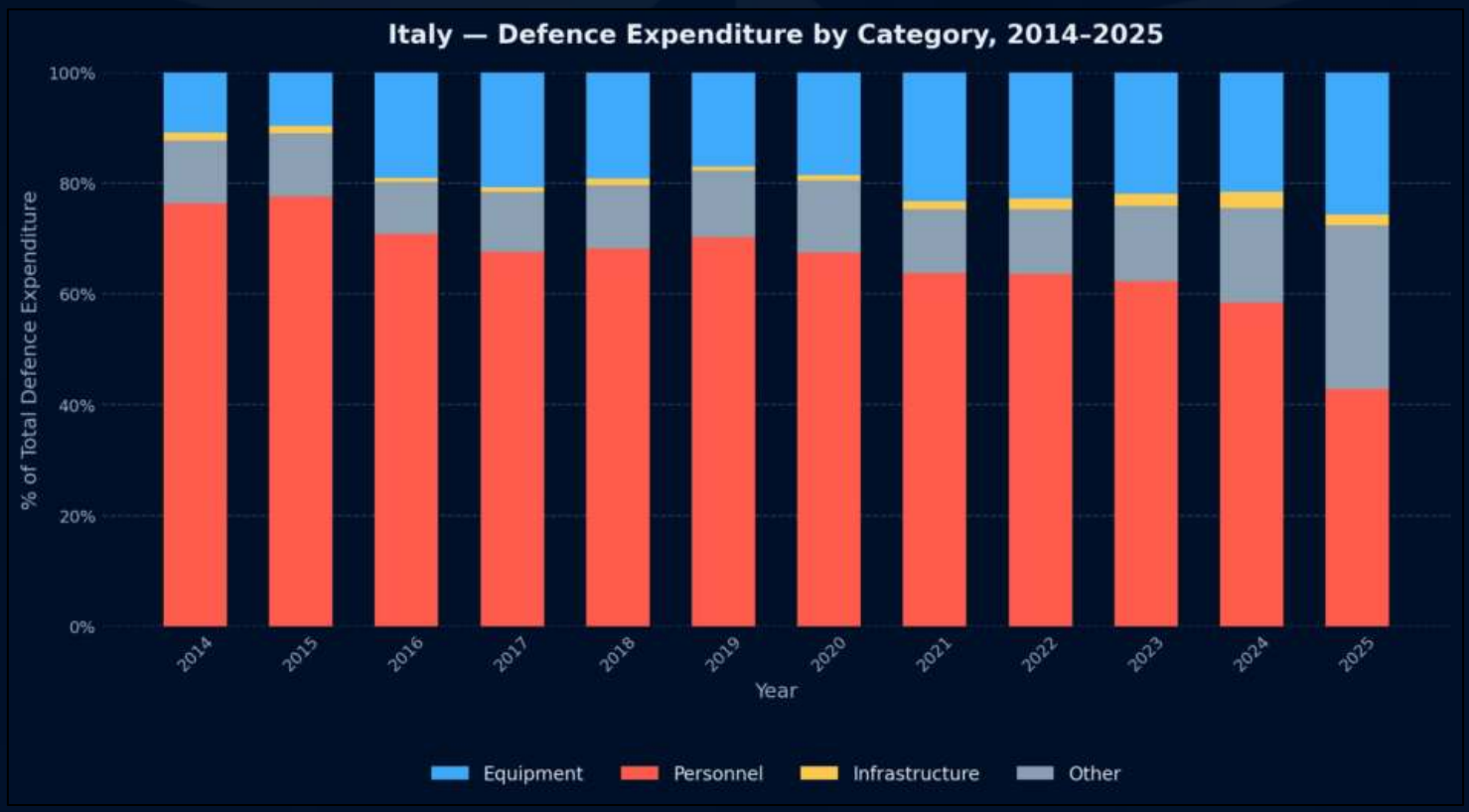
Italy's defense spending chart shows a country that has exclusively tracked below the non-US NATO average for over a decade, spending around 1.1-1.6% of GDP through 2014-2024 while the alliance average rose steadily above it. The jump to 2.01% in 2025 is real but contested: Italy reached the NATO floor primarily through accounting reclassification—incorporating Carabinieri pensions, coastguard, cyber, and space items—rather than a genuine defense budget surge. The regular defense budget sits at roughly €31B while the NATO-counted total reaches roughly €45B after reclassification. Italy is Europe's fourth-largest absolute defense spender, large enough to sustain a capable military and world-class industrial base. But with public debt at 135% of GDP and weak growth, Meloni's endorsement of the Hague 3.5% framework by 2035 needs a credible fiscal path. Italy's absolute spending is significant; its GDP-share trajectory is among the worst of any major NATO economy.



MILITARY CONTRIBUTIONS

Equipment Share

Italy's equipment share has improved, equipment surged to roughly 25%+ in 2025—a genuine rebalancing. The 2025 equipment investment reflects the F-35 program, naval procurement, and GCAP investment all registering simultaneously. Italy's equipment share now exceeds NATO's 20% benchmark. The story behind the numbers is uneven: Italy builds world-class naval vessels and aircraft, while its army operates 150 aging Ariete MBTs with a 1990s design and no delivered replacement. Equipment investment is real and growing, but heavily specialized in air and naval domains while ground force modernization lags significantly.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Italy's personnel picture is one of the most concerning in the alliance. Active military personnel has fallen from roughly 183,000 in 2014 to approximately 170,000 by 2025. This decline is driven by structural recruitment failure rather than deliberate professionalization. Italy's Chief of Defense Staff told parliament in 2024 that the armed forces are "absolutely undersized" and below the "limit of survival" threshold, with actual strength at 165,564. The Italian Navy alone needs 39,000 sailors against a current 29,000. Personnel costs have fallen from roughly 76% to 43% of the defense budget, but this reflects a shrinking force alongside a growing budget rather than genuine efficiency gains. A debate about reintroducing voluntary conscription has re-emerged, but no bill has been enacted. Italy's personnel crisis is the most acute of any major NATO ally.

MILITARY CONTRIBUTIONS

Capability Modernization

Italy's modernization is strong in aviation, naval, and air defense but seriously lagging in ground forces. On combat air, 118 operational Eurofighters and 26 F-35As progressing toward 115 total, with the only European F-35 final assembly facility at Cameri embedding Italy in the global supply chain as both customer and manufacturer. GCAP adds the next-generation bet alongside the UK and Japan. On naval forces, the Cavour carrier and newly commissioned Trieste LHD give Italy simultaneous carrier and amphibious power projection; six FREMM frigates with naval cruise missiles provide long-range precision strike shared only with France among European allies. On air defense, eight SAMP/T batteries and co-production with France through MBDA make Italy a central European air-defense power. On ground forces, 150 aging Ariete MBTs await modernization with no delivered replacement, and an army manpower shortfall of approximately 45,000 soldiers is Italy's most acute structural gap.

MILITARY CONTRIBUTIONS

Force Posture

Italy hosts 12,662 US military personnel—the largest US military presence in southern Europe. Key installations include NSA Naples with roughly 8,500 personnel as headquarters of US Naval Forces Europe-Africa and the Sixth Fleet; Aviano Air Base as a primary US tactical air hub hosting NATO nuclear weapons; and Caserma Ederle in Vicenza hosting the 173rd Airborne Brigade, the US Army's primary rapid-reaction force in Europe. Italy is a framework nation for NATO's eFP battlegroup in Bulgaria with 750 troops and commands NATO's NRDC-ITA corps headquarters. Italy maintains 866 troops in KFOR as one of the largest national contributors. Italian F-35As rotate through Baltic Air Policing. The force posture is broad across the eastern front, Mediterranean, and Kosovo, but the Bulgaria framework role is smaller than comparable UK, German, Canadian, or Spanish eastern front commitments.

MILITARY CONTRIBUTIONS

Industrial Base

Italy's defense industrial base is one of Europe's strongest. Leonardo produces Eurofighter components, helicopters, defense electronics, and radar systems, and holds an equal industrial stake in GCAP alongside the UK and Japan. Fincantieri is one of the world's leading shipbuilders. MBDA Italia co-produces SAMP/T with French and British partners. Cameri's F-35 FACO is the only European final assembly facility, giving Italy a structural role in the alliance's dominant fifth-generation fighter program that no other European ally replicates. On raw materials, Italy has limited domestic critical minerals but is positioned through the Mattei Plan's €5.5B Africa framework and G7 Lobito Corridor involvement to develop supply chain access to African critical minerals—cobalt, lithium, and rare earths—relevant to NATO's defense-industrial de-risking agenda. Italy builds world-class capabilities that allied militaries depend on.

STRATEGIC ALIGNMENT

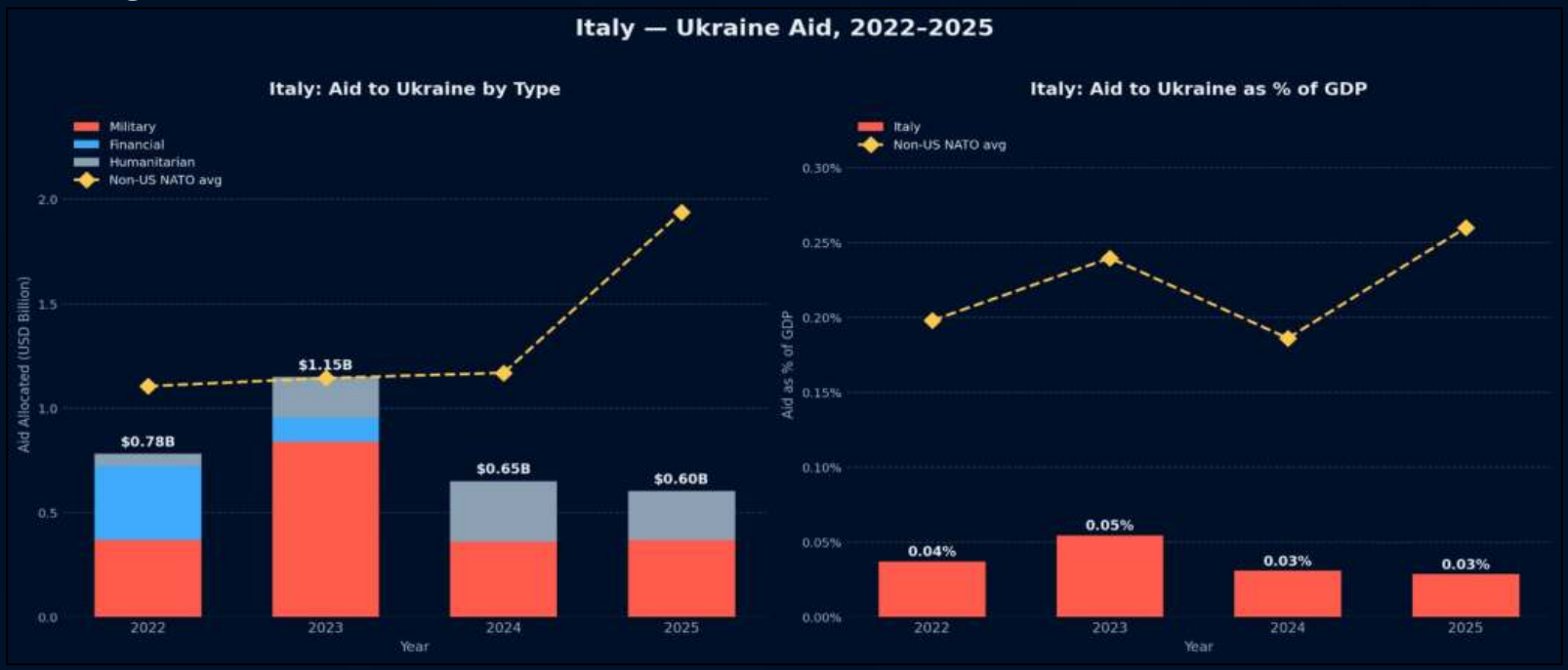
Declared Posture

Italy's declared posture under Meloni has moved decisively toward NATO alignment. The DPP 2025, the Italy-Ukraine 10-Year Security Agreement signed February 2024, G7 Apulia Communiqué, and Hague endorsement all reflect full alignment with NATO's threat framework. Italy's December 2023 BRI withdrawal is the most significant single strategic correction. Italy voted yes on Chinese EV tariffs, joined the Coalition of the Willing, and has maintained Ukraine support and eastern front commitments despite significant domestic coalition pressure. The vulnerability is Lega: Salvini's party holds a 2017 cooperation agreement with Putin's United Russia and has repeatedly criticized lethal aid to Ukraine and EU defense loans, representing a durable ceiling on how explicitly hawkish Italian policy can become. Meloni's achievement is keeping Lega inside a coalition that votes yes on Ukraine, but the fragility of that alignment is a real concern.

STRATEGIC ALIGNMENT

Ukraine Support

Italy's Ukraine aid shows a consistent but under performing contributor: $0.78B in 2022, peaking at $1.15B in 2023, then declining to $0.65B and $0.60B in 2024-2025. This runs at just 0.03-0.05% of GDP every year, consistently well below the non-US NATO average. Kiel tracks €4.095B allocated and €4.052B committed, approximately 0.23% of GDP cumulative. The headline contribution is SAMP/T air defense: Italy and France jointly delivered the first non-US long-range strategic air defense to Ukraine in 2023, with two batteries delivered and a third committed. Additional transfers include Aster interceptors, Puma armored vehicles, and 155mm ammunition across 12 packages through early 2026. Meloni joined the Coalition of the Willing. The structural domestic risk is Lega's consistent criticism of Ukraine aid, which has not yet stopped package continuation but represents a durable political ceiling on Italian ambition.

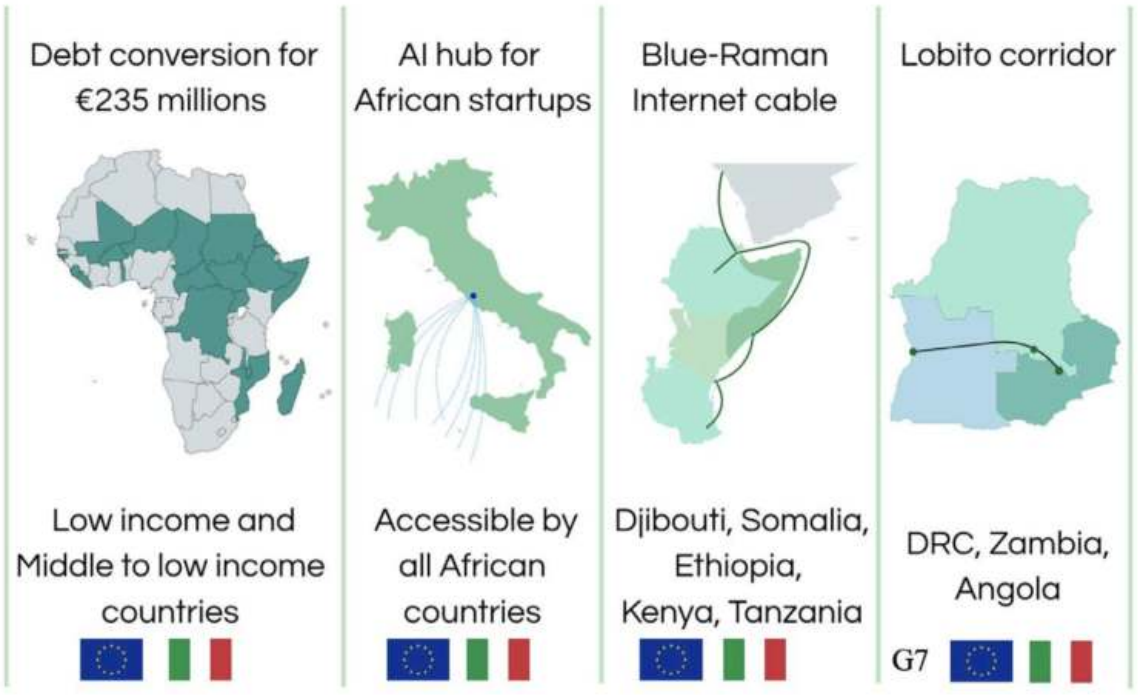


STRATEGIC ALIGNMENT

Russian Decoupling

Italy's Russian energy decoupling is one of the strongest turnaround stories among major Western European states. Russia supplied roughly 40% of Italian gas in 2021; by 2023 that had fallen to approximately 5%. Italy replaced Russian gas with Mediterranean and African suppliers, plus LNG from Egypt, Qatar, and the US. Italy has no Rosatom nuclear dependence. The Mattei Plan provides a strategic Africa and Mediterranean energy framework reducing long-term single-supplier dependence. Italy endorsed every EU Russia sanctions package through the 20th without obstruction.

Figure 2



Source: Author's elaboration based on own data analysis

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Italy recorded 64% for staying in NATO in 2024, below the alliance median, and just 51% felt more safe due to NATO cooperation, tied for the lowest figure alongside France. Only 54% agreed Italy should defend another NATO ally if attacked, and defense spending sentiment was the most dovish in the alliance: only 29% favored an increase and 15% actively wanted to spend less. The Meloni (FdI) government is nominally NATO-loyal but has been the most resistant major European government to new spending targets, and Lega (Salvini), a coalition partner, has long standing dovish stances on Russia. The Movimento 5 Stelle in opposition has been the most vocal parliamentary critic of arms shipments to Ukraine, views that resonate in a public that is distinctly less engaged with the Russia threat than most of its neighbours. Italy is the alliance's most prominent case where the gap between formal NATO commitment and public and political appetite for the costs of that commitment is widest among major Western European members.

STRATEGIC ALIGNMENT

Hedging Behavior

Italy's hedging behavior record under Meloni is substantially clean. The BRI membership was reversed when Meloni withdrew in December 2023. The residual exposure is COSCO's 40% stake in the Vado Ligure container terminal, and small Chinese automotive operations in Milan. Arms procurement is entirely Western: Eurofighter, F-35, GCAP, SAMP/T, FREMM, Fincantieri, Leonardo. Meloni has visited Kyiv multiple times and has not visited Moscow, Beijing, or Tehran. The persistent risk is Lega: Salvini's United Russia agreement and consistent Ukraine-aid criticism represent a durable coalition vulnerability that has not yet produced formal policy breaks but constrains how far Italy can go.

STRATEGIC ALIGNMENT

Operational Cooperation

Italy has a long track record of supporting US-led operations. It contributed forces to Afghanistan under ISAF and Iraq, and continues to maintain one of the deepest overseas operational footprints in European NATO across KFOR Kosovo (866 troops), UNIFIL Lebanon, EUFOR Althea, and Mediterranean maritime missions. Italy hosts NATO JFC Naples—one of NATO's three operational-level commands—and major US bases at Aviano (nuclear sharing, tactical air) and Sigonella (primary Mediterranean and Middle East ISR and logistics hub), making Italy structurally indispensable to US power projection in the region. On recent operations, Italy is a significant EU Operation Aspides contributor with sustained Red Sea naval presence. During the 2026 Iran war, Italy deployed naval assets to the Eastern Mediterranean alongside the French carrier strike group, while simultaneously refusing US overflight for offensive operations. Italy deployed F-35As and a SAMP/T battery to Estonia following the September 2025 Russian airspace violation, combining fifth-generation aircraft with strategic air defense in a high-visibility deterrence signal. Italy is the framework nation for NATO's eFP battlegroup in Bulgaria, though at a smaller scale than UK, German, or Canadian eastern-flank commitments.

LUXEMBOURG

NATO Country Assessment

—TIER TWO—

TRIPLED SPENDING • MILITARY MODERNIZATION • CHINESE FINANCIAL HUB

AT A GLANCE

Toplines

- **Taking the Message to Heart:** Defense spending has tripled from its 2014–2022 baseline and is already reaching its 2% floor commitment. This represents the steepest per-capita adjustment of any NATO member—a genuine political commitment for a small country.
- **Translating Political will into Alliance Capability:** Luxembourg's equipment share is at 53.5% of the defense budget and reflects a deliberate model: concentrate a small defense effort on high-value procurement rather than maintaining a standing army a country of 660,000 cannot meaningfully sustain, then pool ground forces with Belgium in a binational battalion.
- **Financial Hub for American Adversaries:** Seven Chinese banks hold European headquarters in Luxembourg representing approximately 11.6% of the banking market, creating real financial-sector penetration inside one of Europe's most systemically important clearing and fund-management hubs.

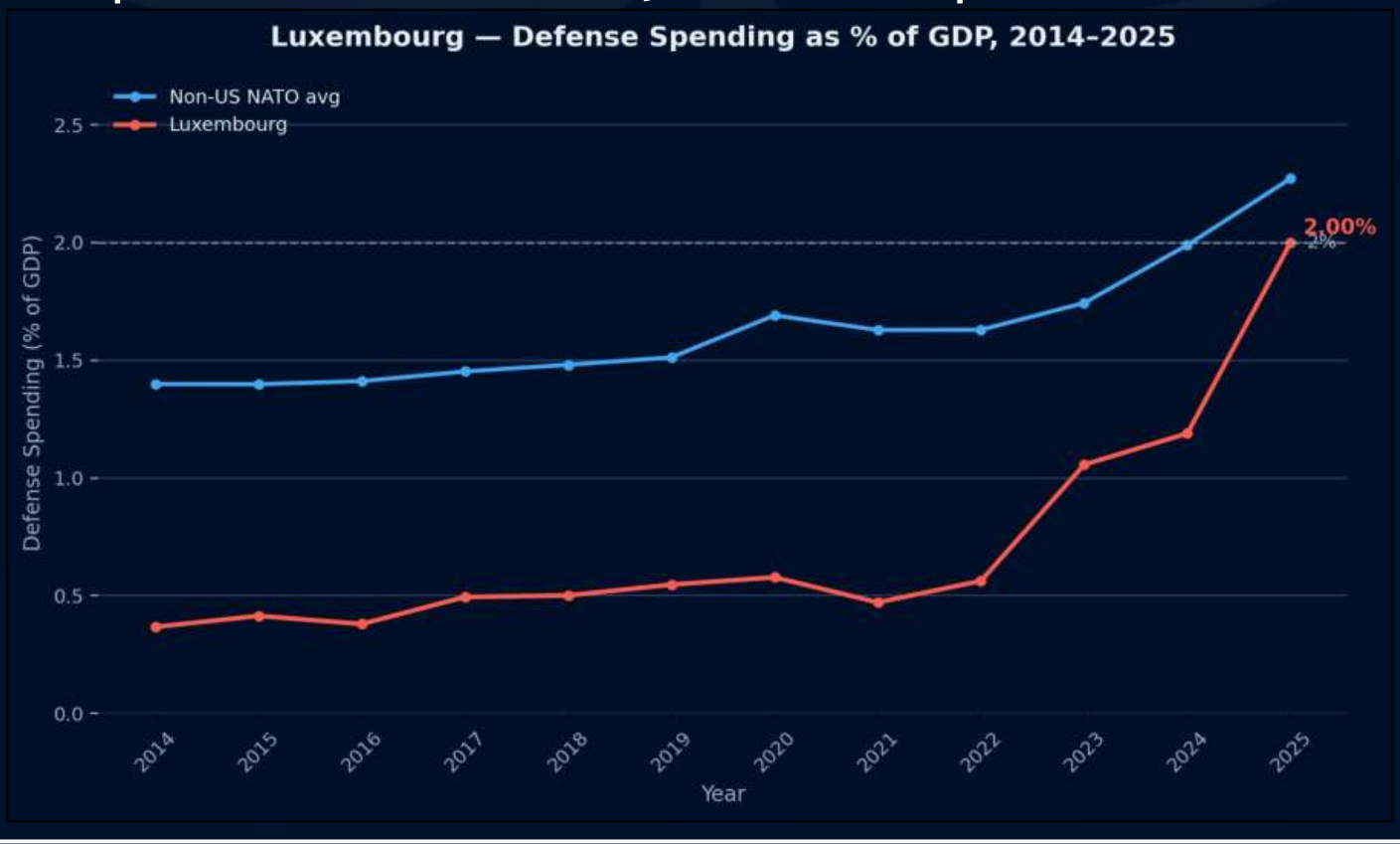
FORCE STRUCTURE AT A GLANCE

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

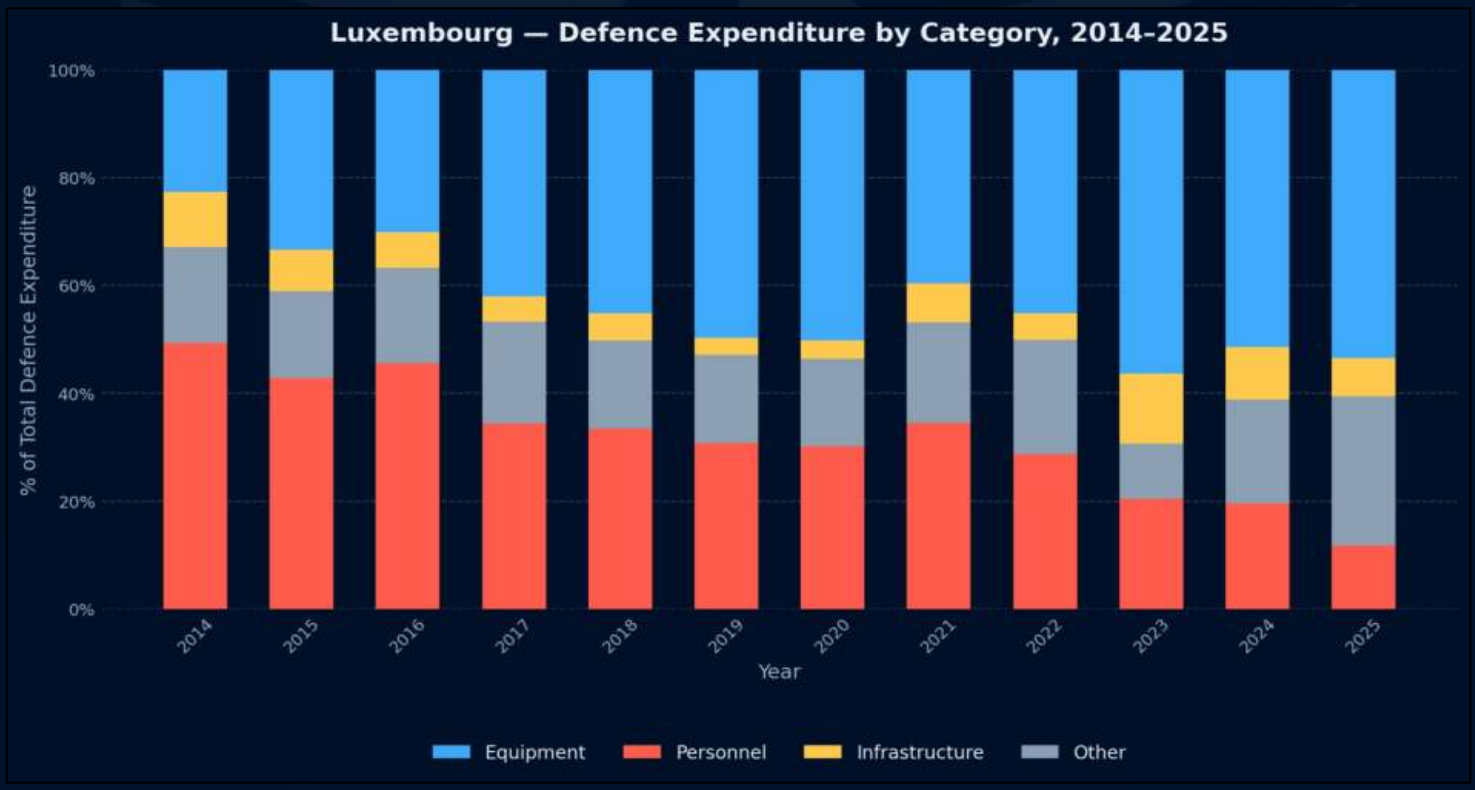
Luxembourg's defense spending trajectory is one of the most dramatic accelerations. The data shows spending running at just 0.37–0.58% of GDP from 2014 through 2022—the worst sustained record in NATO—before tripling to 2.0% of GNI by 2030. Luxembourg measures against GNI rather than GDP because its GDP is heavily inflated by the international financial sector and cross-border workers, an arrangement agreed with NATO. On GNI terms, Luxembourg spent roughly 1.29% in 2024. The structural challenge is what higher spending actually means for a country with a 900-soldier army: Luxembourg faces the steepest per-capita adjustment of any NATO member to reach the Hague framework, and the path there requires sustained political commitment well beyond the current parliament.



MILITARY CONTRIBUTIONS

Equipment Share

Luxembourg's equipment share has increased to approximately 53.5% of the defense budget in 2025—well above NATO's 20% benchmark—reflecting a country whose small defense effort is concentrated almost entirely on procurement rather than maintaining a large standing force. The dominant investment is the $2.74B armored vehicle modernization program covering Jaguar, Griffon, and Serval vehicles for the Belgian-Luxembourg binational combat battalion. The high equipment share partly reflects the absence of legacy platform maintenance costs rather than unusually efficient spending, but the absolute equipment quantities remain small regardless of the favorable ratio.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Luxembourg's personnel picture reflects a force sized appropriately for its population of 660,000. Active military personnel have held remarkably stable at roughly 800-900 throughout 2014-2025. Personnel costs have fallen from roughly 50% of the defense budget in 2014 to approximately 12% in 2025, not because the force shrank but because the budget tripled while headcount stayed flat. Luxembourg's model is deliberate: rather than maintaining a large standing army a country of its size cannot meaningfully sustain, it pools ground forces with Belgium in a binational battalion and concentrates its own budget on high-value procurement: reconnaissance vehicles, strategic airlift, satellites, cyber, and IT. The personnel share falling to 12% is a feature of that model, not a recruiting failure.

MILITARY CONTRIBUTIONS

Capability Modernization

Luxembourg's modernization is focused and appropriate for its size. The $2.74B armored vehicle program—Jaguar, Griffon, and Serval—creates genuine NATO-standard combined-arms reconnaissance capability through the Belgian-Luxembourg binational battalion. Two military satellites (GovSat-1 for secure communications and NAOS/LUXEOSys for ISR) are Luxembourg's most distinctive capability contribution, giving it an autonomous space-based ISR that most similarly-sized allies lack entirely. A400M, A330 MRTT, and NATO AGS participation add pooled airlift, refueling, and surveillance capacity. The ceiling is structural: a 900-soldier army can be equipped to NATO standard but cannot generate force mass. Luxembourg modernizes its niche contributions effectively within that constraint.

MILITARY CONTRIBUTIONS

Force Posture

Luxembourg's force posture is defined by hosting rather than deployable military mass. The NATO Support and Procurement Agency at Capellen is Luxembourg's most important alliance contribution—NATO's primary acquisition and logistics agency, managing the Multi Role Tanker Transport fleet, Strategic Airlift Capability, Alliance Ground Surveillance, and AWACS support. SES at Betzdorf provides critical satellite capabilities for NATO and US operations. Luxembourg hosts no permanent US military installations but contributes meaningfully to US operational capacity through NSPA logistics and satellite infrastructure. On deployed forces, Luxembourg contributes 27 troops to Romania's eFP, 7 to Lithuania's eFP, and 7 to KFOR—politically meaningful for but militarily modest. The Belgian-Luxembourg binational battalion adds a more substantial ground contribution when operational in 2030.

MILITARY CONTRIBUTIONS

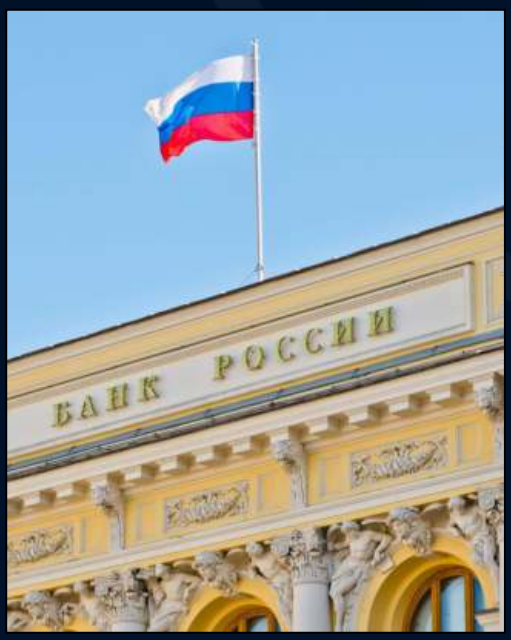
Industrial Base

Luxembourg has no traditional defense manufacturing sector. Luxembourg has no sovereign combat aircraft, naval vessel, or major platform production capability and depends entirely on allied production for heavy equipment. Luxembourg's Defense Industry Strategy white paper emphasizes utilizing cutting edge research institutes and companies to enhance alliance capability.

STRATEGIC ALIGNMENT

Declared Posture

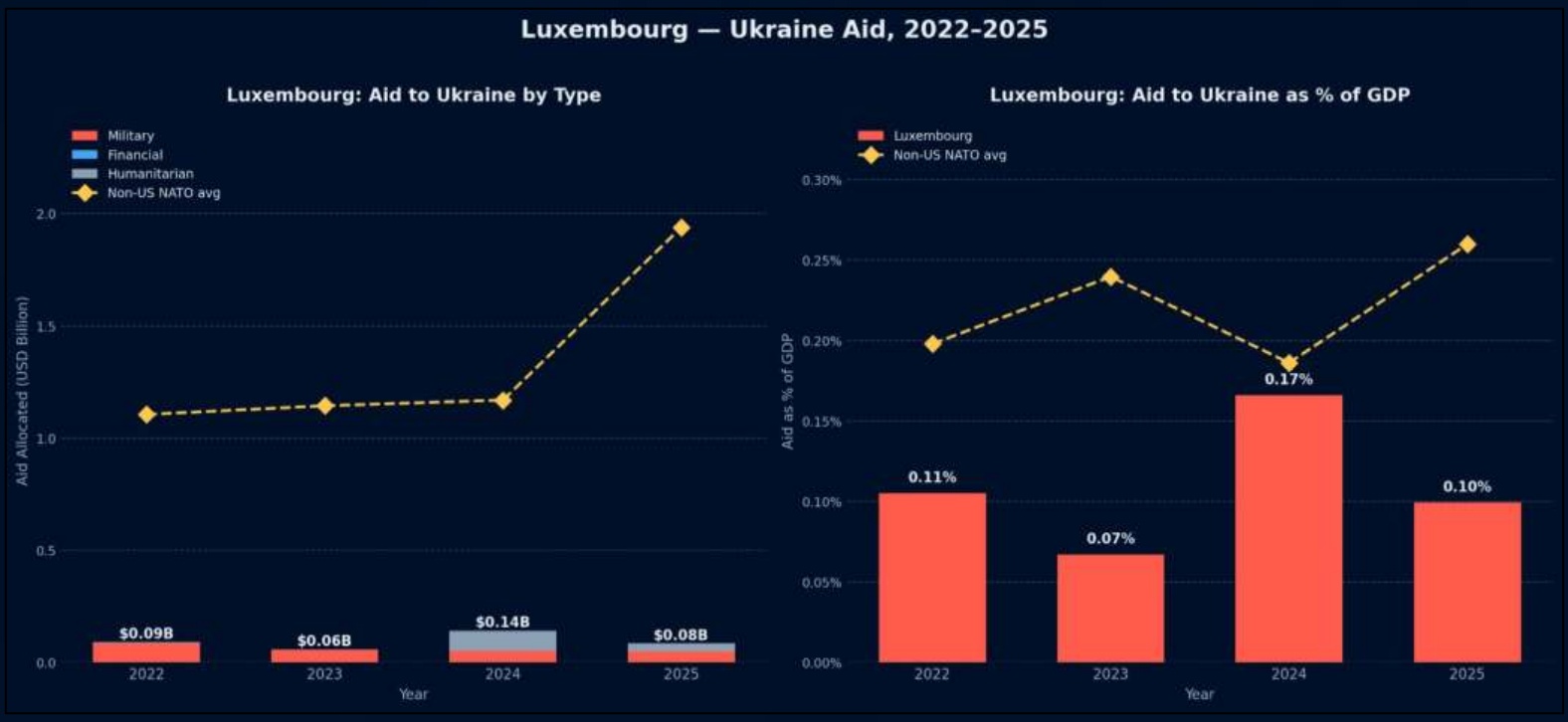
Luxembourg's declared posture tracks NATO's 2022 Strategic Concept on Russia. The Defence 2035 Guidelines structure policy around solidarity, capability development, multinational cooperation, and deployability. The Frieden government has maintained a strongly pro-Ukraine line: Defense Minister Backes and former Foreign Minister Bettel visited Kyiv on April 30, 2025. Luxembourg's Russia exposure is financial and institutional: intelligence and influence risks run through the financial sector, EU institutions, frozen-asset litigation, and cyber targets. The China caveat is meaningful: Chinese banks hold approximately 11.6% of Luxembourg's banking market share, hosting European headquarters of seven Chinese banks—structural commercial exposure that translated into the October 2024 EU EV tariff abstention and a trade-cautious rather than China-defensive alignment posture.



STRATEGIC ALIGNMENT

Ukraine Support

Luxembourg's Ukraine aid runs consistently below the non-US NATO average by GDP share, but the absolute contribution is more consequential than the GDP-share figures suggest for a country with a 900-soldier army. Kiel tracks €0.342B allocated and €0.576B committed—0.47% and 0.80% of GDP. The signature contribution is co-leading the IT Coalition with Estonia, contributing €17.5M cumulatively by January 2025. The November 2024 €80M Danish-model procurement of Ukrainian-made drones, surveillance systems, and electronic-warfare equipment is the largest single package. Direct transfers include 144 NLAW anti-tank missiles, 42 armored vehicles, 34 armored ambulances, 39 UAVs, and 4,000 assault rifles. Luxembourg joined PURL in September 2025 and contributed to the F-16, Artillery, and Drone Coalitions. For a 900-soldier army, co-leading the IT Coalition and delivering sustained multi-domain support represents a genuine above-weight contribution.



