



# TIER 1

Model Allies



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# TIER 1

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## *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.



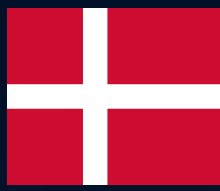


# DENMARK

## 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



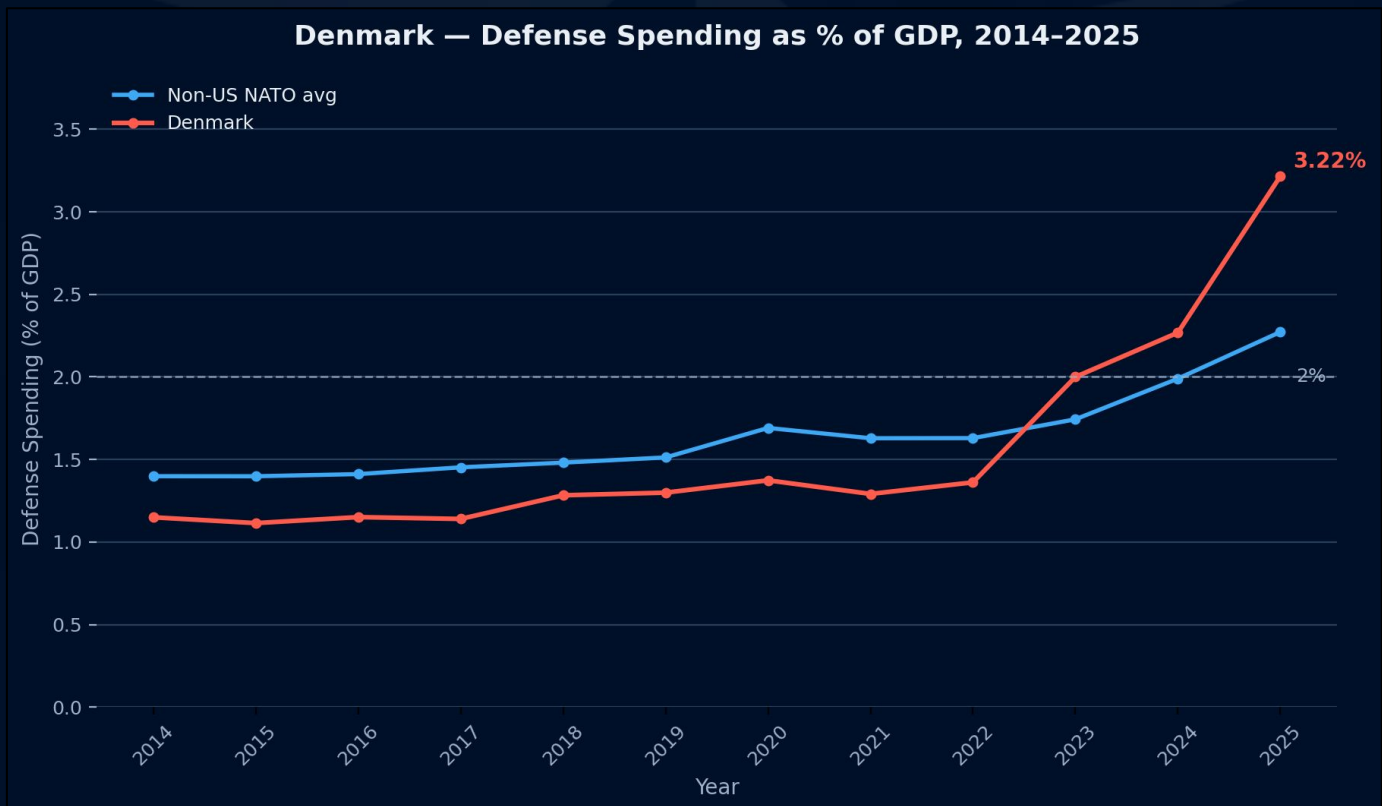
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

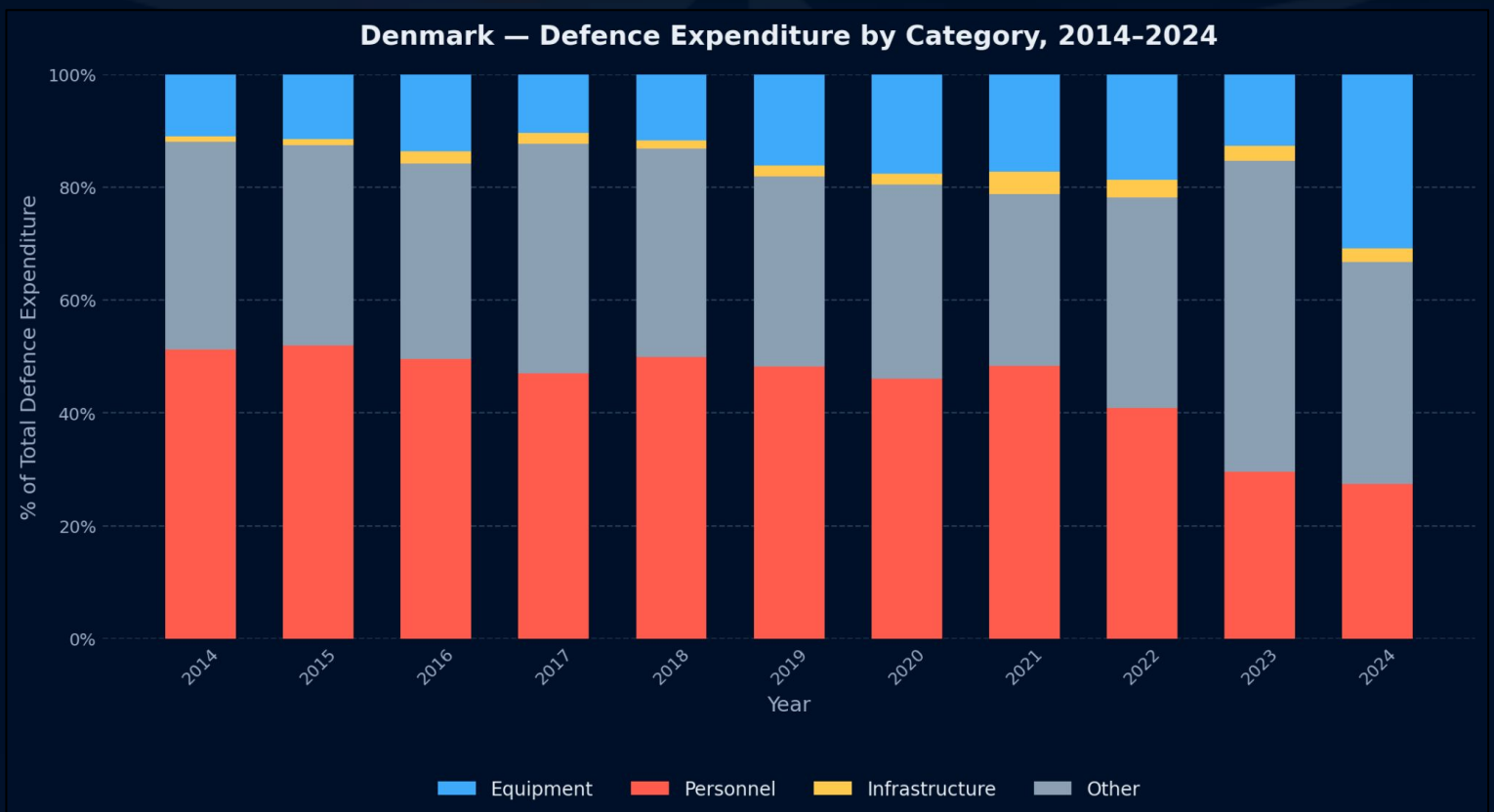
Denmark's [defense spending](#) trajectory is one of the most dramatic in the alliance. Spending tracked below the non-US NATO average for most of the past decade and hovering around 1.1–1.3% of GDP through 2022. After the Russian invasion of Ukraine, Danish defense spending accelerated: 2.0% in 2023, 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*

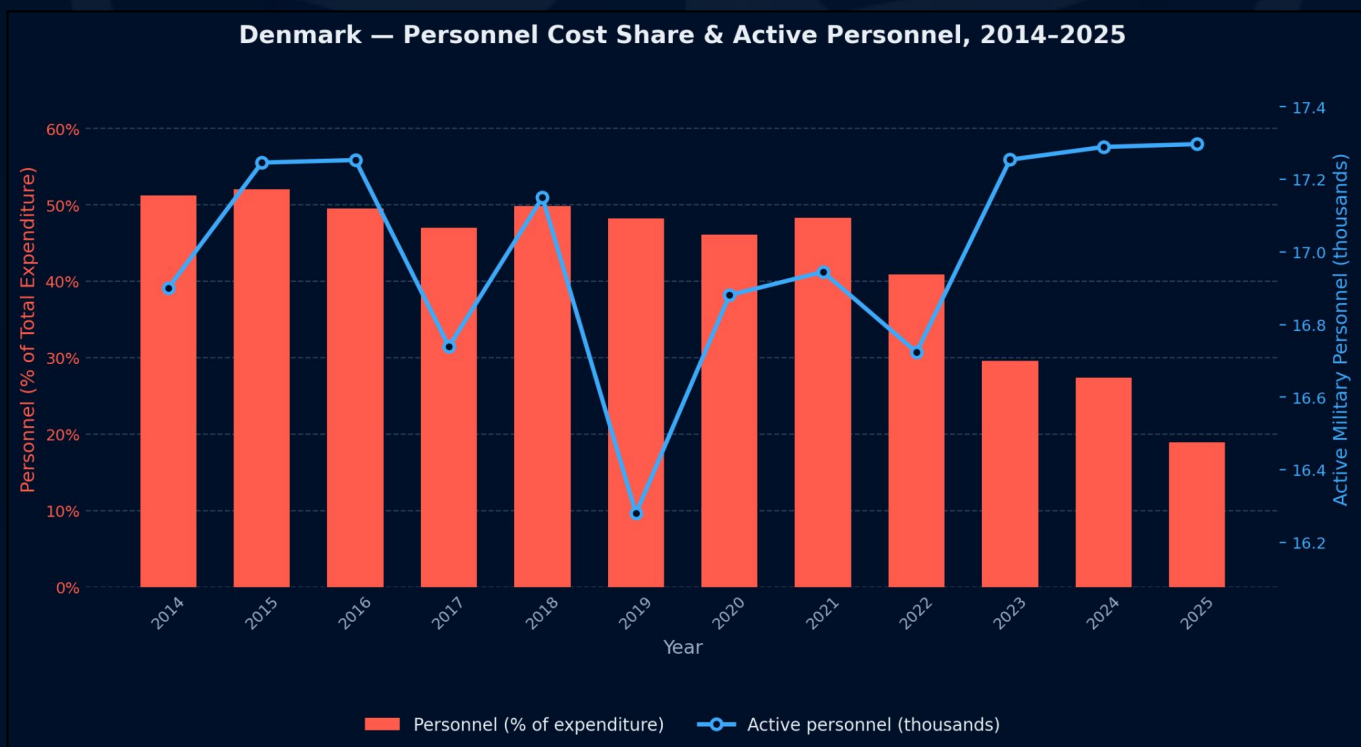
Denmark's equipment share transformation is a model story of transformation. Personnel costs ran at roughly 48–52% of the defense budget through most of 2014–2022, with equipment investment modest and relatively flat. The inflection comes sharply in 2023 and 2024: equipment has surged to roughly 30%+, 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*

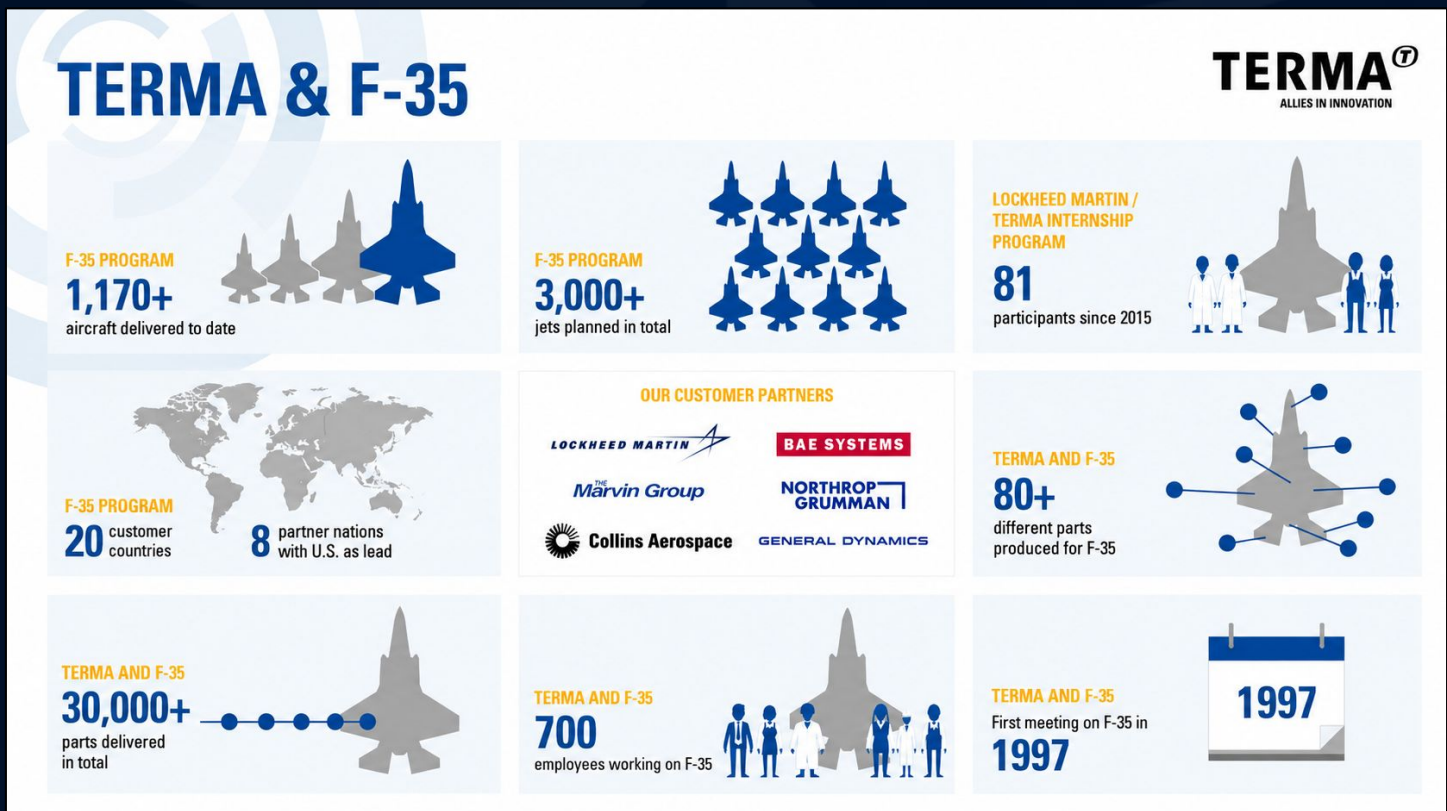
Denmark's force posture is defined by geographic leverage far exceeding its population of six million. Danish territory spans the Baltic approaches, North Sea, and High Arctic through Greenland and the Faroe Islands. Pituffik Space Base in Greenland, operating under the [1951 US-Denmark defense framework](#), 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.