STRATEGIC ALIGNMENT

Russian Decoupling

Luxembourg's Russian energy decoupling is clean: no direct pipeline dependency, drawing through Belgian, German, and French integrated systems, no Rosatom footprint. The real Russia exposure is financial: the Luxembourg financial sector historically handled Russian-linked capital, investment structures, and securities, making sanctions implementation, asset freezes, and beneficial-ownership enforcement the central decoupling challenge rather than energy substitution. Clearstream holds approximately €20B in frozen Russian assets, giving Luxembourg a meaningful role in the windfall-profit and frozen-asset-use architecture. Luxembourg supported every EU Russia sanctions package through the 20th without obstruction. The relevant assessment dimension is enforcement quality across a very large international financial sector operating under wartime sanctions pressure.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Luxembourg recorded 83% for staying in NATO and 65% agreeing it should defend another ally in 2024, solid figures for a micro-state with very modest force contributions, and 71% agreed NATO membership makes a foreign attack less likely. Defense spending appetite was the second-lowest in the survey at 28% favoring an increase, reflecting the position of a small ally looking to gain from larger country's contributions. There is no major political force in Luxembourg's parliament challenging NATO membership, and the governing DP-led coalition is pro-NATO without qualification. Ukraine support stood at around 61% combined, slightly below the alliance median, suggesting that even in a strongly pro-NATO public the costs of solidarity register. The central issue for Luxembourg is whether public support for the alliance will ever translate into meaningfully higher capability contributions, a long-term structural gap that NATO partners have periodically noted.

STRATEGIC ALIGNMENT

Hedging Behavior

Luxembourg's hedging behavior record is mixed. No BRI infrastructure, no adversary arms procurement, no high-level Moscow or Tehran engagement, no obstruction of Finnish or Swedish accession, Western-only procurement throughout. The China concern is significant and structural: seven Chinese banks maintain European headquarters in Luxembourg, representing approximately 11.6% of the banking market. making Luxembourg one of the most China-friendly financial centers in NATO Europe. This is not physical infrastructure like Greece's Piraeus or Hungary's CATL factories, but financial-sector penetration inside one of Europe's most systemically important clearing and fund-management hubs creates real leverage risk over regulatory decisions, sanctions enforcement, and beneficial-ownership transparency. The October 2024 EU EV tariff abstention reflects this exposure directly. Huawei is restricted from 5G core networks, but the banking penetration is the more consequential and harder-to-unwind vulnerability.

STRATEGIC ALIGNMENT

Operational Cooperation

Luxembourg contributed to Afghanistan under ISAF and Iraq coalition operations. On recent US operations, no obstruction of Epic Fury, aligned on Iran sanctions, supports the EU's Operation Aspides but is too small to participate. The core value is institutional: NSPA at Capellen manages NATO's primary acquisition and logistics architecture. SES at Betzdorf provides critical satellite communications and ISR. IT Coalition co-leadership with Estonia delivers Ukraine cyber and digital support. For a 900-soldier army, the institutional footprint is extraordinary.

MONTENEGRO

NATO Country Assessment

—TIER TWO—

ACCELERATION TO 2% • MILITARY MODERNIZATION • WEAK PUBLIC SUPPORT

AT A GLANCE

Toplines

- **Sharing the Burden on Defense:** Defense spending rose nearly 50% in GDP share over three years, reaching 2.03% in 2025, this is a genuine acceleration from a country that had drifted below the floor.
- **Enhancing Capability for NATO 3.0:** Equipment share transformation from 7.5% to 34.3% since 2014, with personnel costs falling from 78% to 44%, reflects a real structural rebalancing. Montenegro is spending its limited budget in roughly the right proportions even if the absolute sums are tiny.
- **Early Gains Undermined by Weak Domestic Support:** Public support for collective defense is soft at 49% agreeing Montenegro should defend another ally if attacked, Ukraine support sits in the lower third of the alliance, and NATO enthusiasm has softened since accession.

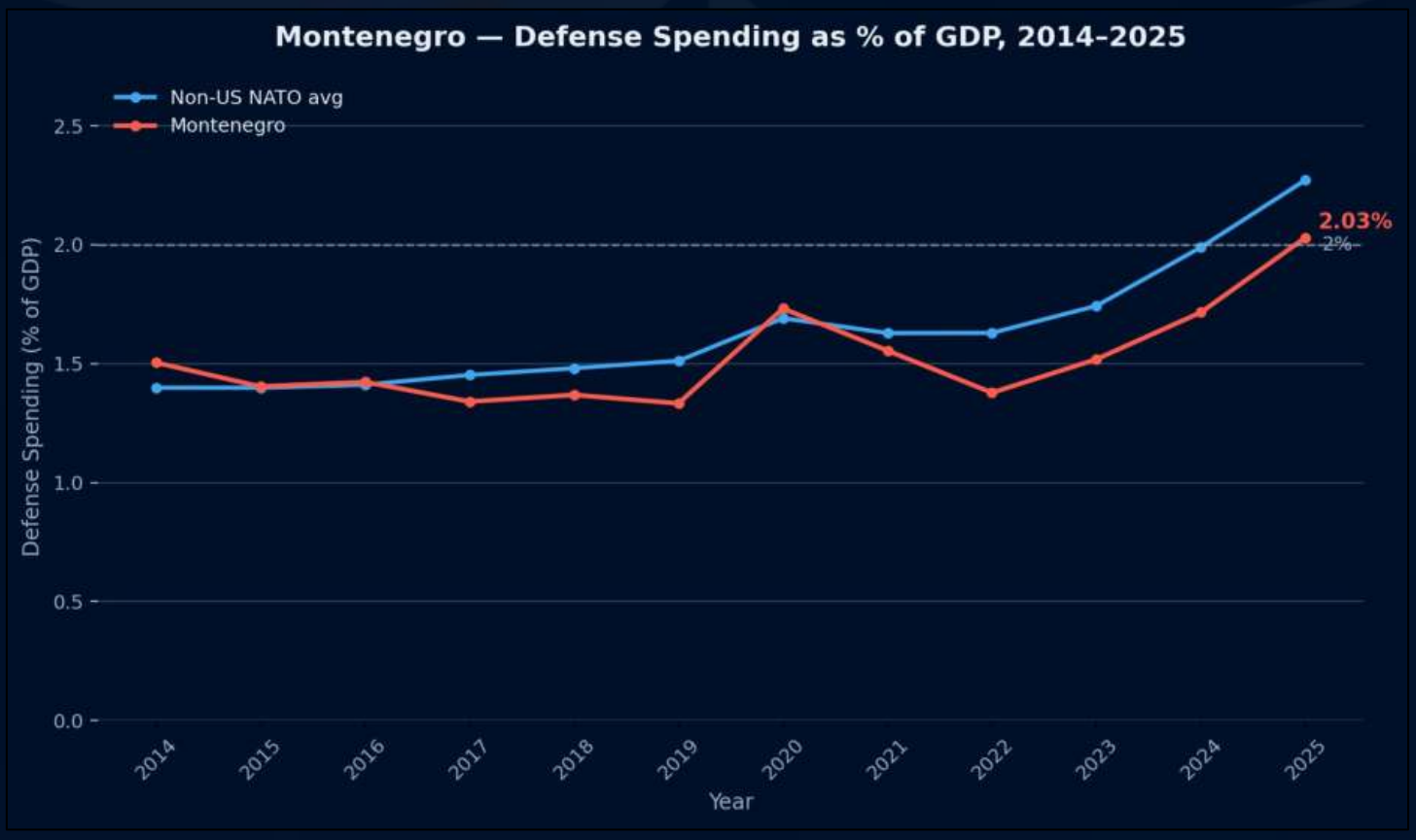
FORCE STRUCTURE AT A GLANCE

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

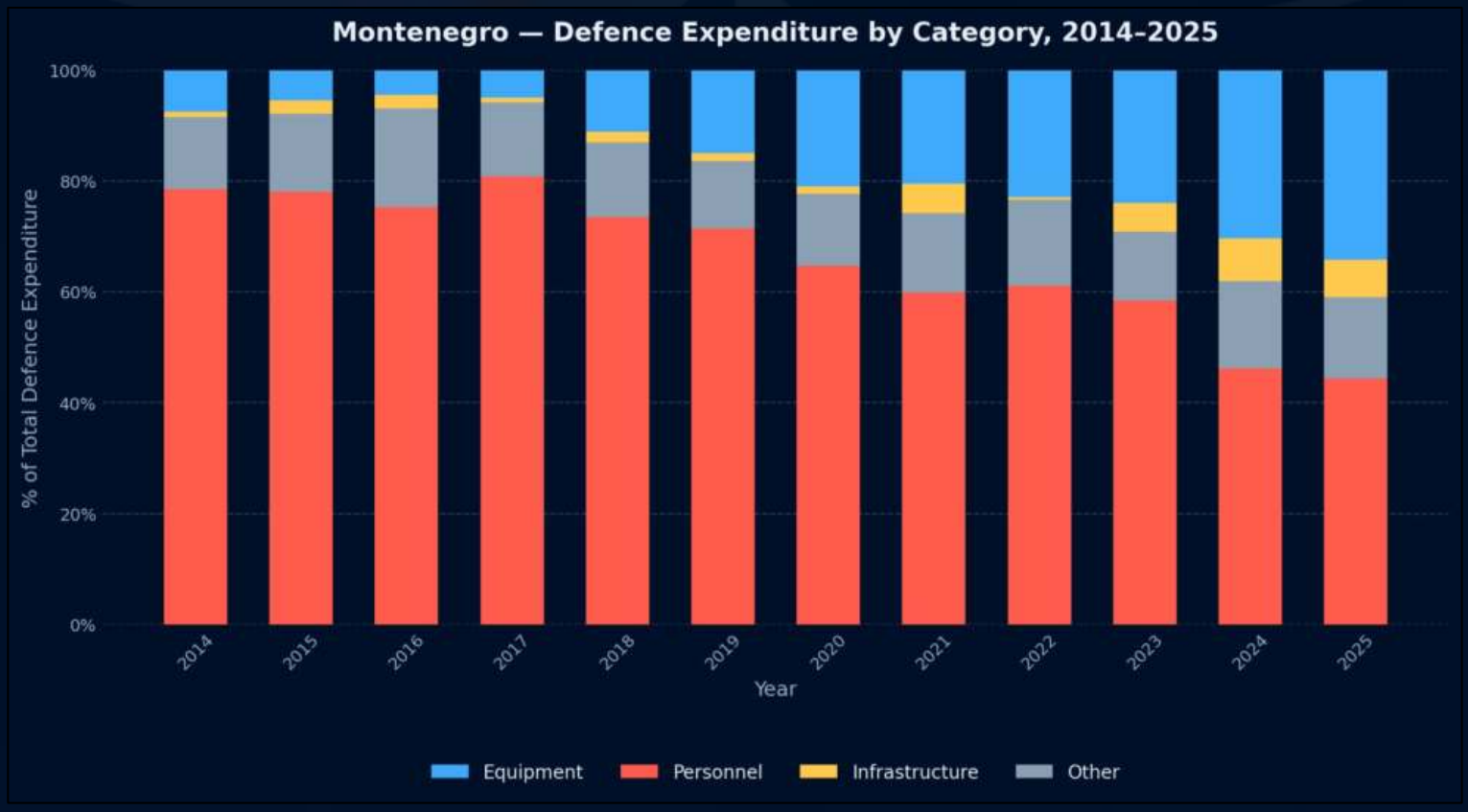
Montenegro reached 2.03% of GDP in 2025—meeting the NATO floor for the first time in years, up from 1.37% in 2022, a nearly 50% increase in GDP share over three years. The data shows Montenegro tracking close to the non-US NATO average through 2018-2020, dipping below after 2021, and recovering sharply by 2025. Montenegro accepted the Hague 3.5% core plus 1.5% framework at the June 2025 summit. The trajectory is positive; the structural ceiling is real—at 2% of GDP, Montenegro's entire defense budget is less than the cost of many single NATO weapons programs, and a population of 620,000 imposes binding limits on force depth regardless of spending share.



MILITARY CONTRIBUTIONS

Equipment Share

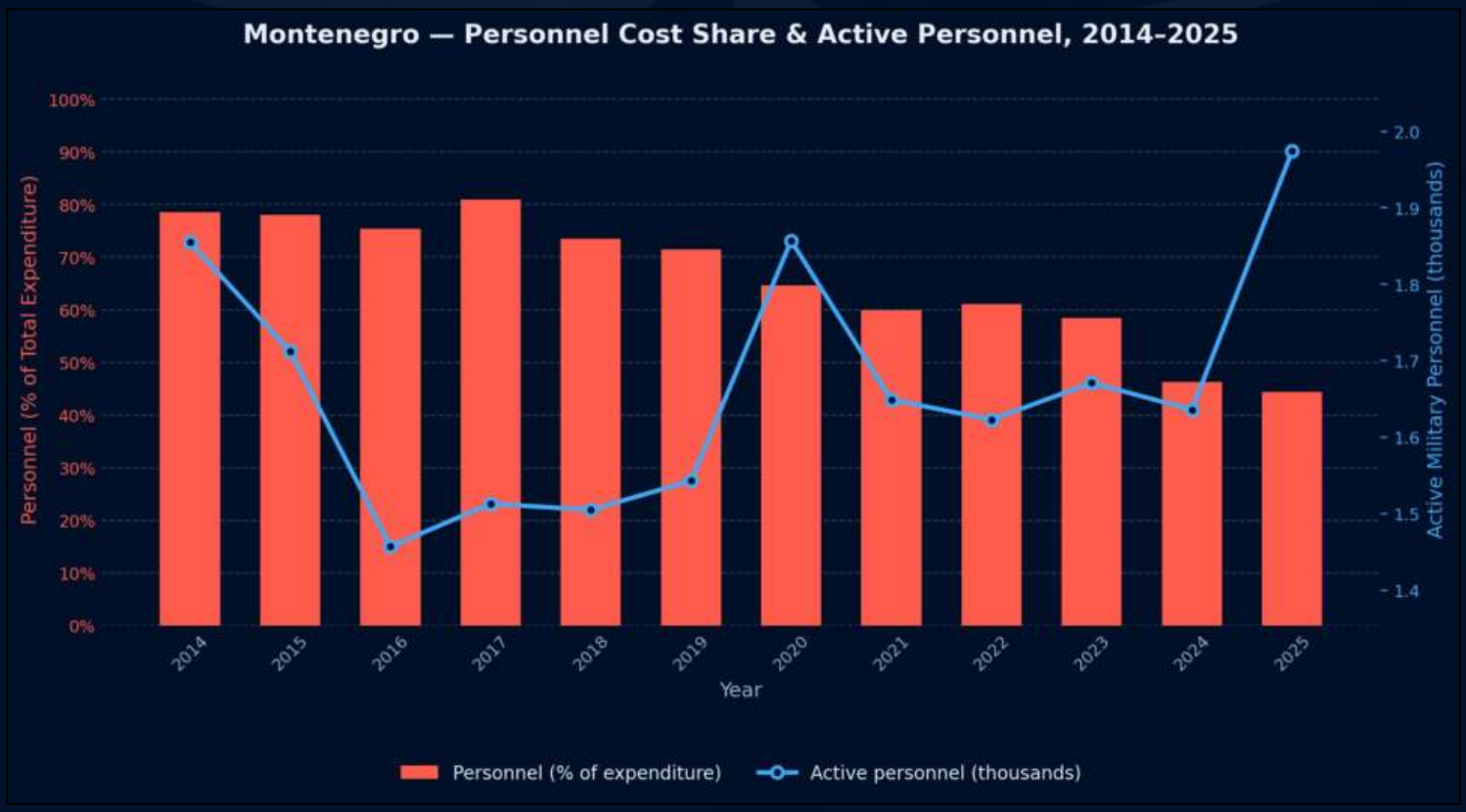
Montenegro's equipment share has risen from roughly 7.5% in 2014 to approximately 34.3% in 2025—well above NATO's 20% benchmark—as personnel costs fell from 78.5% to 44.4% over the same period. The chart shows a clear inflection from 2021 onward as equipment investment began dominating the growing budget. The ratio is favorable; the absolute numbers are not. At 34% of a ~$174M defense budget, Montenegro's entire annual equipment spend is smaller than a single mid-tier NATO procurement contract. Montenegro is caught in the small country trap: equipment-share improvements cannot substitute for the fiscal scale needed to address core capability absences.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Montenegro's personnel picture shows a force that has been both shrinking and now recovering. Active military personnel dropped sharply from roughly 1,850 in 2014 to approximately 1,450 by 2016-2018 before recovering to approximately 2,000 by 2025. Personnel costs have fallen from roughly 78% in 2014 to approximately 44% in 2025, a rebalancing toward equipment. Montenegro is rebuilding force depth while simultaneously freeing budget space for equipment. The constraint remains absolute scale: at roughly 2,000 active personnel, Montenegro fields a force smaller than a single NATO battalion, and the professionalization challenge is sustaining recruitment for a military career in a country of 620,000 where the entire armed forces could fit in a mid-sized sports stadium.



MILITARY CONTRIBUTIONS

Capability Modernization

Montenegro's modernization challenge is replacing a nearly entirely Soviet-era inventory on a budget of approximately $174M. Progress is slow but directionally correct. Ground forces consist of a single motorized infantry battalion equipped with aging BOV APCs, D-30 towed artillery, Soviet anti-tank missiles, and 32 JLTVs as the modern addition. Aviation is the most pressing gap: the G-4 Super Galeb jets and Utva-75 trainers are non-operational, leaving the air force with 16 Gazelle and 3 Bell 412 helicopters as its entire operational inventory—no independent fixed-wing combat capacity whatsoever, with Italian and Greek NATO fighters covering Montenegrin airspace. No submarines, no major naval combatants, no air defense beyond infantry-level systems. Montenegro's realistic modernization scope is infantry equipment, protected mobility, communications, and drones—but even on that narrowed agenda, progress is incremental given the budget constraint.

MILITARY CONTRIBUTIONS

Force Posture

Montenegro's force posture is defined by small but consistent contributions to NATO forward deployments: 40 troops in Bulgaria's eFP, 11 in Latvia's eFP, 2 in Kosovo, and 1 in NATO Mission Iraq. Joining the Canada-led Latvia battlegroup in 2018, shortly after NATO accession, was politically significant. Montenegro has demonstrated immediate alliance commitment from a newly-joined member. Montenegro hosts no significant US or allied military installations and has no nuclear hosting role. NATO air policing over Montenegro is entirely provided by Italian and Greek aircraft. The force posture value is primarily political—demonstrating that even the alliance's smallest member participates in forward deterrence—rather than militarily material.

MILITARY CONTRIBUTIONS

Industrial Base

Montenegro has minimal defense industrial capability. TARA Aerospace produces small arms, ammunition, and is developing drones—the only meaningful domestic defense production. For everything else, Montenegro is entirely import-dependent. The Western Balkans Cyber Capacity Center, inaugurated December 2024, adds a regional cyber-training role that generates alliance value beyond Montenegro's force size. On raw materials, Montenegro holds bauxite and aluminum deposits—the Podgorica Aluminum Plant was historically significant—with potential relevance to NATO's critical minerals supply chain given aluminum's role in aerospace and defense manufacturing, though current production capacity is limited. Montenegro's most strategically relevant industrial asset is geographic: the Port of Bar on the Adriatic provides NATO logistics access to the Western Balkans.

STRATEGIC ALIGNMENT

Declared Posture

Montenegro's declared posture tracks NATO on Russia at the government level. Spajić and President Milatović back EU sanctions, support Ukraine through EUMAM and NSATU participation, and Spajić explicitly rejected BRI financing for future infrastructure. The tension is coalition composition: Parliament Speaker Andrija Mandić leads the pro-Russian For the Future of Montenegro bloc and was among defendants in the 2016 alleged Russia-linked coup plot (acquitted at retrial in 2024). NATO alignment is real at the executive level but structurally fragile given dependence on actors with contrary instincts.

STRATEGIC ALIGNMENT

Ukraine Support

Kiel Institute does not track Montenegro's Ukraine aid in its standard dataset, making precise GDP-share comparison unavailable. Based on publicly reported assistance, Montenegro has transferred €10 million worth of Soviet-era stocks, small arms, ammunition, and humanitarian support across multiple packages—modest in absolute terms relative to a ~$174M defense budget but consistent with its capacity. The more significant story is institutional support: Parliament approved EUMAM participation in June 2025 after a nine-month delay driven by pro-Russian coalition pressure, and NSATU participation in November 2025 by a vote of 44–5. Both votes cleared despite Parliament Speaker Mandić's pro-Russian record. Montenegro aligned with every EU Russia sanctions package from the 6th through the 20th despite non-EU status.

STRATEGIC ALIGNMENT

Russian Decoupling

Montenegro's Russian energy decoupling is clean—minimal pre-2022 dependence, relying primarily on domestic hydroelectric power and Adriatic regional interconnections, no Rosatom footprint, no pipeline gas dependence. The Russia exposure is not energy but financial and social: Russian capital, real estate, tourism, and residence along the Adriatic coast create persistent sanctions enforcement challenges. Golden passport pathways created Russian penetration risks that EU accession pressure has forced tightening on but not eliminated. Montenegro aligned with every EU Russia sanctions package through the 20th despite non-EU status—genuine and among the strongest in the Western Balkans—but enforcement quality against individual Russian property and residence exposure is the real test that Montenegro has only partially passed.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Montenegro recorded 67% for staying in NATO and 71% feeling more safe from NATO cooperation in 2024, solid majorities that nonetheless reflect the country's deep internal divisions between pro-Western and Russia-friendly political camps. Forty-nine percent agreed Montenegro should defend another ally if attacked, below the alliance median, and Ukraine support stood at around 59% combined, in the lower third of the survey. The Europe Now (PES) government of Milojko Spajić is formally pro-NATO and has been the most accelerated Western integration government in Montenegrin history, but the Democratic Front and associated Serbia-aligned parties represent a substantial bloc that is openly pro-Russian and views the 2017 NATO accession as having been imposed over significant domestic opposition. Public Ukraine support is among the lower third of the alliance, consistent with complex historical and cultural ties to both Serbia and Russia that persist in the electorate. NATO support has softened somewhat in Montenegro since accession, consistent with a pattern seen in other newer members where public enthusiasm does not fully consolidate once membership is achieved.

STRATEGIC ALIGNMENT

Hedging Behavior

Montenegro's hedging behavior record is positive at the government level with two lingering concerns. On China, the Bar-Boljare highway—contracted with China Road and Bridge Corporation under a roughly $944M China Exim Bank loan—is one of Europe's most cited BRI debt-exposure cases. Spajić has committed to ally-based financing going forward and no major Chinese-controlled critical infrastructure exists beyond the highway, but the debt burden created real leverage that took years to manage. On Russia, the risk is coalition politics rather than government policy: Mandić's pro-Russian history and the For the Future of Montenegro bloc represent persistent internal pressure that delayed EUMAM and NSATU approvals without ultimately blocking them. Arms procurement is non-adversary, Montenegro did not obstruct Finnish or Swedish accession, and it contributes to NATO forward deployments in Latvia and Bulgaria. The profile is improving but structurally complicated.

STRATEGIC ALIGNMENT

Operational Cooperation

Montenegro contributed forces to Afghanistan under ISAF and Iraq coalition operations. On recent US operations, Montenegro has been supportive without obstruction—no hindrance to Operation Epic Fury, aligned on Iran sanctions. Montenegro does not participate in Operation Aspides or Operation Prosperity Guardian and had no public Epic Fury strike support role. The core operational contributions are distributed across alliance frameworks: 40 troops in Bulgaria's eFP, 11 in Latvia's eFP, continuous KFOR Kosovo presence, and EU NAVFOR Atalanta participation. Parliament approved EUMAM Ukraine participation in June 2025 and NSATU in November 2025—both cleared despite pro-Russian coalition pressure, placing Montenegro inside both EU and NATO Ukraine-support architectures. The Western Balkans Cyber Capacity Centre at Podgorica adds a regional cyber-training role. For NATO's smallest member, the breadth of participation across multiple alliance frameworks is the defining operational story.

NORTH MACEDONIA

NATO Country Assessment

—TIER TWO—

UKRAINE SUPPORTER • CLEAR-EYED ON THREATS • WEAK PUBLIC SUPPORT

AT A GLANCE

Toplines

- **Taking Responsibility for the Fight in Ukraine:** The Krivolak Training Area is one of the largest NATO-accessible training facilities in the Western Balkans, supporting Defender Europe exercises and US bilateral rotations in a region where large training sites are genuinely scarce.
- **Calling the Threat Out and Aligning with NATO:** The 2024–2029 National Security Strategy explicitly names Russian intelligence operations, hybrid warfare, and Chinese coercive policies as direct threats.
- **Urgent Need to Build Public Support:** Public support for collective defense is the second-lowest in the entire alliance: only 37% of North Macedonians say their country should defend another NATO ally if attacked, and only 41% support Ukraine.

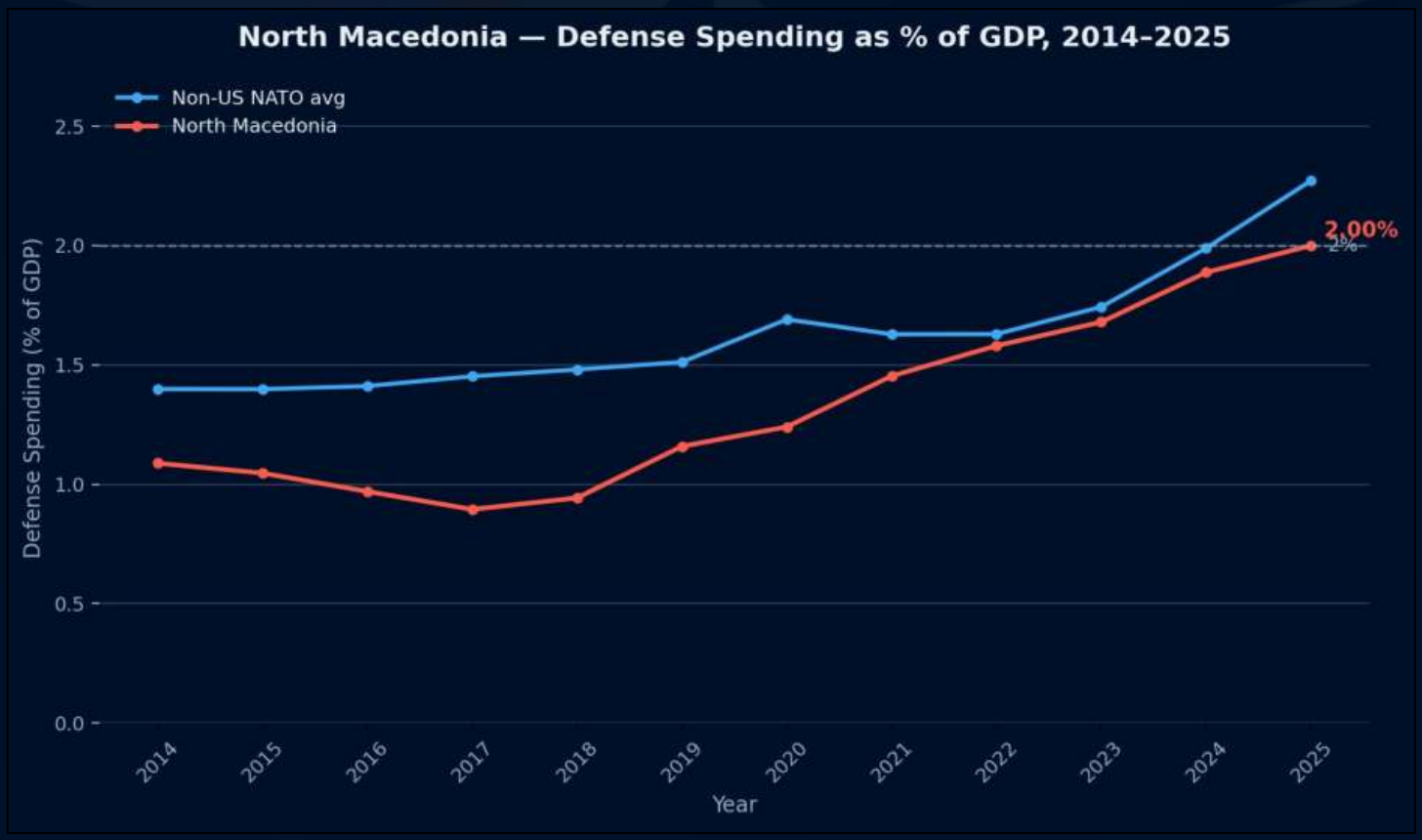
FORCE STRUCTURE AT A GLANCE

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

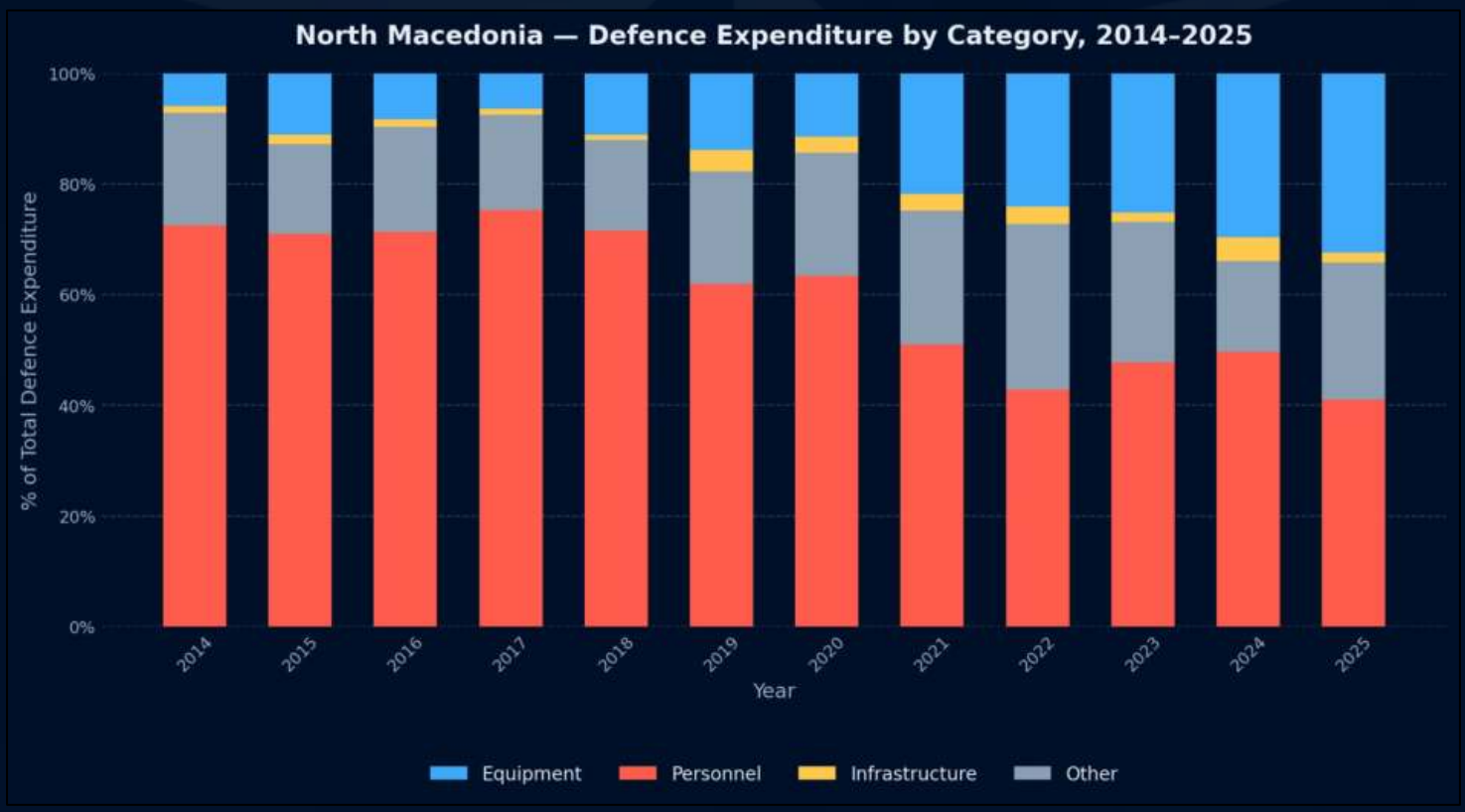
North Macedonia's defense spending trajectory shows consistent improvement from a low baseline. The data shows spending dipping below 1% of GDP in 2016-2018 before a sustained acceleration to 2.00% by 2025—meeting the NATO floor for the first time, though still well below the non-US NATO average of 2.5%. Spending grew from $101M in 2017 to $358M in 2025, a threefold increase in eight years. North Macedonia accepted the Hague 3.5% framework at the June 2025 summit. North Macedonia has the small country problem: even at 2%, a population of 1.8 million produces a modest absolute budget, but the trajectory is consistent and the 2025 milestone is genuine.



MILITARY CONTRIBUTIONS

Equipment Share

North Macedonia's equipment share transformation is visible in the data—rising from roughly 6-7% in 2014-2017 to approximately 32% by 2025, well above NATO's 20% benchmark, while personnel costs fell from roughly 72% to 41% over the same period. The inflection from 2021 onward reflects deliberate procurement investment. The equipment share metric is genuinely favorable; the challenge is that the procurement pipeline—Bradleys, JLTVs, AW149 helicopters—remains incomplete, creating a multi-year gap between legacy Soviet capability and delivered Western capability.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

North Macedonia's personnel picture shows a force that has been slowly declining but is now recovering. Active military personnel fell from roughly 6,600 in 2014 to approximately 5,800 by 2023 before rebounding to approximately 6,200 by 2025. Personnel share have fallen dramatically (from roughly 72% in 2014 to approximately 41% in 2025) as the defense budget grew faster than headcount and equipment investment dominated the spending surge. Defense Minister Misajlovski has identified force professionalization and expansion as priorities alongside equipment modernization, and the National Security Strategy targets meaningful personnel growth to support the transition from Soviet-legacy mass to a lighter, more mobile NATO-compatible force. The real constraint is a population of roughly 1.8 million with a serious demographic ceiling on military recruitment.

MILITARY CONTRIBUTIONS

Capability Modernization

North Macedonia's modernization is a force rebuild converting from a Soviet-legacy inventory to a lighter, NATO-interoperable force on a modest budget. Key programs: Bradley IFVs and 25 JLTVs ($111M FMS, December 2024) for protected mobility; three batteries of Turkish Boran 105mm howitzers for fires; and a €250M Leonardo contract for four AW149 multirole and four AW169M light helicopters replacing the Mi-8/17 and Mi-24 fleets. The critical gap is air defense: no national combat aircraft and no medium-range air defense contract signed despite Defense Minister Misajlovski identifying it as a top priority. The modernization direction is right; the transition period creates a genuine capability gap.

MILITARY CONTRIBUTIONS

Force Posture

North Macedonia's force posture punches above its size through distributed contributions across five simultaneous NATO and EU missions: 70 troops in KFOR Kosovo, 35 in Romania's eFP, 33 in EUFOR Bosnia-Herzegovina, 30 in Bulgaria's eFP, and 9 in Latvia's eFP. Participation in both the Canada-led NATO Multinational Brigade Latvia and Italy-led Multinational Battlegroup Bulgaria demonstrates eastern front engagement well beyond the immediate neighborhood. The Krivolak Training Area is North Macedonia's most important hosting contribution—one of the largest NATO-accessible training facilities in the Western Balkans, supporting Defender Europe exercises and US bilateral rotations. Allied air policing covers North Macedonian airspace given the absence of national combat aircraft.

MILITARY CONTRIBUTIONS

Industrial Base

North Macedonia has virtually no indigenous defense industrial capability beyond small arms and ammunition. Eurokompozit Prilep produces composites and ATS Ballistics produces ballistic protection—the only meaningful domestic outputs. For all heavy equipment, aviation, and electronics, North Macedonia is entirely import-dependent. The Leonardo helicopter contract and US FMS cases include limited local industrial cooperation provisions without sovereign production capability. On raw materials, North Macedonia holds copper and lead-zinc deposits with some historical mining significance, but current output has limited direct NATO defense-industrial relevance. The €38M in EU European Peace Facility support—covering ISR, electronic warfare, and communications systems—reflects allied investment in North Macedonia's capability development rather than any domestic production base.

STRATEGIC ALIGNMENT

Declared Posture

North Macedonia's 2024-2029 National Security Strategy is an explicit assessment—directly naming Russian intelligence services, hybrid operations, disinformation, and coercion as direct threats, and framing China's ambitions and coercive policies as challenges to North Macedonian and NATO interests. The November 2024 EU Security and Defence Partnership and EEAS confirmation of "full alignment" with EU CFSP reinforced the institutional posture. Public NATO support has shown signs of erosion since accession—a soft underbelly beneath the government-level posture.

STRATEGIC ALIGNMENT

Ukraine Support

The Kiel Institute does not track North Macedonia's Ukraine aid in its standard dataset, making precise GDP comparisons unavailable. Based on publicly reported transfers, North Macedonia donated its entire T-72 tank fleet of approximately 31 tanks, four Su-25 ground-attack aircraft, and 12 Mi-24 attack helicopters—effectively transferring its entire heavy combat aviation and armor capability to Ukraine. Additional transfers included artillery, ammunition, and anti-armor systems. US backfill support of approximately $139M financed Western replacements, accelerating Macedonian modernization. North Macedonia has contributed significantly to the fight in Ukraine.

STRATEGIC ALIGNMENT

Russian Decoupling

North Macedonia's Russian energy decoupling is steady—limited pre-2022 direct exposure, with post-2022 diversification toward Greek LNG and Azeri gas reducing reliance on Russian-origin supply. No Rosatom footprint. North Macedonia aligned with almost every EU Russia sanctions package from the 6th through the 20th despite non-EU status. Russia's primary leverage is not energy but social: disinformation, political proxies, religious and identity channels, and regional spillover from Serbia, Kosovo, and Bosnia create persistent influence vectors that energy decoupling alone cannot address.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

North Macedonia recorded 64% for staying in NATO in 2024, in the lower third of the alliance, and only 37% agreed their country should defend another NATO ally if attacked, the second-lowest figure recorded. Only 35% said their country is more safe as a result of NATO cooperation, also among the lowest, and Ukraine support was among the weakest in the survey at around 41% combined. Public attachment to NATO membership is weaker than in most new members, partly because accession was driven by elites in a bilateral bargain with Bulgaria that remains deeply unpopular domestically. The governing VMRO-DPMNE (Mickoski) is formally pro-NATO, but no major party has been able to build an enthusiastic domestic constituency for the security implications of membership. The combination of low capability, low solidarity intention, and frustrated NATO expectations makes North Macedonia one of the alliance's more uncertain peripheral members.

STRATEGIC ALIGNMENT

Hedging Behavior

North Macedonia's hedging record is limited. No meaningful BRI exposure, no major Chinese-controlled infrastructure, Chinese telecom restricted from 5G networks, full EU CFSP alignment from the 6th sanctions package, Western-only procurement pivot, no obstruction of Finnish or Swedish accession. The one elite-level hedging concern is Mickoski's engagement with Chinese diplomatic and economic frameworks beyond what North Macedonia's stated de-risking posture would suggest. Maintaining economic engagement channels with Beijing while publicly endorsing NATO and EU alignment creates a complicated picture. This has not produced concrete policy divergence but represents a pattern worth monitoring in a country still consolidating its Western integration.

STRATEGIC ALIGNMENT

Operational Cooperation

North Macedonia contributed forces to Afghanistan under ISAF and Iraq coalition operations. On recent US operations, North Macedonia has been supportive without obstruction: no hindrance to Operation Epic Fury and full EU sanctions alignment. North Macedonia does not participate in Operation Aspides or have a Red Sea role. The core operational contributions are hosting allied forward presence. Krivolak Training Area is the most important hosting asset—one of the largest NATO-accessible training facilities in the Western Balkans, supporting Defender Europe and bilateral US exercises in a region where large training sites are scarce. Forward deployments span five simultaneous missions: KFOR Kosovo, Romania's eFP, EUFOR Bosnia-Herzegovina, Bulgaria's eFP, and Latvia's eFP. This is a genuine alliance commitment from a small country that joined NATO only in 2020.

PORTUGAL

NATO Country Assessment

—TIER TWO—

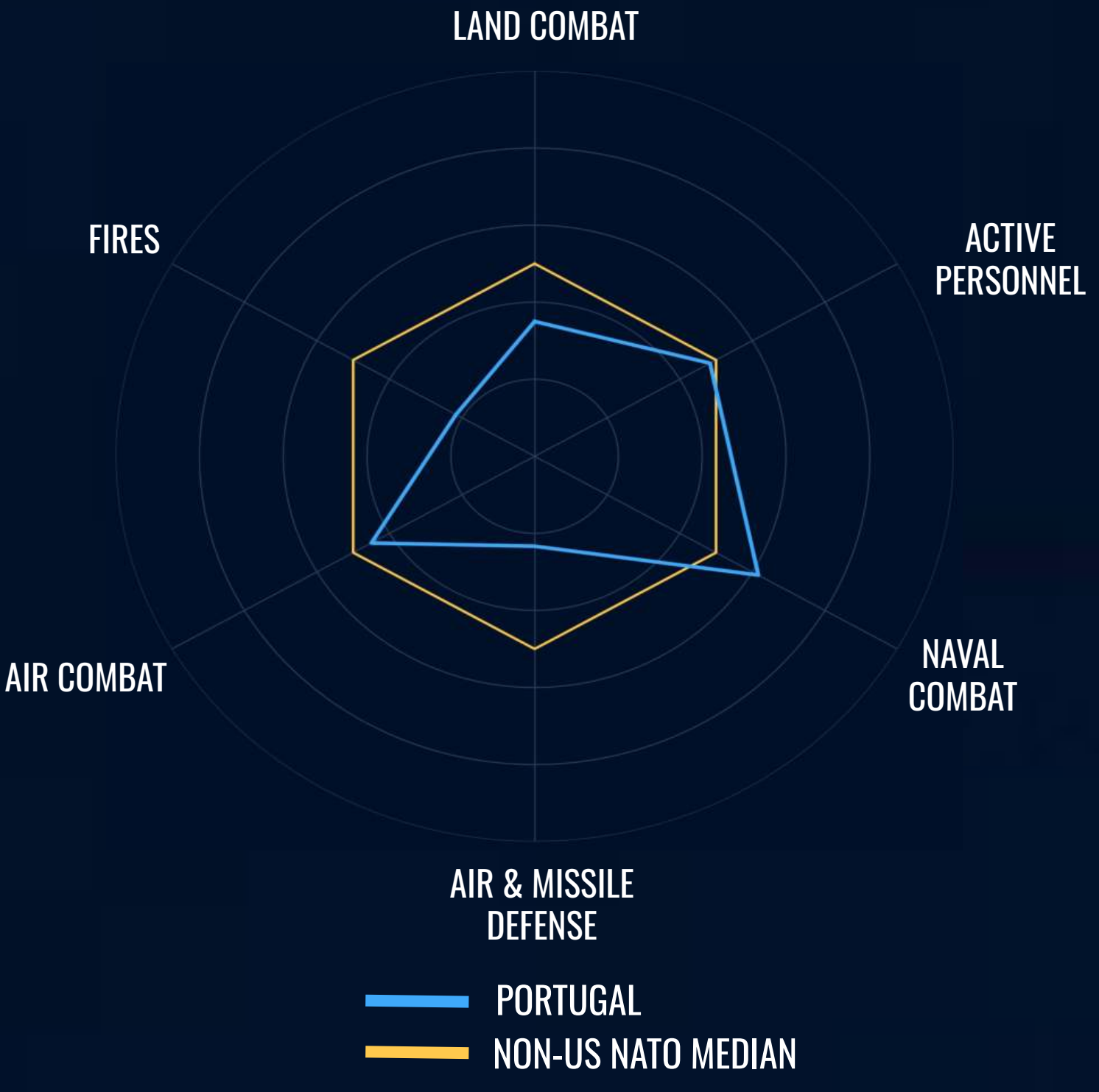
VITAL BASING • PUBLIC SUPPORT FOR NATO • UNACCEPTABLE HEDGING

AT A GLANCE

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

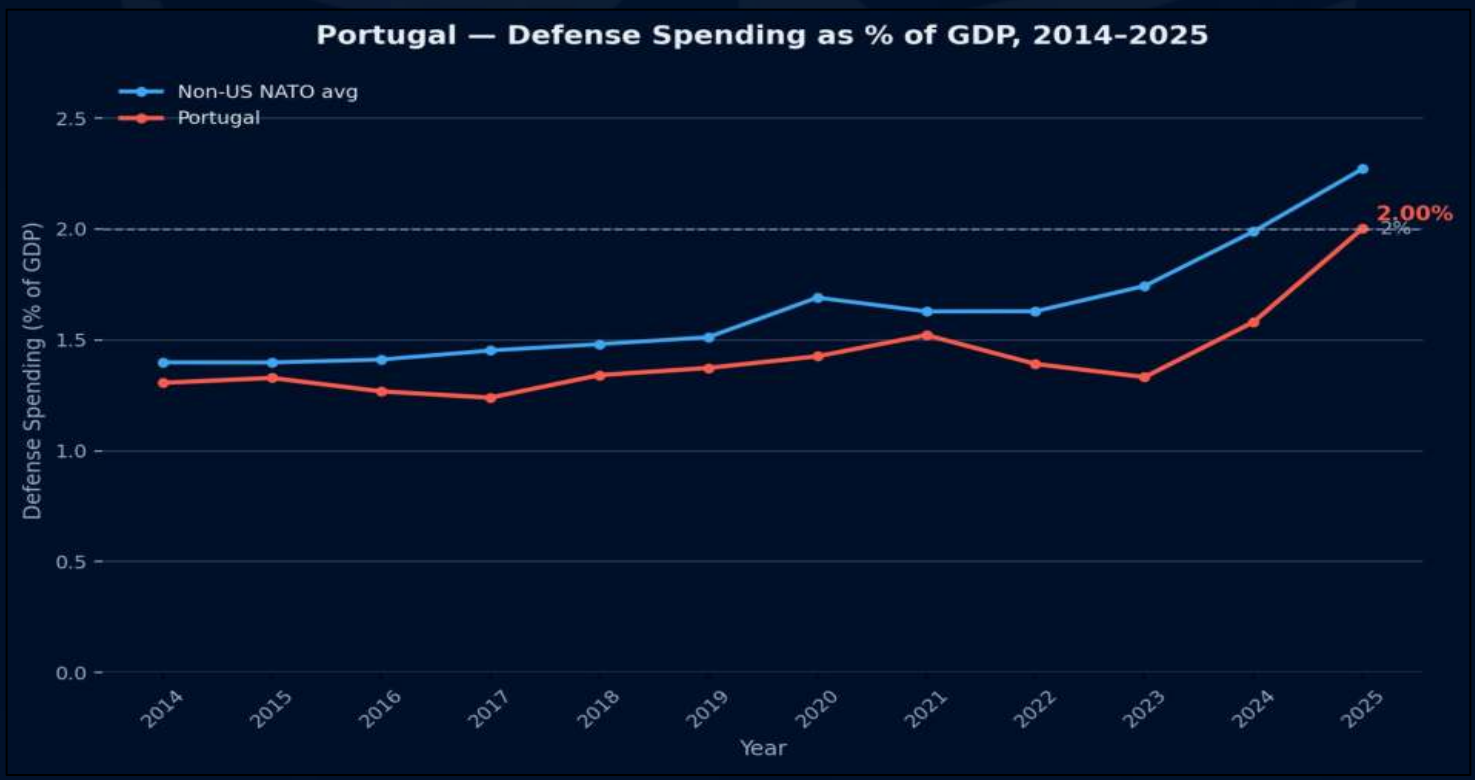


This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

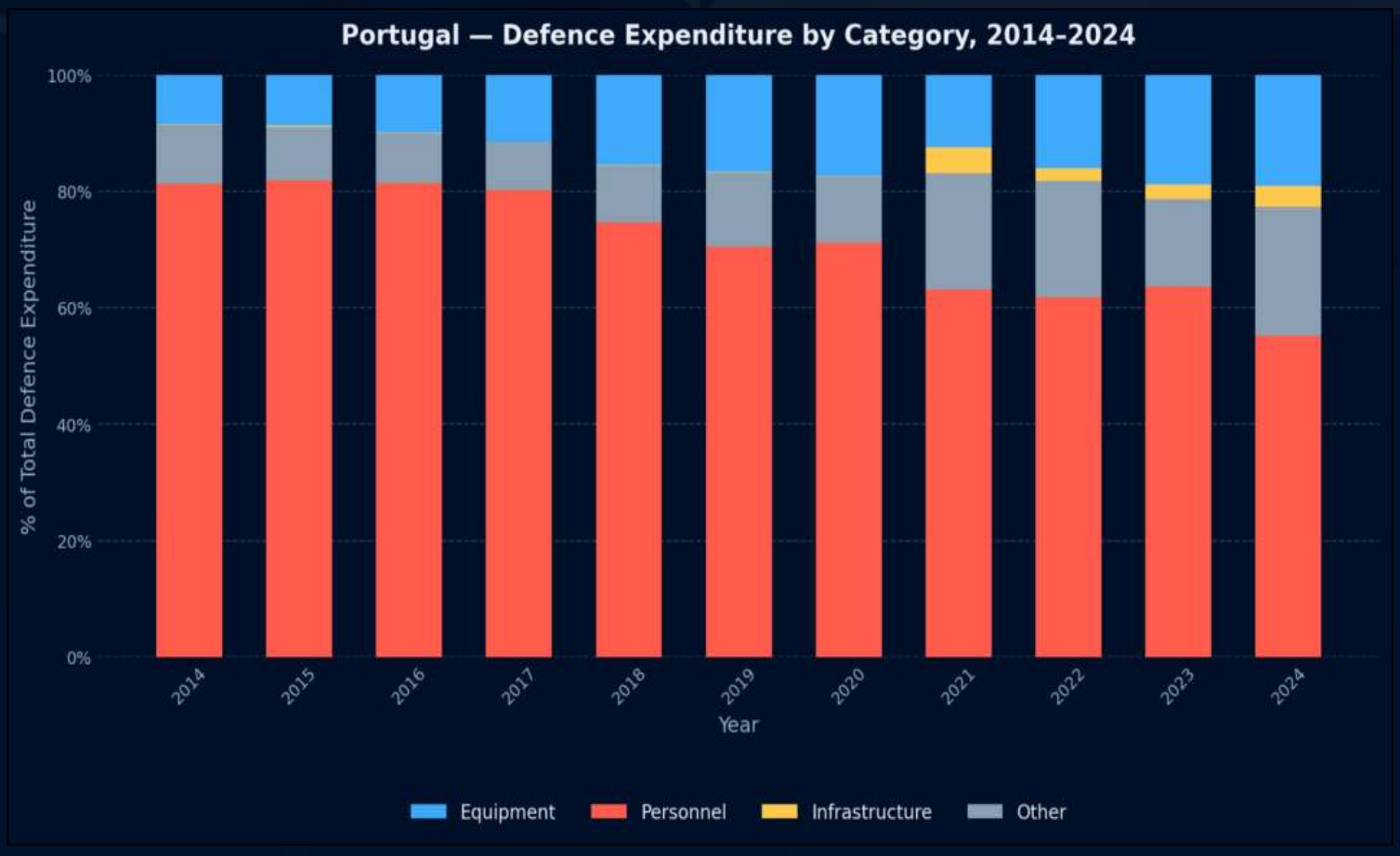
Portugal's defense spending data shows it has consistently tracked below the non-US NATO average for over a decade: spending 1.25-1.55% of GDP through 2014-2024 while the alliance average rose steadily above it. The jump to 2.00% in 2025 is real and represents the fastest single-year acceleration in 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

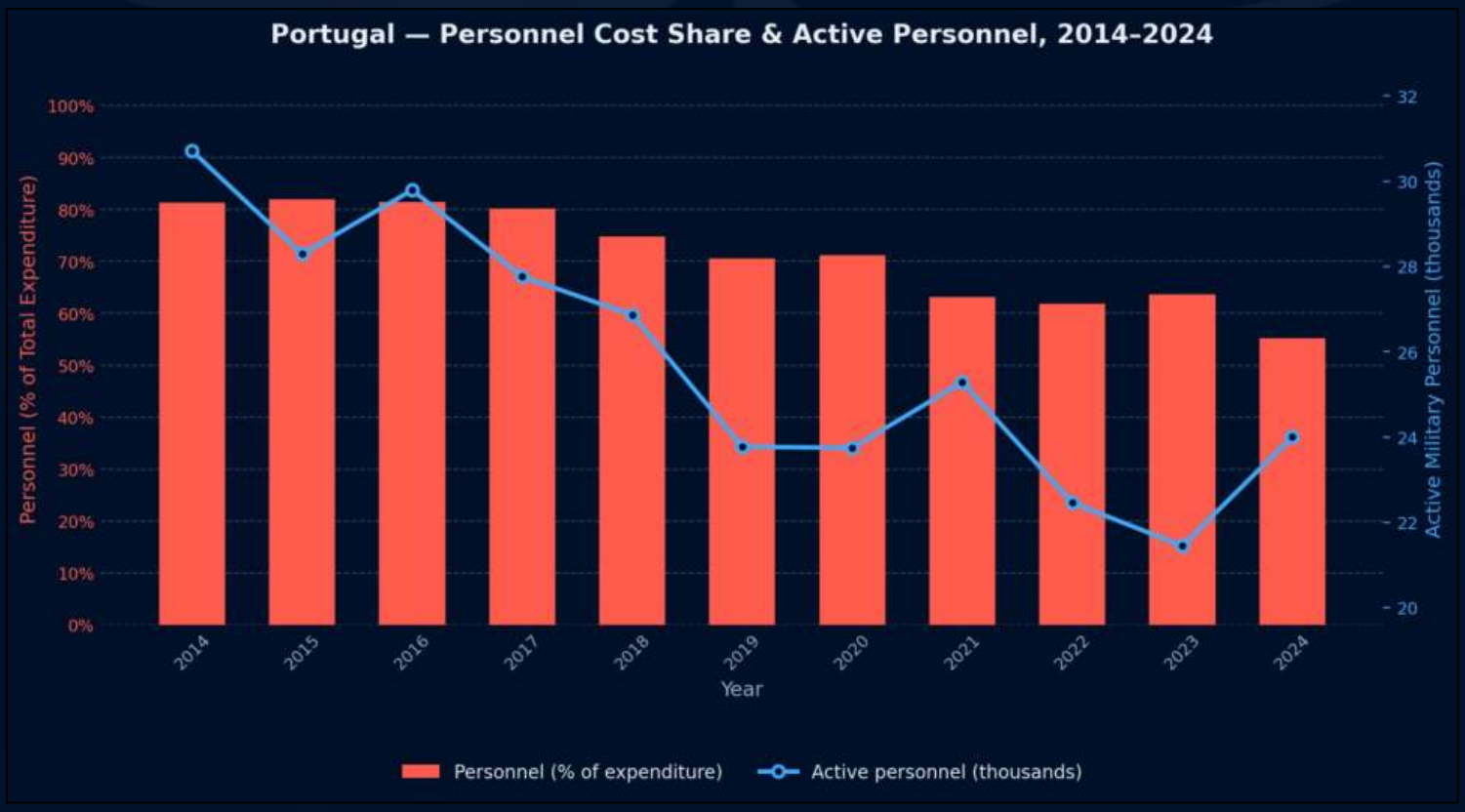
Portugal's equipment share has improved slowly. The data shows personnel costs falling from roughly 81% in 2014 to approximately 55% by 2024, with equipment rising correspondingly to almost 20%, approaching NATO's 20% benchmark. The rebalancing reflects the Military Programming Law investment beginning 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.



MILITARY CONTRIBUTIONS

Capability Modernization

Portugal's modernization is focused on maritime patrol, transport, and modest ground force improvement rather than comprehensive reequipment. 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

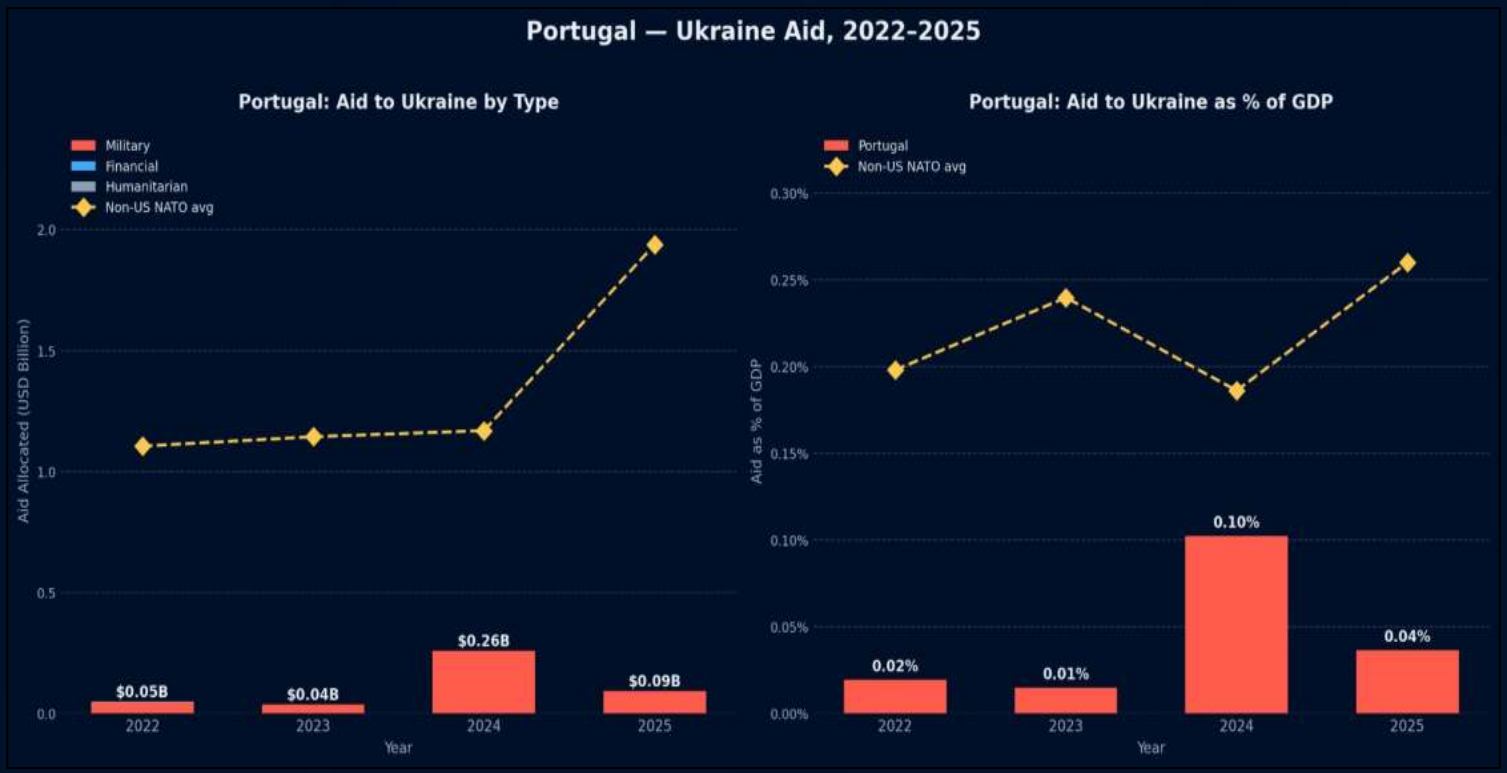
Declared Posture

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 roughly 19-21% of EDP, Portugal's largest utility—Chinese leverage over energy infrastructure that is worth monitoring independently of Russia decoupling.

STRATEGIC ALIGNMENT

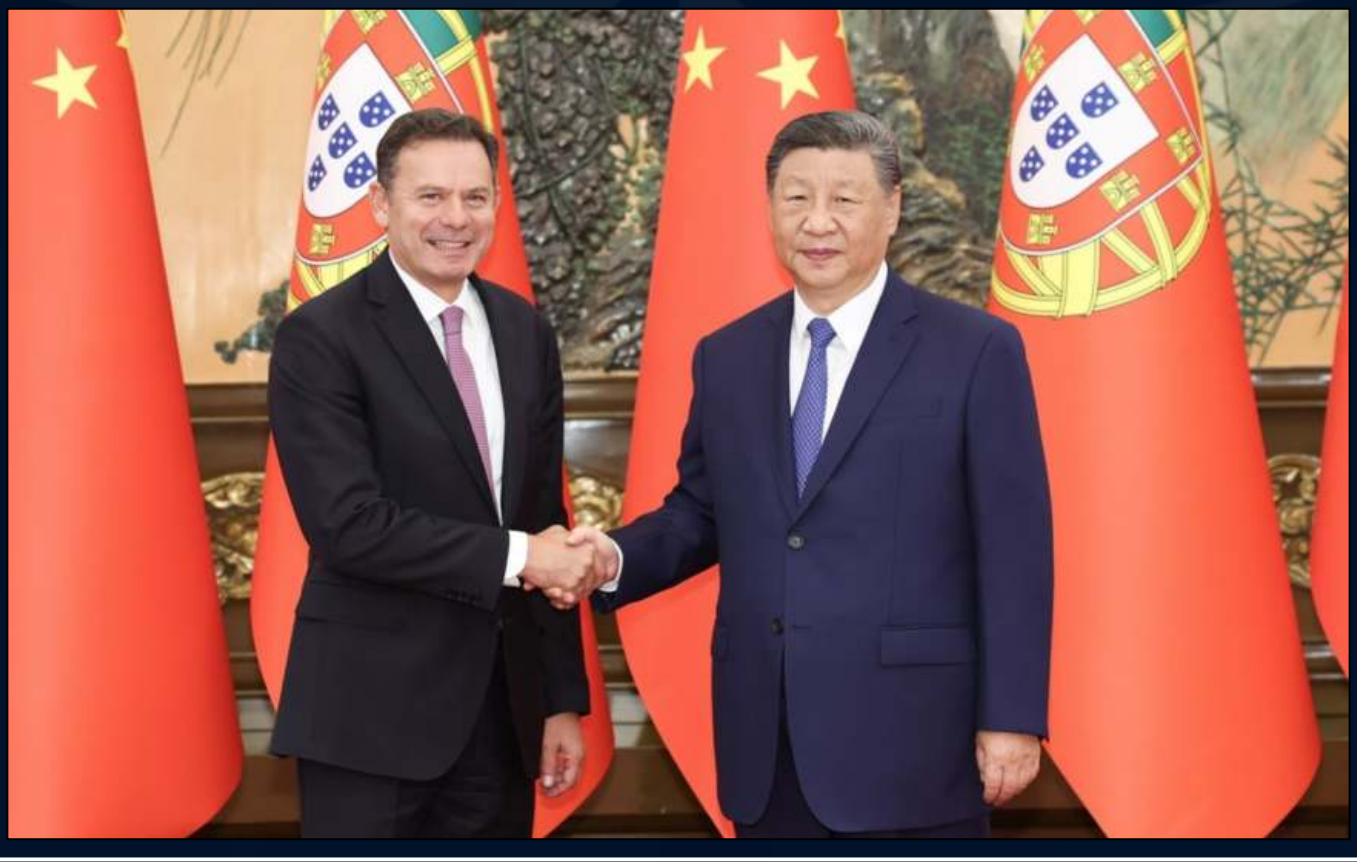
Public Support & Political Resilience

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.

ROMANIA

NATO Country Assessment

—TIER TWO—

NEW AIR BASE • EPIC FURY SUPPORT • COMPETING BUDGET PRIORITIES

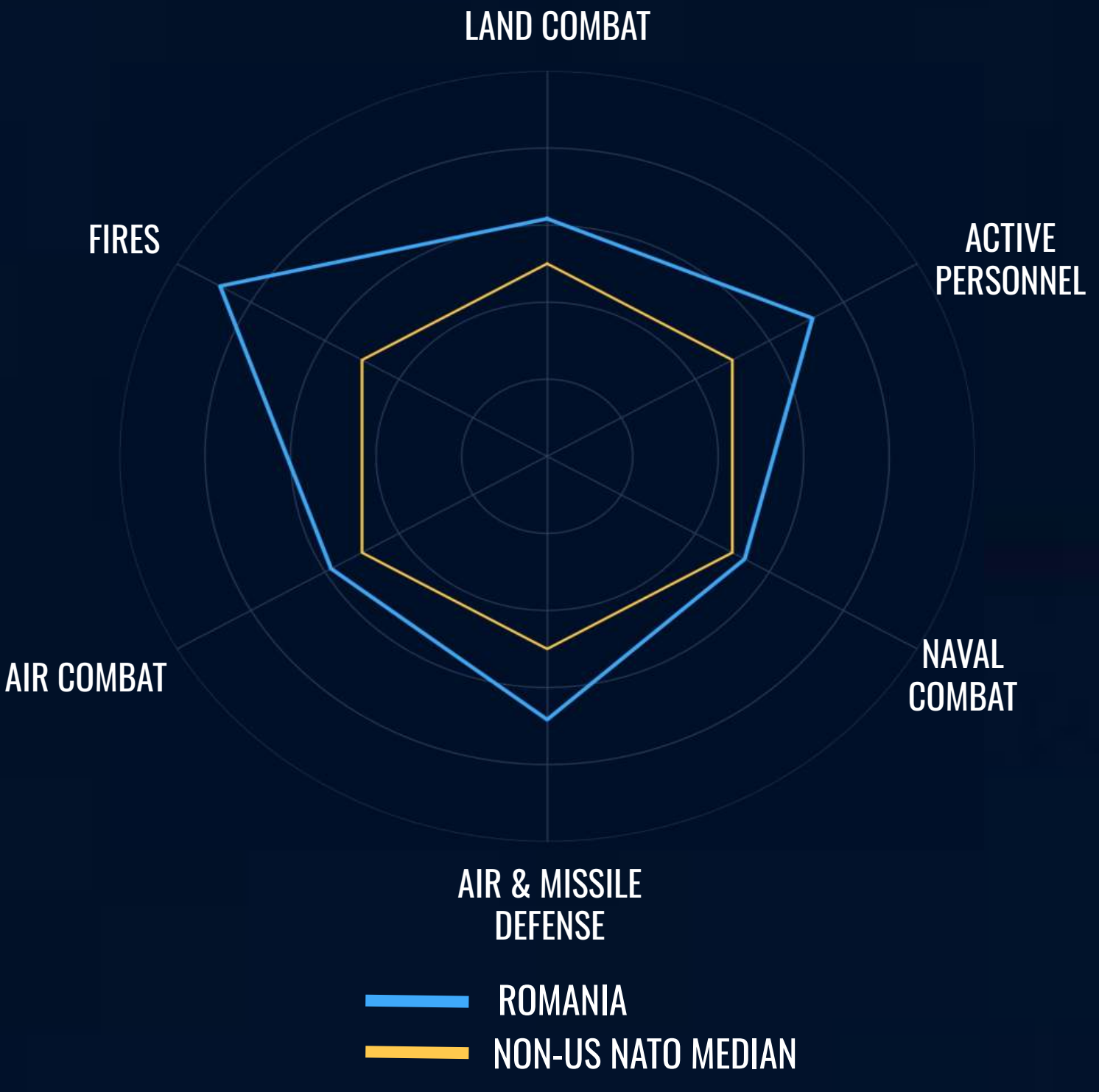
A-2852

AT A GLANCE

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

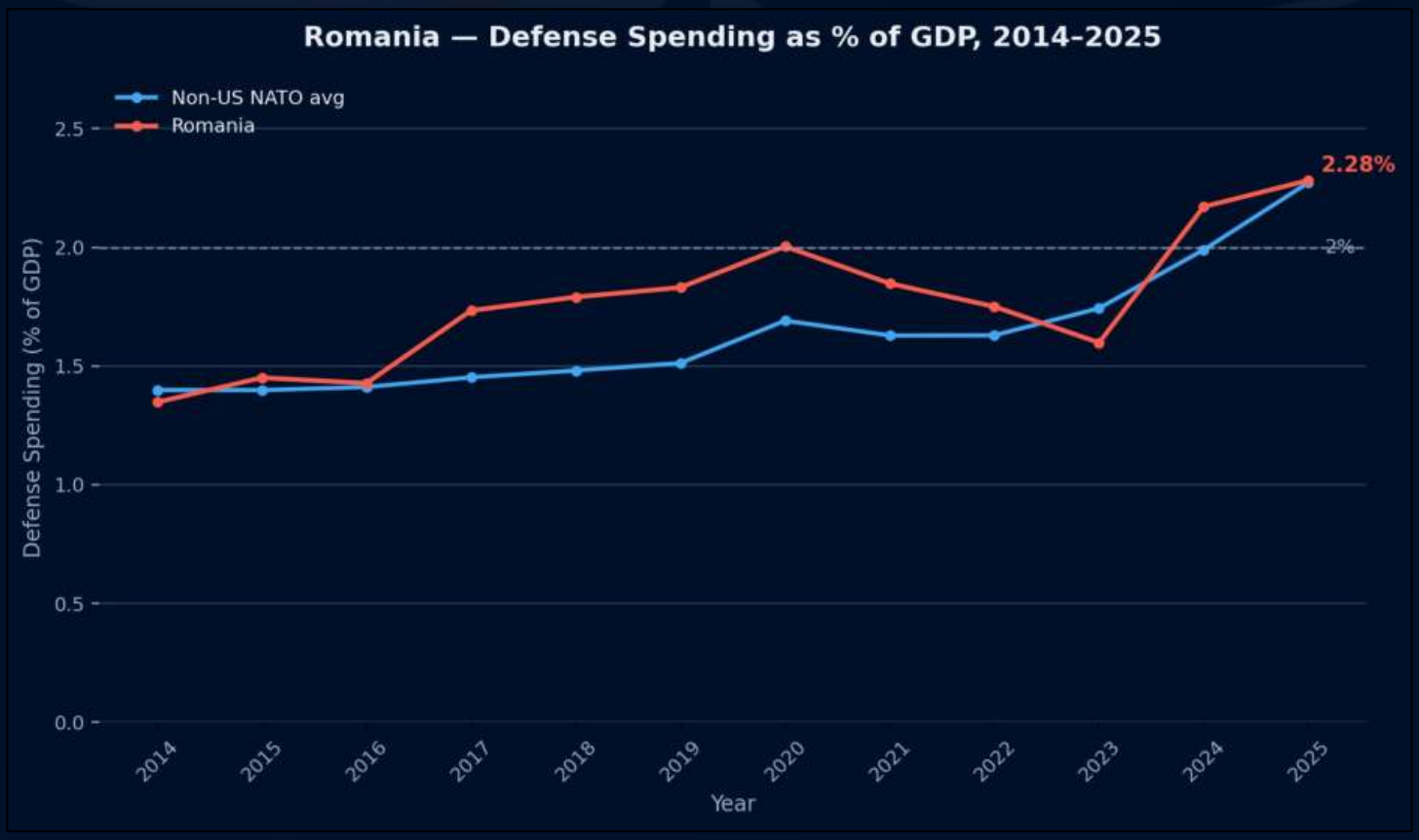


This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

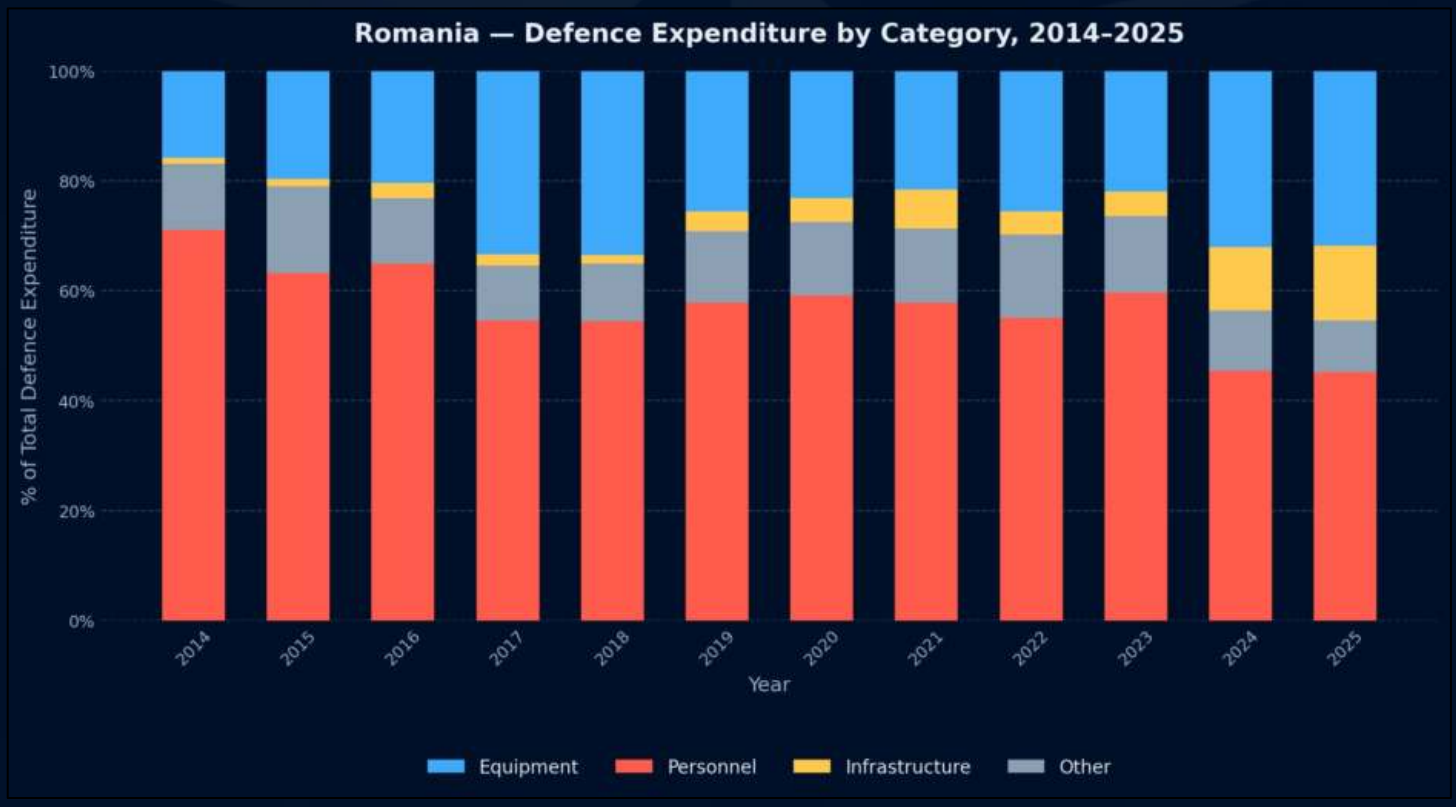
Romania has been one of NATO's more consistent eastern front spenders, consistently above the non-US NATO average. Defense spending reached 2.28% of GDP in 2025, and President Dan committed Romania to the Hague 3.5% framework after his May 2025 election. The critical constraint is Romania's high budget 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

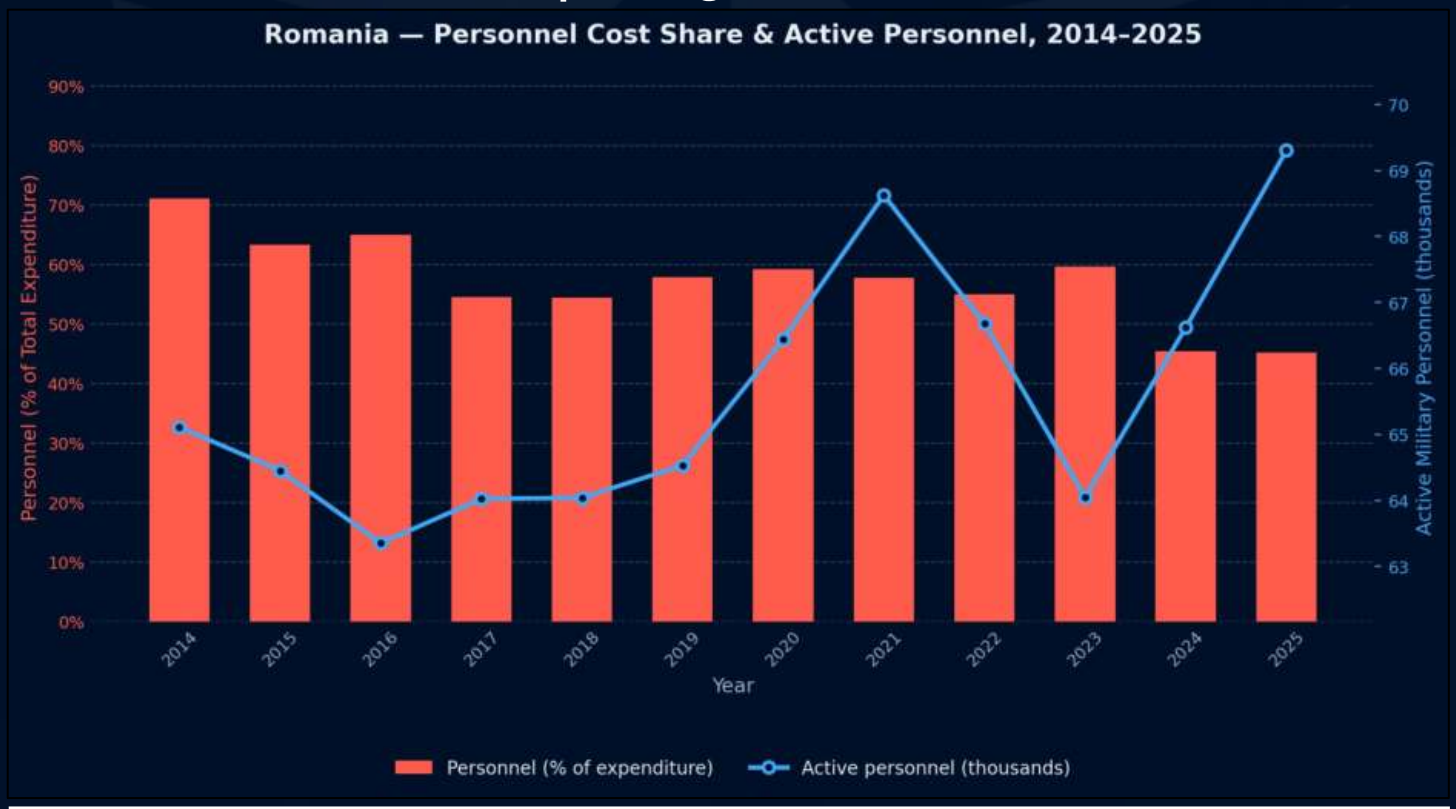
Romania's equipment share reflects a comprehensive reequipment program: 32 F-35As, 54 M1A2 SEPv3 Abrams with 216 more approved, 227 Piranha V IFVs assembled domestically, a tracked IFV competition at ~€2.5B, two Scorpène submarines, Black Sea corvettes, and 36 HIMARS already operational. The scale is 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

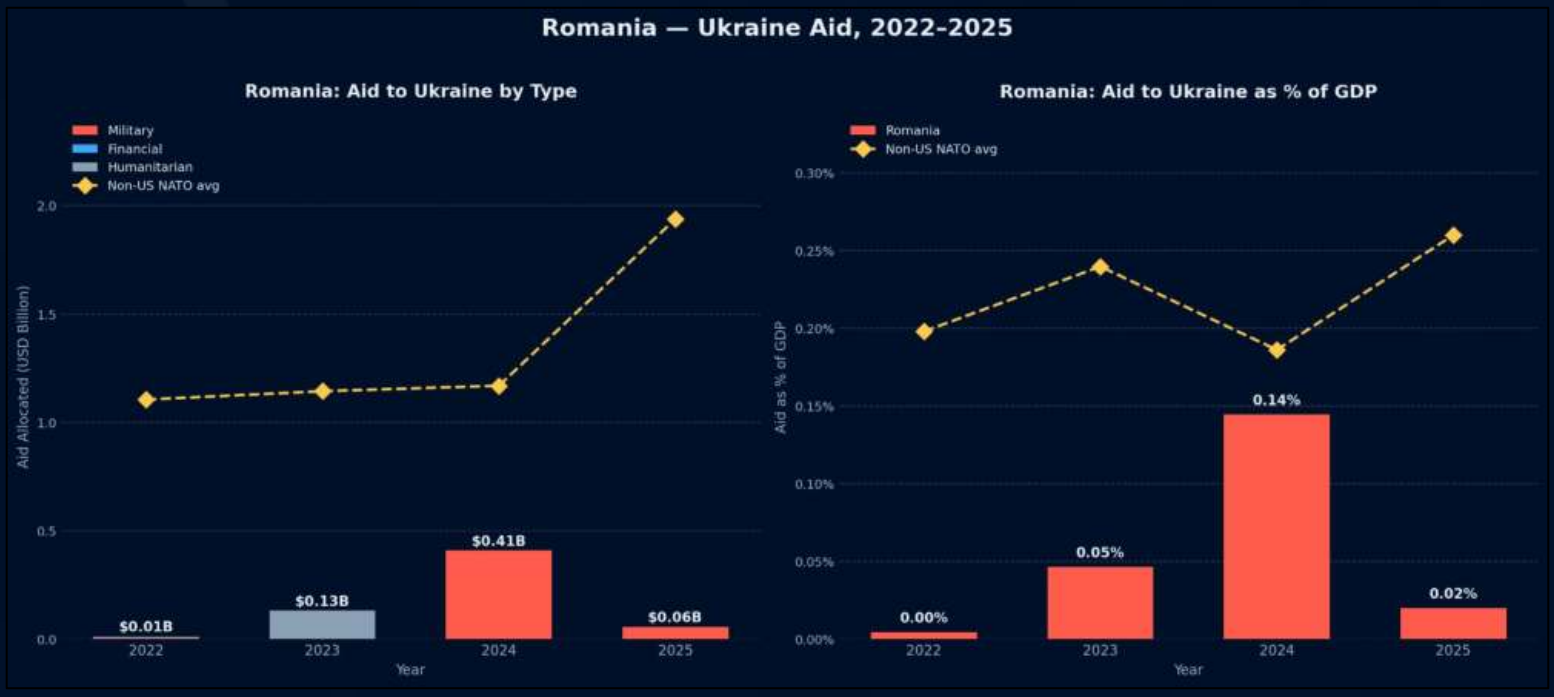
Declared Posture

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.