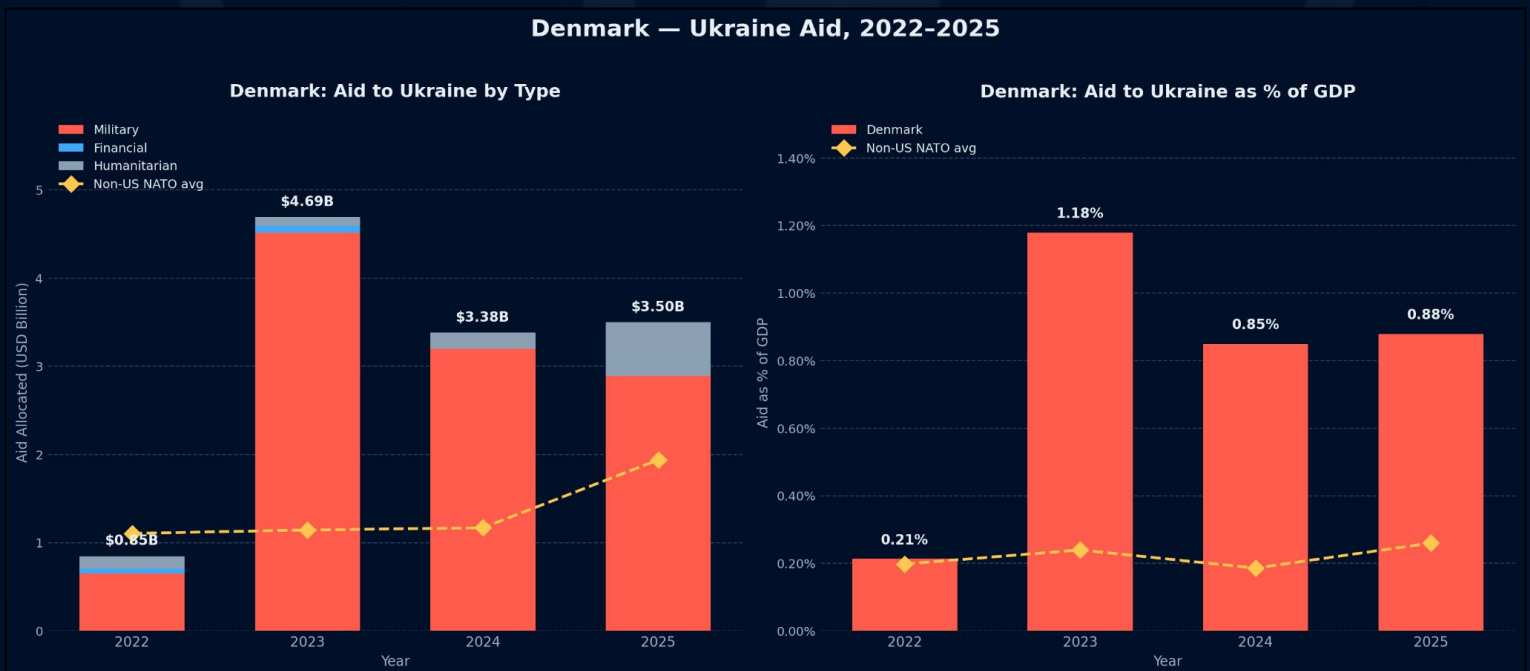


# STRATEGIC ALIGNMENT

## 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.

Denmark — Ukraine Aid, 2022-2025



# 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.

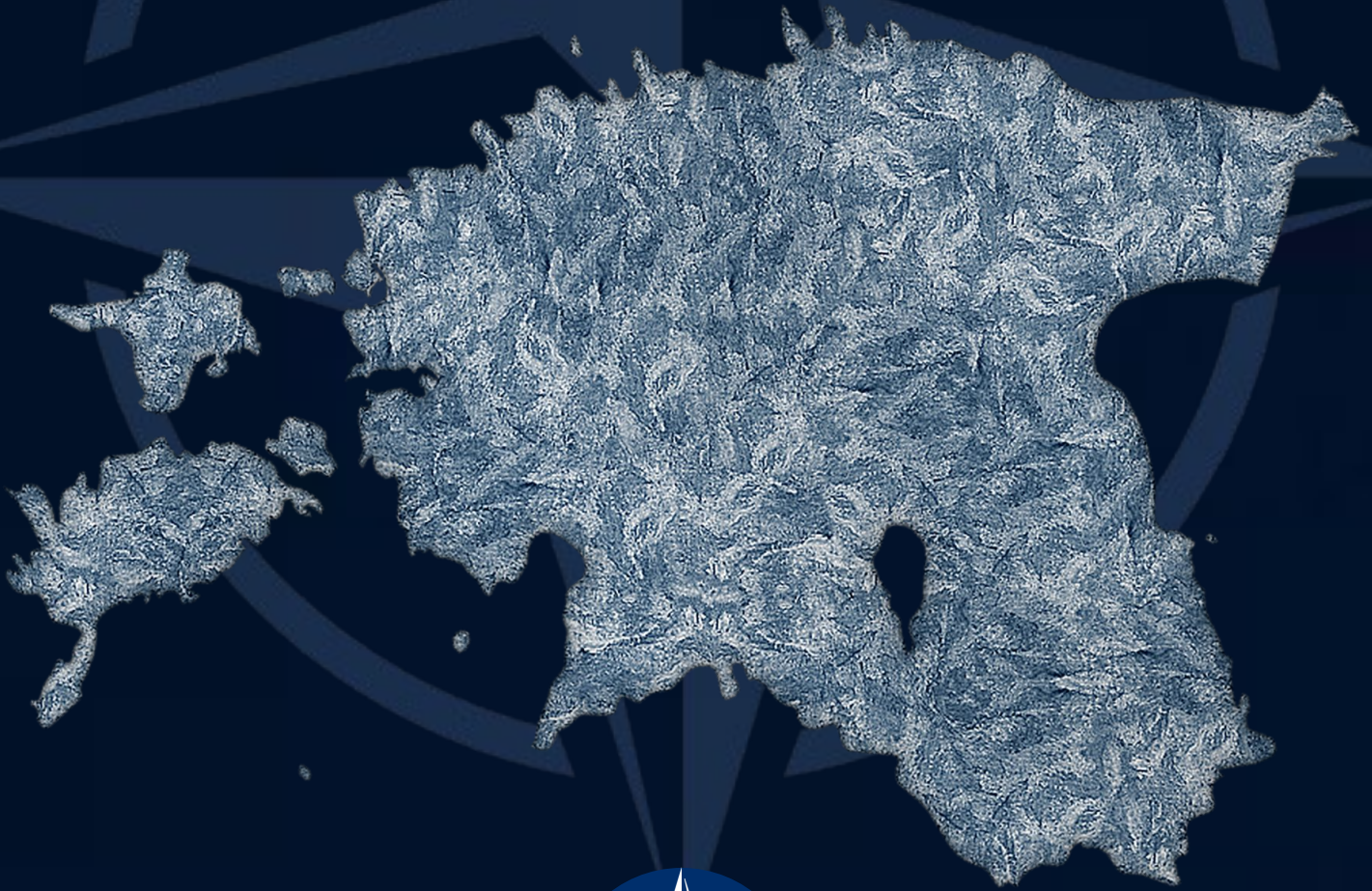




# ESTONIA

## NATO Country Assessment — *TIER ONE* —

DEFENSE SPENDING • UKRAINE LEADERSHIP • RUSSIAN DECOUPLING





# AT A GLANCE

## *Toplines*

- **NATO's 4<sup>th</sup> 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 2<sup>nd</sup> 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



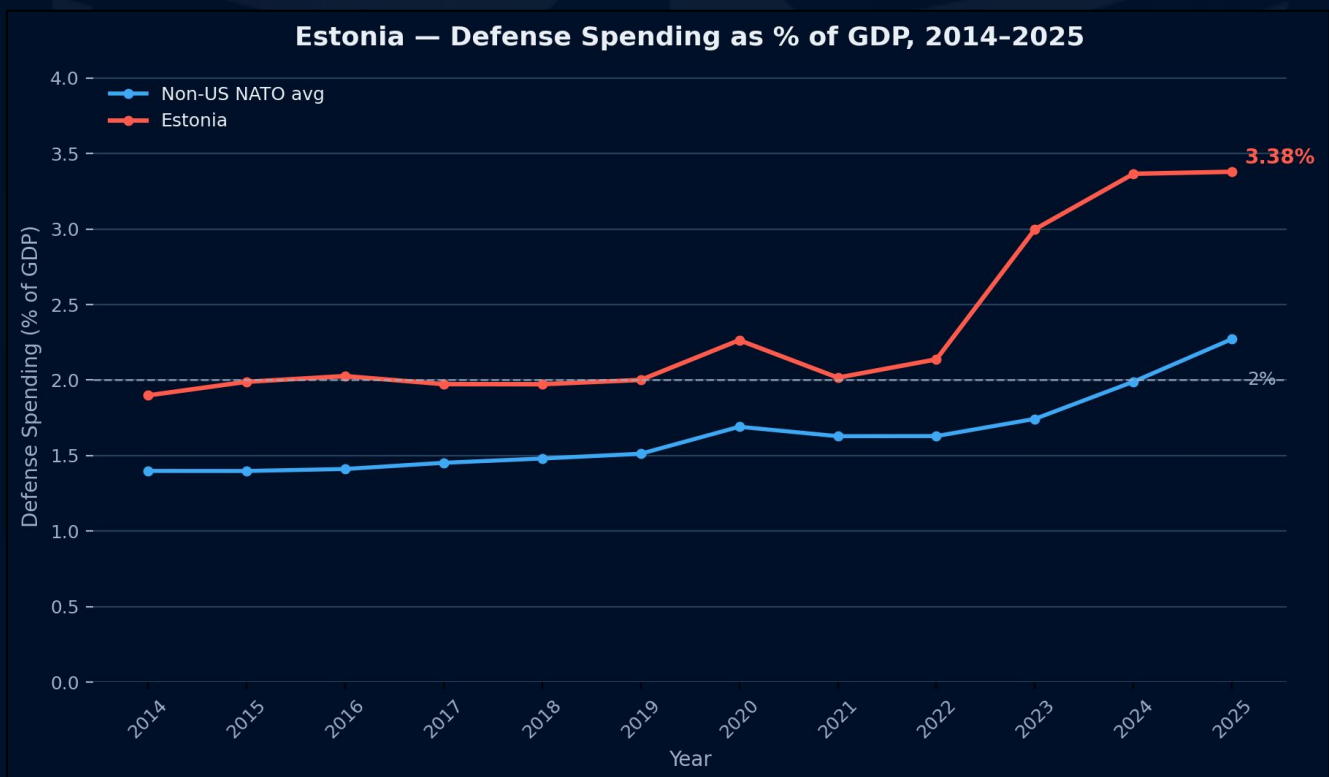
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# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

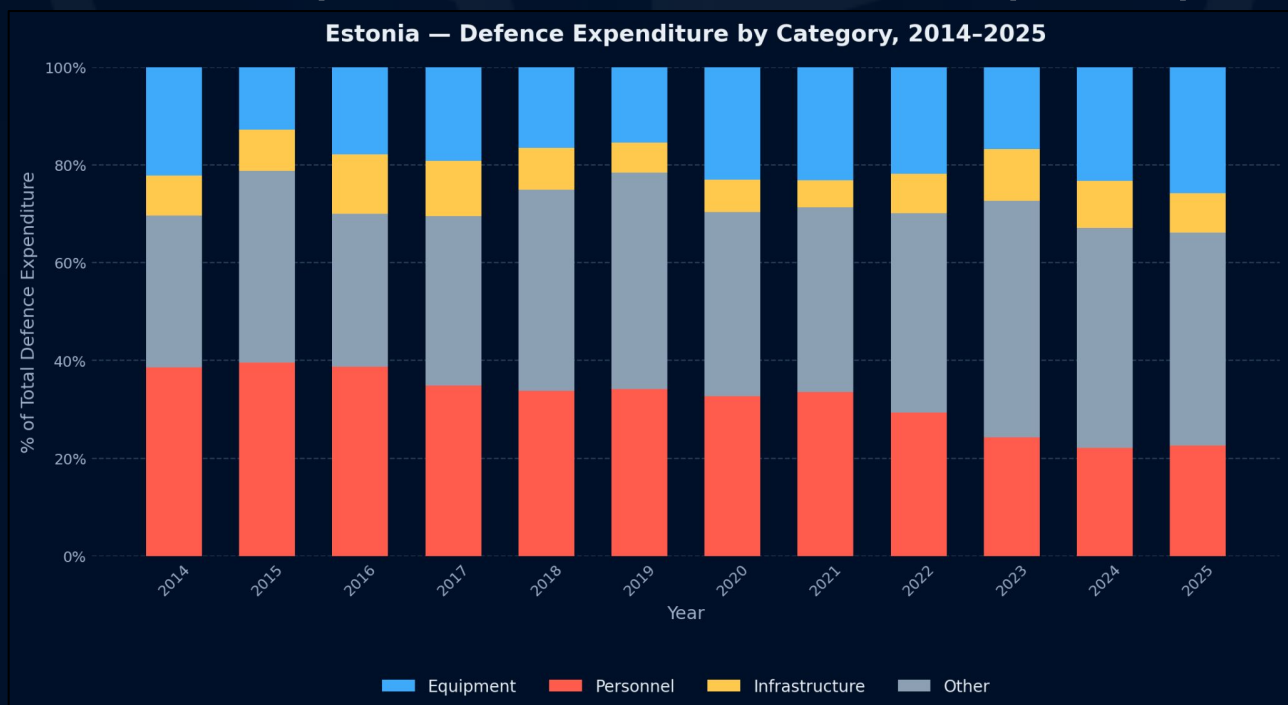
Estonia is one of NATO's most committed allies by [defense spending](#) as a share of GDP. Estonia has exceeded 2% of GDP almost every single year since 2014: averaged at 3.37, well before the post-2022 surge reshaped alliance expectations, and now holds at 3.38% of GDP in 2025. Spending has grown from \$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*