UNITED KINGDOM

NATO Country Assessment

—TIER TWO—

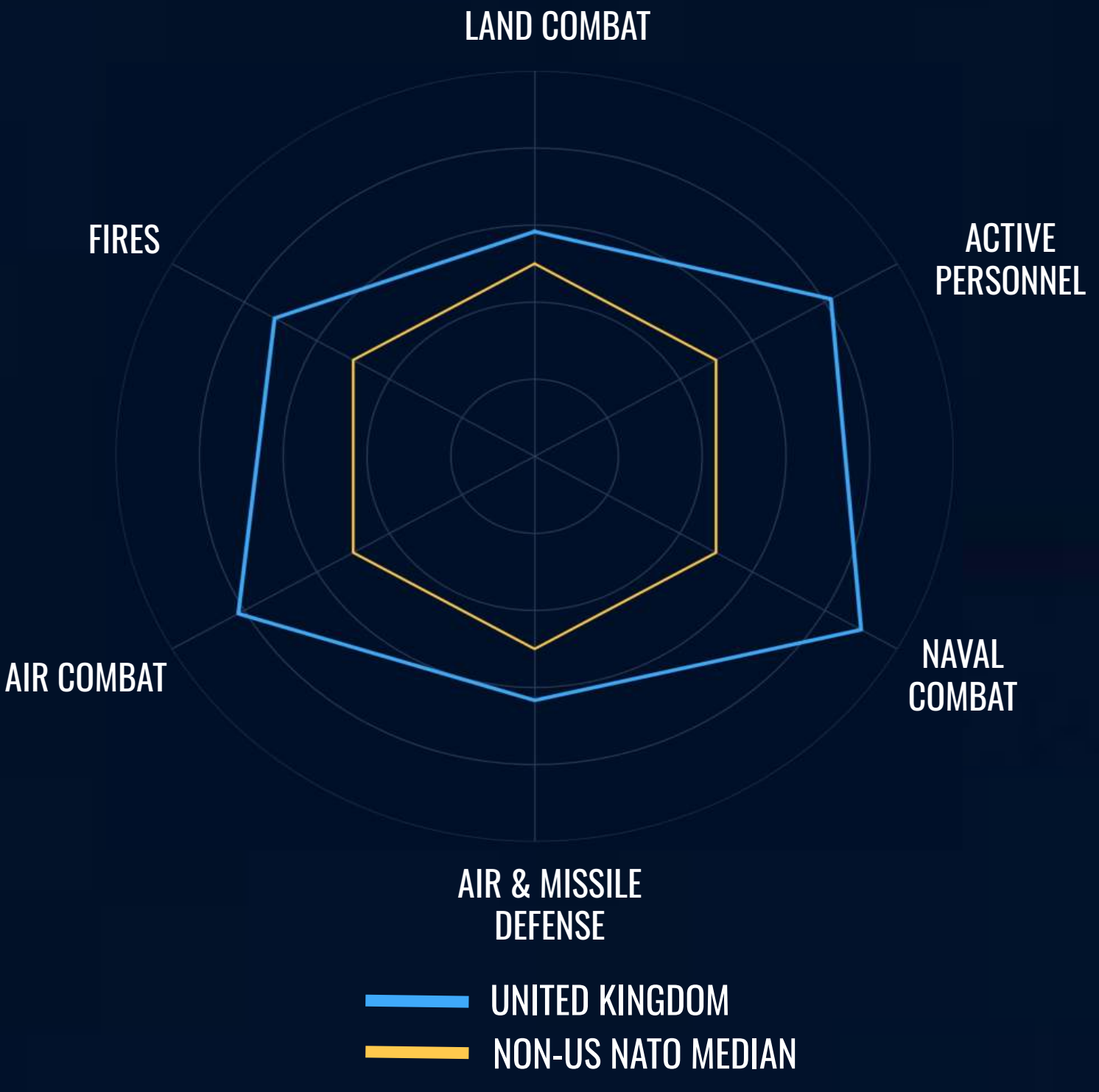
ROBUST DEFENSE SPENDER • UKRAINE SUPPORTER • WEAK LEADERSHIP

AT A GLANCE

Toplines

- **Setting the Standard for European Defense Spending:** The UK is Europe's second-largest defense spender at $94.3B and one of the only NATO countries consistently above 2% since 2014.
- **Showing Strength During Biden's Weakness:** The UK was first on virtually every Ukraine aid escalation threshold that mattered. It was the first Western donor of main battle tanks, first donor of long-range cruise missiles, and its NLAW deliveries at the invasion's start were decisive during the Battle of Kyiv.
- **Undercutting US Forces After Decades of Solidarity:** The UK actively undermined Operation Epic Fury by initially refusing US basing requests, then restricting Akrotiri to defensive-only use after an Iranian drone strike, and ultimately excluding it from further US strike operations. This is a significant operational failure from the ally Washington has historically relied on most when decisive action is required to ensure peace.

FORCE STRUCTURE AT A GLANCE



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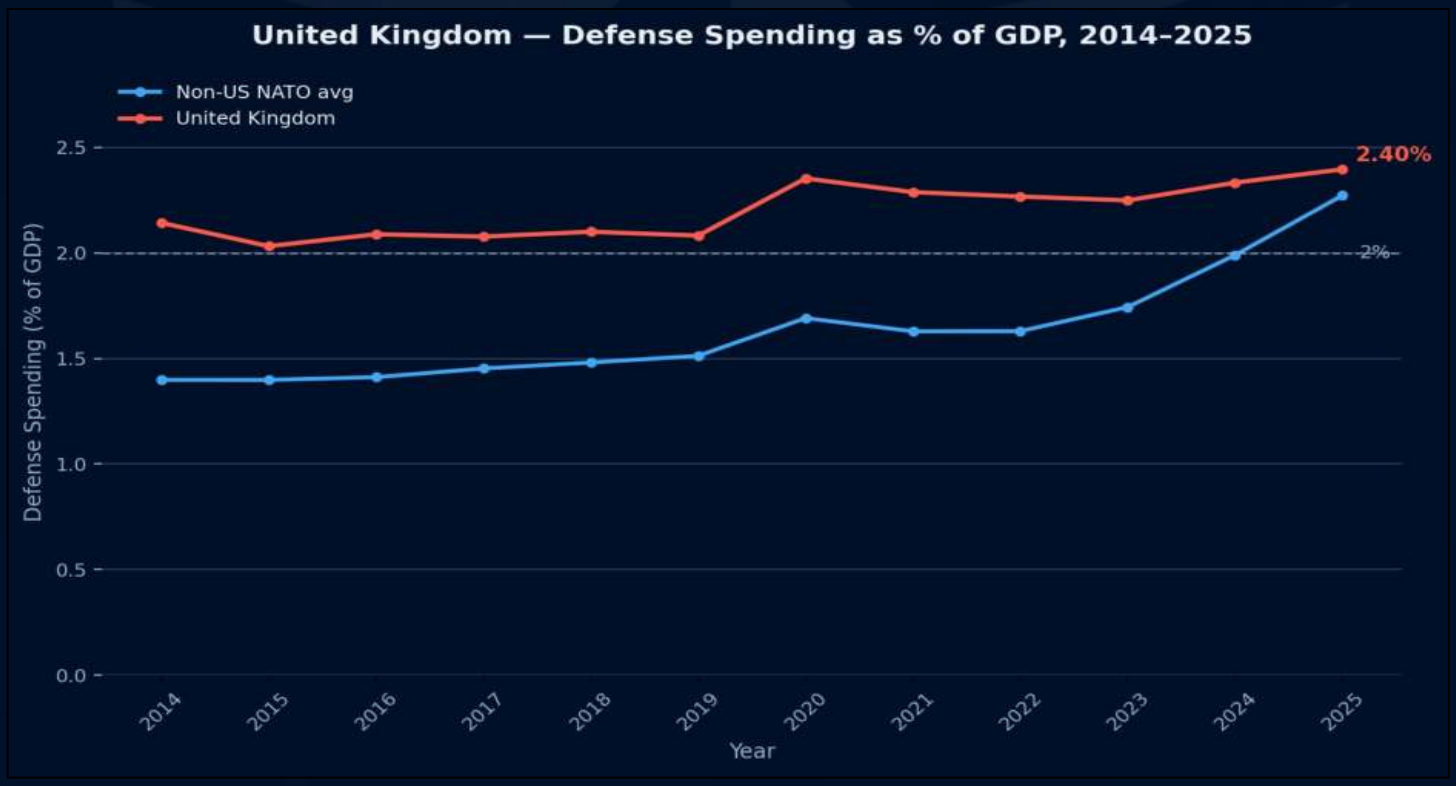
MILITARY CONTRIBUTIONS

Defense Spending Level

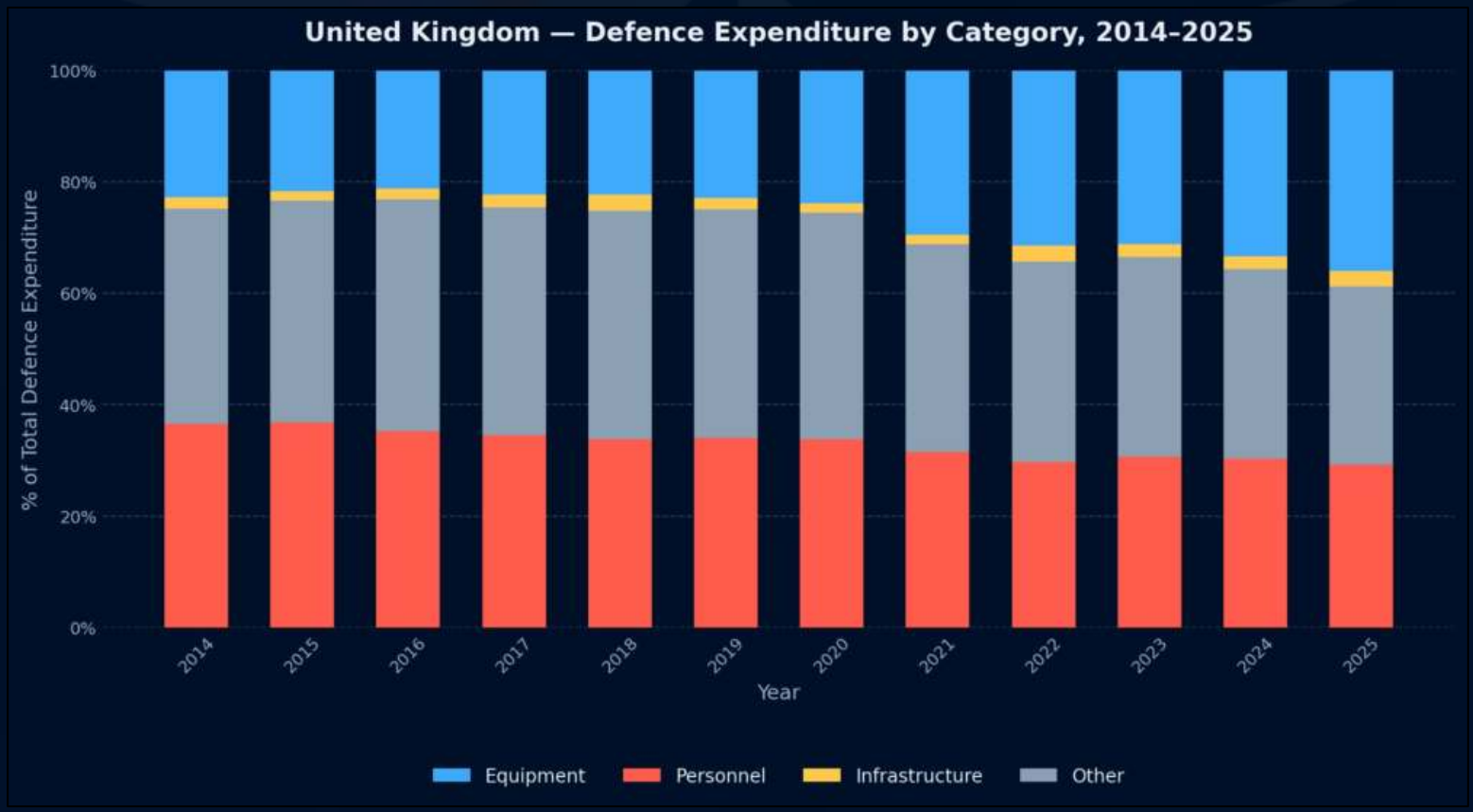
The United Kingdom is Europe's second-largest defense spender at $94.3B in 2025. The UK is one of the only non-US NATO countries consistently above the 2% floor, reaching 2.40% of GDP in 2025. Starmer announced in February 2025 a rise to 2.5% by April 2027, with the 2025 Spending Review projecting defense funding growth from £62.2B in 2025/26 to £73.5B in 2028/29. The UK committed to the Hague 3.5%+1.5% framework by 2035. The central concern is delivery: the Strategic Defence Review's (SDR) modernization ambitions—Dreadnought SSBNs, SSN-AUKUS, GCAP, carrier strike, long-range fires, air and missile defense, and munitions production—are considerably larger than the near-term fiscal envelope, and the upcoming Defence Investment Plan is meant to translate SDR objectives into funded procurement, though it remains unpublished at the time of writing.



MILITARY CONTRIBUTIONS

Equipment Share

The UK's equipment share has held relatively stable with modest yet consistent growth each year, reaching 38% in 2025. The absolute investment behind that share is substantial given the UK's $94B defense budget. Key programs driving current equipment spending include Dreadnought SSBNs under construction, 48 F-35Bs completed with F-35A dual-capable aircraft ordered, GCAP development funded at ~£6B, and Challenger 3 upgrades for 148 tanks. Equipment share is rising as munitions investment accelerates.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

The UK's personnel cost share has fallen steadily from ~35% in 2014 to ~29% by 2025, reflecting budget reallocation toward equipment as the overall defense budget has grown. Active personnel have declined sharply—from ~170,000 in 2014 to ~140,000 by 2025—a reduction that has drawn sustained criticism as the army approaches what many analysts consider the minimum viable size for a major military power. The UK SDR acknowledged the problem directly, committing to halt further reductions and grow the army to at least 76,000 by the next parliament, from a current low of roughly 70,600. Recruitment has been persistently below target across all three services, with the army falling short of annual intake goals for multiple consecutive years. The SDR framed rebuilding "the whole force" as a central priority, stating that "the size and readiness of our Armed Forces must match the threats we face."

MILITARY CONTRIBUTIONS

Capability Modernization

The UK's modernization strategy aims to sustain comprehensive capability across nuclear, carrier strike, submarine, precision strike, and expeditionary domains while rebuilding atrophied ground forces and air defense. On nuclear, Dreadnought-class SSBNs are under construction with £15B committed to the Defence Nuclear Enterprise in June 2025. On combat aircraft, 40 F-35Bs and 105 Typhoon FGR4s form the backbone, with at least 12 F-35A dual-capable aircraft restoring nuclear strike capability and GCAP targeting 2035 service entry. Two Queen Elizabeth-class carriers provide Europe's largest full-deck carrier capability outside France, with Italy's smaller Cavour the only other genuine flat-top in the region. Astute-class SSNs and P-8A Poseidons deliver world-class ASW, with SSN-AUKUS replacing Astute from the late 2030s. Ground fires remain the most exposed gap—AS90 donated to Ukraine, 14 Archer procured as stopgap, 45 M270 MLRS operational—with the SDR committing to long-range fires as a top priority without a funded contract. The modernization ambition is developing; funding should follow.

MILITARY CONTRIBUTIONS

Force Posture

The UK hosts at least 24 US military sites including RAF Lakenheath—the largest US Air Force base in Europe with F-15E and F-35A squadrons—RAF Fairford for B-2 and B-52 rotations, and Fylingdales early warning radar providing ballistic missile tracking. The UK leads NATO Forward Land Forces Estonia at Tapa since 2017, providing Estonia's designated reinforcement brigade, and leads the Joint Expeditionary Force across 10 Northern European nations. RAF Akrotiri in Cyprus served as a critical Eastern Mediterranean strike and intelligence hub during Operation Epic Fury. The Allied Rapid Reaction Corps at Innsworth is NATO's leading deployable corps headquarters. The global deployment footprint spans Estonia, Cyprus, Gibraltar, the Falklands, Brunei, Kenya, Germany, Iraq, and Diego Garcia. As mentioned, the military stands at its smallest in decades, experts assess it cannot currently mobilize a full combat division sustainably.

MILITARY CONTRIBUTIONS

Industrial Base

The UK's defense industrial base is among Europe's strongest. BAE Systems—Europe's largest defense company by revenue—builds critical components for every F-35 produced globally and leads GCAP's UK contribution. GCAP with Italy and Japan is the most credible European next-generation combat air program. AUKUS embeds the UK in an advanced undersea warfare program. Rolls-Royce provides nuclear propulsion for UK submarines. Thales UK's £1.6B Lightweight Multirole Missile contract delivered 5,000 missiles to Ukraine ahead of schedule, demonstrating production scalability under export demand. On raw materials, the UK has limited domestic critical mineral deposits but is a significant processor and refiner, with investments in rare earth and battery material processing chains relevant to defense supply resilience. The primary industrial gaps are land systems and precision munitions production rates insufficient to sustain simultaneous national stockpile rebuilding and Ukraine support.

STRATEGIC ALIGNMENT

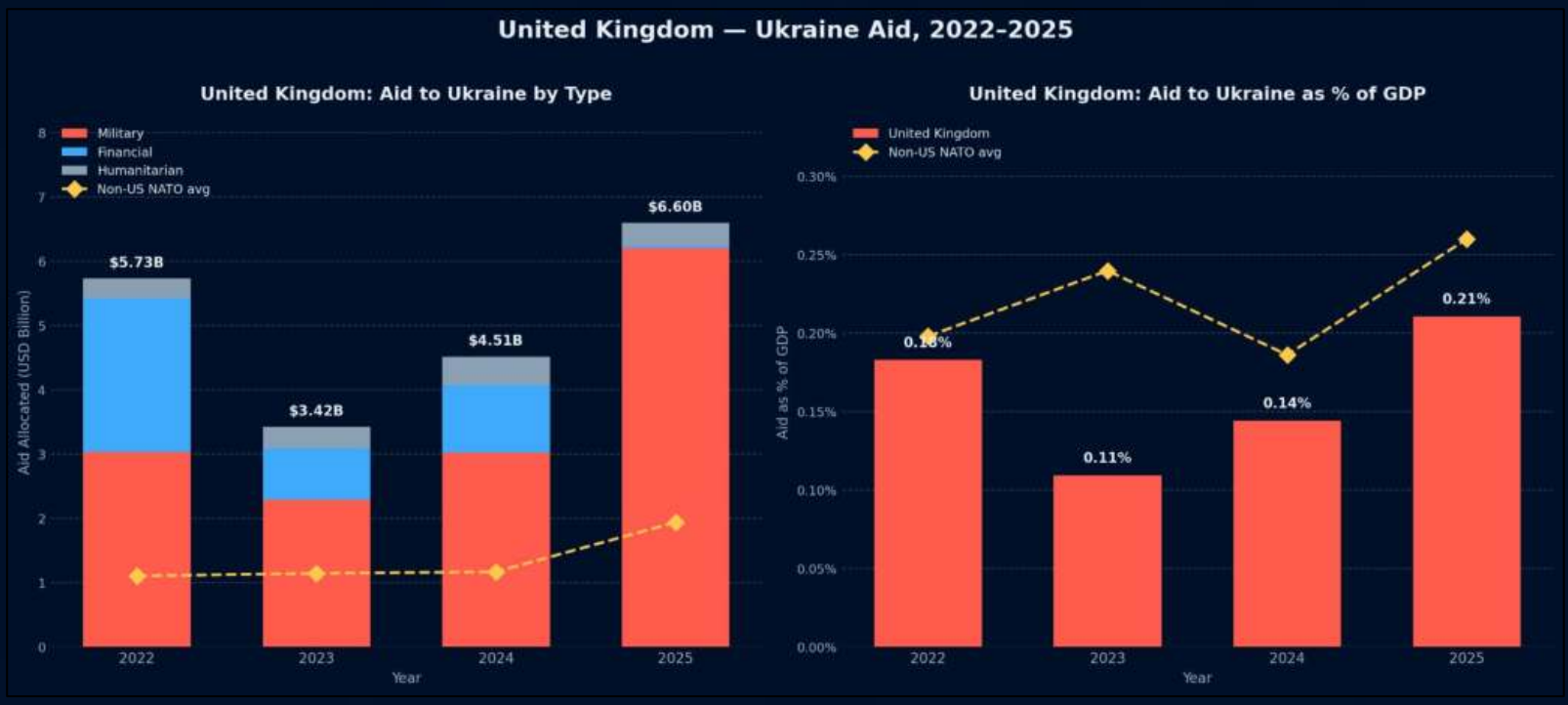
Declared Posture

The UK's 2025 Strategic Defence Review identifies Russia as "the most immediate and pressing state threat" to UK and European security, shifts defense planning explicitly toward warfighting readiness against a peer adversary, and formalizes "NATO First" as the organizing doctrine. The SDR acknowledges institutional hollowness directly, stating that "the size and readiness of our Armed Forces must match the threats we face," a self-awareness that no other major NATO ally has matched in candor. On China, the Integrated Review Refresh frames Beijing as an "epoch-defining challenge," and the UK has implemented materially harder China-security measures than most European peers. The UK-Ukraine 100-Year Partnership signed January 2025 provides a generational commitment framework with no parallel in the alliance. The UK-France Northwood Declaration of July 2025 strengthens European nuclear coordination between the alliance's only two nuclear powers.

STRATEGIC ALIGNMENT

Ukraine Support

The UK is among Ukraine's most consequential supporters by absolute volume. Kiel tracks €20.009B allocated—considerably above the non-US NATO average in absolute terms, though at 0.18–0.21% of GDP it lags the Baltic, Nordic, and Eastern European leaders. The UK committed £3B per year in military aid through 2030/31—the most specific long-term floor of any NATO ally. The UK was the first Western donor of main battle tanks and the first donor of long-range cruise missiles, breaking escalation taboos that other allies followed. NLAW anti-tank missiles delivered at the invasion's start were operationally decisive during the Battle of Kyiv. Operation Interflex has trained over 56,000 Ukrainian soldiers—the largest single-donor training program—consuming over a quarter of British Army training facilities. The Coalition of the Willing co-leadership with France provides the framework for potential post-ceasefire stabilization forces.



STRATEGIC ALIGNMENT

Russian Decoupling

The UK's Russian energy decoupling is among the fastest and most complete in the alliance. Pre-war UK Russian exposure was limited—roughly 4% of gas, 9% of oil—and the UK banned Russian coal in August 2022, crude and refined products from December 2022, and LNG from January 2023. No Rosatom dependence; civil nuclear runs on EDF EPRs, Westinghouse fuel, and Rolls-Royce SMRs with CGN removed from Sizewell C. The UK runs one of the most active national Russia sanctions regimes in the world, sanctioning thousands of individuals and entities including Rosneft and Lukoil, and co-architected the G7 oil price cap. The one concern is a May 2026 decision creating an open-ended exemption allowing diesel and jet fuel derived from Russian oil refined in third countries to keep flowing through UK-linked shipping and insurance networks; a follow-up announcement set January 2027 as the deadline to close it.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

The UK recorded 82% for staying in NATO, 73% agreeing the country should defend another ally, and 68% feeling more safe from NATO cooperation in 2024. Thirty-one percent favored increasing defense spending in 2024, a figure that shifted upward significantly in 2025 as the Starmer government committed to 2.5% of GDP and ultimately to the Hague 5% framework, and Ukraine support stood at around 78% combined, above the alliance average. Labour, the Conservatives, and the Liberal Democrats all maintain strong pro-NATO positions, sustaining the broadest mainstream consensus of any large alliance member. Reform UK is the principal outlier: sympathetic to Russia-accommodation frames, and willing to question the pace of Ukraine support, though it has stopped short of formally opposing NATO membership. The UK's broad public support for NATO—bolstered by stable cross-party political alignment—translates into a resilient source of NATO stability.

STRATEGIC ALIGNMENT

Hedging Behavior

The UK's hedging behavior is broadly clean with two meaningful concerns. On China, the UK has implemented materially harder security measures than most European peers—Huawei banned from 5G, CGN removed from Sizewell C, robust investment screening under the National Security and Investment Act, and PRC officials sanctioned over Hong Kong and Xinjiang. Against this, the approval of China's super-embassy despite explicit intelligence warnings, the collapsed Cash/Berry China-spying prosecution, and MI5's November 2025 warning about Chinese intelligence-linked Westminster headhunting reveals oscillating policy between clear-eyed hawkishness and ill-conceived appeasement. Additionally, the outgoing Starmer government conducted months of outreach to Beijing, culminating in a three-day state visit to China in January 2026 that yielded £2.2 billion in new exports, £2.3 billion in market access, and a separate $15 billion AstraZeneca investment commitment—generating significant economic exposure. No adversary arms procurement, no BRI participation, and no high-level Moscow or Tehran engagement complete an otherwise clean profile.

STRATEGIC ALIGNMENT

Operational Cooperation

The UK contributed substantially to both Iraq and Afghanistan: deploying tens of thousands of troops across both campaigns, sustaining significant casualties, and leading coalition operations in southern Iraq and Helmand Province. These campaigns established the UK as the US's most operationally committed European partner across two decades of high-intensity operations. Current operational cooperation spans every theater. As a framework nation for NATO FLF Estonia since 2017, the UK leads the alliance's most credible Baltic tripwire formation. Unfortunately, the UK actively undermines Operation Epic Fury. The UK initially refused US basing requests for Epic Fury, then authorized narrow, defensive-only strikes against Iranian missile sites on March 1, 2026. An Iranian drone hit RAF Akrotiri an hour later; the UK subsequently excluded Akrotiri from further US use, while its own jets ran sustained counter-drone defense of Cyprus (Operation Luminous). Operation Interflex has trained 63,000+ Ukrainian soldiers, making the UK the alliance's single most important Ukraine training actor. The Queen Elizabeth-class carriers provide Europe's only conventional full-deck carrier capability outside France. The Allied Rapid Reaction Corps at Innsworth is NATO's premier deployable corps headquarters. The JEF coordinates ten Northern European nations across the High North and Nordic-Baltic region. The operational limitation is the army's historically low strength and force-wide stockpile depth that the SDR acknowledges but has not yet funded to resolution.

TIER 2

Policy Recommendations

1. **Conditional Industrial Incentives:** Advanced US defense systems, co-development opportunities, preferred procurement are available to Tier 2 allies but tied to measurable progress on identified shortfalls with access expanding as performance improves.
2. **Basing and Presence Conditionality:** US force presence levels in Tier 2 countries linked explicitly to defense spending trajectory and capability investment, signaling that presence is a partnership.
3. **Structured Accountability:** Tier 2 allies placed in NATO working groups with Tier 1 peers on their specific shortfall areas, giving best-practice advice rather than relying solely on top-down US pressure.
4. **Ukraine Contribution Floors:** Tier 2 allies pressed to meet a minimum Ukraine military aid threshold as a condition of full partnership benefits.
5. **Explicit Upgrade Pathway:** Washington makes clear to each Tier 2 ally precisely what it would take to earn Tier 1 designation, creating a named and achievable timetable that gives governments a domestic political argument for higher contributions.

TIER 3

Lagging Allies

TIER 3

At A Glance

Tier 3 allies are the delinquents of the alliance. These countries still provide notable contributions that give reasons for membership, but their slacking demands a dramatic turnaround. Despite their commitments to NATO, Tier 3 allies actively undermine the alliance in one or more ways. These countries are usually content to free-ride off their European neighbors and make little concerted effort to take responsibility for their own defense. Some actively court NATO adversaries in Moscow and Beijing, while others undermine US operations that contribute to shared security interests. These partners need to understand the consequences of their free-riding and how it is to the detriment of the West's security.

CANADA

NATO Country Assessment

— TIER THREE —

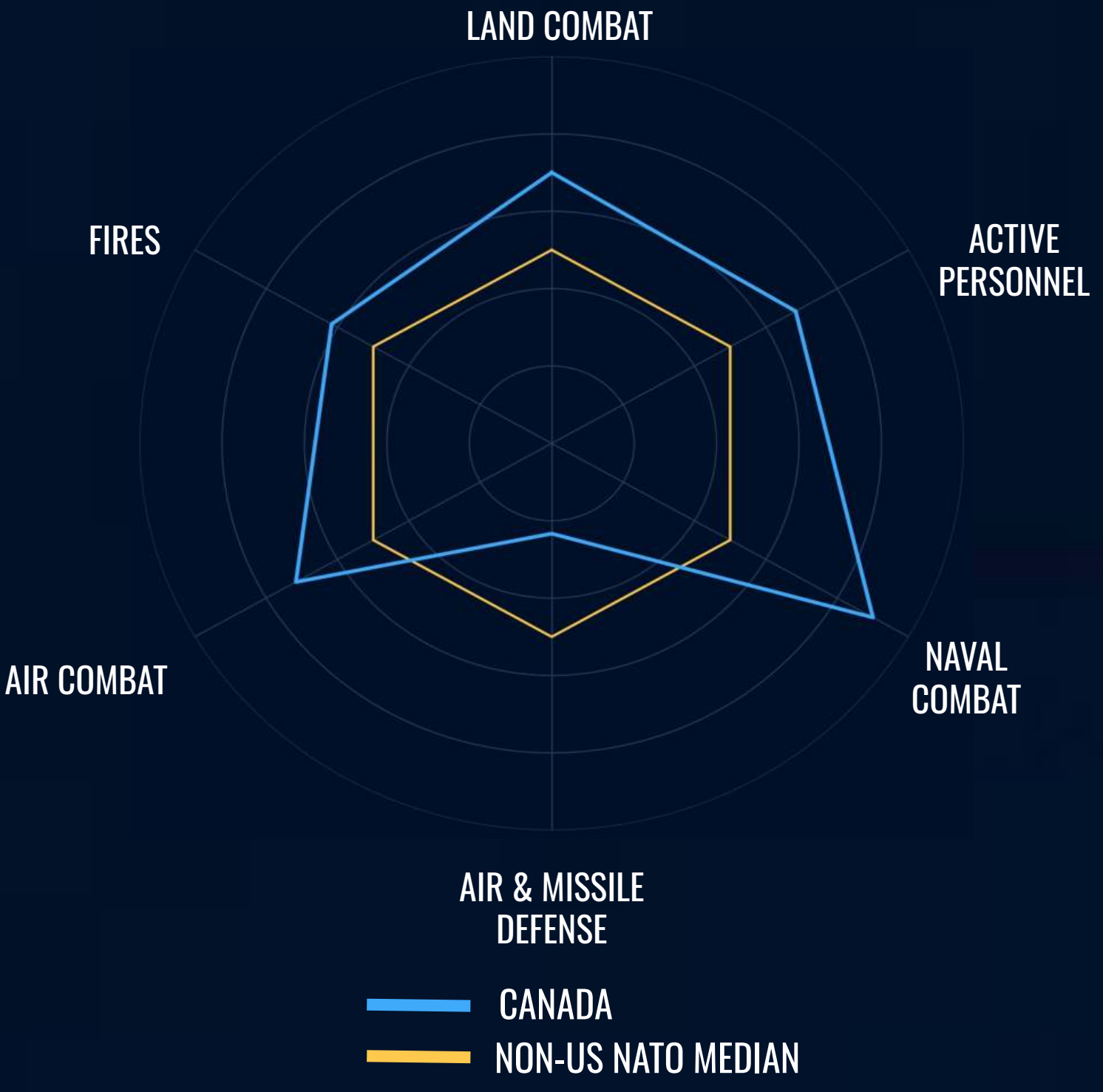
VOTERS DEMAND REARMAMENT • CHINA DELUSION • CHRONIC FREE-RIDER

AT A GLANCE

Toplines

- **The Canadian People Reject Carney's Weakness:** Public support for defense spending surged dramatically through 2025, with three in four Canadians now favoring increases and 72% backing the Hague 5% commitment.
- **Carney's Dangerous China Delusion:** Carney's January 2026 Beijing visit was explicitly framed as finding alternative partners to the US. Canada undermines NATO and our shared interests when it courts Beijing.
- **NATO's Wealthiest Chronic Free-Rider:** Canada is a G7 economy with the fifth-largest GDP in NATO that spent roughly 1.3% of GDP as recently as 2023, arriving at 2% only after decades of neglect while smaller and less wealthy allies carried the burden Canada refused to share.