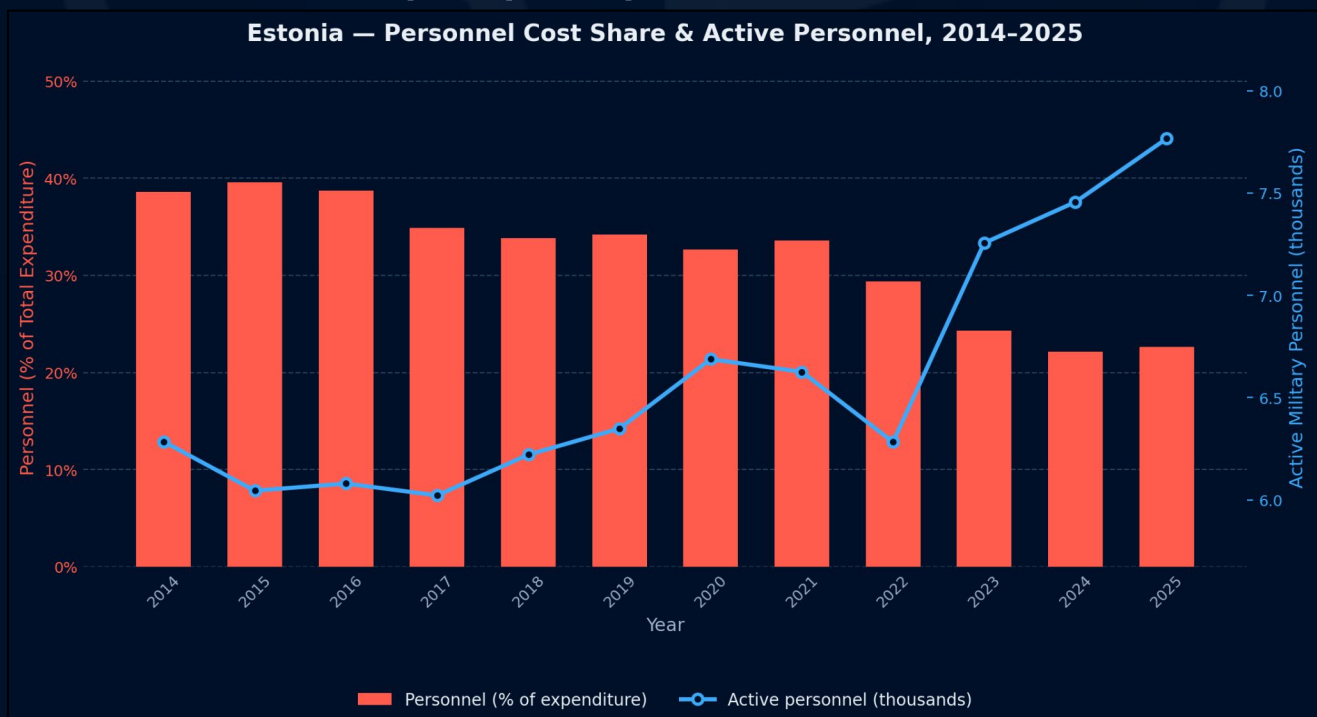
Estonia's [equipment share](#) shows an ally consistently arming themselves, cognizant of the risks Europe faces. Personnel costs have fallen from roughly 40% of the defense budget in 2014 to approximately 22% in 2025, while equipment has surged to roughly 20%+, reflecting the scale of capital investment 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, Iгла 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.

Estonia — Ukraine Aid, 2022-2025

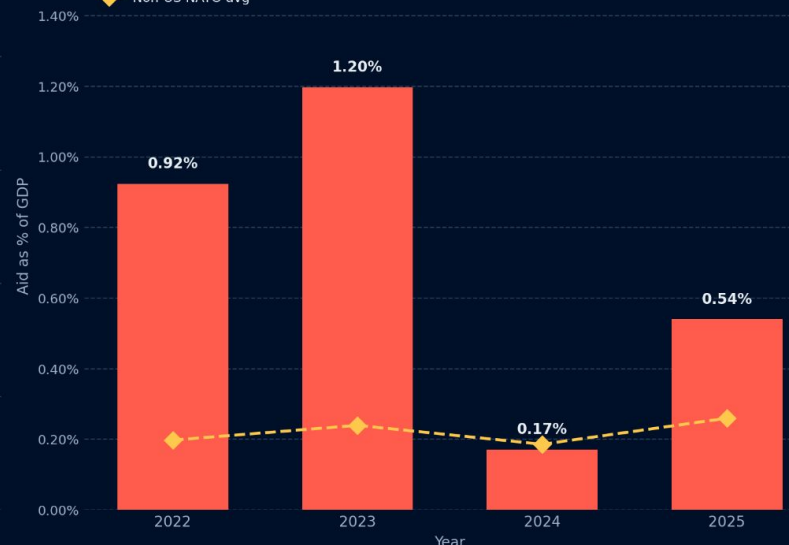
Estonia: Aid to Ukraine by Type

- Military
- Financial
- Humanitarian
- ◆ Non-US NATO avg



Estonia: Aid to Ukraine as % of GDP

- Estonia
- ◆ Non-US NATO avg



# 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 20<sup>th</sup>. 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.

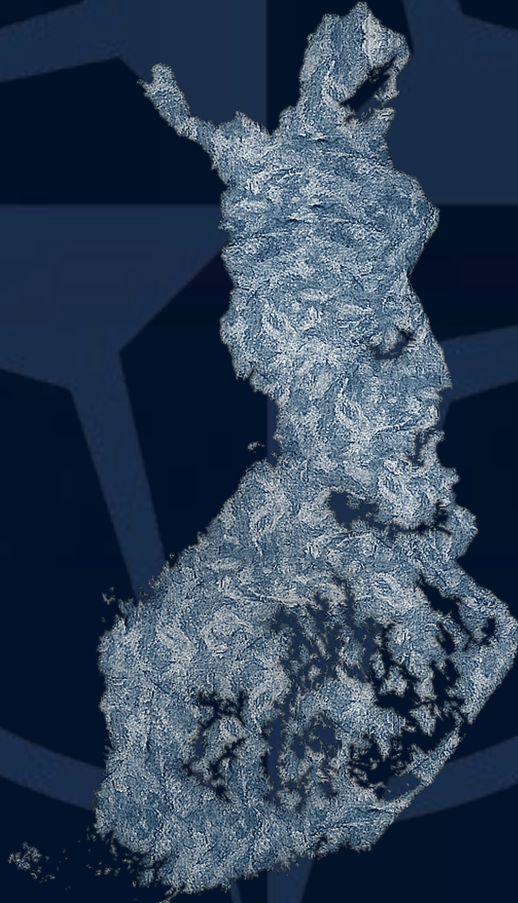




# FINLAND

## NATO Country Assessment — *TIER ONE* —

DEFENSE SPENDING • POWER PROJECTION • AIR DOMINANCE





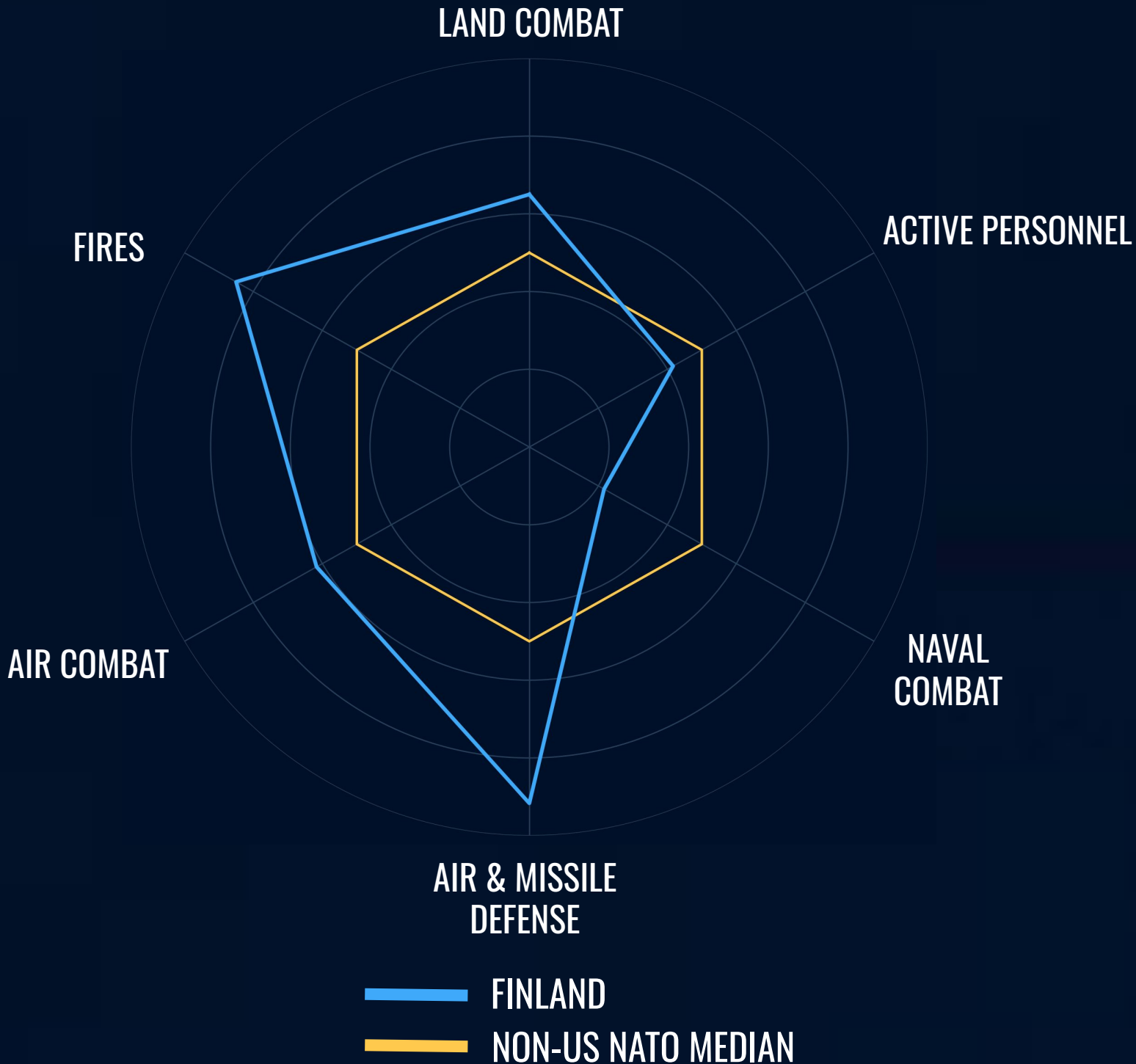
# AT A GLANCE

## *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



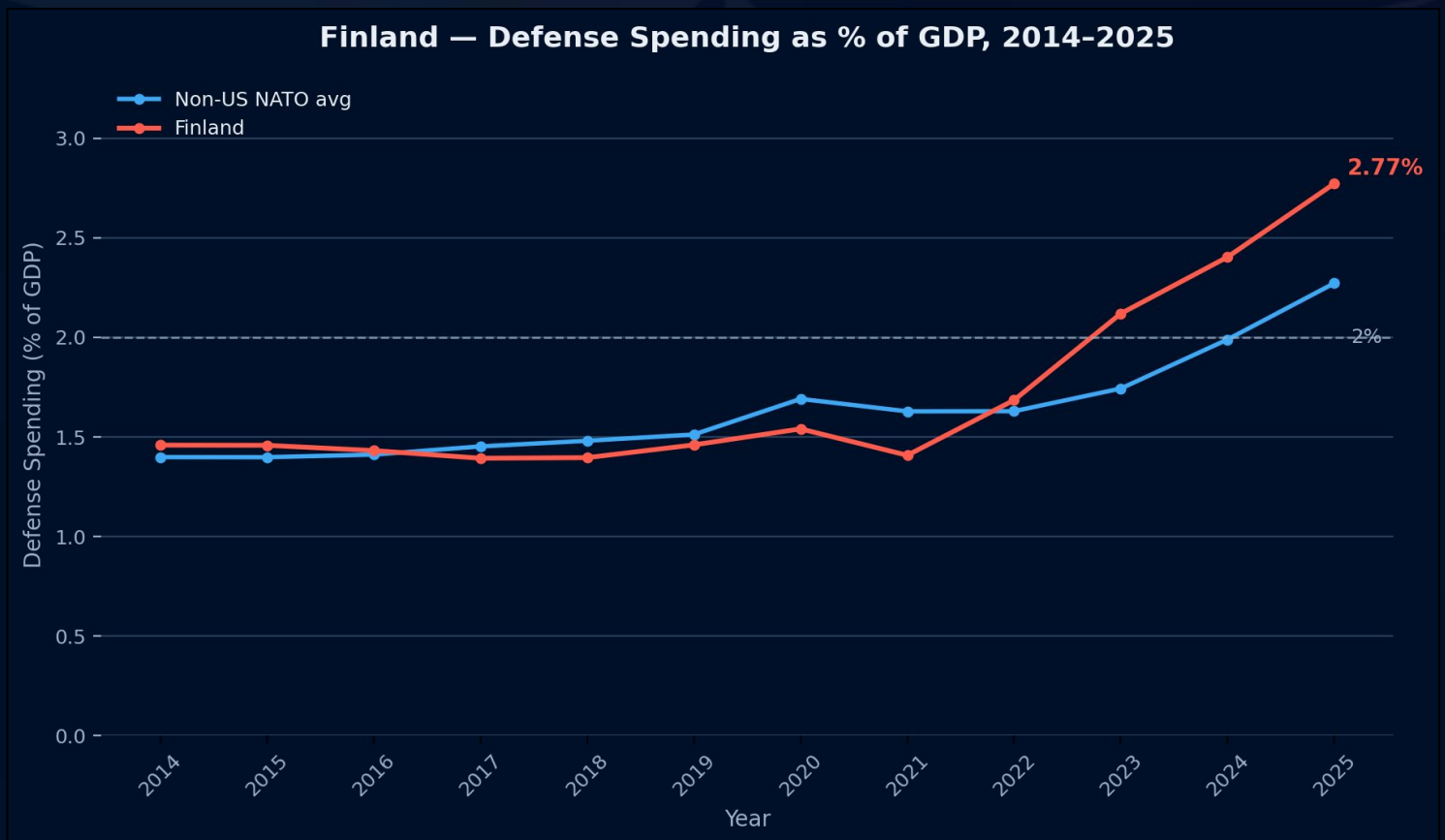
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# MILITARY CONTRIBUTIONS

## *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.

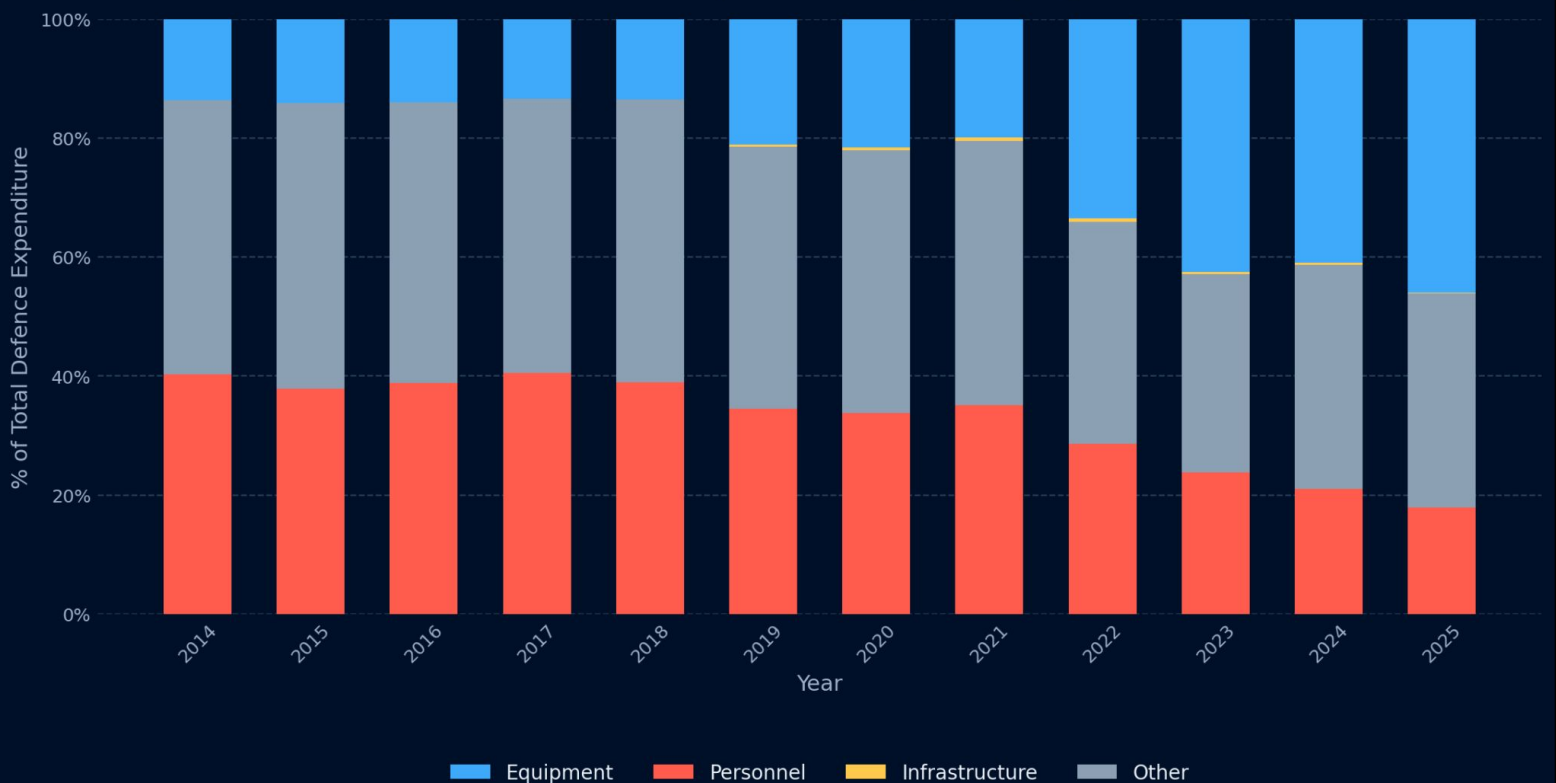


# MILITARY CONTRIBUTIONS

## *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.

Finland — Defence Expenditure by Category, 2014-2025

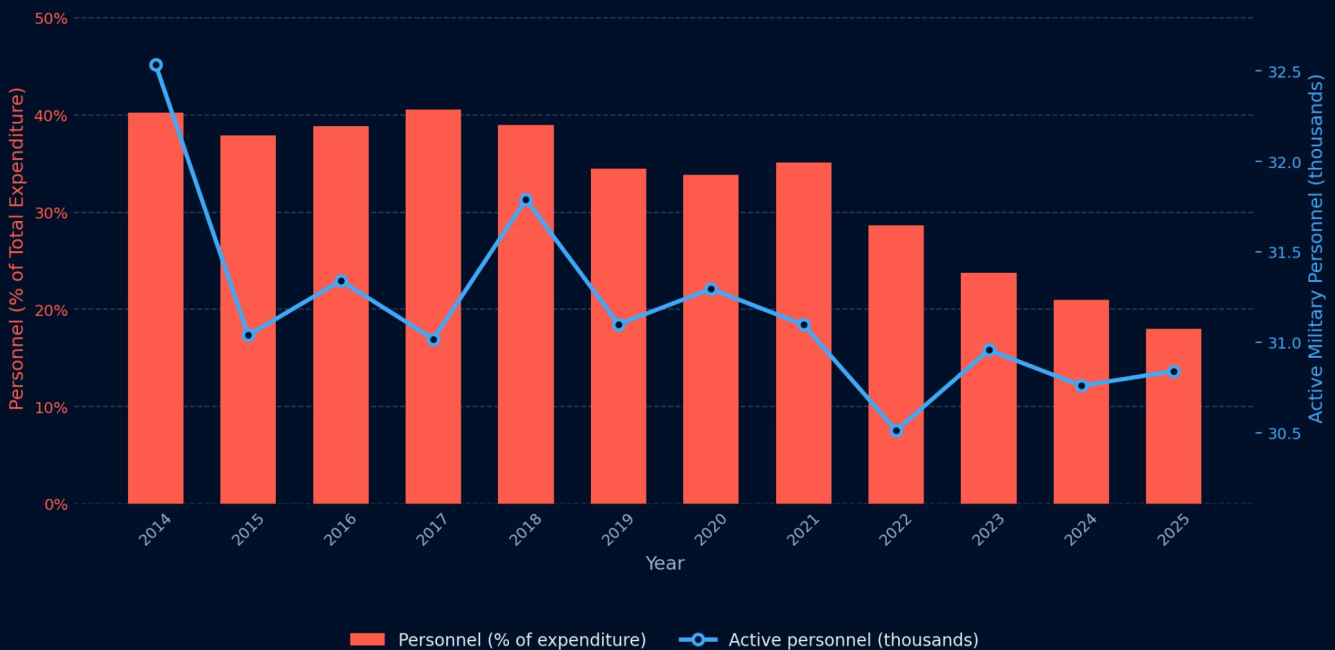


# MILITARY CONTRIBUTIONS

## *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.

Finland — Personnel Cost Share & Active Personnel, 2014–2025



# 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.



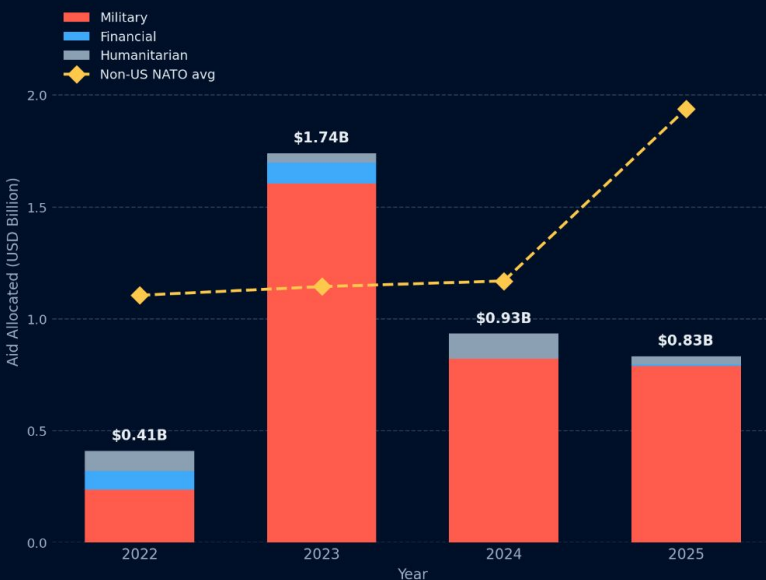
# STRATEGIC ALIGNMENT

## *Ukraine Support*

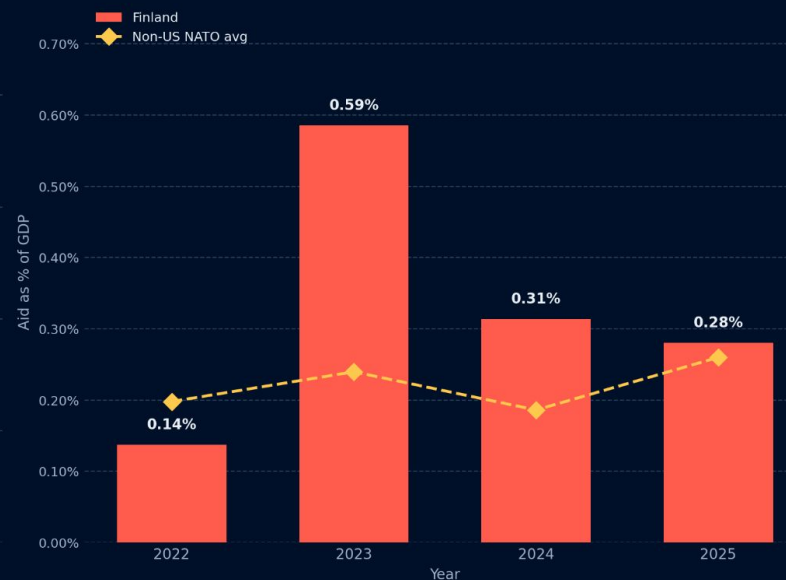
Finland's [Ukraine aid](#) peaked at \$1.74B in 2023 (0.59% of GDP, well above the non-US NATO average) before settling at \$0.93B and \$0.83B in 2024–2025, still running above the alliance average. Kiel tracks €3.605B allocated and €4.433B committed (1.43% and 1.76% of GDP) substantially military-heavy 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.