FORCE STRUCTURE AT A GLANCE



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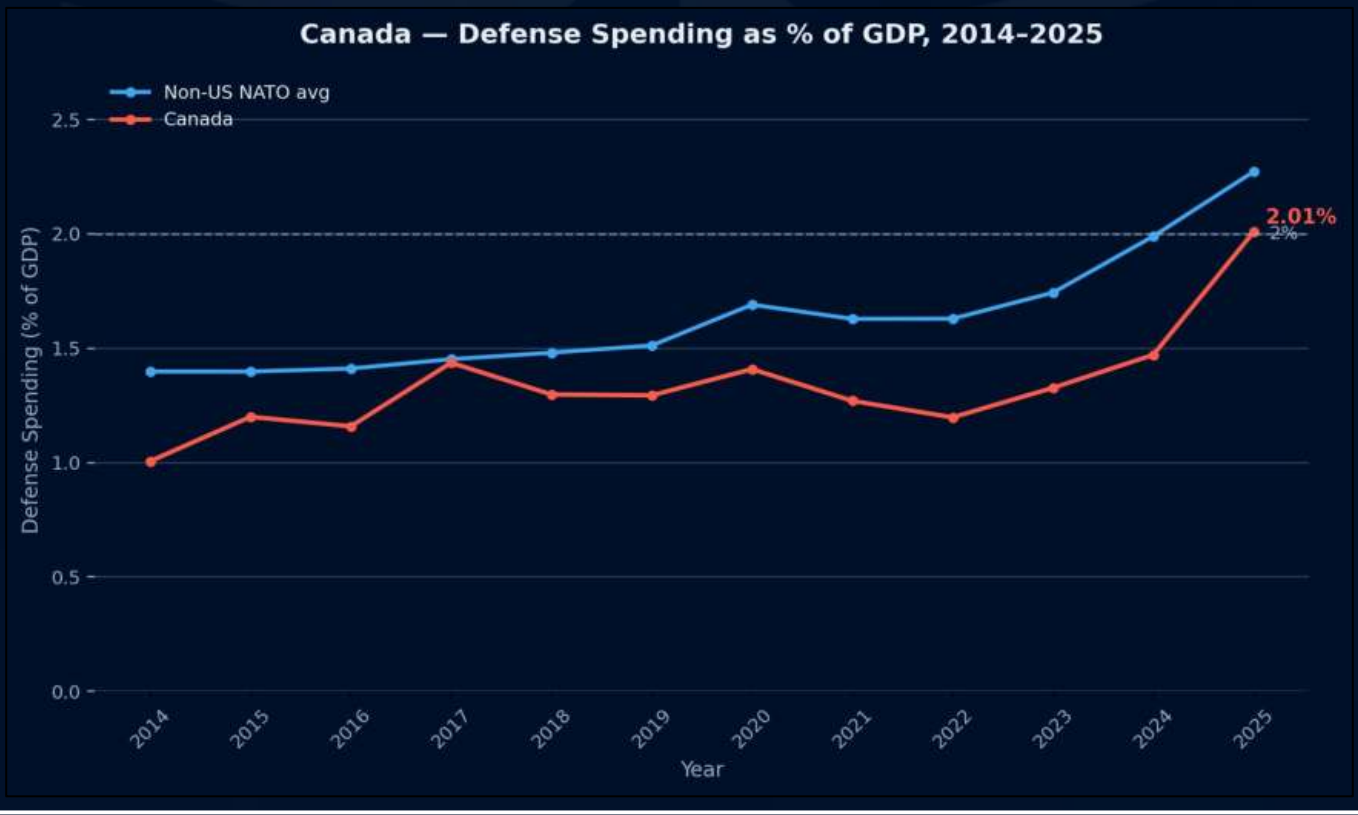
MILITARY CONTRIBUTIONS

Defense Spending Level

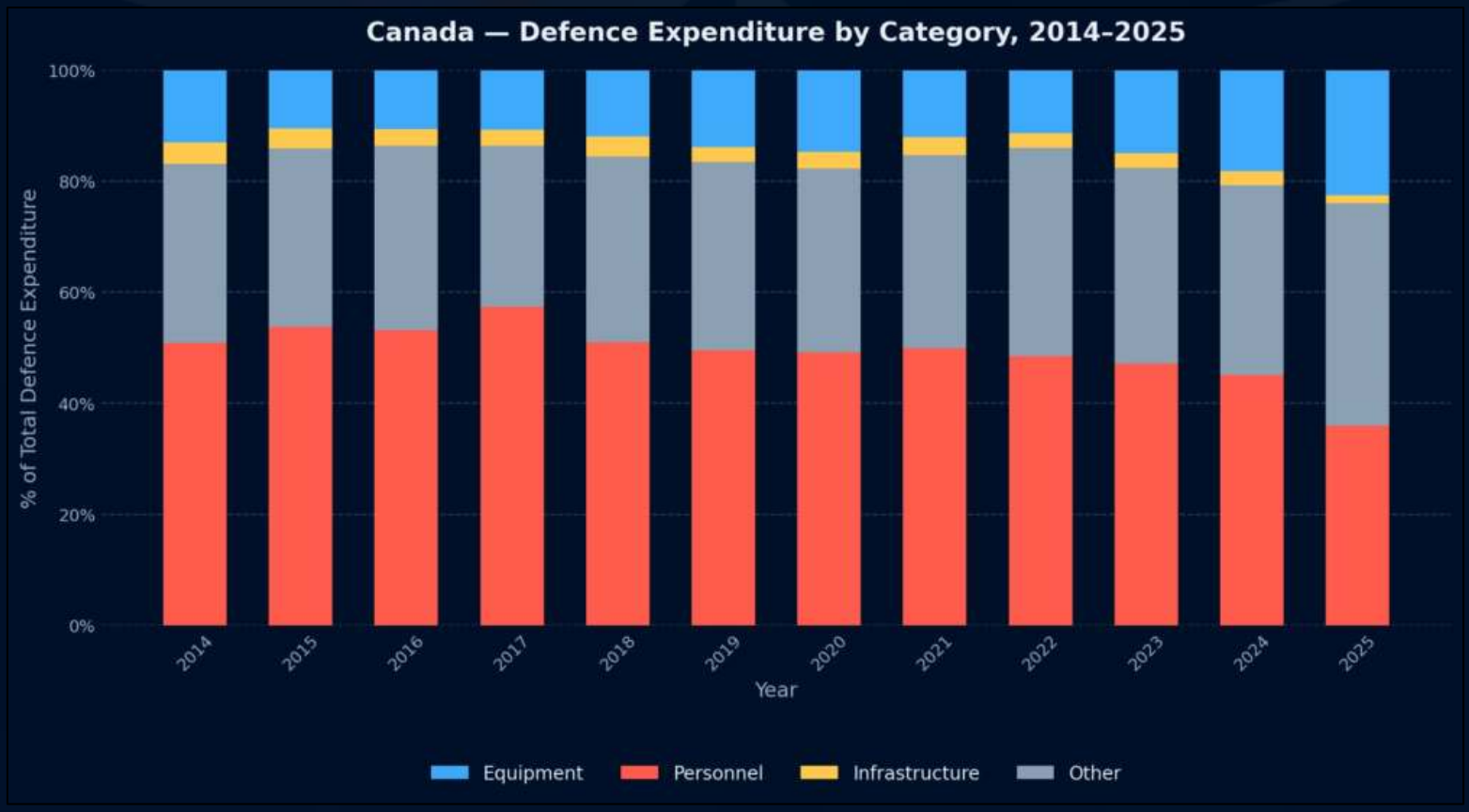
Canada's defense spending trajectory is the most embarrassing among major NATO allies relative to its wealth and global standing. NATO figures show Canada spending was among the alliance's lowest at approximately 1.3% of GDP in 2023, before the Carney government achieved the 2% benchmark for 2025–2026. Canada accepted the Hague framework commitment to 3.5% core defense plus 1.5% defense-related spending by 2035, but there is no credible fiscal framework for reaching 3.5%, let alone 5%. The spending jump to 2% is real but arrives after decades of consistent underinvestment by one of the alliance's wealthiest members, a G7 economy with the fifth-largest GDP in NATO. The strategic issue is consistency: Canada's new posture starts from a severely hollowed-out baseline and depends on sustained political will across a government that historically free-rides on other allies.



MILITARY CONTRIBUTIONS

Equipment Share

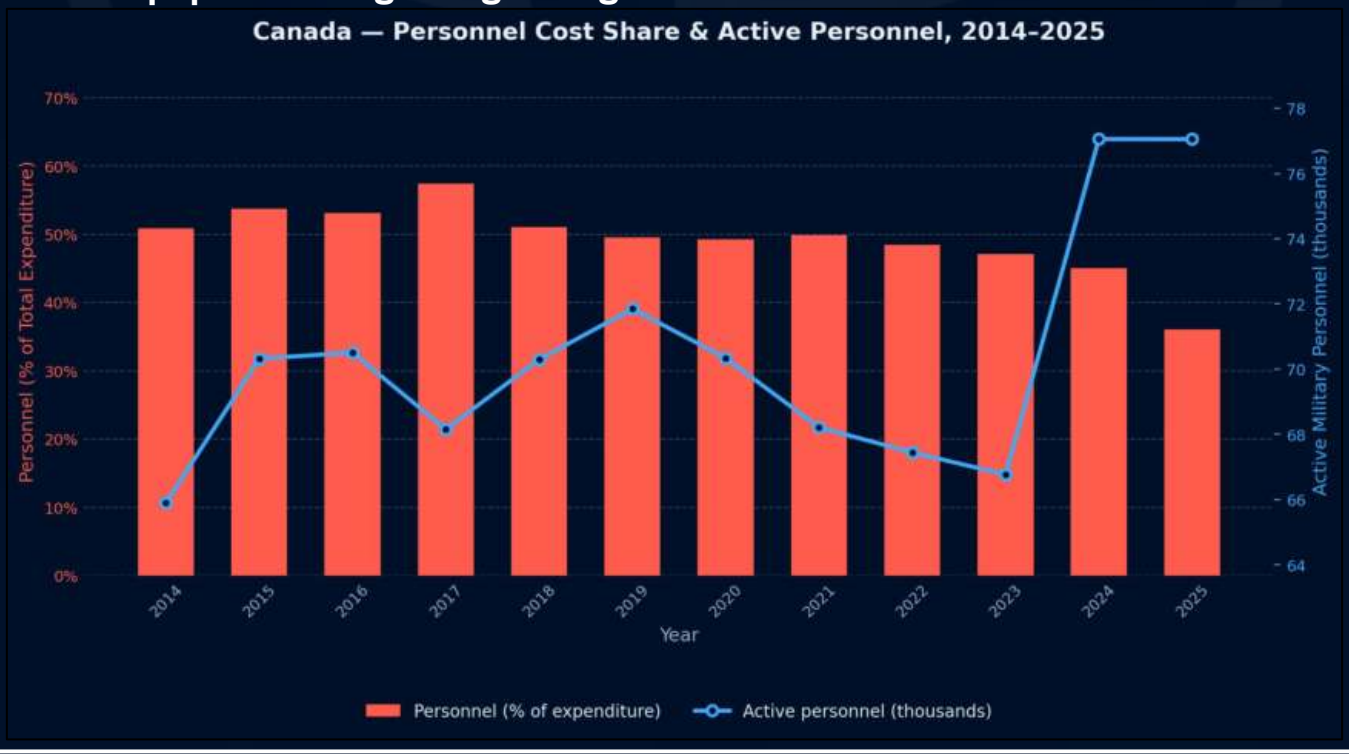
Canada's equipment share has risen meaningfully if slowly over the years. It reached the NATO target of roughly 20% of total defense expenditure in 2025. Personnel has fallen from roughly 50% in 2014 to approximately 36% in 2025, a genuine rebalancing. But the "Other" category (which includes procurement-adjacent and operational spending) has dominated the budget throughout, consistently running at 30-35%. The equipment gaps are severe across every service like the aging CF-18s, 1990s-era Halifax frigates, and outdated Arctic surveillance infrastructure, with the two dominant modernization programs, 88 F-35s and 15 surface combatants, both behind schedule and over budget. Equipment share is finally moving in the right direction, but the gap between contracted and delivered capability remains the defining Canadian defense story.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Canada's personnel picture shows a force trying to reverse a decade of decline. NATO data shows active personnel oscillating in the high-60s to low-70s through most of the decade before sliding to a low of 66,768 in 2023. The reversal since has been sharp: personnel jumped to 77,056 in 2024 and held flat at 77,054 in 2025, the steepest single-year move in the series. This tracks the most aggressive recruitment push in years: 6,706 recruits enrolled in 2024–2025, a 55% increase over the prior year and a 10-year peak. But net recruitment minus attrition (6,706 against 5,026 departures, a gain of roughly 1,700) doesn't obviously explain a 10,000+ jump in the NATO-reported total. Between April 2022 and March 2025, one in thirteen applicants made it through the recruitment pipeline, with more than half withdrawing within 60 days Attrition is also worsening, with 5,026 leaving in 2024–2025 versus 4,256 the year before. The personnel cost share is falling because the equipment budget is growing faster than the headcount.



MILITARY CONTRIBUTIONS

Capability Modernization

Canada's modernization program is serious but struggling to realize it. The headline programs: 88 F-35As contracted in 2023, 15 River-class surface combatants through Irving Shipbuilding (deliveries not expected until the 2030s, behind schedule), 12 new conventionally-powered submarines to replace four aging Victoria-class boats, and a $38.6B NORAD modernization plan covering Arctic radar, northern airfields, and space-based surveillance. The NORAD investment is Canada's most urgent because the existing North Warning System predates cruise and hypersonic missile threats entirely. As Canada attempts to make up for years of underinvestment, delivered capability lags commitment across every service.

MILITARY CONTRIBUTIONS

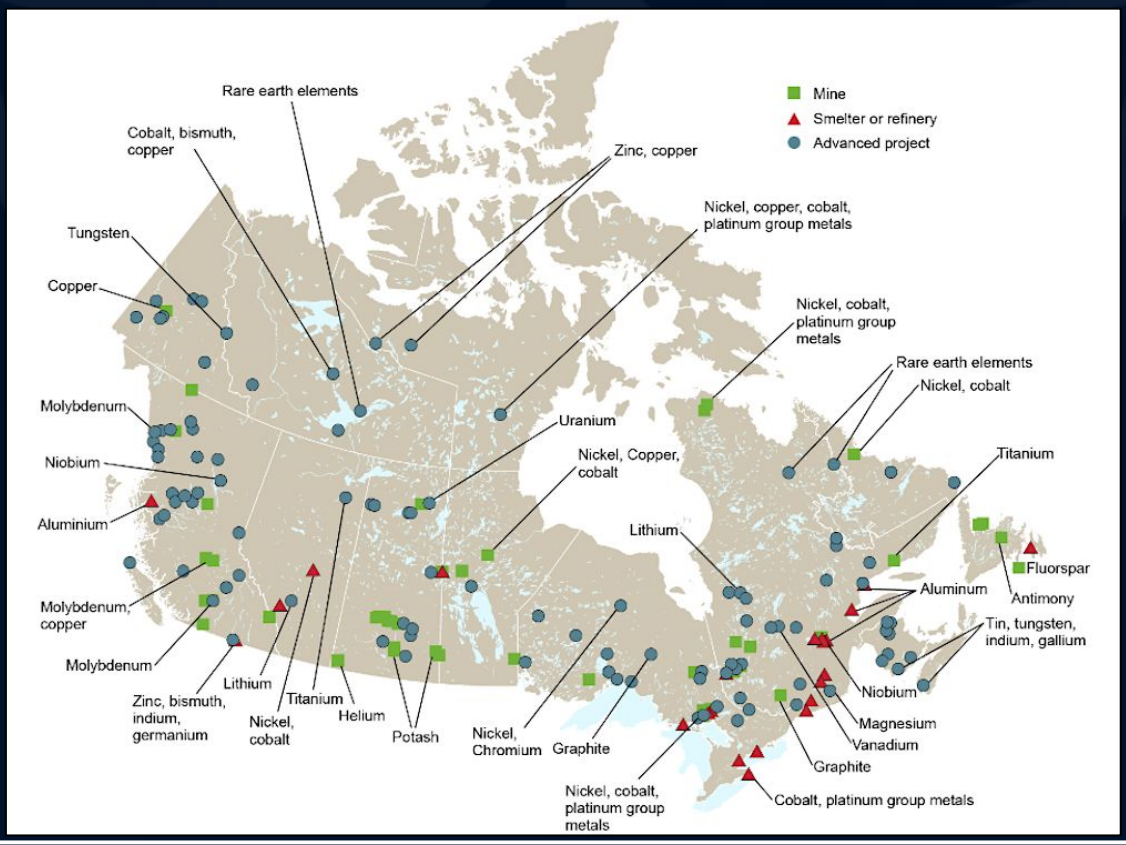
Force Posture

Canada's force posture rests on two unique contributions: NORAD bi-national command with the US and framework-nation leadership of NATO Multinational Brigade Latvia, with approximately 2,000 CAF personnel deployed under Operation Reassurance. The Latvia brigade achieved full multinational structure in October 2024 and conducted its first complete brigade exercise in November 2024. Operation Unifier deploys roughly 350 personnel training Ukrainian forces across the UK, Poland, and Latvia—the alliance's longest-running Ukraine training mission. The gaps are significant: NORAD's North Warning System is dangerously outdated, Arctic basing and sustainment infrastructure is weak relative to the threat, and Canada has no major permanent basing outside North America and Latvia.

MILITARY CONTRIBUTIONS

Industrial Base

Canada's defense industrial base has genuine strengths: Irving Shipbuilding building 15 River-class combatants, Magellan Aerospace manufacturing F-35 components, Pratt & Whitney Canada producing turbine engines. These companies are heavily integrated into the American defense industrial base. PM Carney has stated a goal of reducing US defense-industrial dependence, but this is political posture rather than structural reality. Canada's most strategically significant raw-material contribution is its critical minerals position: it holds major reserves of nickel, cobalt, lithium, and rare earth elements essential to batteries, electronics, and precision munitions—resources NATO increasingly needs to onshore. Munitions production capacity remains limited by European standards.



STRATEGIC ALIGNMENT

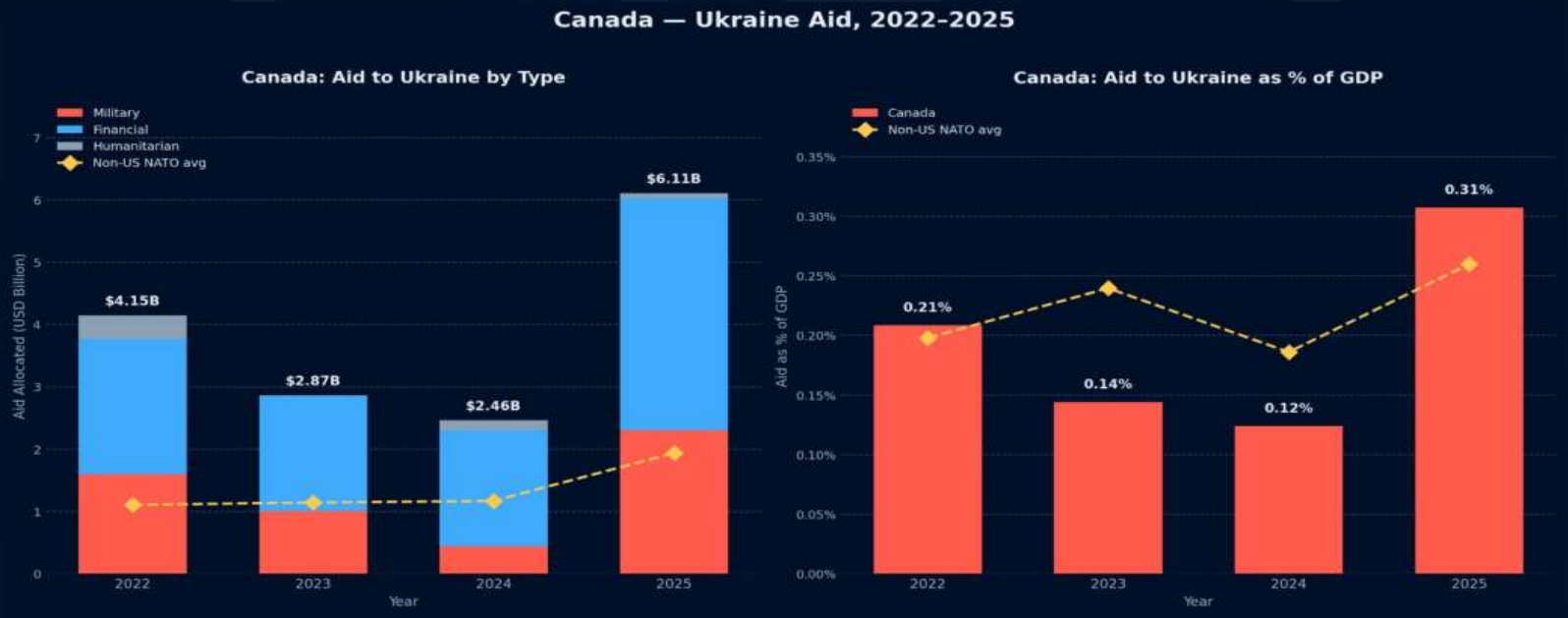
Declared Posture

Canada's declared posture is anchored in the April 2024 Our North, Strong and Free defense policy update and the $38.6B NORAD Modernization Plan announced in June 2022. On Russia, Canadian doctrine tracks NATO 2022 but frames the threat primarily through the Arctic and continental-defense lens. Highlighting increased Russian long-range aviation, cruise and hypersonic missile activity, and submarine presence in North American approach zones rather than European deterrence. On China, Canadian doctrine has hardened materially: the 2024 policy warns about Chinese dual-use research vessels in Canadian Arctic waters, Chinese disinformation and foreign interference targeting Northerners, and adversary interest in Arctic connectivity and infrastructure. Canada belatedly banned Huawei and ZTE from 5G in May 2022, and PM Carney's January 2026 China visit represents a dangerous delusion about where Canadian security lies. On Iran, Canada designated the IRGC as a terrorist entity in June 2024. Canada's posture is improving, but the gap between declared strategy and government action is inconsistent.

STRATEGIC ALIGNMENT

Ukraine Support

Canada's Ukraine aid picture shows a clear trend: support dropped from $4.15B in 2022 to $2.46B in 2024 before surging to $6.11B in 2025, driven overwhelmingly by financial aid rather than military transfers. As a share of GDP, Canada tracked below the non-US NATO average in 2023–2024 before recovering to 0.31% in 2025. Military aid has remained modest throughout (8 Leopard 2 tanks, one NASAMS battery, M777 howitzers, 200+ armored vehicles) trailing Nordic, Baltic, Polish, and Dutch peers in direct transfers. Canada's highest-value contributions are structural: Operation Unifier has trained 47,000+ Ukrainian personnel since 2015, the Air Task Force delivered 23M+ pounds of allied military aid by September 2024, and Canada has committed $8.5B in military assistance through 2029. The training and logistics architecture matters, but the weapons volume does not match Canada's wealth.



STRATEGIC ALIGNMENT

Russian Decoupling

Canada has no Russian energy exposure to decouple from and is a major net exporter of oil, gas, hydroelectricity, and uranium, with no Russian pipeline gas or Rosatom nuclear dependency. The decoupling challenge is Arctic and sanctions-based: Canada has supported every G7 Russia sanctions package, added 100 shadow-fleet vessel designations in early 2026, and is active on oil price-cap enforcement.

STRATEGIC ALIGNMENT

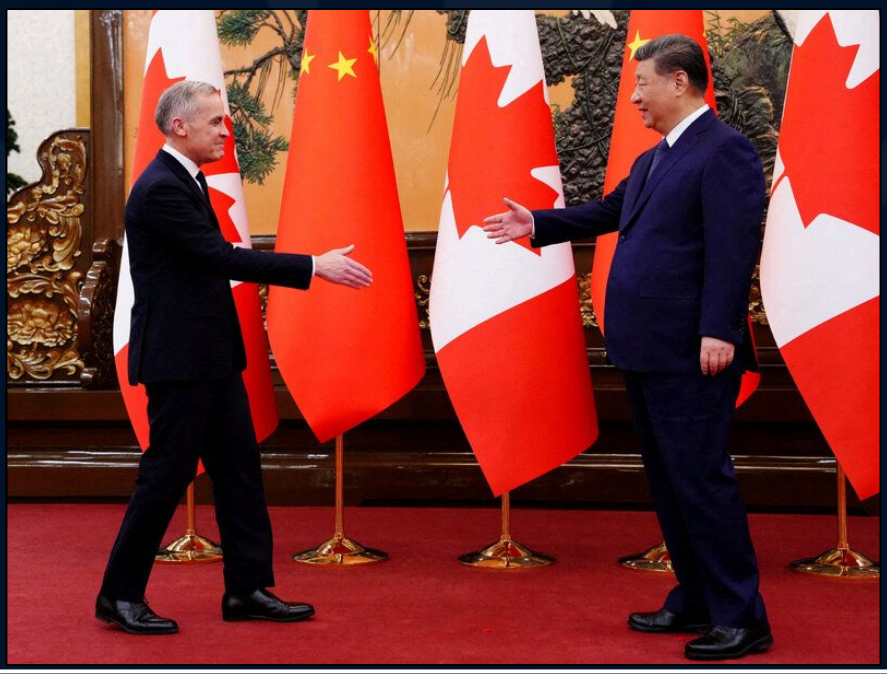
Public Support & Political Resilience

In the 2024 NATO survey, 72% of Canadians said they would vote to stay in NATO, 63% agreed Canada should defend another NATO ally if attacked, and around 67% supported continuing to provide Ukraine assistance. Thirty-nine percent favored increased defense spending in 2024, a figure that rose sharply through 2025 as US conditionality around Article 5 sharpened public threat perception, with 2025 Nanos polling showing three in four Canadians want to increase defense spending alongside growing support for European and NATO alignment. Prime Minister Carney's Liberal government met the 2% GDP target and pledged 5% by 2035 at the Hague summit, with EKOS polling in 2026 finding 72% supporting the five percent commitment. The Conservative Party under Poilievre is staunchly pro-NATO on spending, while the NDP remains lukewarm on defense spending increases.

STRATEGIC ALIGNMENT

Hedging Behavior

Canada's hedging behavior record is increasingly delusional. The positives are real: no BRI participation, no adversary arms procurement, no Moscow or Tehran engagement, Western-only procurement across F-35, P-8A, NASAMS, and River-class combatants. But the negatives are also worrying. Canada was the last Five Eyes member to ban Huawei from 5G (four years after Australia) with Chinese-linked Arctic infrastructure interest already a documented concern before Ottawa finally acted. Carney's declaration for strategic autonomy only weakens NATO and is a gift to autocrats in Moscow, Beijing, and Tehran. Carney's January 2026 Beijing visit, explicitly framed as reducing US dependence and finding alternative partners, emboldens China at exactly the moment NATO allies are hardening against Beijing. China can never be a fair partner and pursuing that relationship only opens up Canada to a predatory aggressor. For an ally with Arctic sovereignty responsibilities and critical minerals China actively covets, the direction Carney is pointing is a genuine concern, not just an ambiguity.



STRATEGIC ALIGNMENT

Operational Cooperation

Canada has a long track record of supporting US-led operations—contributing 40,000 troops to Afghanistan under ISAF and to coalition operations in Iraq—and maintains the alliance's most integrated bilateral defense relationship with the United States through NORAD. The Latvia framework-nation role is Canada's major European contribution, with approximately 2,000 CAF personnel deployed and a full multinational brigade structure achieved in October 2024. On recent US operations, Canada's posture has been more cautious. Carney did not join Operation Epic Fury and has been disappointingly unfair in his criticisms of US military actions to maintain security in the Red Sea and Venezuela. Canada did not participate in Operation Prosperity Guardian or EU Operation Aspides. The operational picture is a country that has been a reliable US partner historically but is now navigating a more arms-length relationship with Washington under Carney, concentrated on continental defense and NATO's eastern front rather than expeditionary operations alongside the US.

HUNGARY

NATO Country Assessment

— TIER THREE —

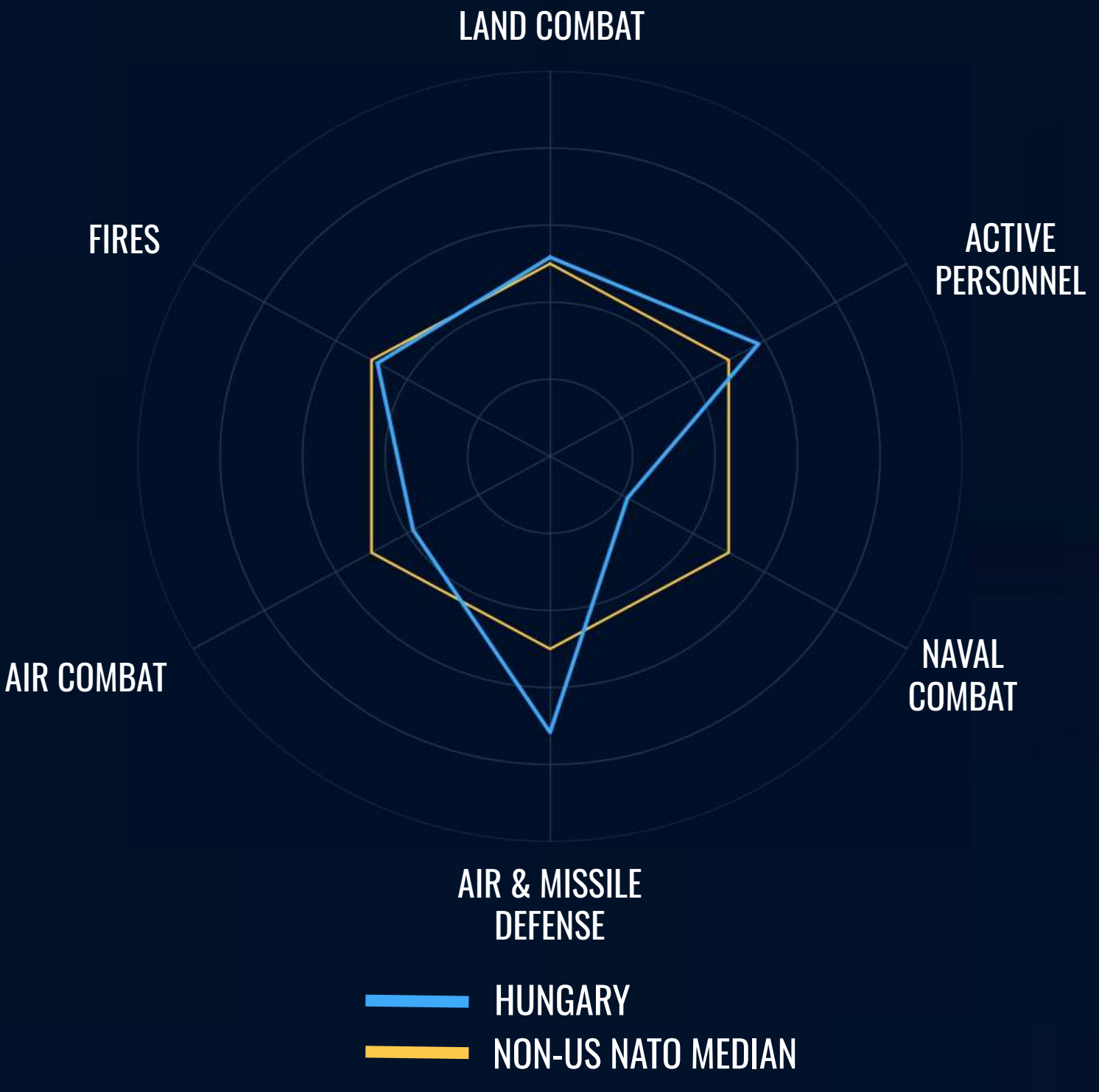
MODERNIZING MILITARY • WEAK UKRAINE SUPPORT • RUSSIAN GAS SPENDER

AT A GLANCE

Toplines

- **Modernizing For a New Era of Warfare:** The Zrínyi 2026 defense modernization program is genuinely impressive: 44 Leopard tanks, 218 infantry vehicles, 24 howitzers, and 14 NASAMS III launchers represent a real shift from legacy Soviet platforms to modern capability.
- **Failing to Take Responsibility for European Security:** Hungary's Ukraine aid record is the worst in the alliance by every measure with zero military aid across the entire war, early blocking of weapons transit through Hungarian territory, and vetoes on billions of dollars in EU assistance.
- **Funding the Russian Warmachine:** Hungary is NATO's worst Russian energy decoupling case with Russian crude imports actually increasing to 49% after the invasion, pipeline gas imports reaching post-invasion highs in 2025, and initiating construction on a new Russian nuclear project in Hungarian territory. Rather than sourcing from American or allied countries, Hungary has opted to pay Russia billions of dollars in energy imports.

FORCE STRUCTURE AT A GLANCE

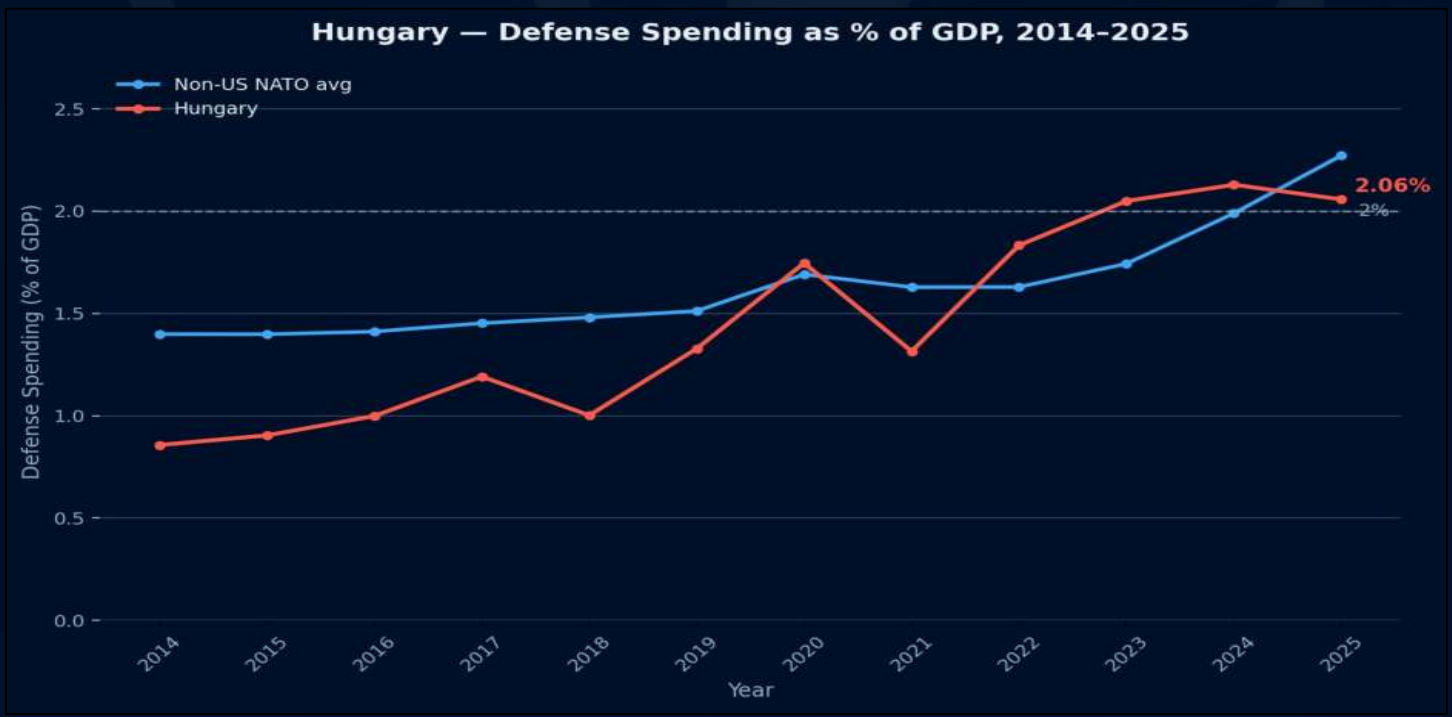


This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

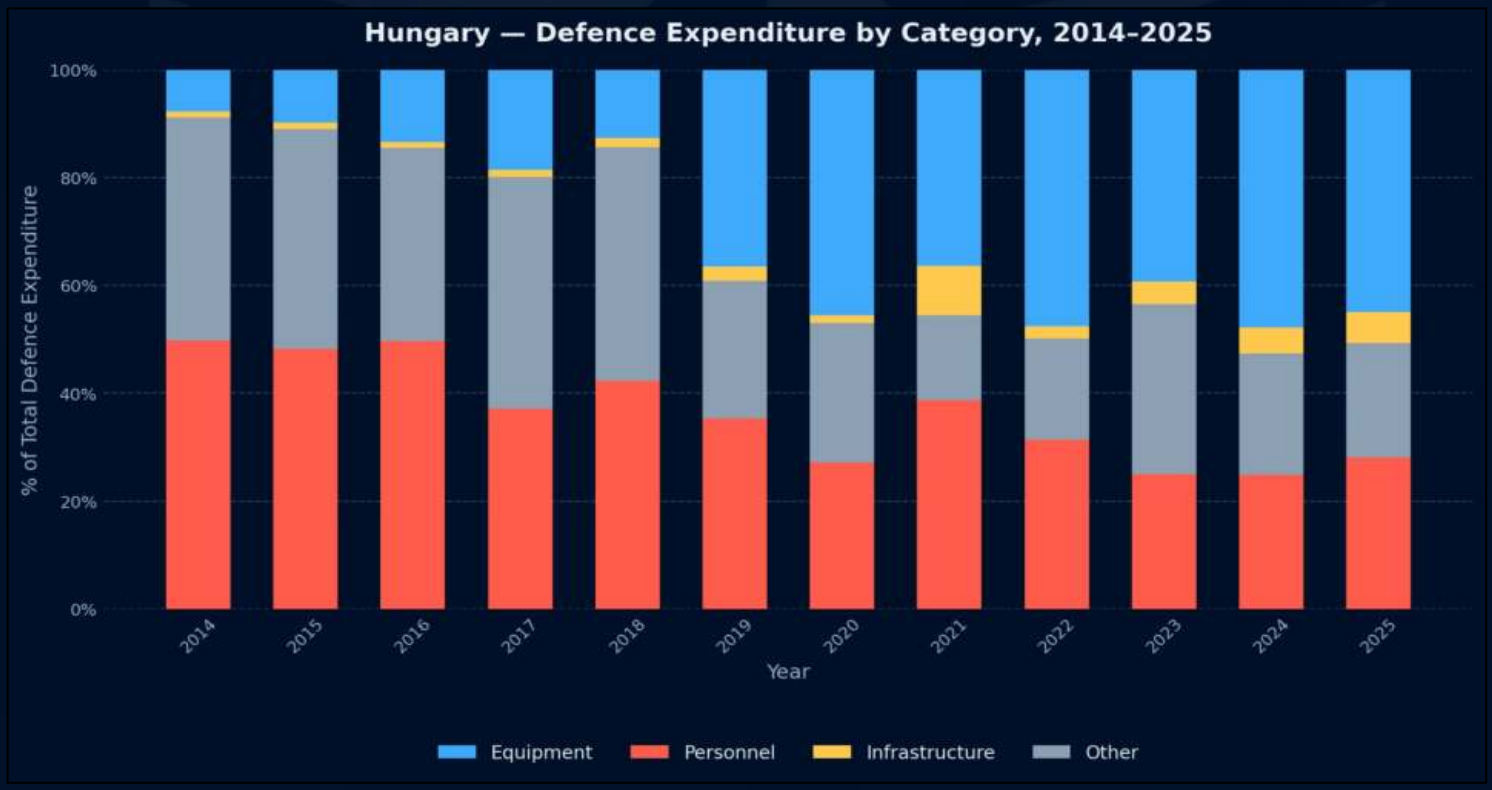
Hungary spent below 1% of GDP on defense as recently as 2018—one of the worst records in the alliance—before a belated acceleration brought it to roughly 2.1% by 2023. Hungary's spending is well below the non-US NATO average for most of the past decade, only converging with it in 2022-2024. Under Orbán, the trajectory then reversed: Hungary's 2025 defense budget fell roughly 2.3% in nominal terms, making it one of the very few NATO allies to cut spending in the year the alliance agreed to move toward 5% of GDP. Orbán ultimately agreed to the Hague 3.5%+1.5% framework, but was quick to declare it non-binding. The April 2026 Magyar-Tisza election landslide changes the political environment—Tisza has pledged to restore Western trust—but no full defense spending commitment has been published. The April 2026 Vance visit and $700M HIMARS announcement signal a new US-Hungary direction, but Hungary's spending trajectory remains below alliance goals and Magya's fiscal commitment is undefined.



MILITARY CONTRIBUTIONS

Equipment Share

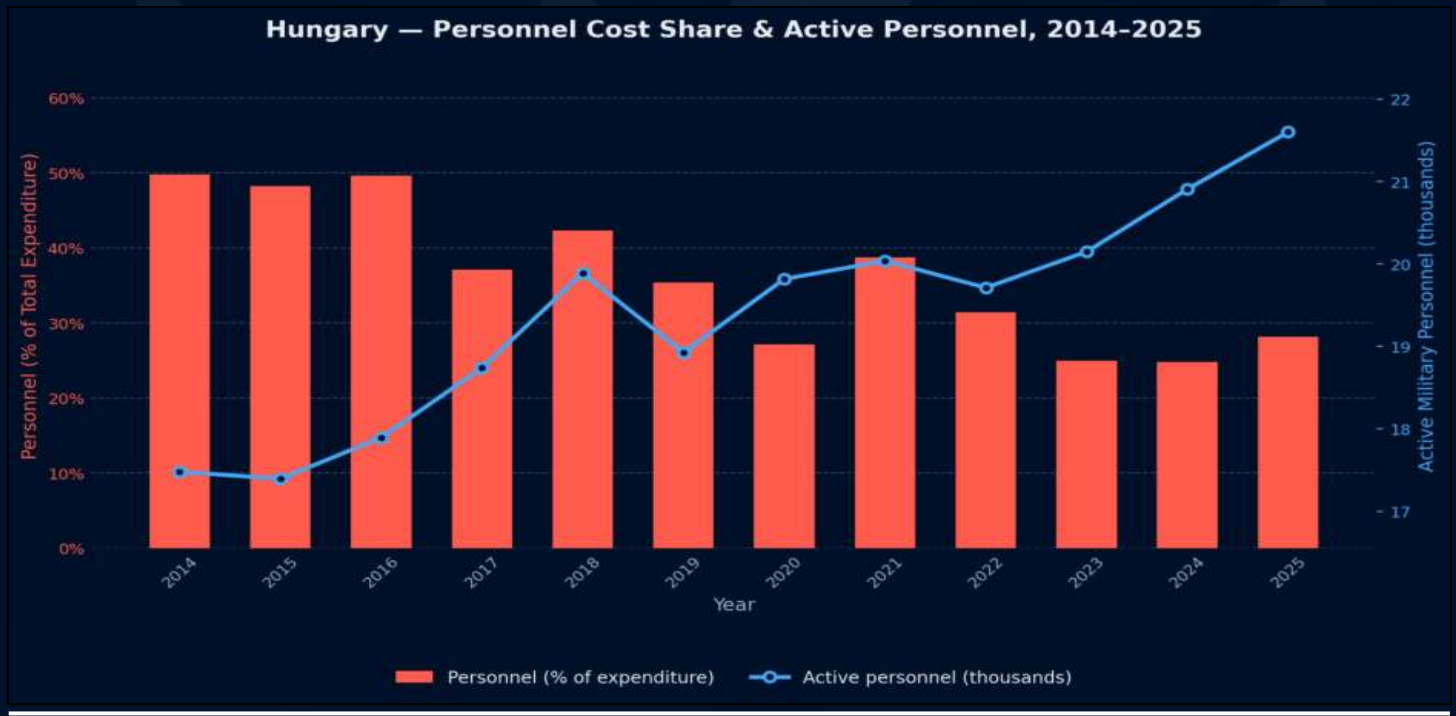
Hungary's equipment share transformation is notable. Personnel costs fell from roughly 50% in 2014 to approximately 28% in 2025, while equipment surged to roughly 45%+. This surge is driven by the Zrínyi 2026 program simultaneously delivering 44 Leopard 2A7HU tanks, 218 KF41 Lynx IFVs (~€2B), 24 PzH 2000 howitzers, 14 NASAMS III launchers, and H225M helicopters. The April 2026 HIMARS announcement adds Hungary's first long-range precision strike capability. The Rheinmetall Zalaegerszeg factory producing Lynx IFVs domestically adds industrial depth. Equipment share is rising rapidly from a very low baseline, but the combat air gap and the 2025 spending plateau are real concerns.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Hungary's personnel picture shows a force that is both growing and becoming cheaper relative to the overall budget. Active military personnel has grown from roughly 17,500 in 2014 to approximately 21,500 by 2025 (a 23% increase) while personnel's share of the defense budget fell from roughly 50% to approximately 28% over the same period. The combination is the right direction: more soldiers consuming less of the budget as equipment investment dominates. The Zrínyi 2026 program has driven professionalization alongside modernization: Hungary moved from a conscript-to-volunteer force and has been expanding recruitment targets. The concern is scale: at roughly 21,500 active personnel, Hungary's force remains small for a country of 10 million on NATO's eastern front, and the 2025 spending plateau raises questions about whether the personnel growth trajectory can be sustained alongside the equipment programs already contracted.



MILITARY CONTRIBUTIONS

Capability Modernization

Hungary's modernization under Zrínyi 2026 has been genuine and in several domains impressive. On armor, 44 Leopard 2A7HU tanks and 218 KF41 Lynx IFVs—with 45 delivered and domestic production underway at the Rheinmetall Zalaegerszeg plant—represent a real generational upgrade from Soviet-era T-72s and BMPs. On artillery, 24 PzH 2000 howitzers provide NATO-standard fires, with the April 2026 $700M HIMARS procurement adding Hungary's first long-range precision strike capability. On air defense, 14 NASAMS III launchers provide meaningful medium-range coverage. The critical gap is combat air: 14 Gripen C/Ds leased from Sweden is NATO's smallest modern fighter fleet, with just 4 contributing to Baltic Air Policing as Hungary's primary NATO air contribution. No replacement program has been announced. The Magyar government has not yet published a modernization roadmap for the next investment cycle.

MILITARY CONTRIBUTIONS

Force Posture

Hungary serves as a framework nation for NATO's Multinational Battlegroup Hungary—one of four eastern-front battlegroups established at the 2022 Madrid Summit. Hungary's largest deployed mission is 469 troops in KFOR Kosovo, where it has contributed continuously since 1999 and held the KFOR Command position in 2021-2022. Hungary contributes 165 troops to EUFOR in Bosnia-Herzegovina. Hungary hosts no permanent US military installations—reflecting limited US-Hungary defense integration under Orbán—though the April 2026 HIMARS package and Vance visit signal a new direction. The force is configured primarily for territorial defense with limited expeditionary capacity. Four Gripens contributing to Baltic Air Policing is Hungary's primary NATO air contribution, constrained by the fleet's small size.

MILITARY CONTRIBUTIONS

Industrial Base

Hungary's defense industrial base is developing through joint ventures with partner nations rather than sovereign capacity. The Rheinmetall Zalaegerszeg factory, opened in 2023, is the most significant asset: producing KF41 Lynx IFVs domestically and potentially serving as a regional production node. April 2026 partnerships with L3 Harris and Northrop Grumman through the 4iG Group add secure communications and satellite cooperation, signaling a new US-oriented industrial direction under Magyar. On raw materials, Hungary holds bauxite deposits and has historically been a significant aluminum producer. The most significant industrial complication is Hungary's Chinese EV and battery manufacturing footprint: CATL, BYD, EVE Energy, Nio, and Huawei infrastructure represent the deepest Chinese industrial penetration of any NATO state, creating dual-use, counterintelligence, and supply-chain security concerns that persist regardless of which government is in power.

STRATEGIC ALIGNMENT

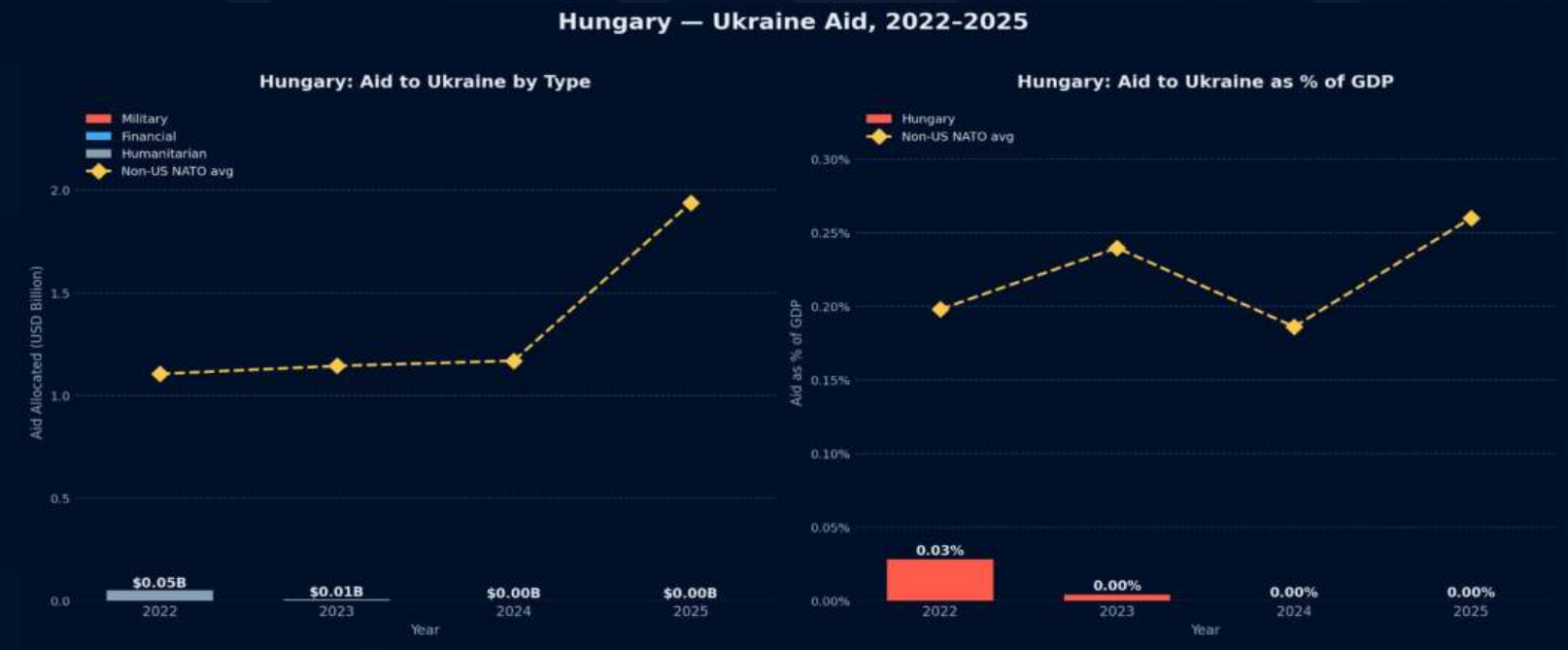
Declared Posture

Hungary's declared posture was the weakest in the alliance under Orbán. The 2020 National Security Strategy explicitly called for "pragmatic development of Hungarian-Russian relations and economic cooperation" and described China as a civilizational center rather than a strategic challenge. The April 2026 Magyar-Tisza election win with 53.18% of the vote and 141 of 199 parliamentary seats, clearing the two-thirds constitutional threshold, is the transformative event. The open questions are pace and depth: Tisza has pledged to reduce Russian energy dependence by 2035 and review Paks II, but remains cautious on direct Ukraine military aid. The 2020 doctrine documents have not yet been replaced. Hungary's declared posture is in transition from the worst in the alliance toward something approaching standard NATO positions—but new strategy documents reflecting the post-2022 security environment have not yet been published.

STRATEGIC ALIGNMENT

Ukraine Support

Hungary's Ukraine aid data is stark: $0.05B in 2022 (0.03% of GDP), dropping to $0.01B in 2023, and zero in 2024 and 2025—entirely humanitarian, with zero military aid across the entire period. Kiel tracks just €0.054B total, the worst record in the alliance by every measure. Under Orbán, Hungary refused to send weapons from Hungarian stocks, blocked weapons transfers through Hungarian territory, and vetoed approximately $7.6B in EU aid to Ukraine including sanctions packages, European Peace Facility reimbursements, and a €90B EU loan. Hungary was the only EU member state to refuse to sign the March 2025 Council conclusions on continued Ukraine support. The April 2026 Magyar transition ended active obstruction—vetoes were lifted and EU tracks unblocked—but Tisza remains cautious on bilateral military aid. Hungary's Ukraine support remains lacking, and any weapons have yet to come from Budapest.



STRATEGIC ALIGNMENT

Russian Decoupling

Hungary is the worst Russian energy decoupling case in NATO. Russia supplied the vast majority of Hungarian crude before 2022 and continued to do so after: Hungarian Russian crude imports actually increased 49% from 3.4M tons in 2021 to 5M tons in 2022, with cumulative imports reaching 13.5M tons worth €6.3B through end-2024. Russian pipeline gas imports reached post-invasion highs in 2025. Paks II—the only active Russian Rosatom nuclear construction project in Europe—poured first concrete in February 2026, representing a multi-decade Russian nuclear infrastructure commitment on NATO territory. Hungary's own national oil company (MOL), admitted in November 2025 that roughly 80% of its crude demand could be met through other nations, directly undermining years of government claims that Hungary had no viable alternative to Russian oil. The Magyar transition opened a new pathway: MOL purchased 510,000 tons of US crude, Westinghouse signed MOUs for Paks 1 fuel and lifetime extension, and Tisza pledged to end Russian energy dependence by 2035. Paks II review is underway without a cancellation commitment. Hungary was the most active EU sanctions obstructor from the 12th package forward—a record that ends under Magyar but is not erased by it.

STRATEGIC ALIGNMENT

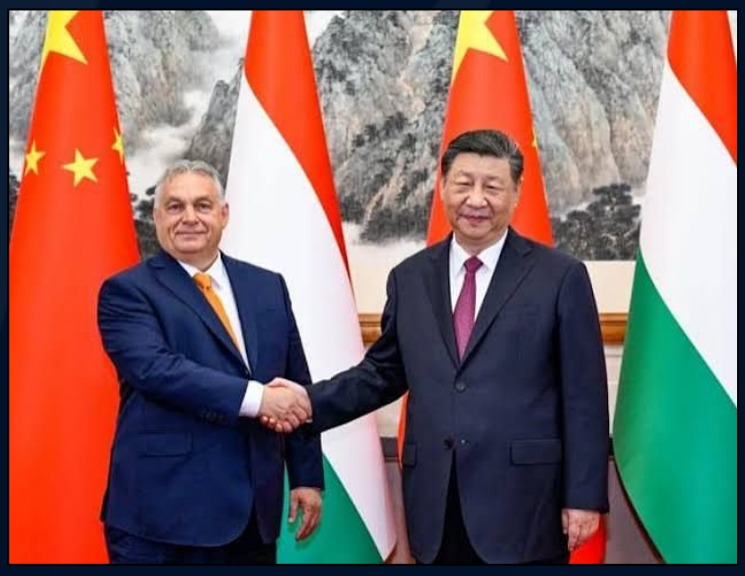
Public Support & Political Resilience

Hungary recorded 76% for staying in NATO in 2024, 51% willing to defend another ally, and Ukraine support was among the weakest in the alliance at around 41%, consistent with twelve years of governing policy that actively framed the war as a Western provocation. Sixty-eight percent agreed NATO membership makes a foreign attack less likely, but concern about war in NATO countries was among the alliance's lowest. The TISZA party (Péter Magyar) won the 2026 parliamentary elections, ending Orbán's tenure, and is strongly pro-NATO, representing a potentially significant strategic reorientation for Budapest. Fidesz, now in opposition, spent twelve years using NATO membership as a blocking tool against Ukraine aid, sanctions consensus, and alliance solidarity, and will likely continue this role from opposition. Public opinion on Ukraine support remains mixed by Central European standards, meaning the new government will face domestic friction in rapidly closing Hungary's credibility gap with NATO partners.

STRATEGIC ALIGNMENT

Hedging Behavior

Hungary is one of the most counter-aligned NATO allies across nearly every dimension, a direction the new government might change. On China, Hungary is the most BRI-integrated EU state: first EU member to sign a BRI MoU in 2015, the only EU leader at China's 2023 Belt and Road Forum, $16B in Chinese FDI since 2010, 62% of all Chinese EV-related investment into Europe by 2024, CATL's $7.8B Debrecen gigafactory in production, BYD plants in Szeged and Komárom, a Huawei European logistics hub, and the China-financed Budapest-Belgrade railway linking to COSCO-controlled Piraeus. Huawei has not been meaningfully restricted from Hungarian 5G infrastructure. On Moscow, Orbán's July 2024 Kremlin visit during the EU Council presidency was unprecedented among allied heads of government. On arms, Hungary purchased Russian Mi-24 helicopters that were later modernized further in Russia, rather than a NATO ally. The April 2026 Magyar election changed the political posture, but the Chinese industrial footprint, Paks II construction, and Huawei infrastructure are built into running factories and signed contracts that no government can quickly unwind.



STRATEGIC ALIGNMENT

Operational Cooperation

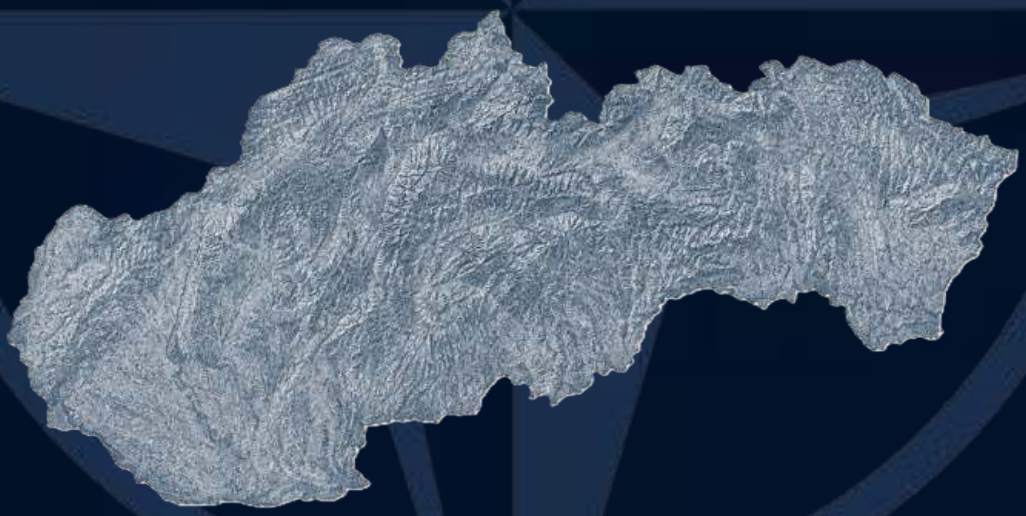
Hungary's operational cooperation record is defined by active obstruction under Orbán, and a new trajectory under Magyar that is only beginning to take shape. Hungary contributed forces to Afghanistan under ISAF and participated in coalition operations in Iraq, demonstrating early allied commitment before the Orbán-era political deterioration. Since then, the operational record has been mixed. Hungary serves as framework nation for NATO Multinational Battlegroup Hungary with US, Italian, Croatian, and Turkish contributors, and has maintained continuous KFOR contributions since 1999 including a KFOR Commander rotation in 2021-2022. On Ukraine, Hungary was the only NATO ally to actively obstruct military assistance and block weapons transit through its territory. On recent US operations, Hungary did not contribute to Operation Aspides, Operation Prosperity Guardian, or Operation Epic Fury, reflecting both limited naval capacity and political reluctance to participate in operations that could antagonize Russia or Iran. The April 2026 Magyar transition changes the trajectory: the $700M HIMARS package represents Hungary's first long-range precision strike capability and a qualitative step toward US defense integration, and the Rheinmetall Zalaegerszeg plant provides a persistent Central European production contribution regardless of government. The Magyar transition is real, but the record cannot be erased.

SLOVAKIA

NATO Country Assessment

— TIER THREE —

EARLY UKRAINE DONOR • ACTIVE COUNTER-ALIGNMENT • POOR SPENDER

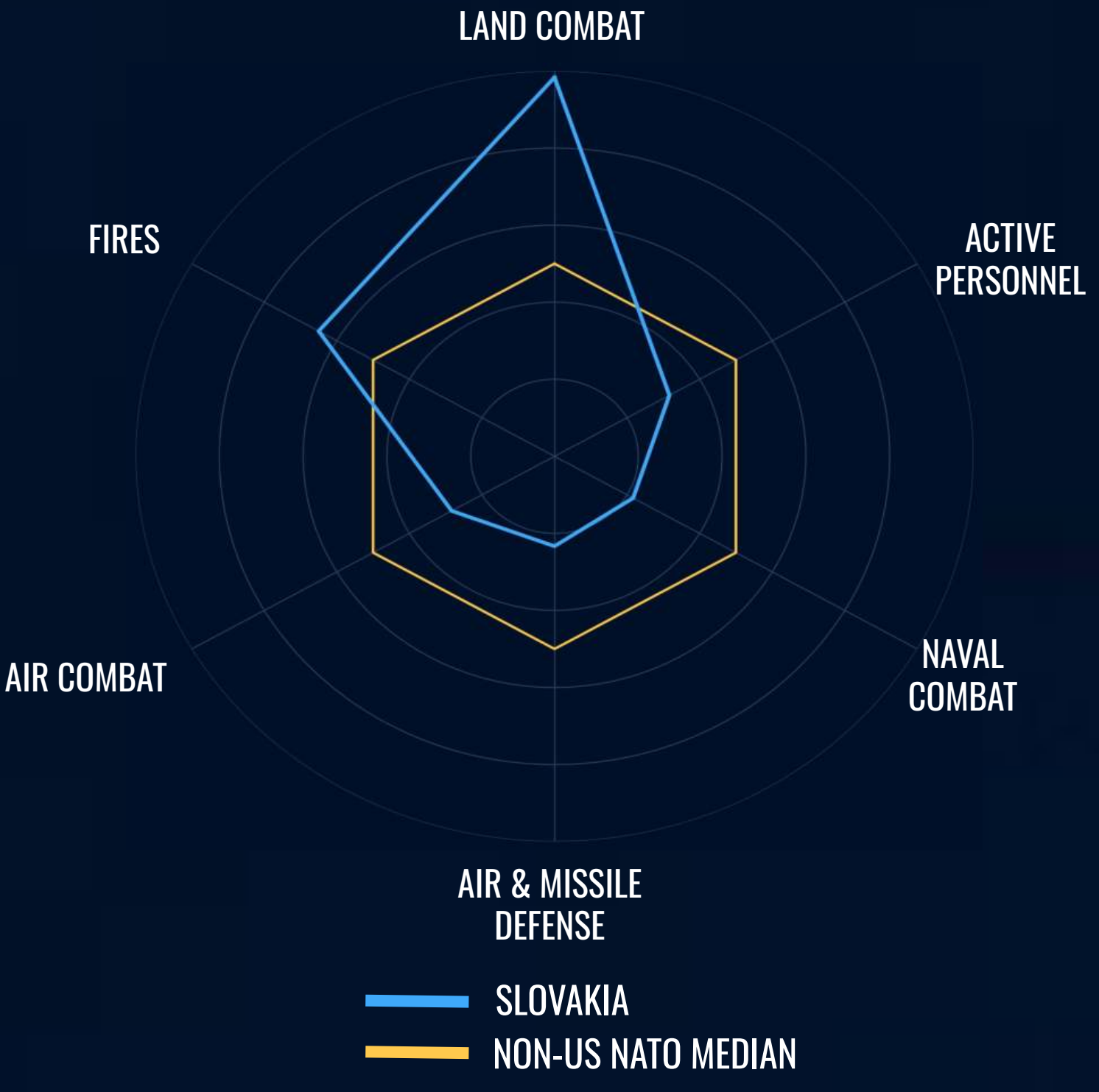


AT A GLANCE

Toplines

- **An early Proactive Supplier of European Defense:** Slovakia transferred the S-300 air defense system, 13 MiG-29s, and Zuzana-2 howitzers which were among the most significant early-war transfers by any ally.
- **Actively Aligning Against NATO and the US:** Prime Minister Fico represents the alliance's most extreme case of undermining NATO solidarity by attending the 2025 Moscow Victory Day as the only EU head of government, appearing alongside Vladimir Putin, Kim Jong Un, and Xi Jinping at China's Victory Day in September 2025, and returning to the Kremlin for bilateral meetings while simultaneously blocking Ukraine aid and threatening EU sanctions packages.
- **Skimping on Spending While Others Foot the Bill:** Slovakia's 2% defense spending figure is contested with critics putting current spending closer to 1.74% after removing dual-use hospital classifications. Additionally, Fico dismissed the Hague 3.5% framework as "absolutely absurd" while refusing to commit to any target date.

FORCE STRUCTURE AT A GLANCE



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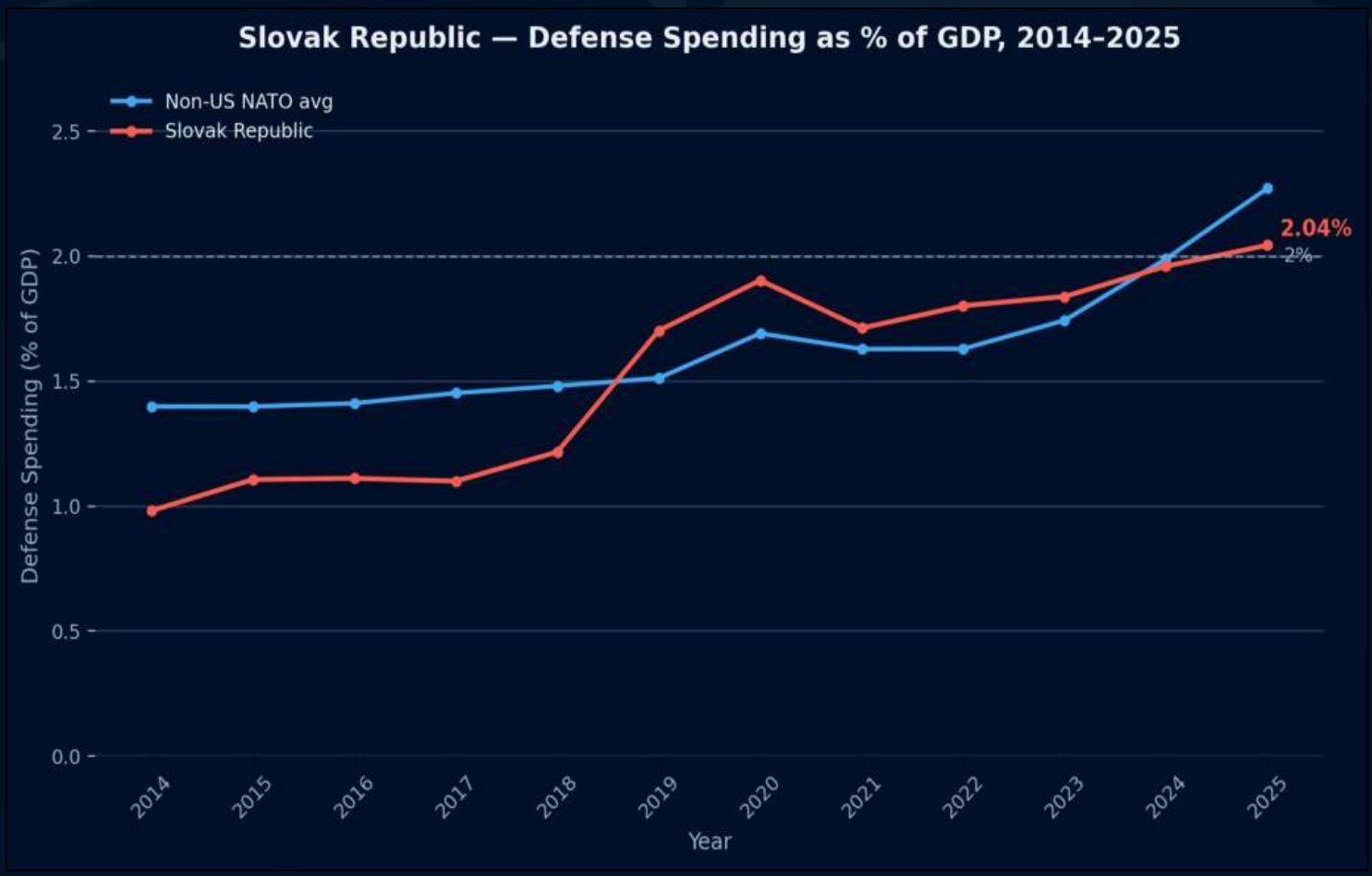
MILITARY CONTRIBUTIONS

Defense Spending Level

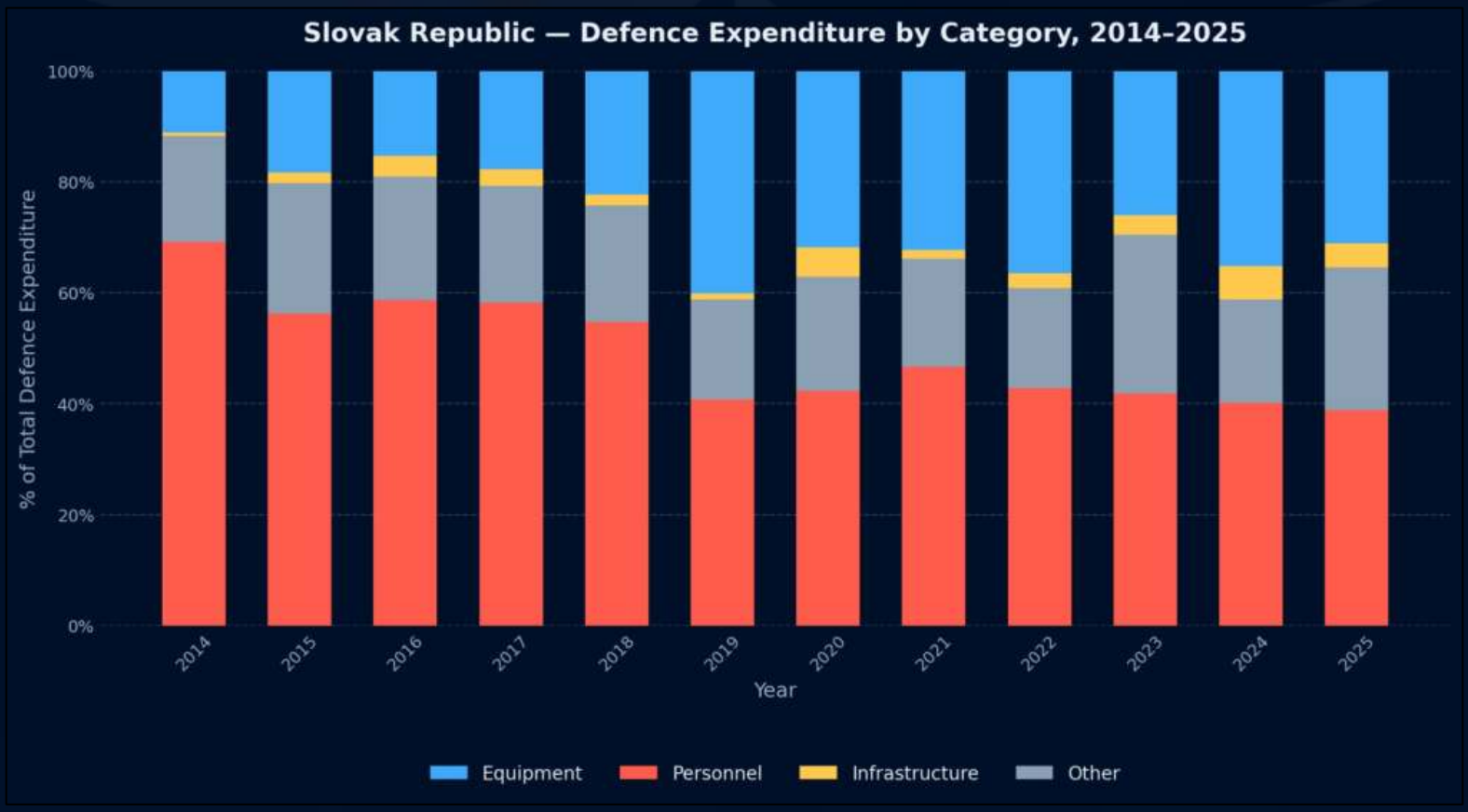
Slovakia's defense spending has relatively improved since 2018. Slovakia reached 2.04% of GDP in 2025, nominally meeting the NATO floor. The figure is contested: critics argue that without dual-use hospital classifications covering roughly 35% of the military equipment budget, actual defense spending would be closer to 1.74% by NATO methodology. While Slovakia eventually signed the 3.5%+1.5% Hague framework, Fico dismissed it as "absolutely absurd" and refused to promise to meet the 2035 target date. The trajectory has shifted from convergence to defiance precisely when the alliance is accelerating.



MILITARY CONTRIBUTIONS

Equipment Share

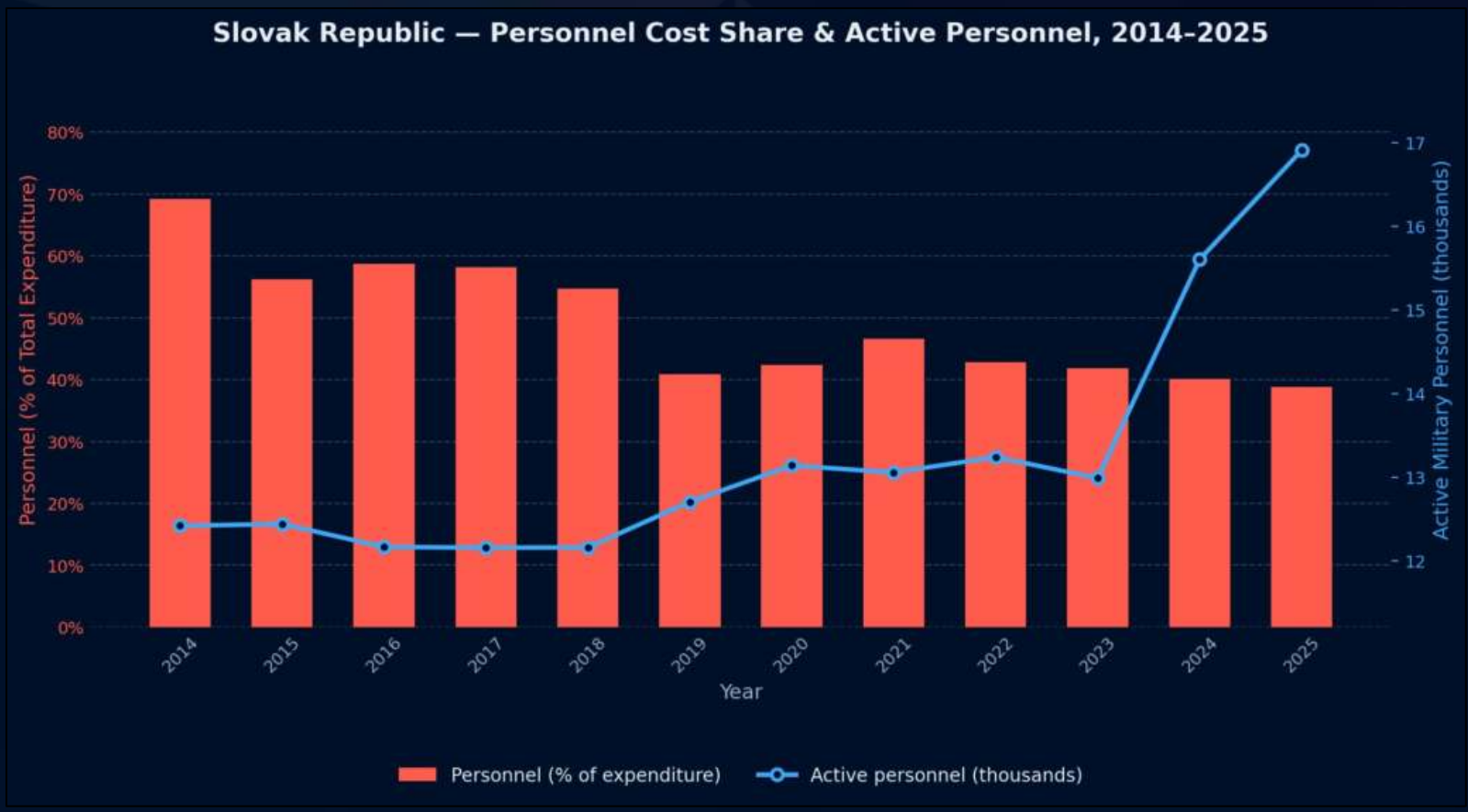
Slovakia's equipment share has risen substantially since 2019, reflecting a procurement pipeline committed largely before Fico returned to power. Major programs include 14 F-16 Block 70/72s (~$1.9B), 152 CV90 MkIV IFVs (~$1.4B), 76 Patria AMV XPs, and 6 Israeli mobile air-defense systems (€554M)—ambitious for a country Slovakia's size. The risk is whether Fico funds follow-on options (71 additional CV90s, future F-16 tranches) without the political commitment to higher spending that underwrote the original contracts.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Slovakia is undergoing a significant recruiting campaign. Personnel cost share has fallen from ~70% in 2014 to ~40% by 2025 as equipment procurement has grown. Active personnel have risen sharply—from ~13,000 to ~17,000 between 2023 and 2025—a steep near-term increase. Slovakia has set a target of 25,000 active personnel by 2030, requiring roughly 50% growth from current levels. Recruitment campaigns have emphasized salary increases and modernized equipment as incentives, with the CV90 and F-16 programs used explicitly in public messaging to attract younger recruits.