Finland — Ukraine Aid, 2022–2025

Finland: Aid to Ukraine by Type



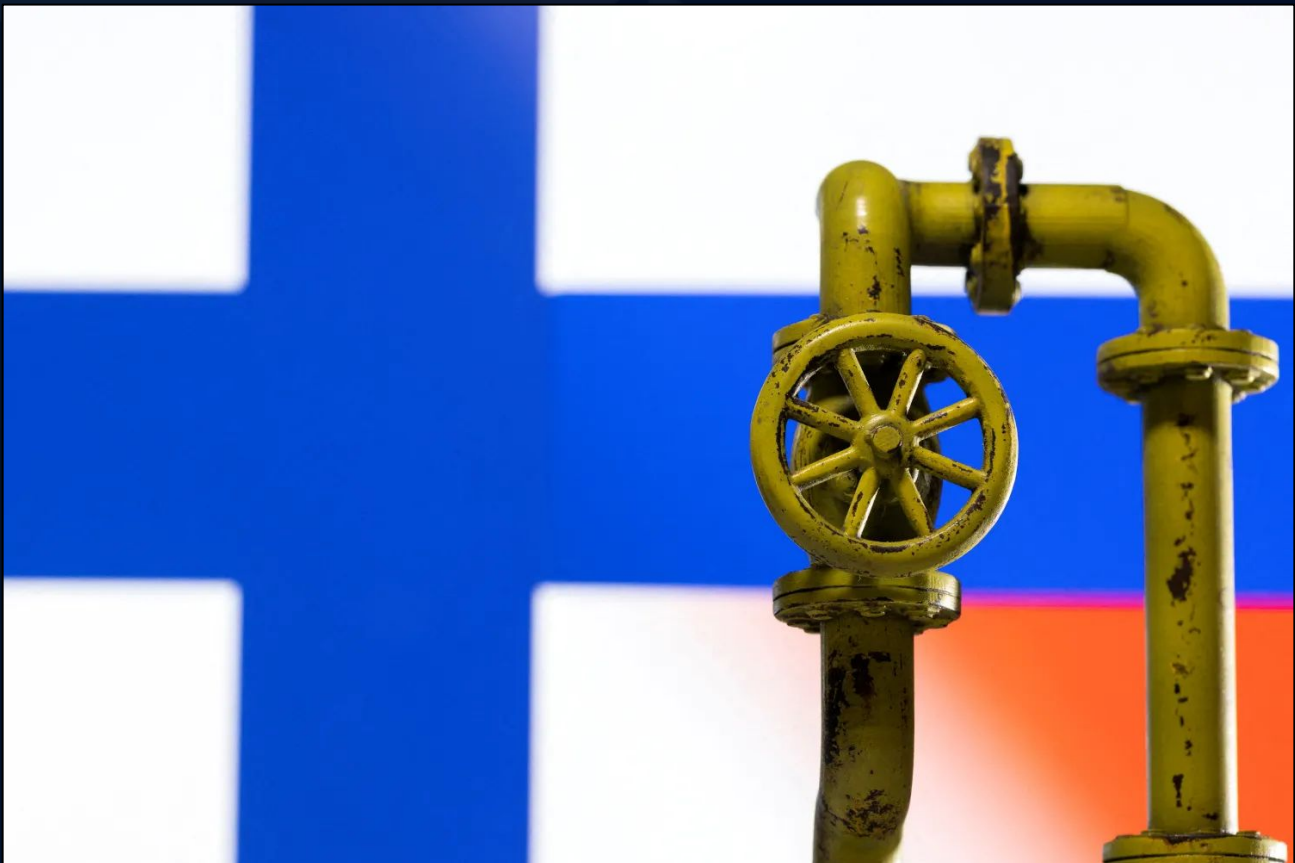
Finland: Aid to Ukraine as % of GDP



# 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*

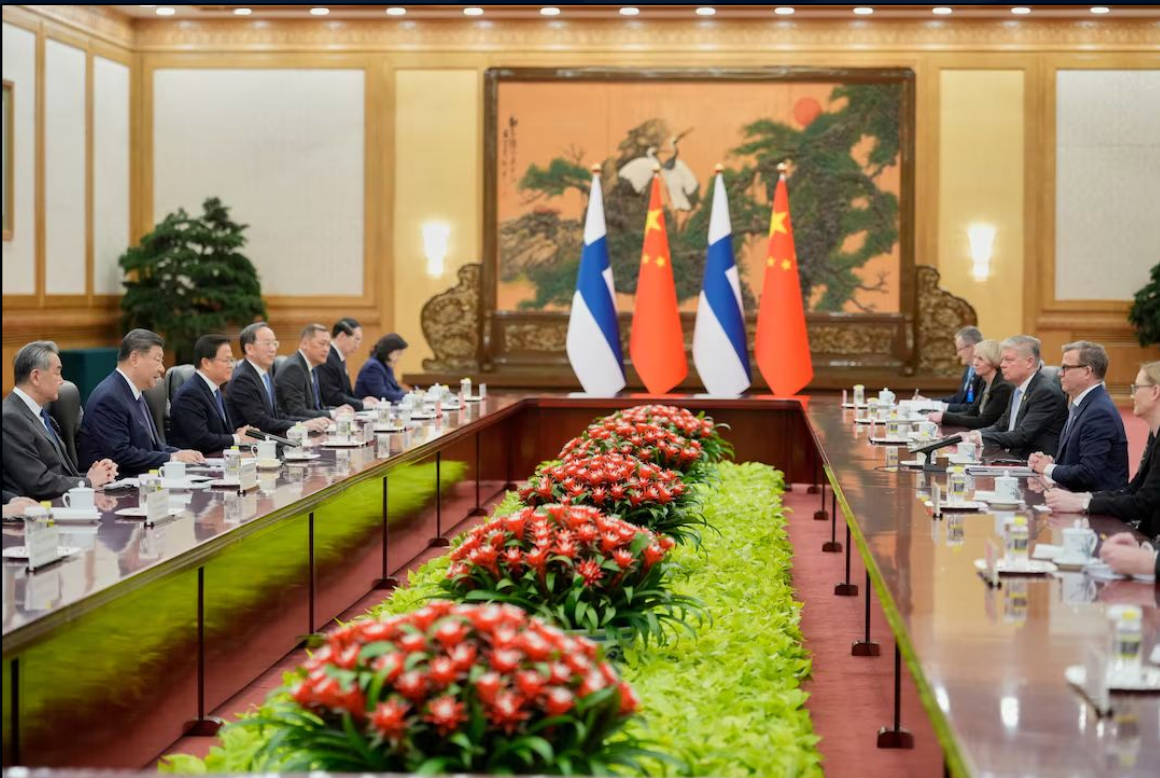
Eighty-three percent of [Finns said in 2024](#) they would vote to stay in NATO, remarkable for a country that formally joined only in April 2023, while 73% agreed Finland should defend another ally and 79% agreed NATO membership makes a foreign attack less likely. Seventy-nine percent said Russia's 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.

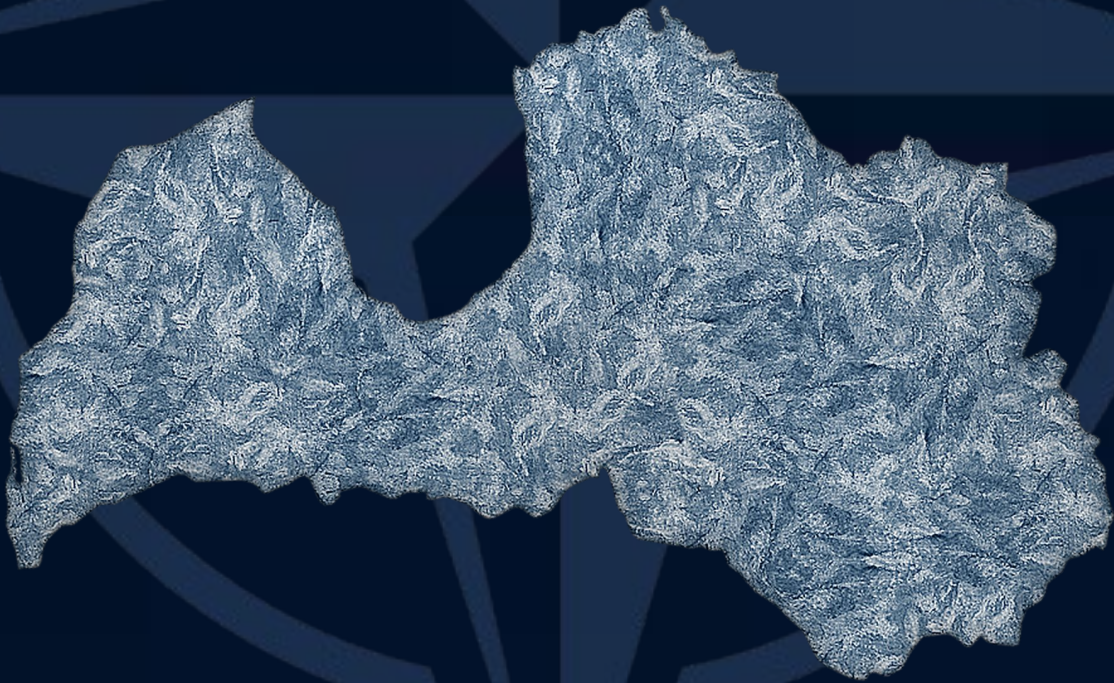




# LATVIA

## 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



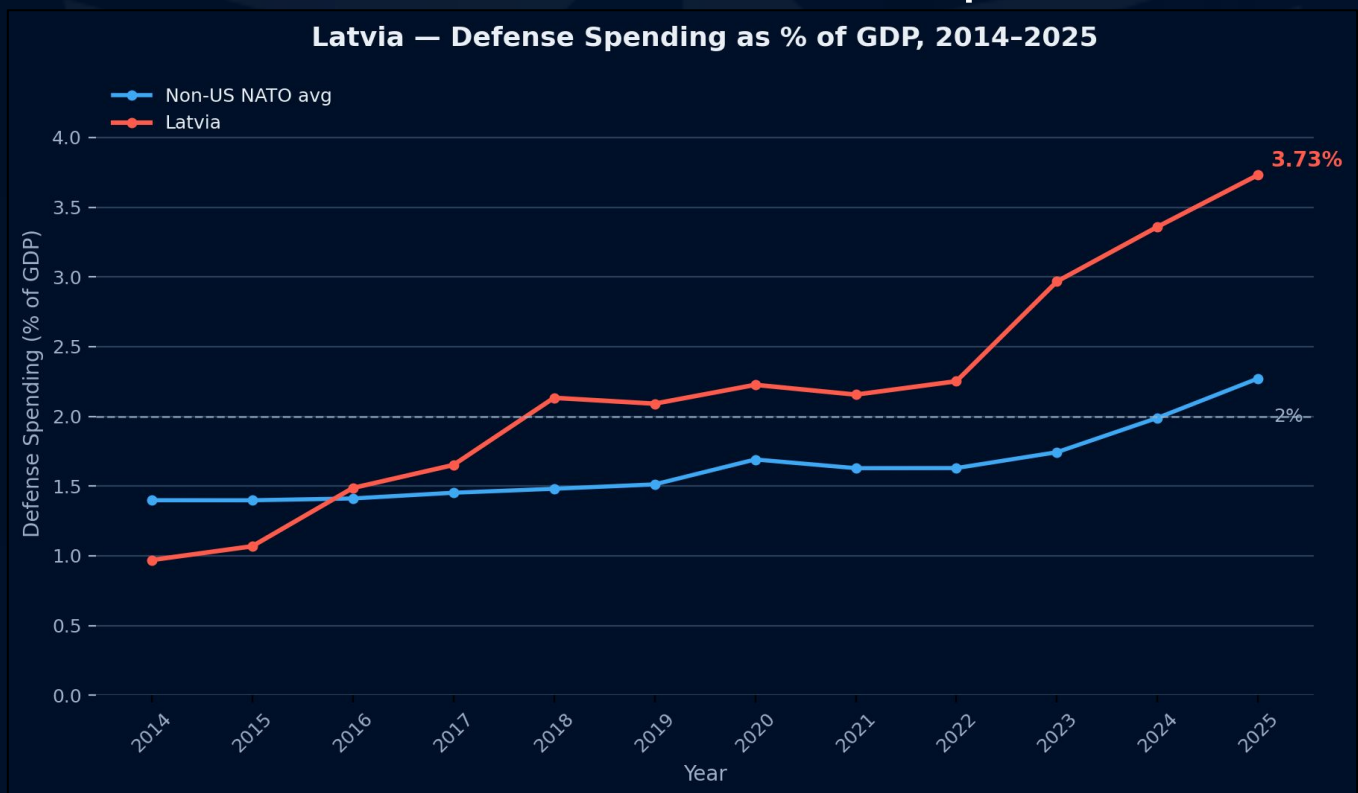
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

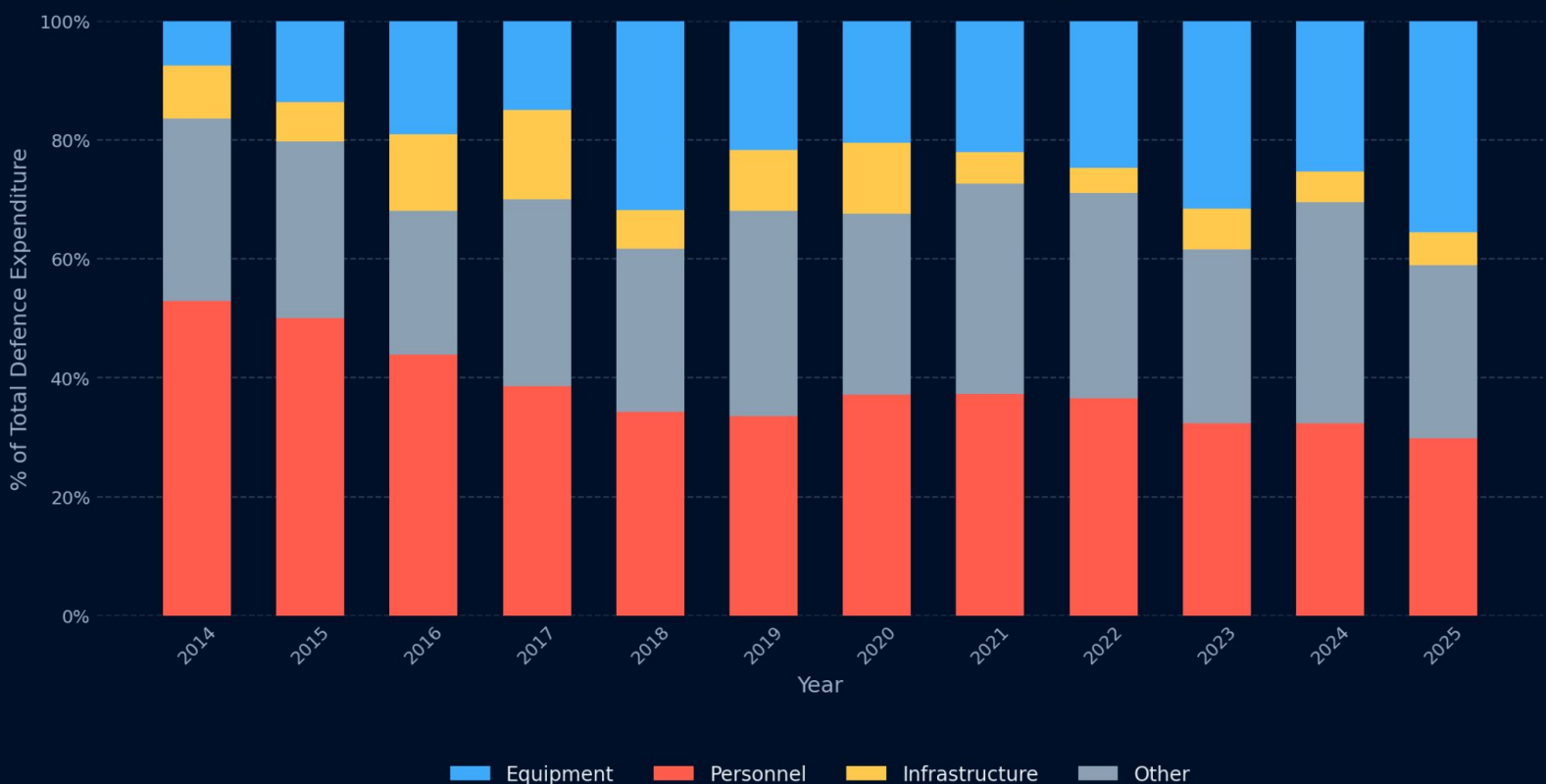


# MILITARY CONTRIBUTIONS

## *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.

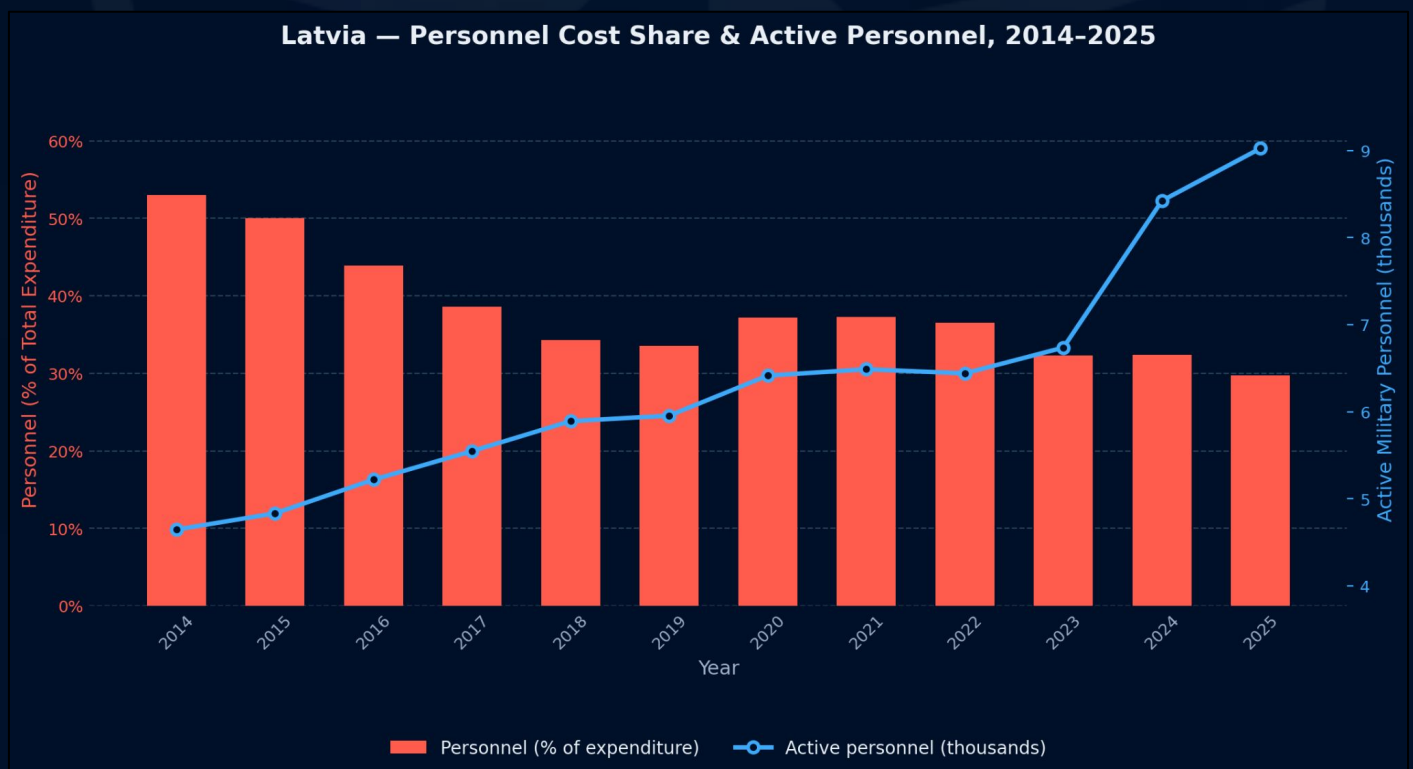
Latvia — Defence Expenditure by Category, 2014-2025



# 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*

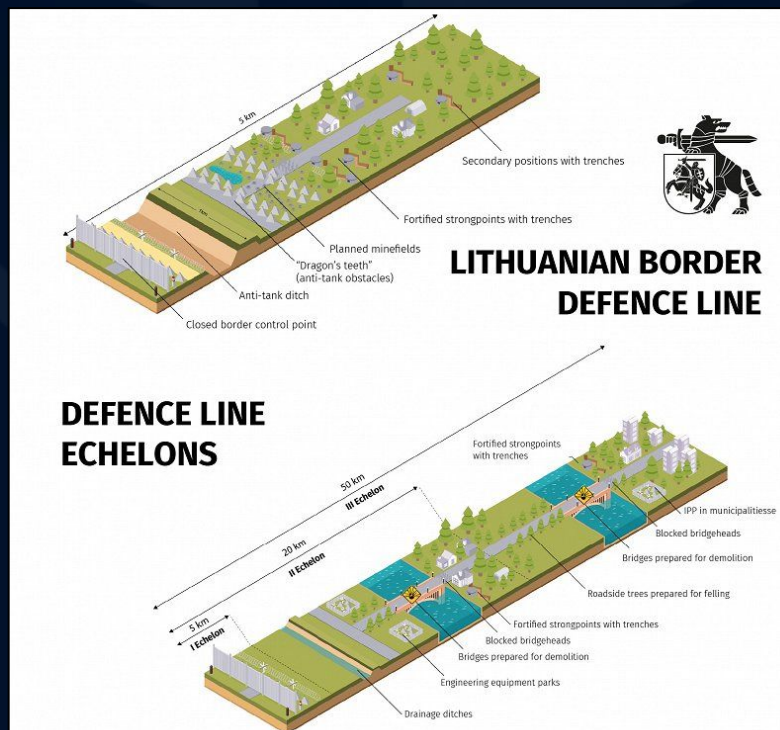
Latvia's [modernization is focused](#) and threat-informed. On fires, 65 M109A5 howitzers, 18 Archer 155mm systems approved, and 6 HIMARS with ATACMS signed create a layered fires architecture from medium-range to deep-strike precision. On air defense, [joint Estonia-Latvia IRIS-T SLM procurement](#) 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*

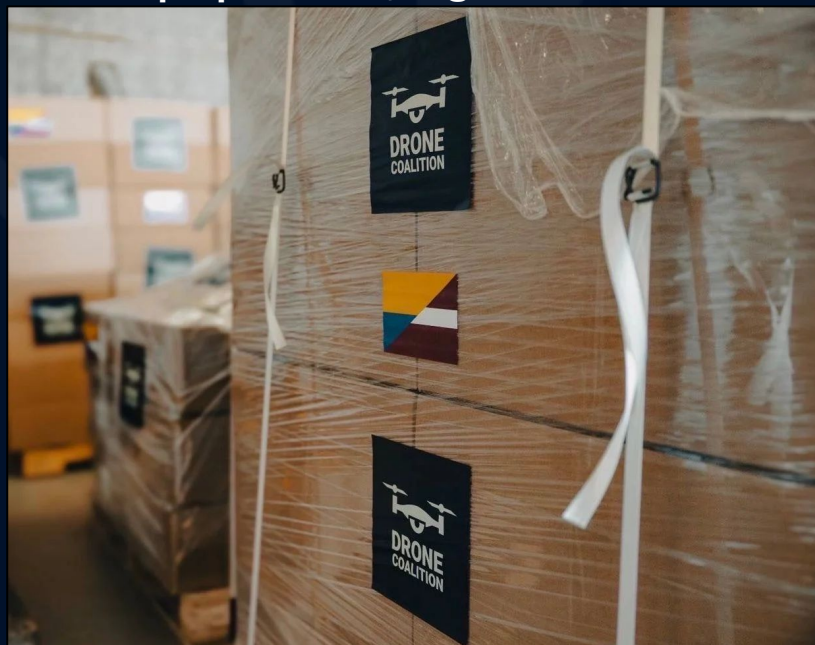
Latvia hosts NATO's first eFP formation to scale to full brigade size—the Canada-led NATO [Multinational Brigade Latvia](#), stood up at Ādaži in July 2024 with 14 contributing nations. Canada plans up to 2,200 persistently deployed troops under Operation Reassurance including 15 Leopard 2A4M tanks and 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.



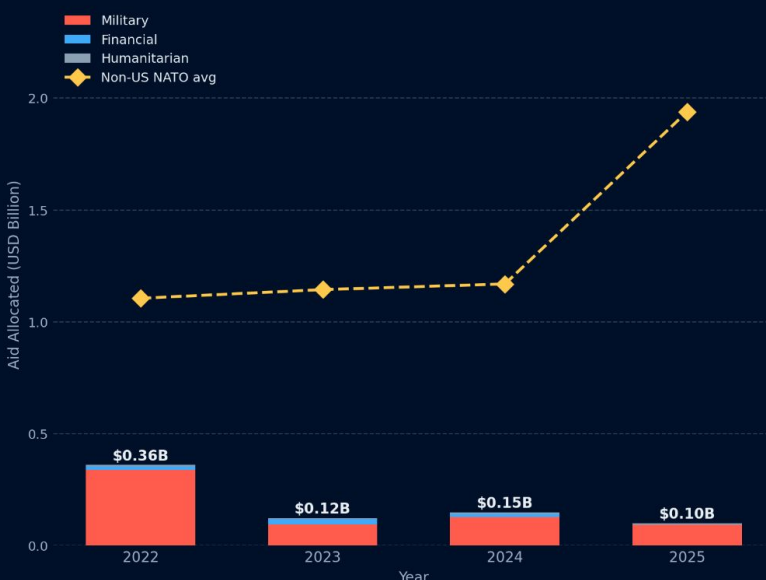
# STRATEGIC ALIGNMENT

## Ukraine Support

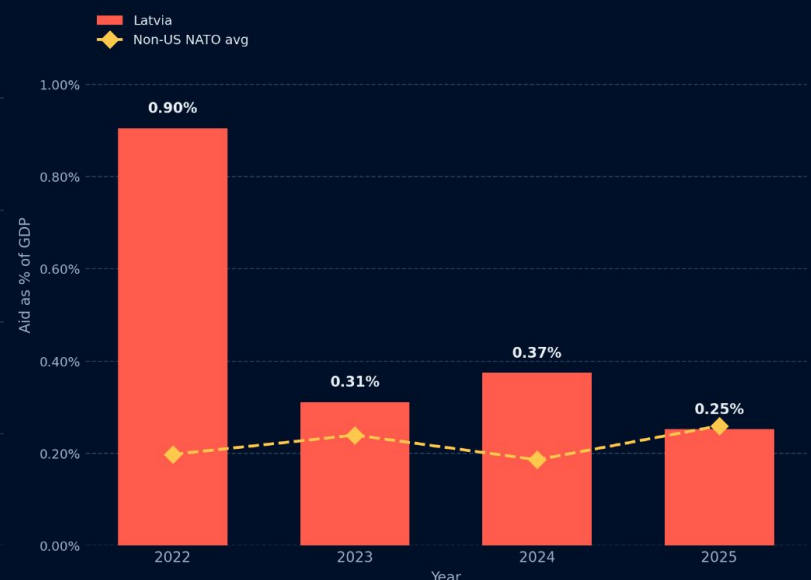
Latvia's [Ukraine aid](#) shows consistent above-average contribution every year: 0.90% of GDP in 2022 settling at 0.25-0.37% in subsequent years. Kiel tracks €0.654B allocated and €0.679B committed roughly 1.94% and 2.02% of GDP—top-tier globally alongside Estonia, Lithuania, and Denmark. Latvia's signature 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.