MILITARY CONTRIBUTIONS

Capability Modernization

Slovakia's modernization strategy is modest and directionally right. The 14 F-16 Block 70/72s—the most advanced F-16 variant, first delivered in 2024—replace MiG-29s donated to Ukraine in 2023, with talks underway on four additional aircraft to reach a full squadron. Ground modernization centers on 152 CV90 MkIV IFVs replacing Soviet BMP-2s, with domestic assembly at ZTS-Špeciál and deliveries running through 2030, alongside 41 Zuzana-2 howitzers and 15 Leopard 2A4 tanks. Air defense has transitioned from the donated S-300 to 6 Israeli Barak-MX systems delivered April 2026, though a long-range missile defense gap above medium-range coverage remains unaddressed.

MILITARY CONTRIBUTIONS

Force Posture

Slovakia hosts NATO's eFP battlegroup at Lešť training center, established April 2022 under Spain's framework leadership since July 2024, with capacity around 3,000 troops scalable toward brigade-level reinforcement. The 2022 US-Slovak Defense Cooperation Agreement granted access to two Slovak air bases, though no permanent US installations are present. Slovakia contributes 230 troops to UNFICYP Cyprus and 31 CBRN specialists to Latvia, reflecting a pattern of specialized niche contributions rather than combat mass deployment. Its 60-mile Ukraine border gives it eastern front land without the force depth to independently defend it.

MILITARY CONTRIBUTIONS

Industrial Base

Slovakia's defense industrial base is modest but strategically significant in the domains European rearmament needs most. ZVS Holding has substantially expanded 155mm shell production since 2022, giving Slovakia outsized importance as an artillery ammunition supplier relative to its overall budget. Konštrukta Defence produces the Zuzana-2 SPH—a domestically designed 155mm wheeled howitzer with exports to Ukraine and allied partners—and is developing the lighter Eva M2 based on Ukraine battlefield feedback. ZTS-Špeciál assembles the CV90 fleet domestically under the BAE Systems contract. Slovakia has no sovereign combat aircraft or precision missile capability, but its concentration in ammunition and artillery production aligns precisely with where European industrial capacity has been most strained since 2022.

STRATEGIC ALIGNMENT

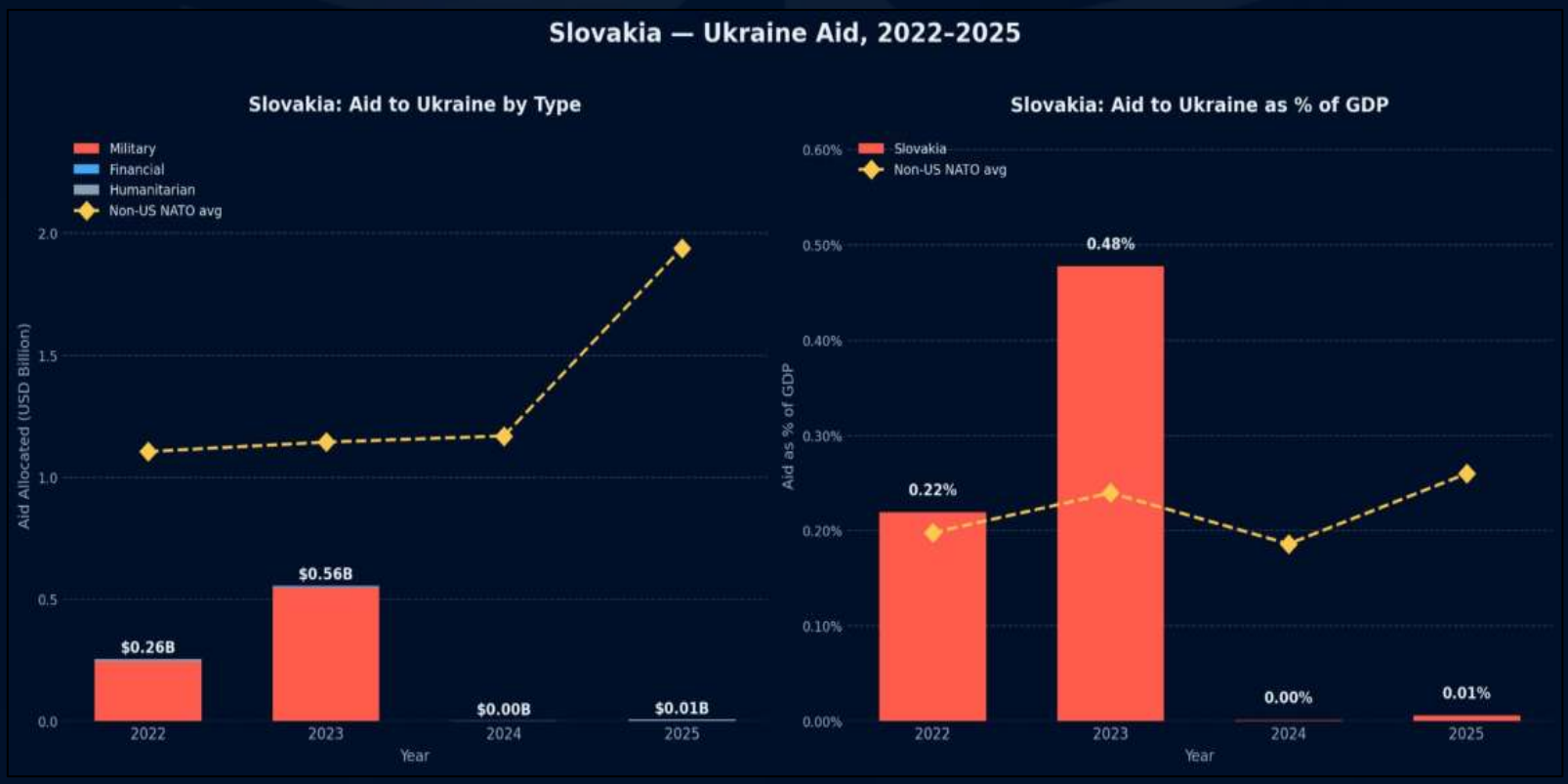
Declared Posture

Slovakia's 2021 Security and Defence Strategies meet NATO baseline alignment at the document level—identifying Russian Crimea occupation as aggression and Russian disinformation as a direct threat, while framing Slovakia's security within NATO structures. On China, the documents reflect standard EU alignment without explicit threat designation. A scheduled 2025 strategy review has not produced updated documents, leaving the 2021 frameworks as the formal reference point despite the significant shift in government practice since October 2023.

STRATEGIC ALIGNMENT

Ukraine Support

Slovakia's Ukraine support is dramatically bifurcated. Under pre-Fico governments through October 2023, Slovakia delivered ~€691M in aid including the S-300 air-defense system, 13 MiG-29s, and Zuzana-2 howitzers—among the most consequential early-war transfers by any NATO ally. The Kiel headline of €0.721B and 0.48% of GDP peak in 2023 reflects almost entirely this period. Since October 2023, military aid has effectively ceased. Commercial defense exports to Ukraine continued at roughly $1.25B in 2024—framed as trade rather than aid—and a first non-lethal package was announced in October 2025, but the trajectory from one of NATO's most generous contributors to near-zero state military assistance represents the sharpest single reversal in alliance Ukraine support.



STRATEGIC ALIGNMENT

Russian Decoupling

Slovakia's Russian energy decoupling is among NATO's worst. Russia supplied roughly 87% of Slovak crude oil in 2024, processed almost entirely at the MOL-owned Slovnaft refinery configured for Russian crude. Slovakia shifted to Russian gas via TurkStream after the Ukraine transit contract expired in January 2025. Nuclear fuel diversification agreements with Framatome and Westinghouse were signed in 2023 but substitution remains incomplete. On sanctions, Slovakia has threatened or delayed multiple EU packages since the 18th, with the 2026 Druzhba dispute—during which Slovakia declared a national energy emergency and suspended emergency electricity exports to Ukraine—illustrating both the depth of dependence and the willingness to leverage it.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Slovakia recorded only 65% for staying in NATO in 2024, among the lowest in Central Europe, while 61% agreed NATO membership makes a foreign attack less likely and 53% agreed Slovakia should defend another ally. Ukraine support was among the weakest in the survey at around 41% combined, consistent with the governing SMER-SSD's active effort to frame the war as a Western provocation. Prime Minister Fico has formally maintained NATO membership while blocking Ukraine aid, undermining sanctions consensus, attending Russian and Chinese Victory Day events, and advancing the most openly Russia-accommodating posture of any incumbent NATO government. The principal opposition force, Progressive Slovakia, is strongly pro-NATO and has been the most consistent domestic critic of Fico's hedging. The political risk is whether Fico's normalization of Russia-sympathy in public discourse leaves lasting damage to Slovakia's alliance reliability beyond his tenure.

STRATEGIC ALIGNMENT

Hedging Behavior

Slovakia's hedging behavior presents a mixed picture. The procurement profile is strongly Western—F-16 Block 70, CV90 MkIV, Israeli air defense—with zero adversary procurement and Soviet platforms donated rather than retained. Huawei remains excluded from 5G core networks. Against this, Fico met Putin in the Kremlin in December 2024, attended Moscow Victory Day as the only EU head of government in May 2025, appeared at China's Victory Day parade alongside Putin and Kim Jong Un in September 2025, and returned to Moscow for a bilateral Putin meeting in May 2026. There is no Hungary-style BRI industrial footprint, but the sustained adversary diplomatic engagement is the most extensive by any current NATO head of government and creates real risk regardless of procurement alignment.

STRATEGIC ALIGNMENT

Operational Cooperation

Slovakia's operational cooperation is historically strong with recent worrying signals. Slovakia contributed troops to both Iraq and Afghanistan. Slovakia hosts NATO's eFP battlegroup at Lešť—capacity around 3,000 troops, scalable toward brigade-level reinforcement—as its primary current operational contribution. Slovakia contributes to KFOR and standing NATO missions. Slovakia has not participated in Operation Aspides, Operation Prosperity Guardian, or Operation Epic Fury. The 2026 Druzhba dispute—during which Slovakia suspended emergency electricity exports to Ukraine in winter—represents the most operationally consequential negative, crossing from political obstruction into direct infrastructure harm against a bordering partner.

SLOVENIA

NATO Country Assessment

—TIER THREE—

TROOP CONTRIBUTOR • UKRAINE DONOR • MANIPULATING SPENDING

AT A GLANCE

Toplines

- **Setting the House in Order for NATO's Future:** NATO Secretary General Rutte called out Slovenia by name in May 2026, warning that misleading accounting was masking a genuine defense shortfall.
- **Recruiting Crisis:** Active personnel is stuck around 6,000 against a stated 10,000 recruitment target. This is roughly a 50% gap—undermining NATO readiness.
- **Sharing the Burden for Ukrainian Defense:** While other countries hesitated on Ukraine shipments, Slovenia donated its entire armored capability including its 28 tanks as well as 35 infantry vehicles.

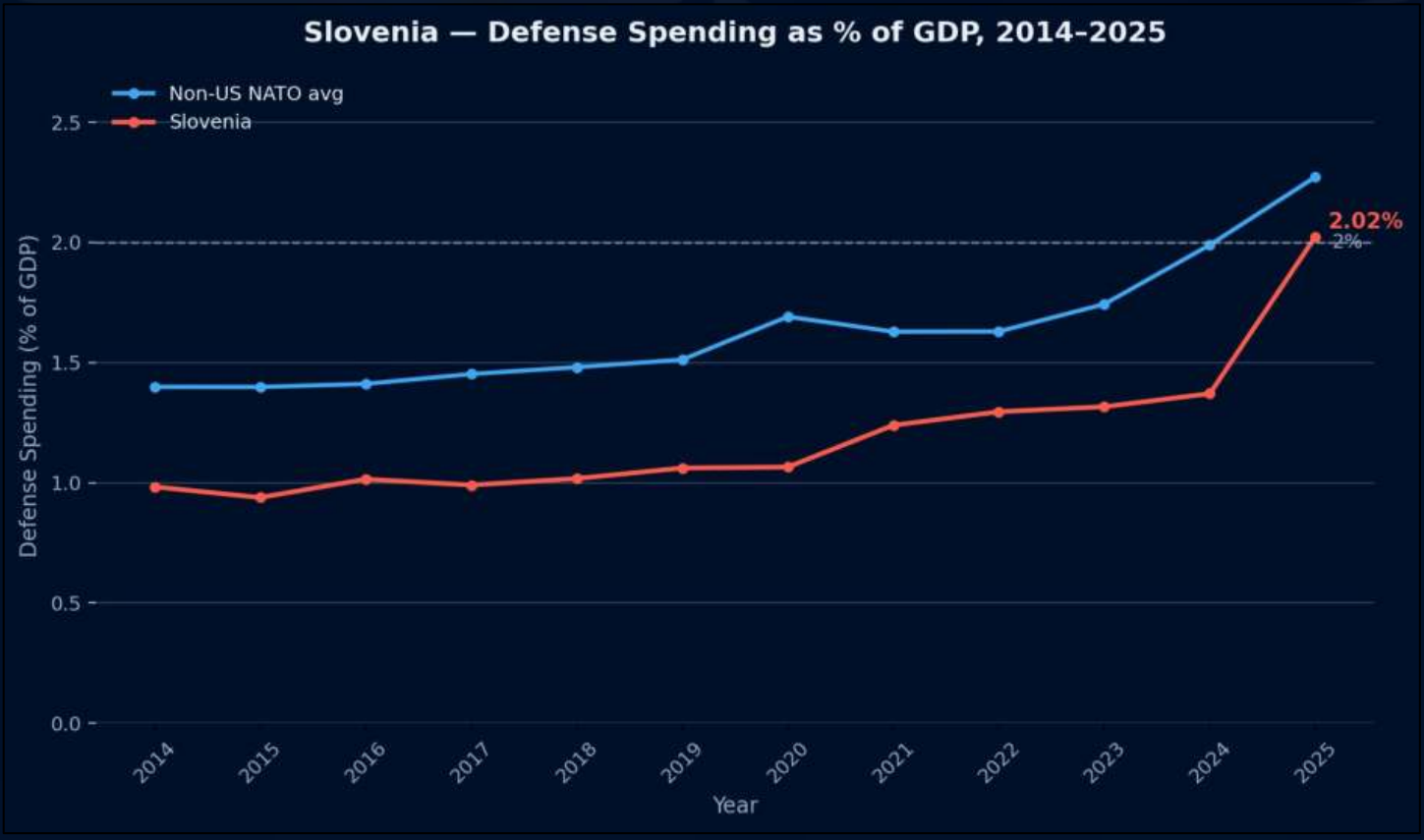
FORCE STRUCTURE AT A GLANCE

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

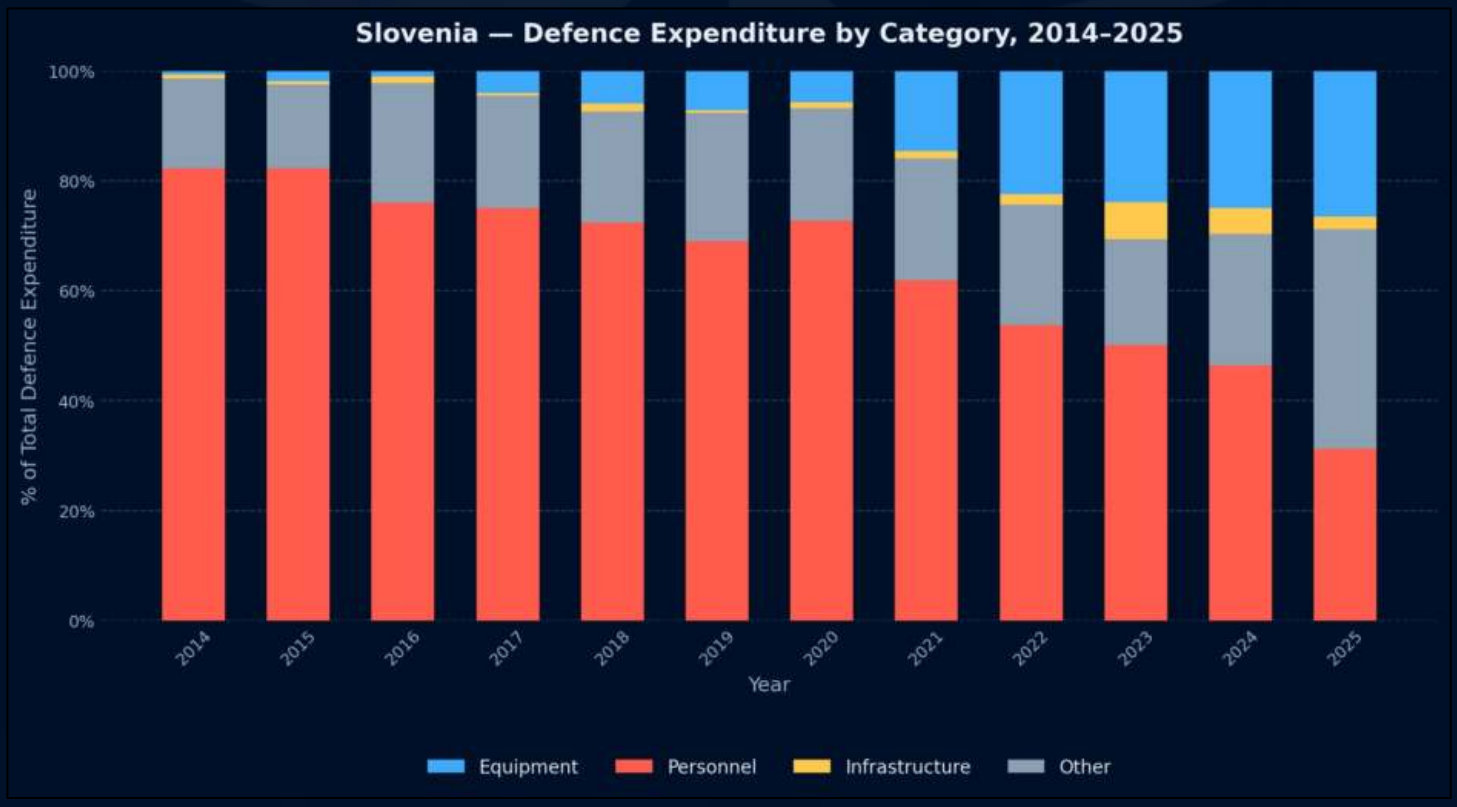
Slovenia's defense spending story is one of constant underinvestment with recent positive movement. Slovenia reached 2.02% of GDP in 2025, among the last NATO allies to hit the floor after spending below 1.1% from 2014 to 2019. The figure is contested: NATO Secretary General Rutte's May 2026 warning explicitly called out Slovenia by name, stating that inflated accounting was masking a genuine shortfall and urging Ljubljana to close the gap between reported and real defense investment. The Golob government pledged 3% by 2030 and accepted the Hague 3.5%+1.5% framework by 2035. Slovenia's trajectory is among the slowest in the alliance relative to its capability gaps and the post-2022 threat environment.



MILITARY CONTRIBUTIONS

Equipment Share

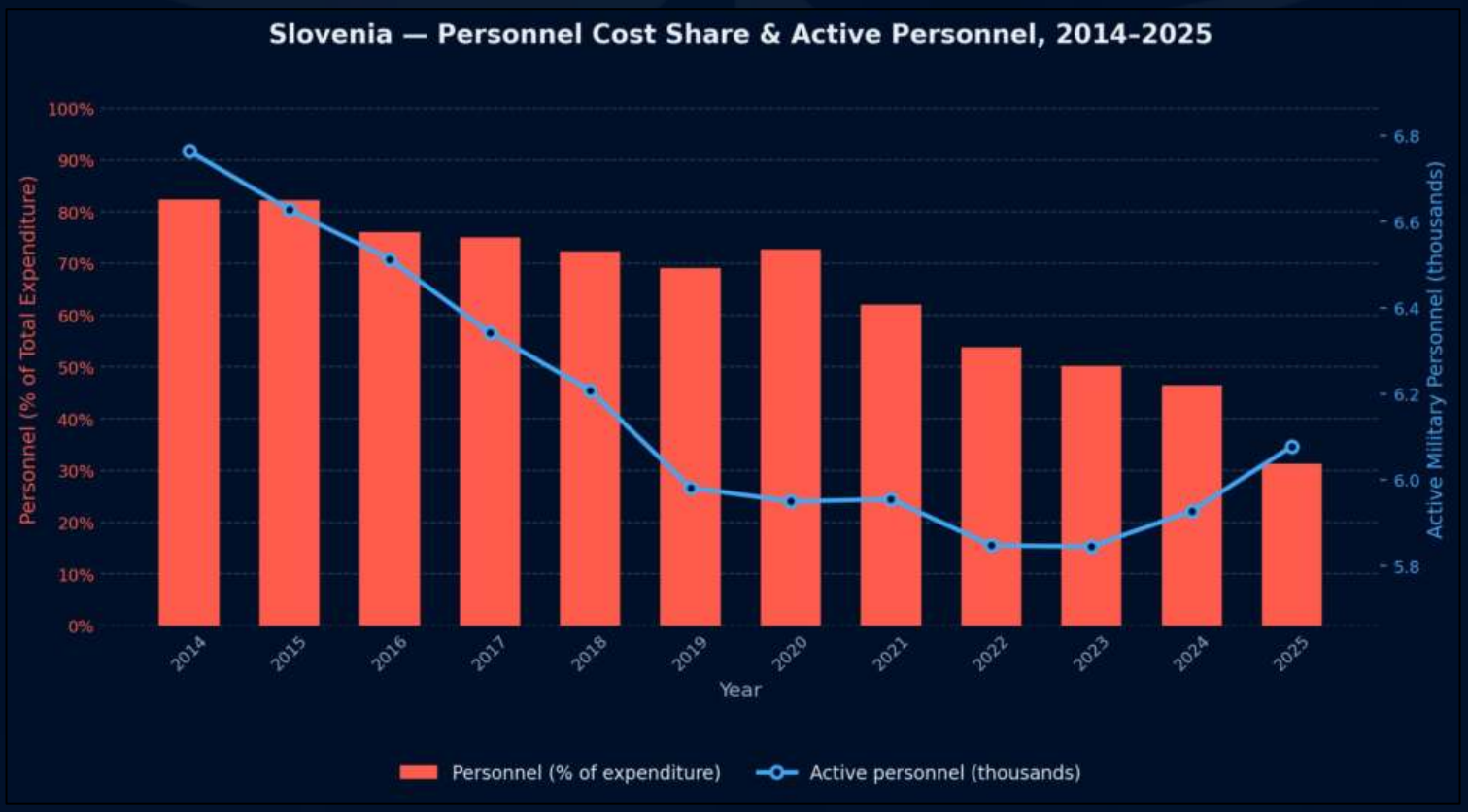
Slovenia's equipment share has risen dramatically—from near zero in 2014 to roughly 26% by 2025—reflecting deliberate readjustment away from a salary-heavy legacy structure. Major commitments include three IRIS-T SLM fire units, 12 CAESAR 155mm howitzers ordered June 2025, and a Letter of Intent for 106 Patria AMV XP vehicles at ~€695M—the largest procurement in Slovenian military history. Slovenia's equipment share improvement remains more promising than delivery at the high end. The IRIS-T and CAESAR programs are firmer and more consequential for near-term capability.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Slovenia's personnel cost share has fallen sharply—from 82% in 2014 to 31% by 2025—one of the most dramatic budgeting efforts in the alliance. Active personnel have held relatively stable at roughly 6,000 throughout, meaning the reduction reflects budget reallocation rather than force cuts. Slovenia has set a target of 10,000 active personnel, requiring roughly 50% growth from current levels. Recruitment has been a persistent challenge for a small country with a limited military tradition, and closing the gap between current strength and the 10,000 target is one of Slovenia's most significant near-term defense planning problems.



MILITARY CONTRIBUTIONS

Capability Modernization

Slovenia's modernization strategy prioritizes filling the most critical capability gaps first after years of near-zero equipment investment: area air defense, precision fires, and protected mobility. Three IRIS-T SLM fire units will provide Slovenia's first-ever medium-range air defense capability from 2027–2028. Twelve CAESAR howitzers ordered June 2025 represent its most modern artillery. The 106-vehicle Patria AMV XP procurement remains delayed. Slovenia has no fighter aircraft and depends entirely on allied rotations for airspace coverage, with no near-term national combat aircraft program. Its M-55S tank fleet was donated, leaving no MBT capability. The modernization direction is correct; the gaps are significant and the Patria delay is the most consequential near-term risk.

MILITARY CONTRIBUTIONS

Force Posture

Slovenia's force posture is modest but present across multiple theaters simultaneously: 111 troops in Slovakia's eFP, 43 in Latvia's eFP, 114 in KFOR, and 21 in EUFOR Bosnia-Herzegovina. Slovenia hosts the NATO Mountain Warfare Centre of Excellence at Poljče, the alliance's primary center for mountain and winter warfare training. No permanent US or allied military installations are present; Slovenia's hosting value is institutional rather than infrastructural. Air policing over Slovenian airspace is provided by allied fighters, leaving Slovenia dependent on Italy and Hungary for its own airspace coverage.

MILITARY CONTRIBUTIONS

Industrial Base

Slovenia's defense industrial base is niche-focused and export-oriented. Key capabilities include CBRN detection equipment (JAGER), communications and electronics (Iskra), remote weapons stations (Valhalla Turrets), simulation systems (STO), and small arms and ammunition (Arex). Slovenia has no platform design or production capability for major systems and is entirely import-dependent for significant capabilities. Raw material relevance is limited: Slovenia lacks the mineral or energy resource base that gives some CEE allies strategic supply-chain value. Technology-transfer and component-assembly roles through the Patria AMV XP and CAESAR programs are prospective rather than current.

STRATEGIC ALIGNMENT

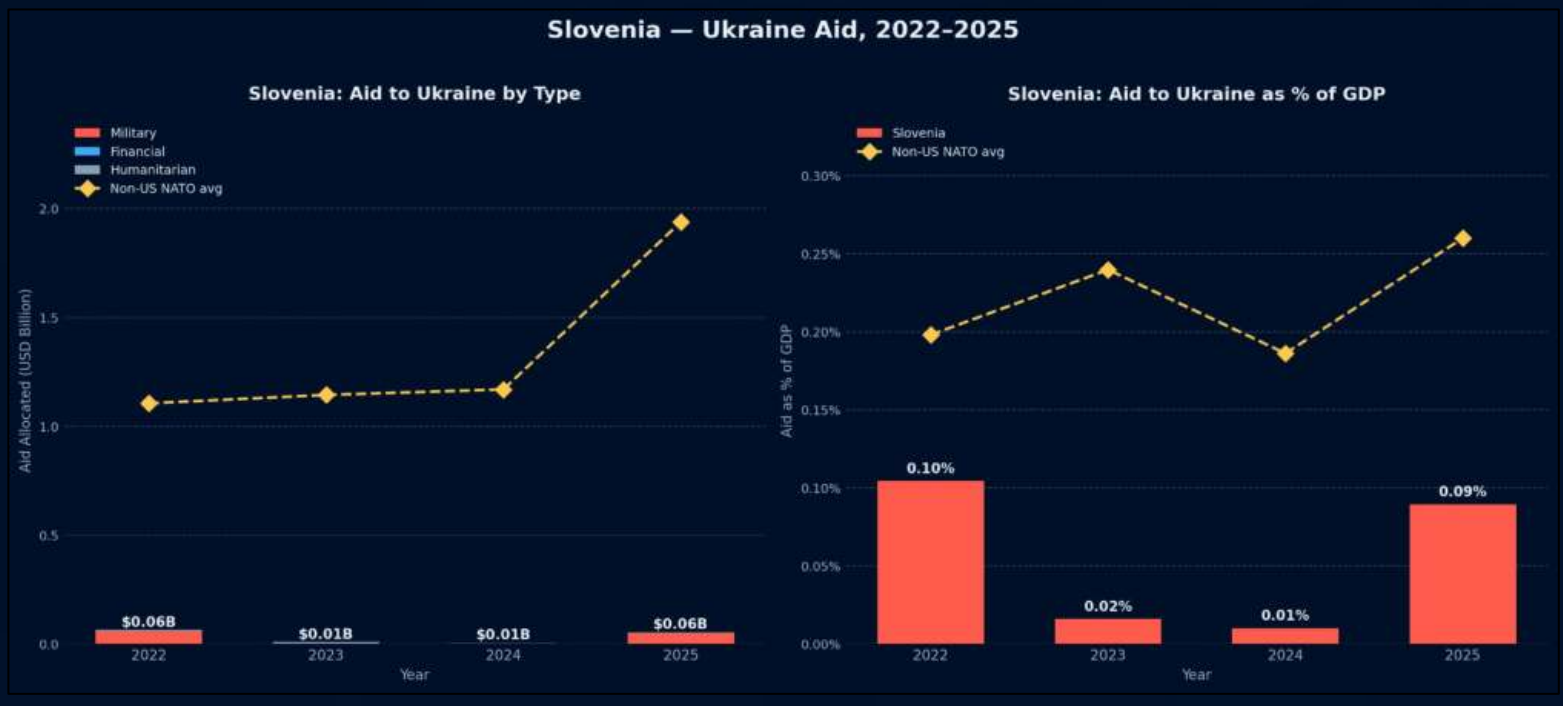
Declared Posture

Slovenia's 2019 National Security Strategy frames Russia's war against Ukraine as a fundamental deterioration in European security, though without the existential threat language used by front-line allies. On China, Slovenia's posture is weaker than most NATO peers—its October 2024 no-vote on Chinese EV tariffs places it in the China-accommodating bloc, and 5G telecom security standards lag behind Czech, Polish, and Baltic benchmarks. Slovenia has supported EU Russia sanctions packages. A strategy update is overdue and would be the most useful near-term signal of whether the new Janša government intends to sharpen Slovenia's threat framing or maintain the 2019 baseline.

STRATEGIC ALIGNMENT

Ukraine Support

Slovenia's signature early-war contribution was donating its entire 28-vehicle M-55S tank fleet through the German Ringtausch framework. Additional transfers included 35 BVP M-80A IFVs, armored vehicles, howitzers, and ammunition. Kiel figures show €0.135B allocated: roughly 0.10% of GDP in 2022, dropping sharply in 2023–2024 before recovering to 0.09% in 2025, consistently well below the NATO non-US average. The bilateral security cooperation agreement signed July 2024 provides a framework, but without a statutory multi-year aid floor, future intensity depends on the party in power. Slovenia participates in EUMAM Ukraine training but is not a coalition co-leader, and its overall contribution profile reflects a willing but capacity-constrained ally whose most impactful transfers came early in the war.



STRATEGIC ALIGNMENT

Russian Decoupling

Slovenia's Russian energy decoupling is largely clean. Gas supply runs through Croatian, Italian, and Austrian interconnections including the Krk LNG route, with Russian-origin exposure substantially reduced after 2022. Nuclear energy is anchored in the jointly-owned Krško Westinghouse PWR with Croatia—no Rosatom dependence—with future expansion planned under Westinghouse and EDF frameworks. Slovenia supported every EU Russia sanctions package through the 20th without obstruction. Administrative sanctions enforcement capacity is smaller than larger EU states, but Slovenia has not resembled Hungary, Slovakia, or Austria as a deep energy-dependence problem. The most pressing decoupling risk is political drift rather than energy dependence. Slovenia might backslide on sanctions enforcement intensity without formal policy reversal.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Slovenia recorded only 58% for staying in NATO in 2024, third-lowest in the alliance, with 55% feeling more safe from NATO cooperation and only 51% agreeing the country should defend another NATO ally if attacked. Fifty percent agreed NATO membership makes a foreign attack less likely, also among the lowest in the survey, and only 27% favored increasing defense spending, second-lowest after Iceland. The Golob (Gibanje Svoboda) government is nominally pro-NATO and has increased defense spending from a very low base, while the SDS (Janša) in opposition is actually the stronger NATO hawk by reputation, having aligned Slovenia firmly with US and Eastern front positions during previous tenures. The combination of low public NATO attachment and a governing coalition that prioritizes social spending over defense creates. Slovenia is the closest analogue to Italy's pattern of low public engagement with the costs of alliance membership, compressed into a much smaller economy and force structure.

STRATEGIC ALIGNMENT

Hedging Behavior

Slovenia's hedging behavior is broadly clean. There is no BRI infrastructure footprint, no major Chinese-controlled critical infrastructure, and no adversary arms procurement. Arms procurement is entirely Western-aligned—Patria AMV XP, CAESAR, IRIS-T SLM, Mistral—with M-55S tanks donated to Ukraine rather than retained. Chinese telecom is restricted from 5G core networks, though less aggressively than Czech or Baltic standards. No high-level Moscow, Beijing, or Tehran engagements have occurred under either the Golob or Janša governments. The clearest concern is the October 2024 no-vote on Chinese EV tariffs, aligning Slovenia with Germany and Hungary rather than the Czech Republic, Poland, and the Nordics—a signal worth monitoring as an indicator of broader China posture.

STRATEGIC ALIGNMENT

Operational Cooperation

Slovenia has consistently supported US and NATO operations. Slovenia contributed to both Iraq and Afghanistan. Current contributions span four concurrent missions—NATO eFP Slovakia and Latvia, KFOR, and EUFOR Althea—meaningful for a force of 6,200. Slovenia hosts the NATO Mountain Warfare Centre of Excellence at Poljče, the alliance's primary center for mountain and winter warfare doctrine. Slovenia participates in EU Operation Aspides, providing limited but real Iran-linked maritime security engagement. Slovenia did not participate in Operation Prosperity Guardian or Operation Epic Fury and is not a Red Sea or Indo-Pacific actor. The most significant operational gaps remain the absence of fighter aircraft requiring entirely allied airspace coverage and the small active force limiting deployable mass.

SPAIN

NATO Country Assessment

— TIER THREE —

CRITICAL BASING • FLAGRANT FREE-RIDER • UNDERMINING ALLIANCE

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.