Latvia — Ukraine Aid, 2022-2025

Latvia: Aid to Ukraine by Type



Latvia: Aid to Ukraine as % of GDP



# 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.

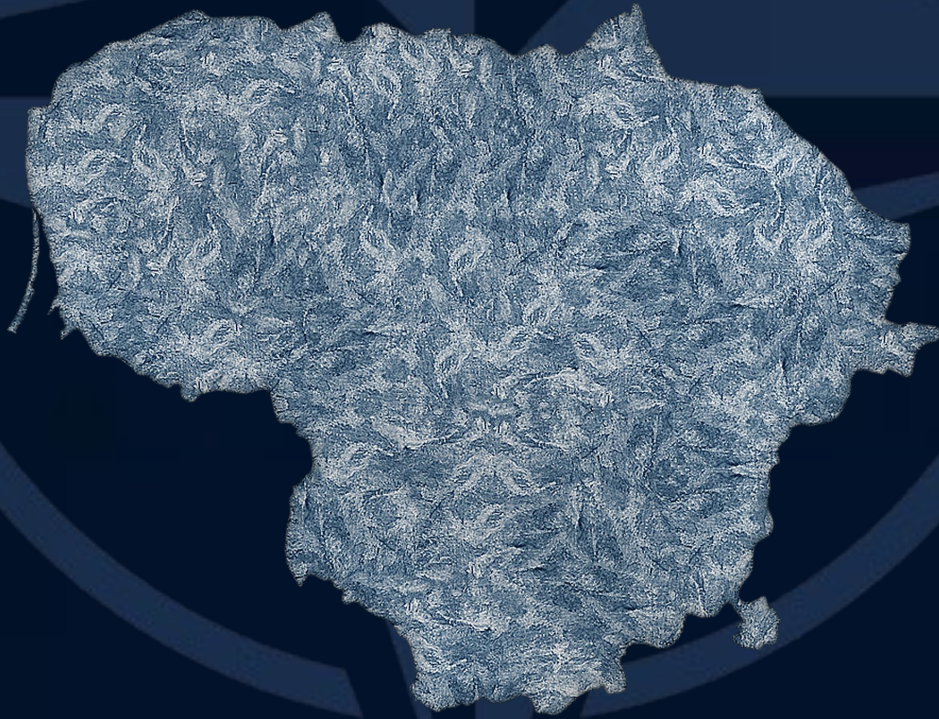




# LITHUANIA

## 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.

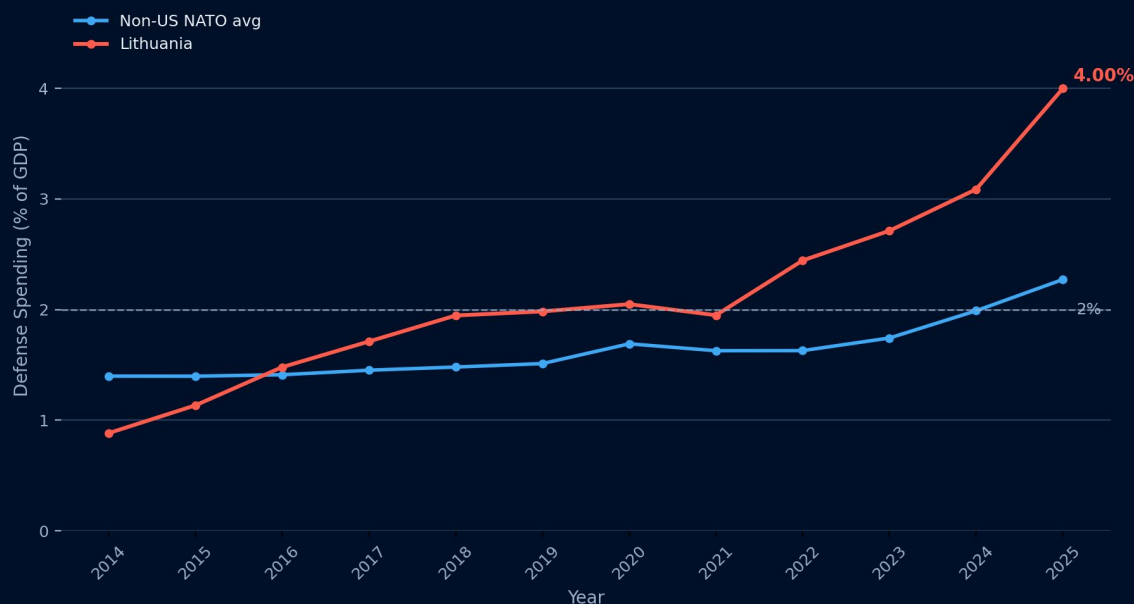


# MILITARY CONTRIBUTIONS

## *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.

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

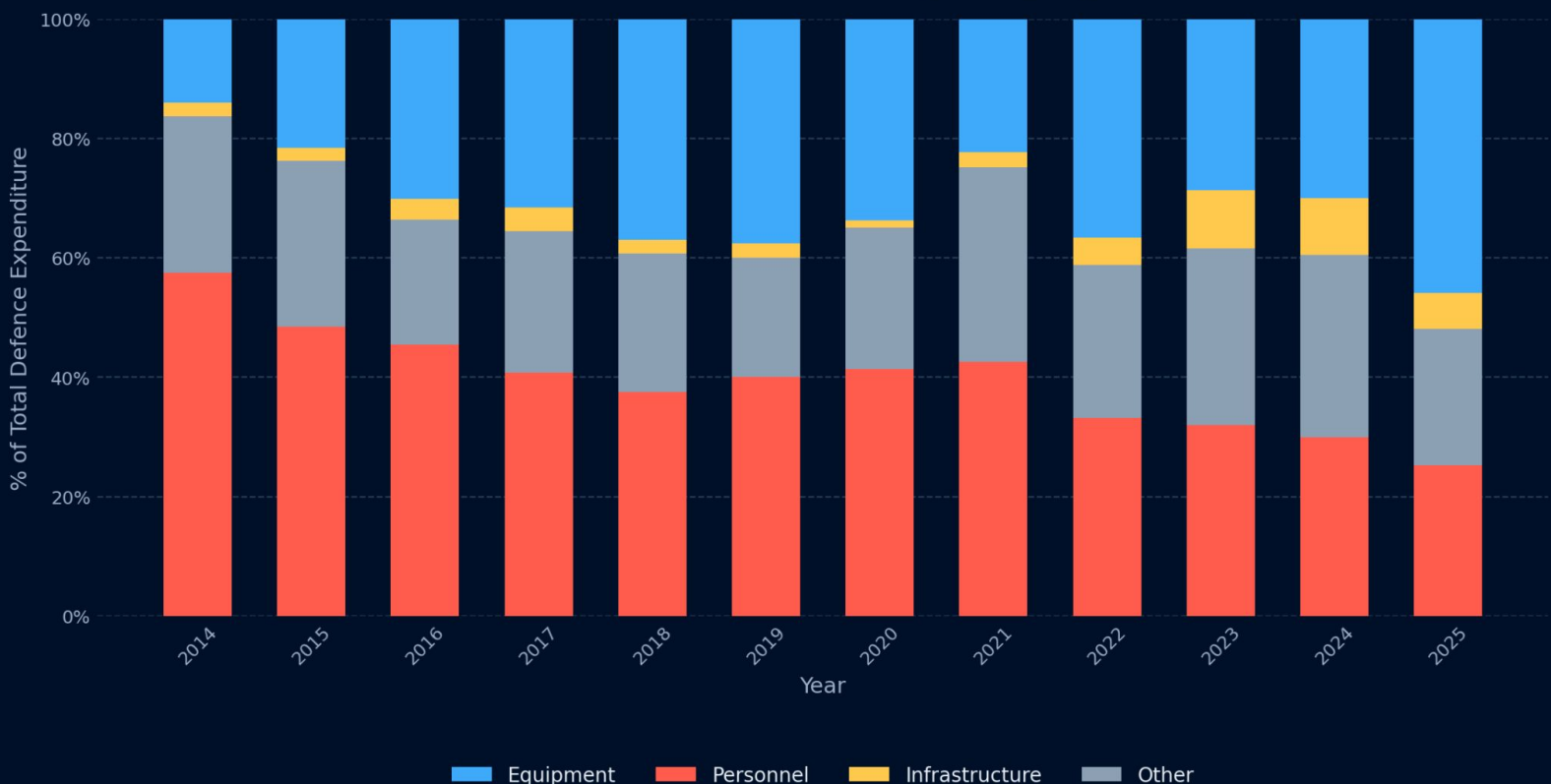


# MILITARY CONTRIBUTIONS

## *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.

Lithuania — Defence Expenditure by Category, 2014-2025

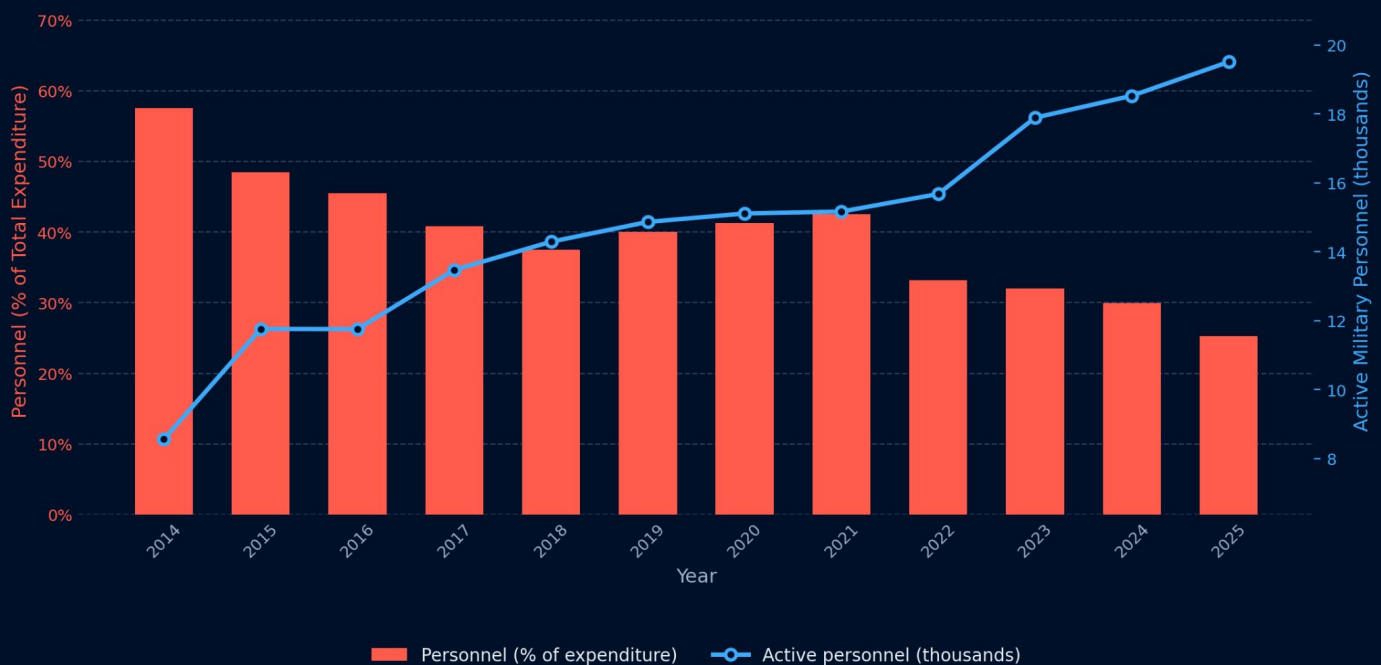


# MILITARY CONTRIBUTIONS

## *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.

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



# 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.



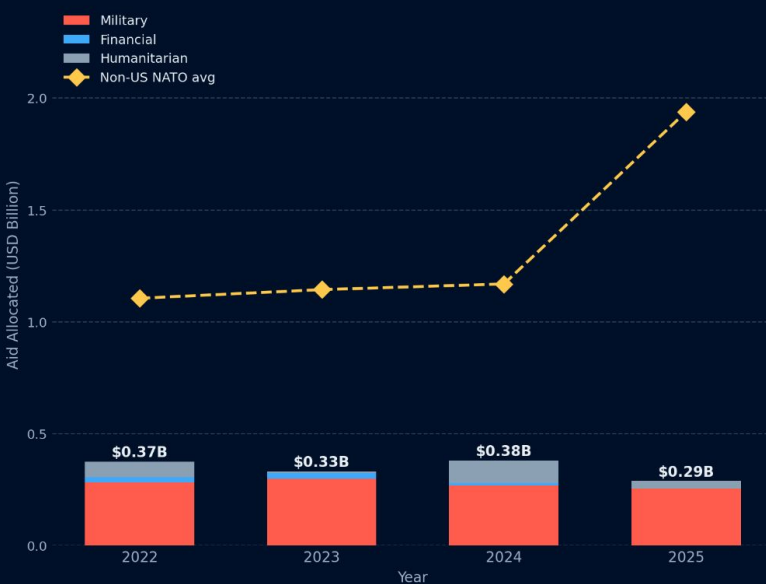
# STRATEGIC ALIGNMENT

## Ukraine Support

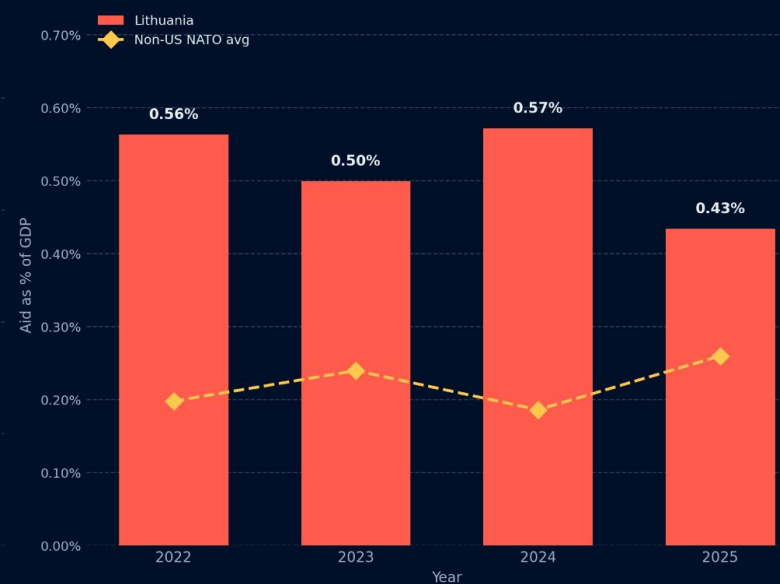
Lithuania's [Ukraine aid chart](#) shows consistent, relatively large contributions every year: 0.56% of GDP in 2022, 0.50% in 2023, 0.57% in 2024, and 0.43% in 2025—roughly double the non-US NATO average throughout. Kiel tracks €1.418B allocated and €1.595B committed (2.52% and 2.84% of GDP) which is 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.