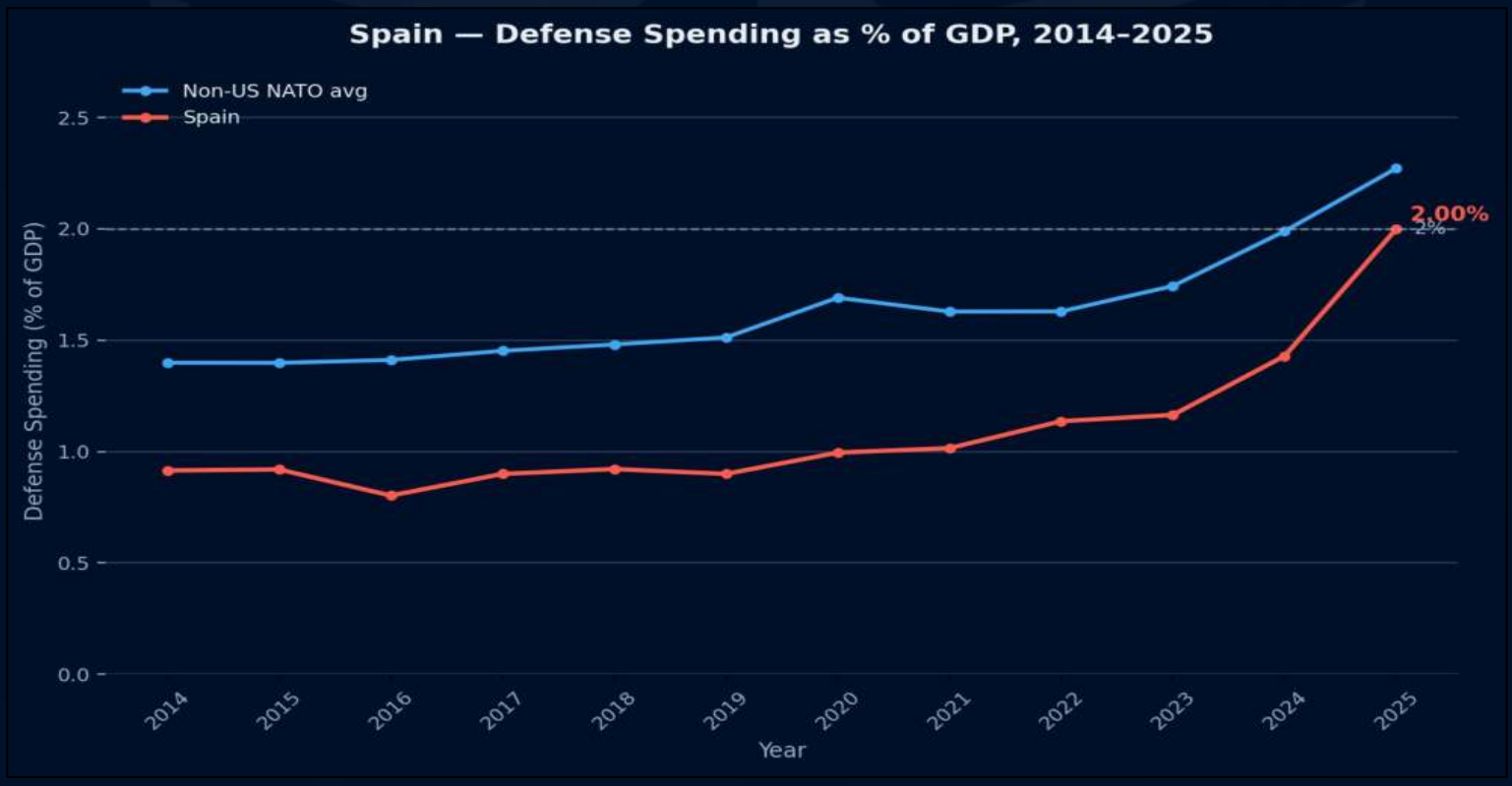
FORCE STRUCTURE AT A GLANCE

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

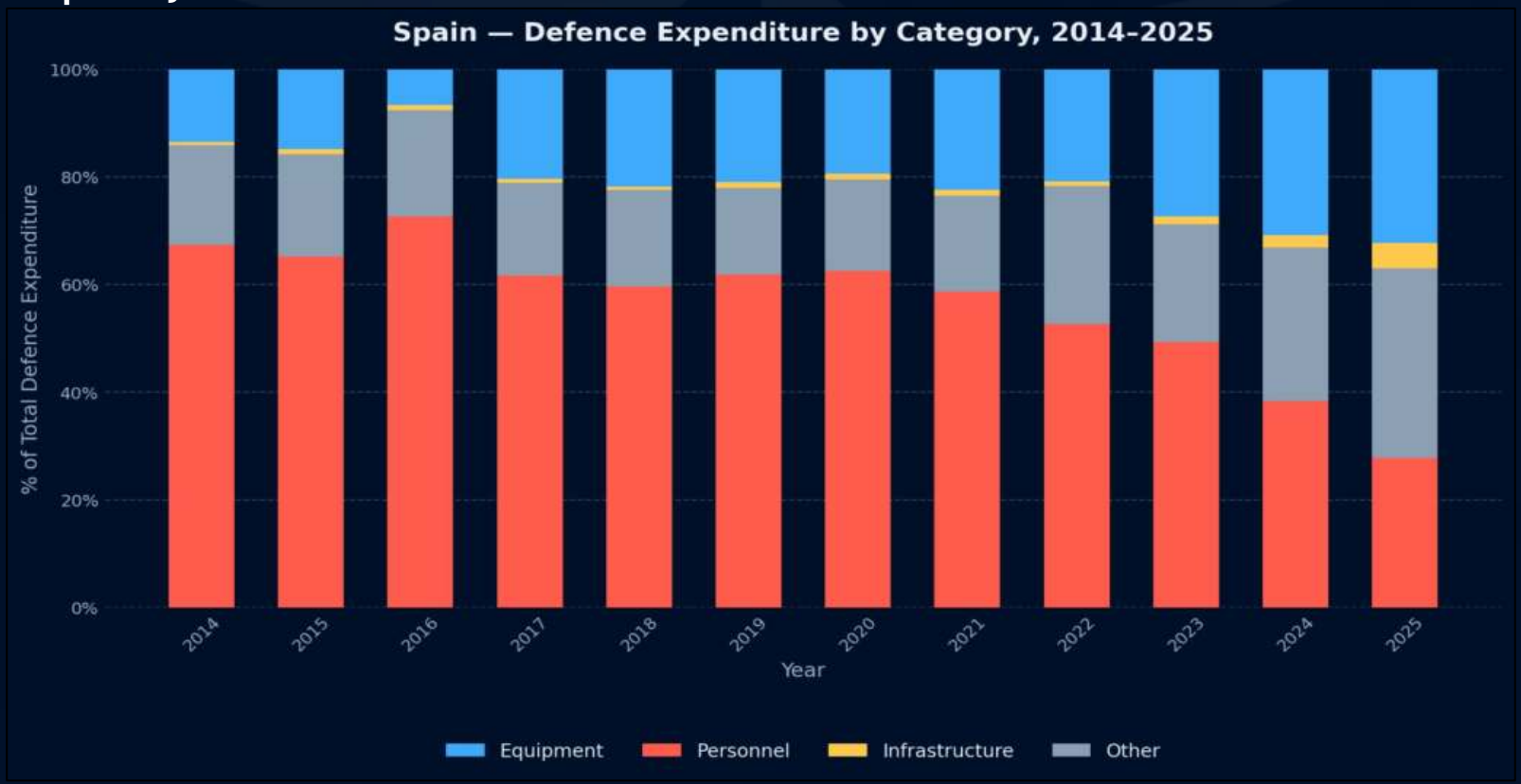
Spain's defense spending record is the most problematic of any major NATO economy. Spain reached 2.00% of GDP in 2025—nominally meeting the NATO floor for the first time—but the figure is contested, with roughly a third of the increase attributed to telecommunications and cybersecurity spending classified 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.



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.



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

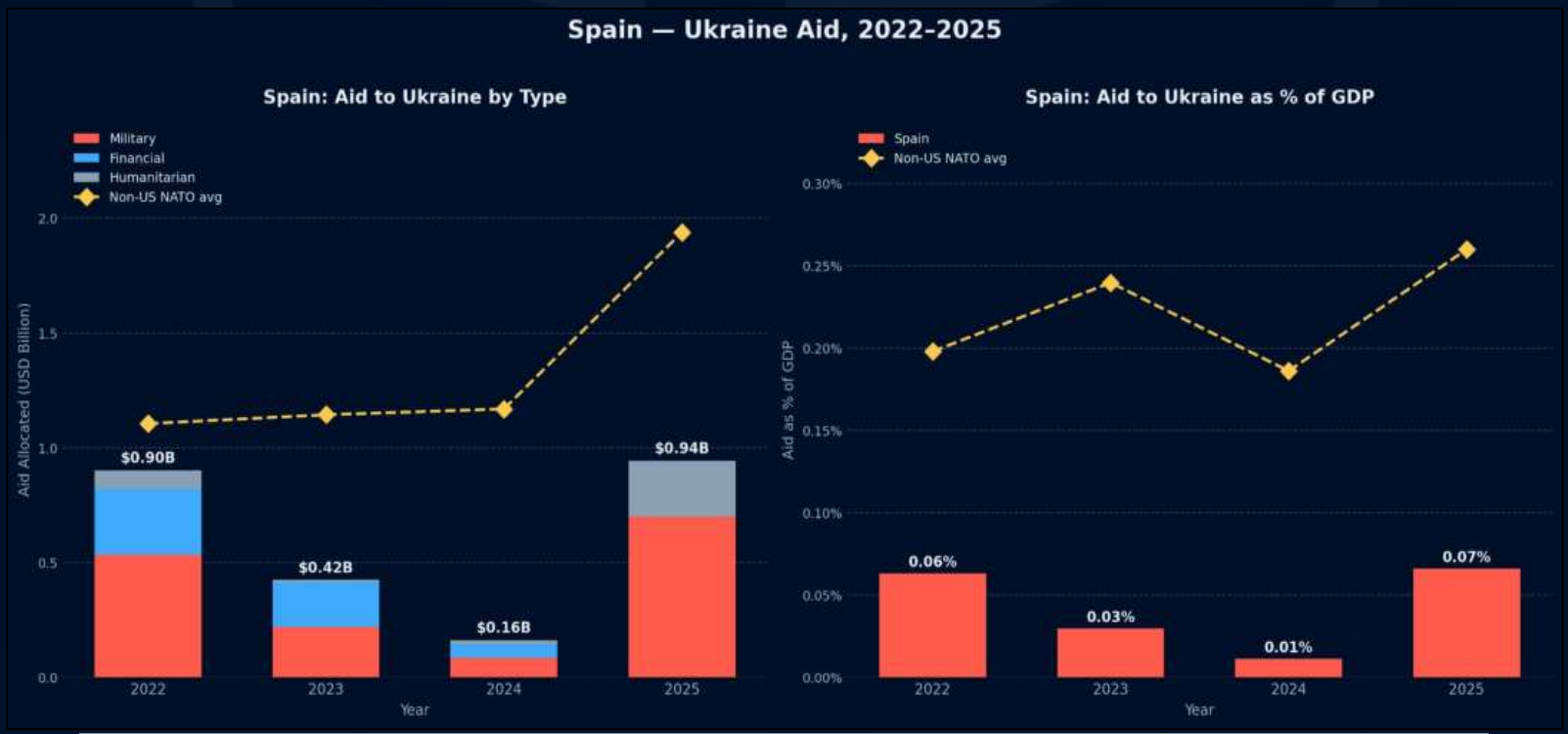
Declared Posture

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.



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

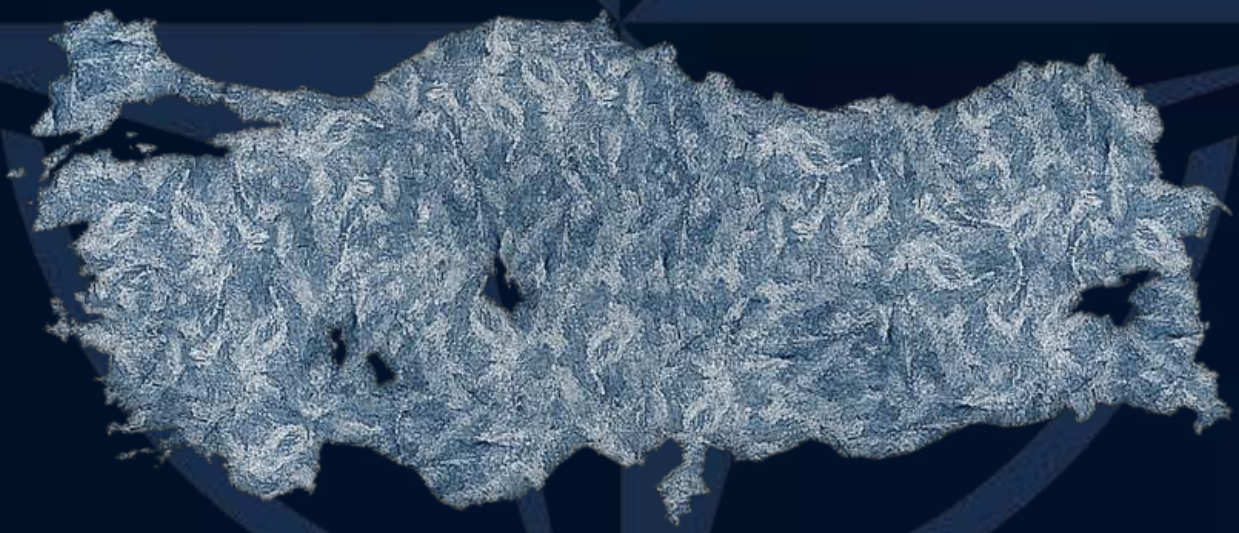
Spain's operational cooperation record is split between a strong historical baseline and a significant recent rupture. Spain deployed thousands of troops to both Iraq and Afghanistan, sustaining casualties, and contributed to NATO-led Libyan operations in 2011. Spanish basing and airspace access supported 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.

TURKEY

NATO Country Assessment

— TIER THREE —

MIDDLE EAST BASING • RUSSIAN ARMS PURCHASES • ENGAGING THE ENEMY

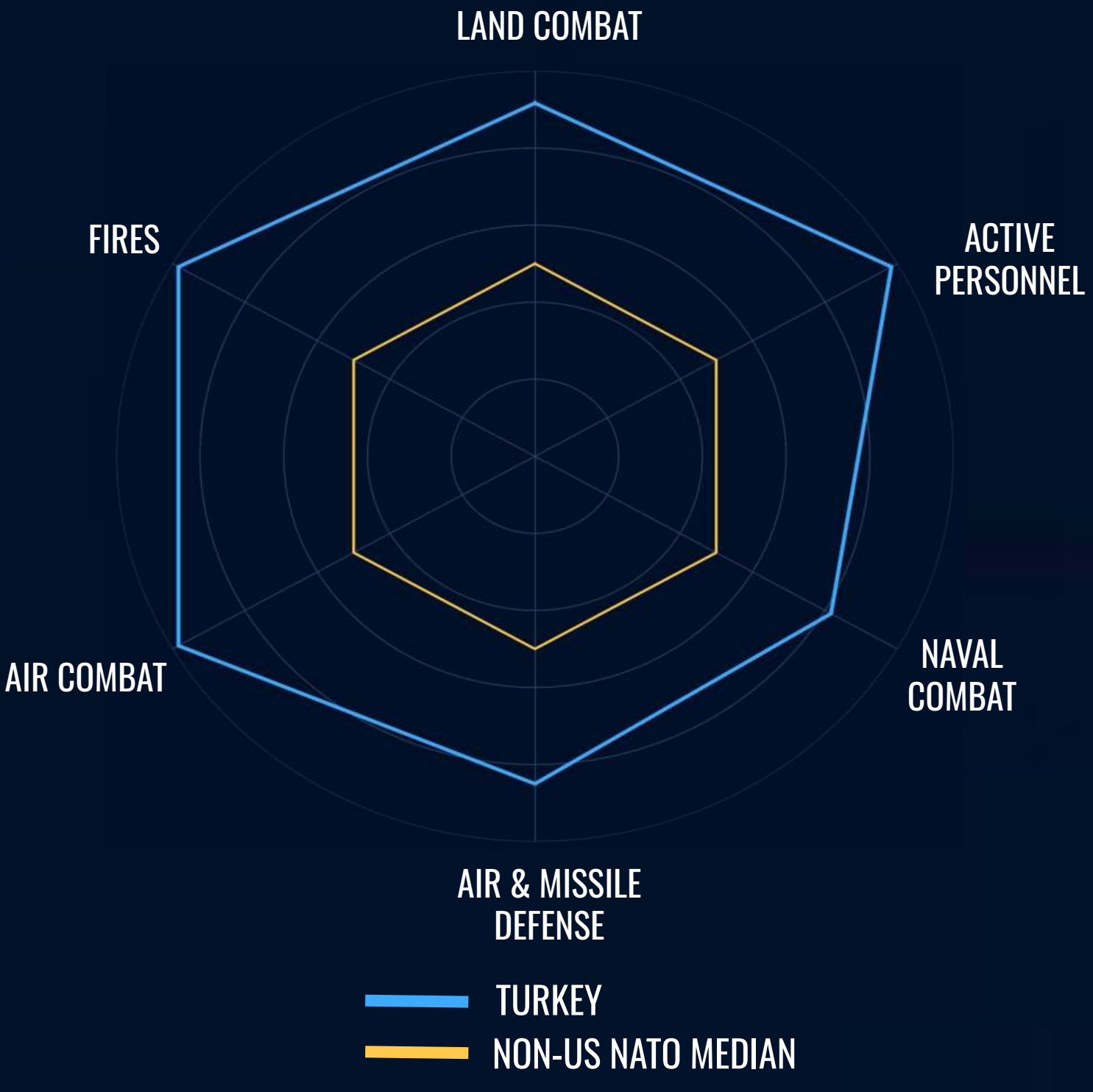


AT A GLANCE

Toplines

- **Foundational Basing Providing Critical Power Projection Capability:** Incirlik Air Base, the Kürecik BMD radar, and NATO Allied Land Command at İzmir form a vital southeastern anchor for US and allied operations across the Mediterranean, Middle East, and Central Asia.
- **Russian Arms Purchases That Jeopardize American and NATO Security:** The Russian S-4000 air-defense systems in Turkish inventory prevents networking into NATO's integrated air and missile defense architecture, dramatically undermining shared security.
- **Engaging the Enemy:** Erdoğan has maintained close and friendly ties with Putin throughout the conflict that exceeds responsible diplomatic engagement. NATO Secretary General Rutte has publicly called this out in language widely understood as directed at Ankara.

FORCE STRUCTURE AT A GLANCE

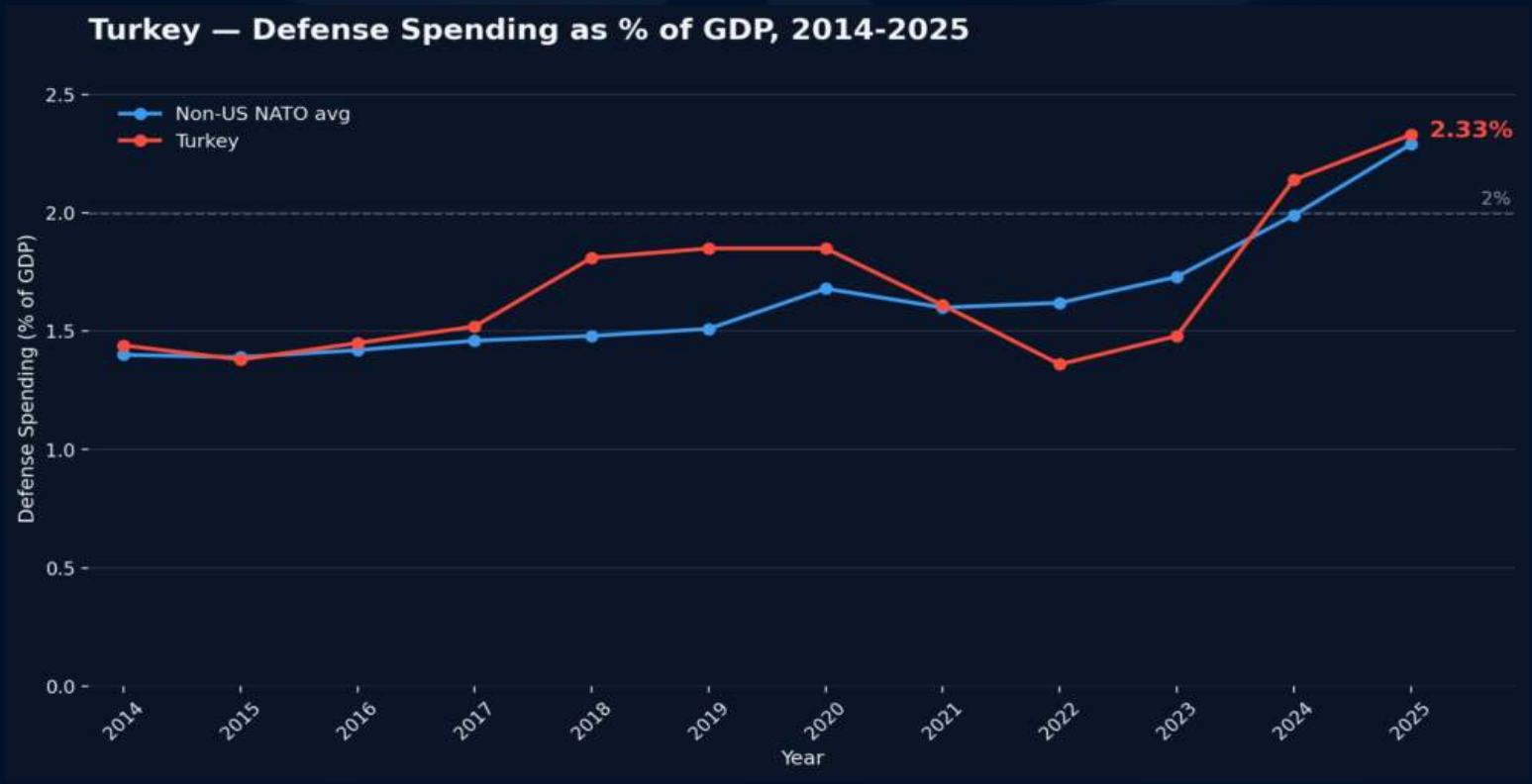


This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

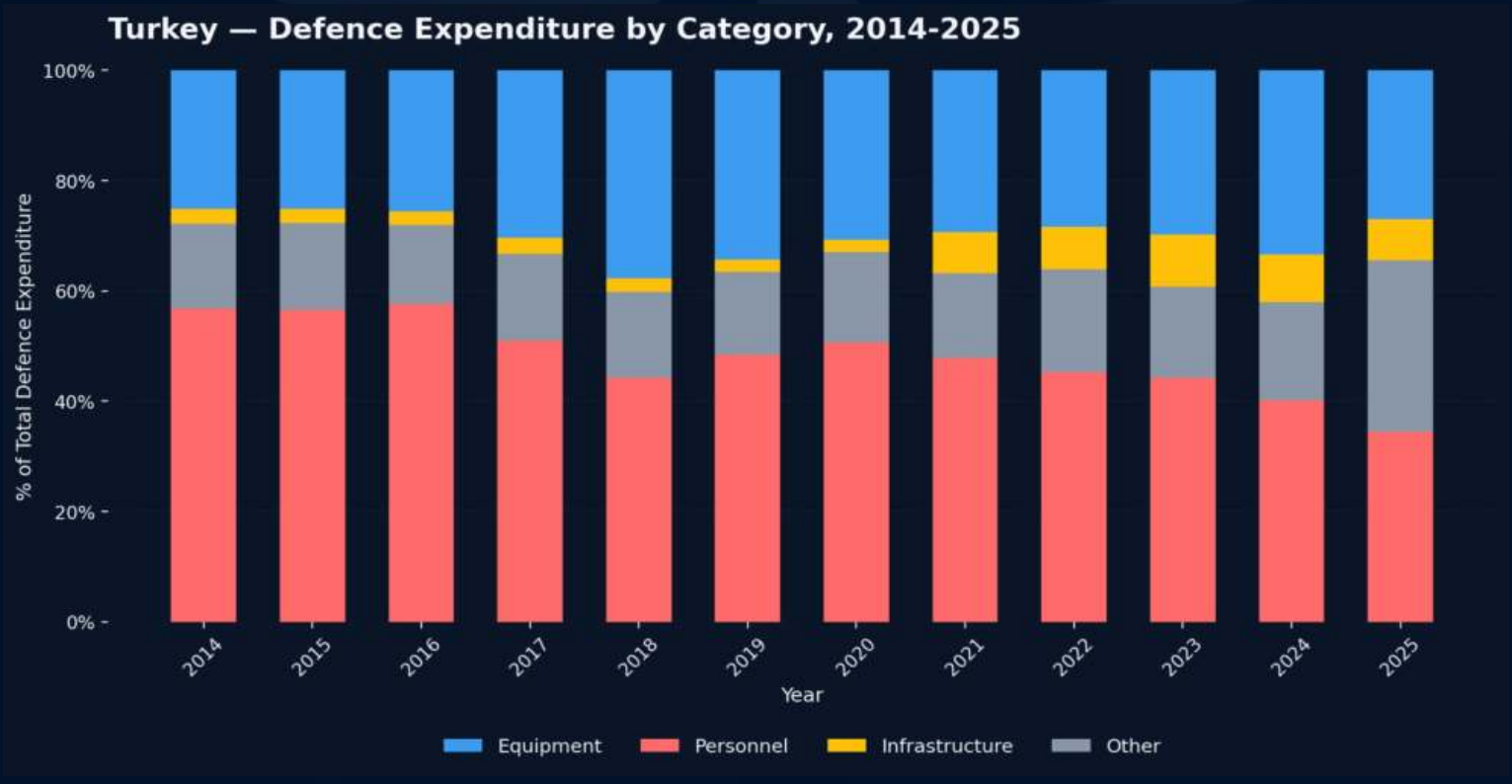
Turkey maintains NATO's second-largest military after the United States. Turkey's defense spending reached 2.33% of GDP in 2025, above the NATO floor and consistently above the alliance non-US average for most of the past decade. Projections of 2.83% in 2027 and 3.2% in 2028 reflect genuine upward trajectory backed by budget commitments rather than accounting adjustments. Turkey backed the Hague 5% framework and will host the 2026 NATO Summit in Ankara, assuming command of NATO's Allied Reaction Force from 2028. For NATO's second-largest military, the combination of above-floor spending and indigenous production depth makes Turkey's defense investment story structurally different from most European allies.



MILITARY CONTRIBUTIONS

Equipment Share

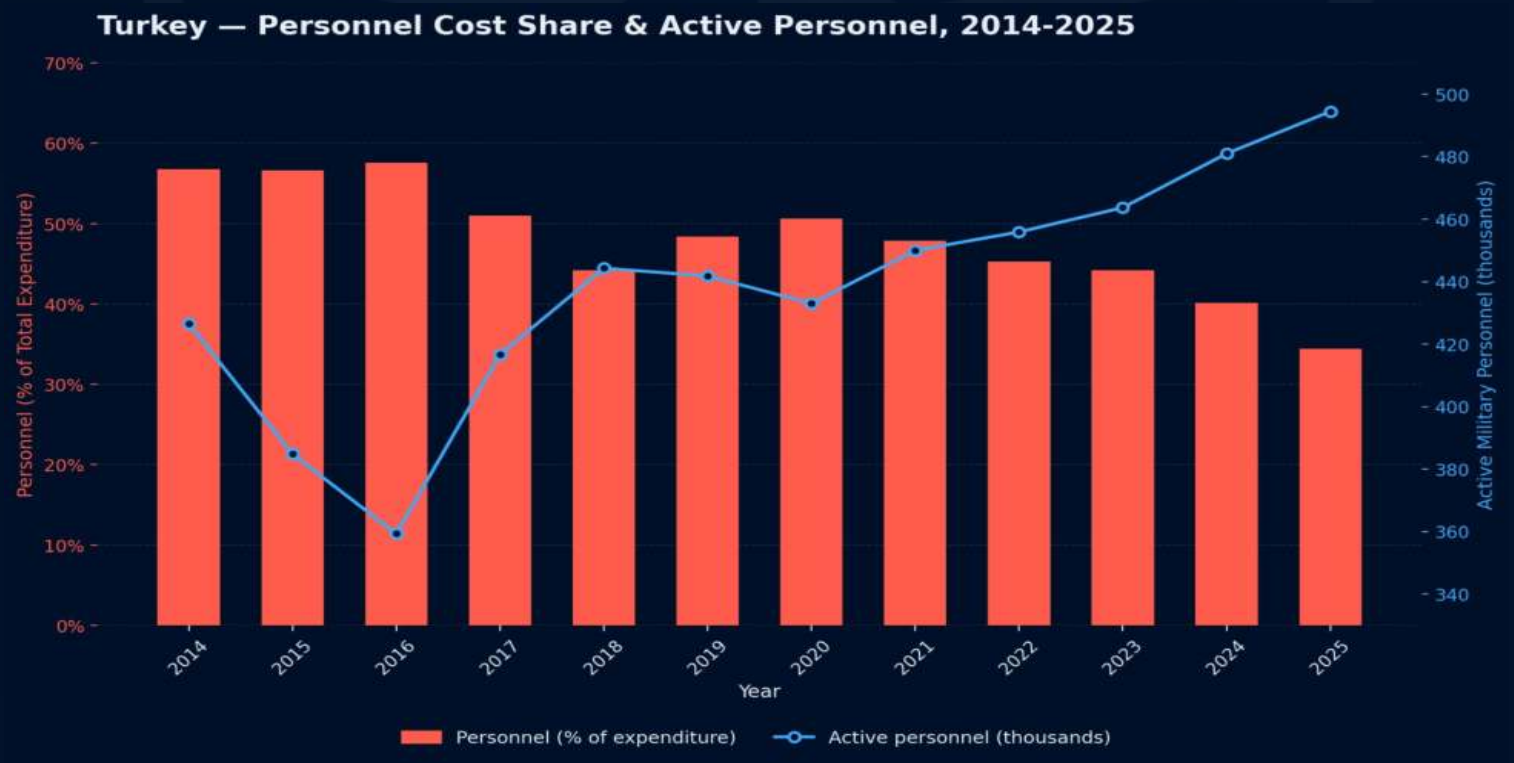
Turkey's equipment share reflects an economy investing heavily in domestic platform production rather than foreign procurement. Turkey's equipment share has risen from ~16% in 2014 to ~35% by 2025, reflecting deliberate investment in domestic platform production. Turkey has increased domestic defense production from roughly 20% to 80% of military equipment over two decades through systematic industrial policy. The $2.3B F-16 Block 70 procurement in 2024 is the only significant recent foreign acquisition—virtually everything else flows through Baykar, ROKETSAN, ASELSAN, and TAI. The S-400 acquisition remains the most consequential equipment decision, creating NATO interoperability failure in air defense that no subsequent domestic investment has resolved and that continues to exclude Turkey from F-35 program participation.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Turkey's personnel cost share has fallen from ~57% in 2014 to ~35% by 2025 as equipment investment has grown. Active personnel have risen sharply—from ~425,000 in 2014 to ~500,000 by 2025—making Turkey NATO's second-largest military by headcount after the United States. Turkey maintains conscription, with mandatory service providing the recruitment base for a force of this scale. Sustaining 500,000 active personnel while simultaneously funding a comprehensive domestic defense modernization program creates competing budget pressures. Turkey's large conscript-based ground force limits the degree of professionalization achievable at scale. The sheer size of the force means average training standards and equipment quality per soldier are lower than smaller all-volunteer allies, even as the high-end units and special operations forces are genuinely capable. Whether Turkey can sustain force expansion while also delivering the equipment modernization agenda is the central personnel-quality challenge.



MILITARY CONTRIBUTIONS

Capability Modernization

Turkey's modernization strategy prioritizes domestic production and strategic autonomy over NATO interoperability—a deliberate choice that undermines the alliance. On combat aircraft, 240 F-16s form NATO's largest non-US tactical air fleet, with 40 new Block 70s approved in 2024 and the indigenous KAAN fifth-generation program progressing toward service entry. On UAVs, the TB2, TB3, and jet-powered stealth Kızılelma represent genuine generational leadership in unmanned combat aviation. On air defense, the S-400 in inventory remains NATO's most serious interoperability problem; the domestic Steel Dome architecture partially compensates but does not resolve it. On naval forces, Turkey operates a substantial surface and submarine fleet across the Aegean, Black Sea, and Eastern Mediterranean. On ground forces, the army is large, combat-experienced, and organized for high-intensity conventional warfare with no European parallel in operational depth. The ALTAY MBT program represents long-term armor modernization.

MILITARY CONTRIBUTIONS

Force Posture

Turkey's force posture combines critical NATO hosting infrastructure with an active deployed military presence across multiple theaters. Incirlik Air Base hosts US nuclear weapons under NATO sharing arrangements and serves as the critical logistics hub for Mediterranean and Middle Eastern operations—one Iranian missile was intercepted in its vicinity during the 2026 Iran crisis. The Kürecik BMD radar in Malatya Province is central to NATO's Iran missile-warning architecture and became operationally critical during Operation Epic Fury. NATO Allied Land Command at İzmir hosts a major alliance land-domain command node. Beyond hosting, Turkey maintains active military deployments in Syria, Iraq, Libya, and Qatar, and a persistent naval presence in the Eastern Mediterranean. Turkey invoked the Montreux Convention after February 2022 to restrict Russian naval reinforcement through the Bosphorus—one of the most consequential single operational decisions of the war's early period. Turkey contributes to NATO's Multinational Battlegroup Bulgaria and assumes command of NATO's Allied Reaction Force from 2028.

MILITARY CONTRIBUTIONS

Industrial Base

Turkey has transformed its defense industrial base more dramatically than any NATO ally over the past two decades, growing domestic production from 20% to 80% through deliberate industrial policy. Baykar's TB2 is the world's most combat-proven armed drone, exported to dozens of countries including NATO allies. ROKETSAN produces missiles and rocket artillery; ASELSAN provides defense electronics and communications; TAI is developing KAAN. Turkey has become a significant defense exporter to other NATO members, giving it industrial influence within the alliance alongside strategic autonomy. Baykar's planned drone production facility in Ukraine would extend Turkish defense-industrial reach directly into Ukraine's military production architecture. On raw materials, Turkey holds significant deposits of boron—controlling roughly 70% of global reserves—a critical material for defense applications including nuclear shielding and high-strength alloys, giving Turkey meaningful strategic leverage in defense-relevant critical minerals.

STRATEGIC ALIGNMENT

Declared Posture

Turkey's 2025 Red Book update broadens its national security concept to economy, energy, and AI, consistent with Ankara's wider strategic autonomy drive—an outlook that explicitly resists total NATO alliance alignment. Turkey formally endorses NATO collective defense and the Hague framework, but its declared postures on Russia, China, and Iran diverge from alliance consensus in ways that are deliberate rather than incidental. On Russia, Turkey's doctrine simultaneously acknowledges Russian aggression and frames Turkey as an indispensable mediator and economic partner. On China, Turkey's SCO dialogue partnership and BRI Middle Corridor alignment reflect a declared strategic preference for Eurasian positioning over Western alignment. On Iran, Turkey's self-declared role as regional stabilizer and de-escalation intermediary positions Ankara closer to Tehran than any other NATO allies—a posture that sat uncomfortably alongside Iranian missiles intercepted over Turkish territory in 2026.

STRATEGIC ALIGNMENT

Ukraine Support

Turkey is not tracked by Kiel in any meaningful way—€0.071B allocated, just 0.010% of GDP—because Turkey's most consequential contributions have been structured as commercial sales or diplomatic actions rather than state military aid, deliberately avoiding the transparency frameworks that govern allied assistance. Bayraktar TB2 drones were among the most consequential early-war Ukrainian weapons, delivered commercially through Baykar rather than government-to-government aid. The Montreux Convention closure limiting Russian Black Sea Fleet reinforcement was potentially the single most strategically significant Turkish action for Ukrainian survival in the early war. Co-mediating the Black Sea Grain Initiative enabled Ukrainian agricultural exports at a critical juncture. Baykar's planned Ukraine drone production facility would embed Turkish defense technology permanently in Ukrainian military production. Against this, Turkey has not joined EU or G7 sanctions on Russia, and formal bilateral aid remains near the bottom of the alliance distribution. Turkey's Ukraine contribution is real and consequential in specific domains.

STRATEGIC ALIGNMENT

Russian Decoupling

Turkey has the most significant Russian energy dependence in NATO outside Slovakia and Hungary, compounded by Rosatom nuclear construction. Russia supplies roughly 40% of Turkish natural gas through Blue Stream and TurkStream, and became a larger oil and refined-products supplier after 2022. Akkuyu nuclear power plant—built, owned, and operated by Rosatom—creates the deepest Russian nuclear infrastructure footprint inside NATO territory, giving Moscow structural leverage over Turkish energy security for decades. Turkey has not pursued decoupling and has explicitly used its energy-hub position to preserve autonomy. Turkish firms have been sanctioned by US authorities for Russia-related evasion, and Turkey has not joined any EU or G7 sanctions package—providing an alternative economic channel for Moscow.

STRATEGIC ALIGNMENT

Public Support & Political Resilience

Turkey recorded 69% for staying in NATO in 2024, 64% feeling more safe from NATO cooperation, and 61% agreeing the country should defend another NATO ally, solid aggregate figures that mask substantial volatility in underlying attitudes. The Metropoll March 2026 survey found 68% of Turks favoring neutrality in the US-Iran conflict, and the ANK-AR May 2026 survey found only 26% of Turks viewed NATO membership as beneficial, with a plurality saying "neither beneficial nor harmful." The AKP government under Erdoğan formally maintains NATO membership while pursuing a strategically autonomous foreign policy: blocking member accessions as leverage, maintaining economic ties to Russia despite sanctions, and positioning Turkey as an indispensable mediator rather than a reliable front-line ally. The CHP and IYI Party are broadly more pro-Western and show higher NATO approval among their supporters than AKP voters, while HDP/DEM is the most critical of NATO operational commitments. Turkish public support for the alliance is better characterized as conditional and instrumental than principled, making Turkey's behavior in any serious Article 5 scenario the most unpredictable of any formal ally.

STRATEGIC ALIGNMENT

Hedging Behavior

Turkey's hedging behavior is the most concerning in the alliance. The Russian S-400 acquisition is the clearest adversary-procurement case inside NATO. While Trump signaled a willingness to lift sanctions, Congress will also have a say in the future of any F-35 sales. Erdogan has maintained direct Putin engagement throughout the war, a sustained wartime Moscow relationship that exceeds any other NATO ally. On China, Turkey's BRI Middle Corridor memorandum and SCO dialogue status represent real exposure. NATO Secretary General Rutte has repeatedly pressed Turkey on S-400 disposal and sanctions alignment, stating publicly that allies must ensure their actions do not undermine the alliance's collective posture—language widely understood as directed at Ankara. The aggregate hedging profile is bleak: no other member combines S-400 ownership, Rosatom nuclear dependency, sanctions non-participation, and sustained adversary diplomatic engagement simultaneously.

STRATEGIC ALIGNMENT

Operational Cooperation

Turkey is an incredibly complicated partner for operational support. Turkey contributed substantially to both Iraq and Afghanistan, providing troops, logistics, and basing access across both campaigns. Incirlik Air Base was central to US and coalition operations throughout both wars and remains one of NATO's most operationally critical installations. Kürecik's BMD radar is the irreplaceable sensor for Iranian ballistic missile warning on the Middle East threat axis. Turkey's Montreux Convention closure after February 2022 restricting Russian naval reinforcement through the Bosphorus was one of the most consequential single operational decisions of the war. Against this, Turkey's Syria and Iraq operations have created recurring US policy friction—most significantly the 2019 Operation Peace Spring incursion into northeastern Syria, which prompted US Congressional sanctions threats and led to a US troop withdrawal from the area, disrupting counter-ISIS operations. S-400 incompatibility means Turkey's air defense cannot be networked into NATO's integrated air and missile defense architecture, a persistent operational liability at the alliance's southeastern flank.

TIER 3

Policy Recommendations

1. **Explicit Public Naming:** Washington demands change by publicly identifying Tier 3 allies by name in congressional testimony, State and War Department reporting, and presidential statements.
2. **Consider Reduced US Force Presence:** US rotational deployments, exercises, or permanent basing in Tier 3 countries are scaled back in proportion to their contribution shortfalls.
3. **Bilateral Trade and Economic Pressure:** Washington signals that chronic NATO underperformance carries costs in trade negotiations, investment frameworks, and diplomatic priority.
4. **Mandatory Capability Remediation Plans:** NATO requires Tier 3 allies to submit binding multi-year remediation plans with specific milestones to correct milestones, subject to annual alliance-level review.
5. **Formal Alliance Review Trigger:** Sustained Tier 3 status over multiple years triggers a formal NATO review of that ally's contributions and obligations and determines consequences if goals aren't met.