Lithuania — Ukraine Aid, 2022-2025

Lithuania: Aid to Ukraine by Type



Lithuania: Aid to Ukraine as % of GDP



# 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.

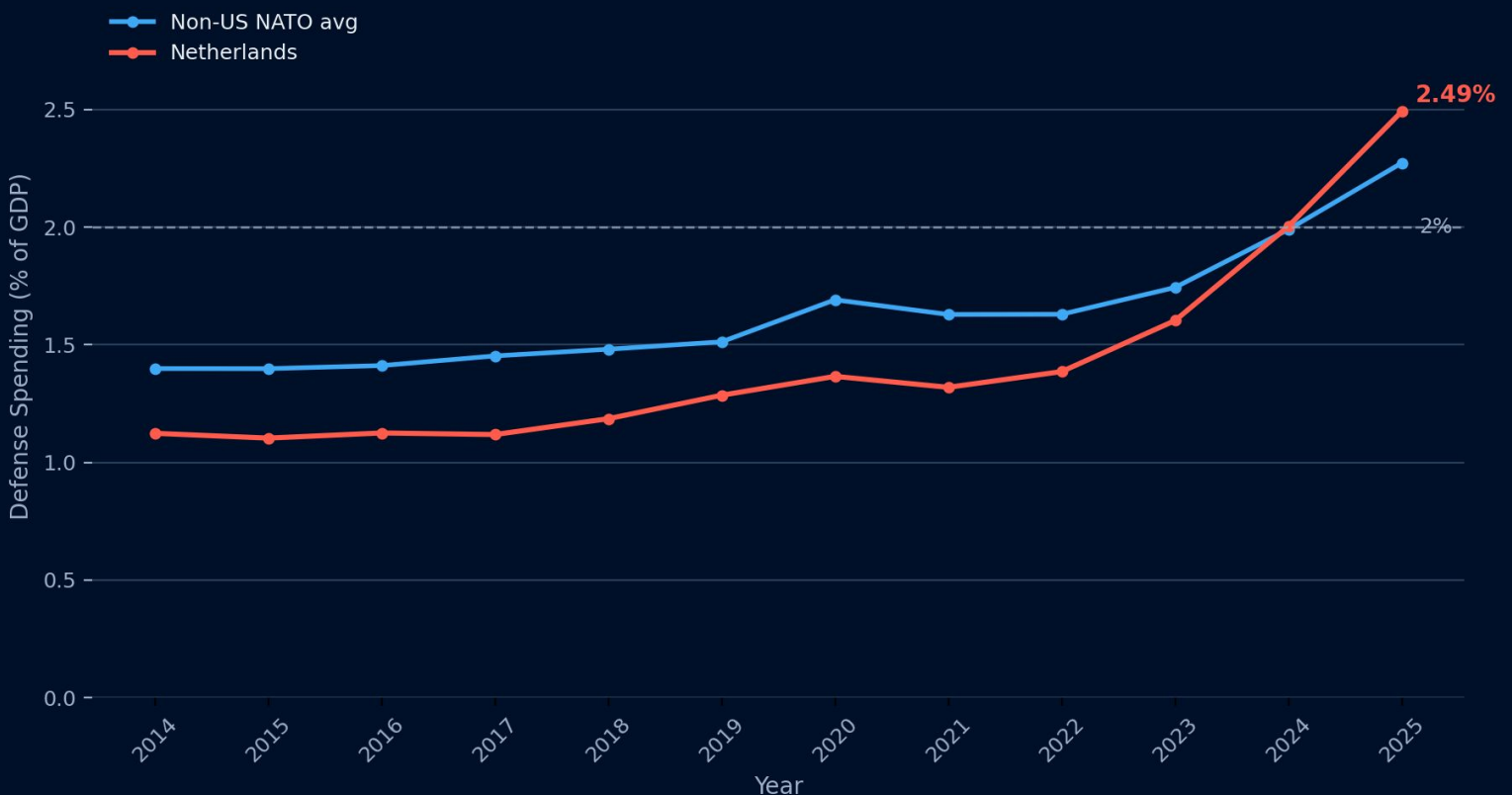


# MILITARY CONTRIBUTIONS

## *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.

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

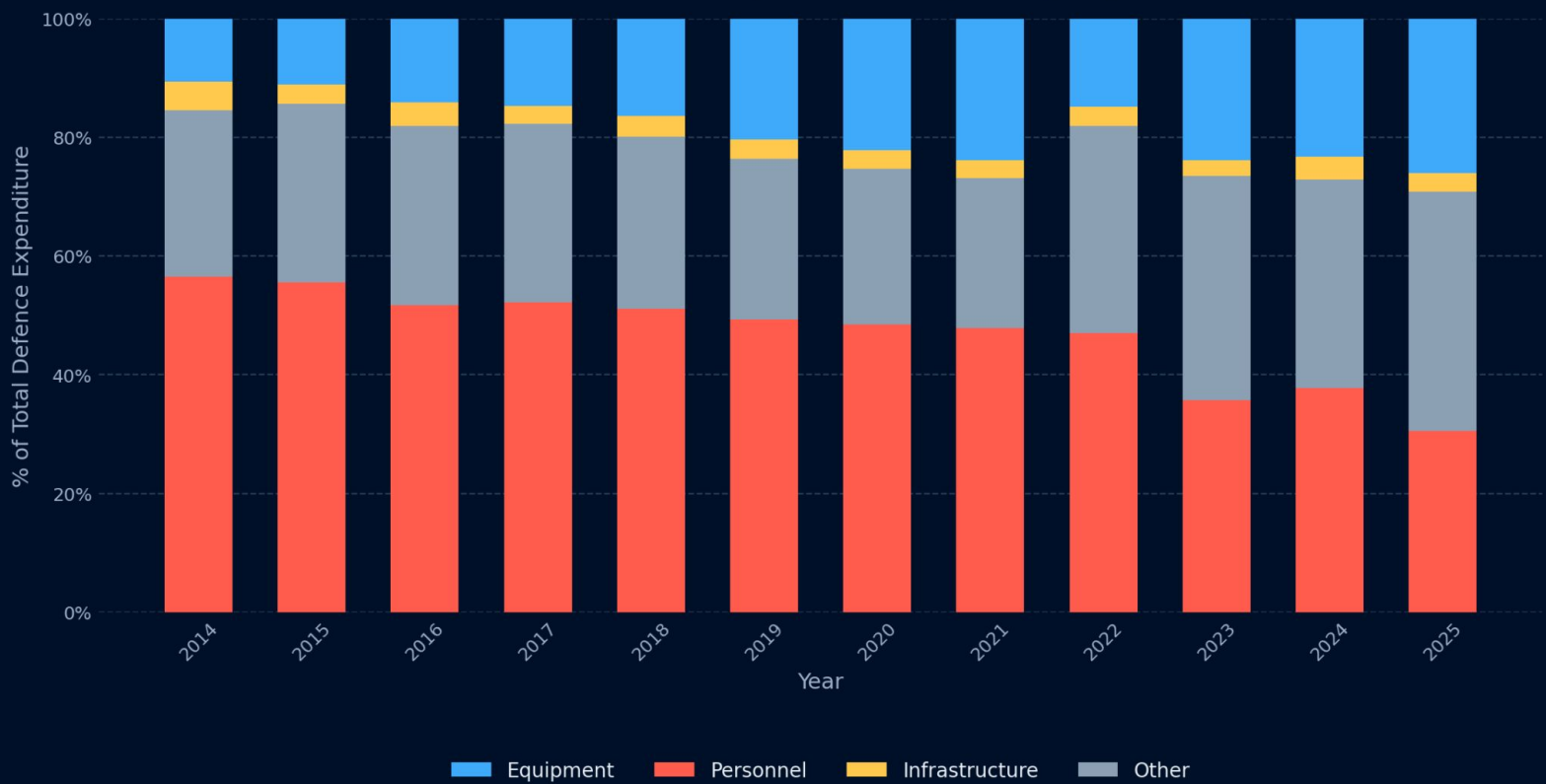


# MILITARY CONTRIBUTIONS

## *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.

Netherlands — Defence Expenditure by Category, 2014-2025

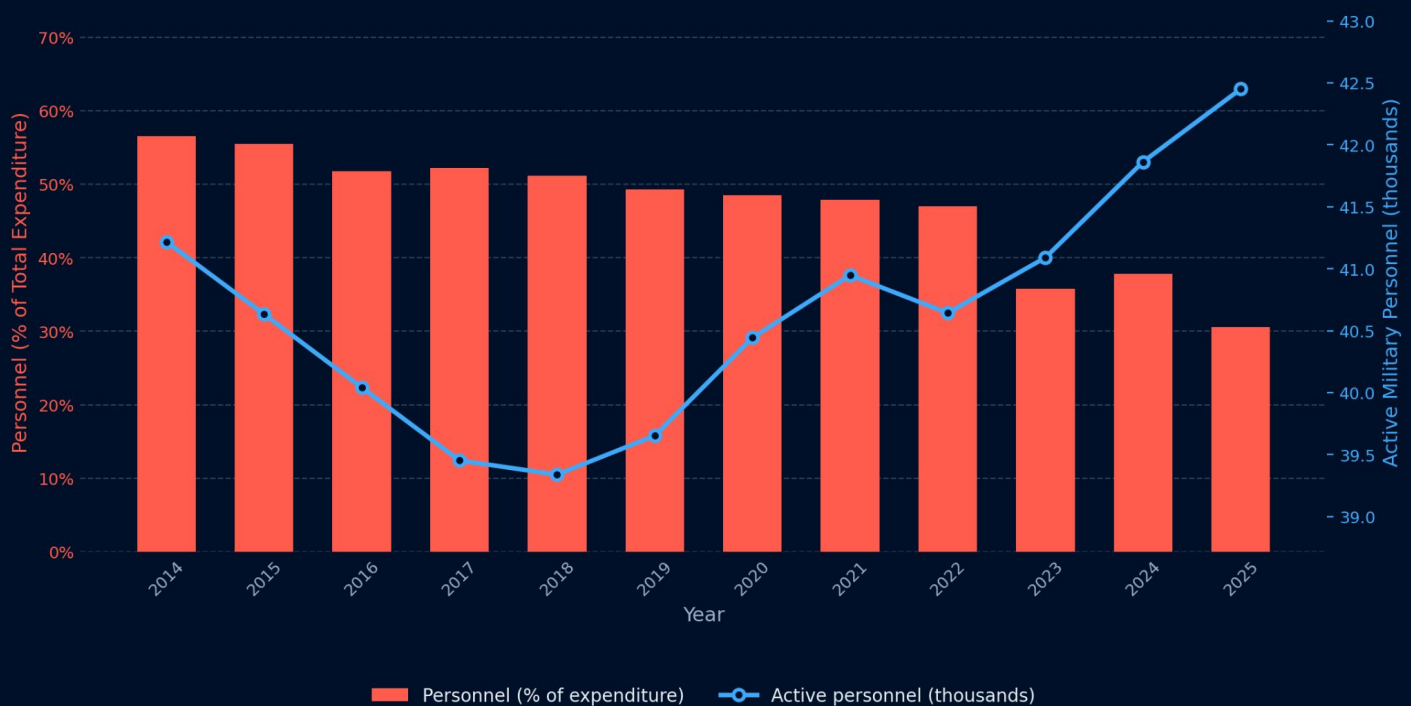


# MILITARY CONTRIBUTIONS

## *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.

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



# 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 Provinciën 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 Jettens coalition government's 66-seat parliamentary base is the principal risk to sustained spending commitments.

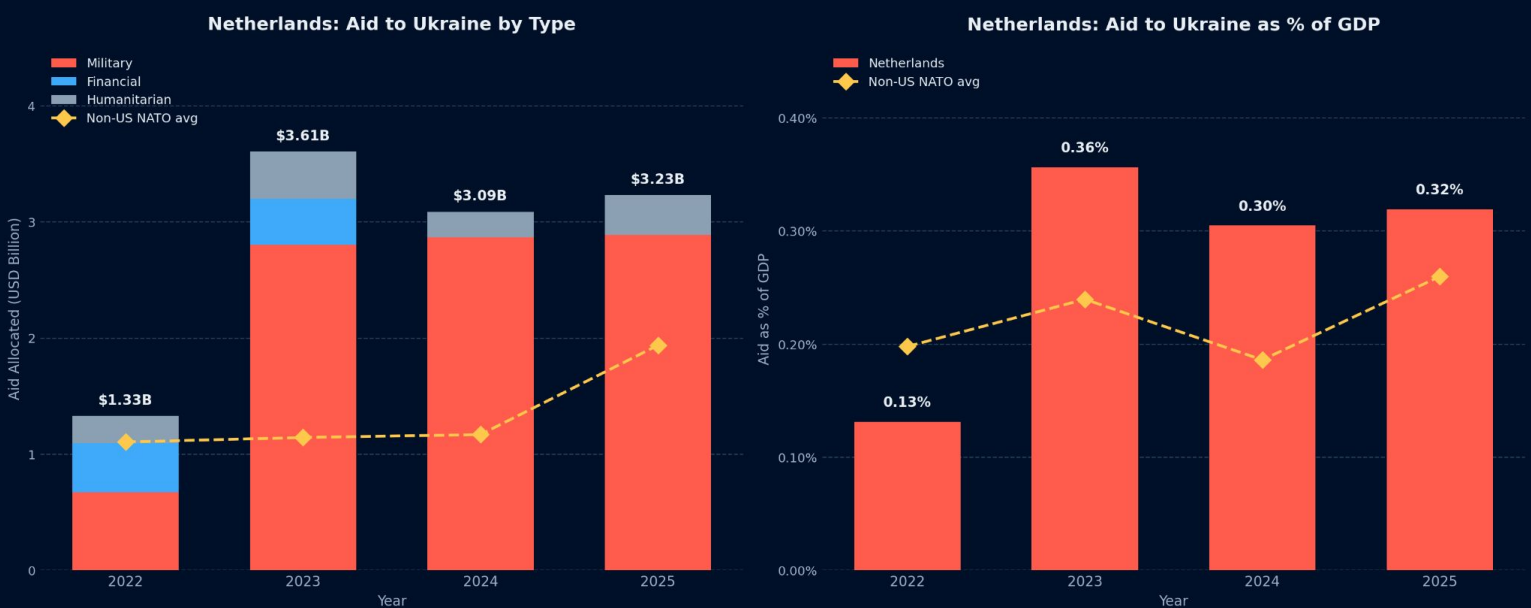


# STRATEGIC ALIGNMENT

## 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.

Netherlands — Ukraine Aid, 2022-2025



# 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



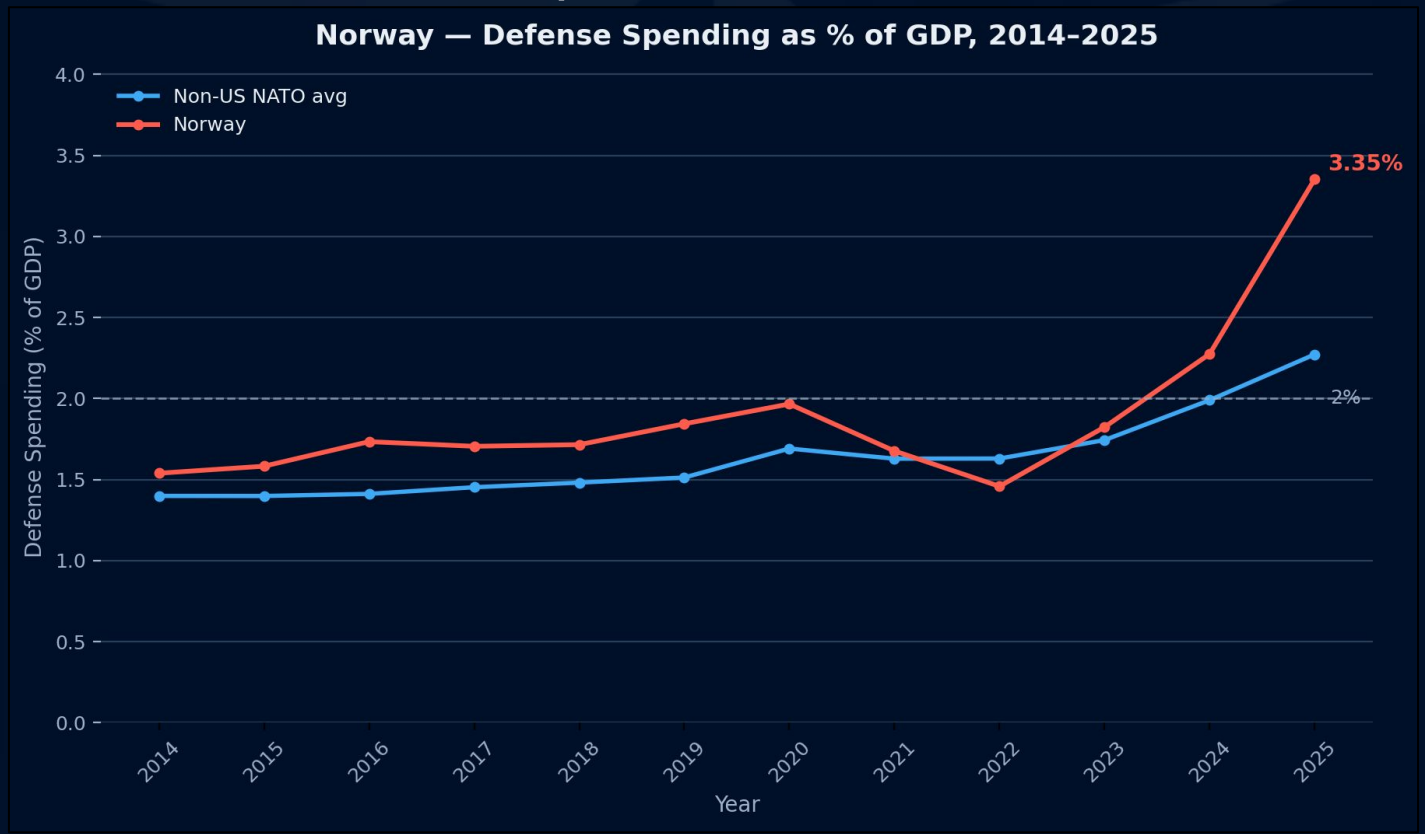
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

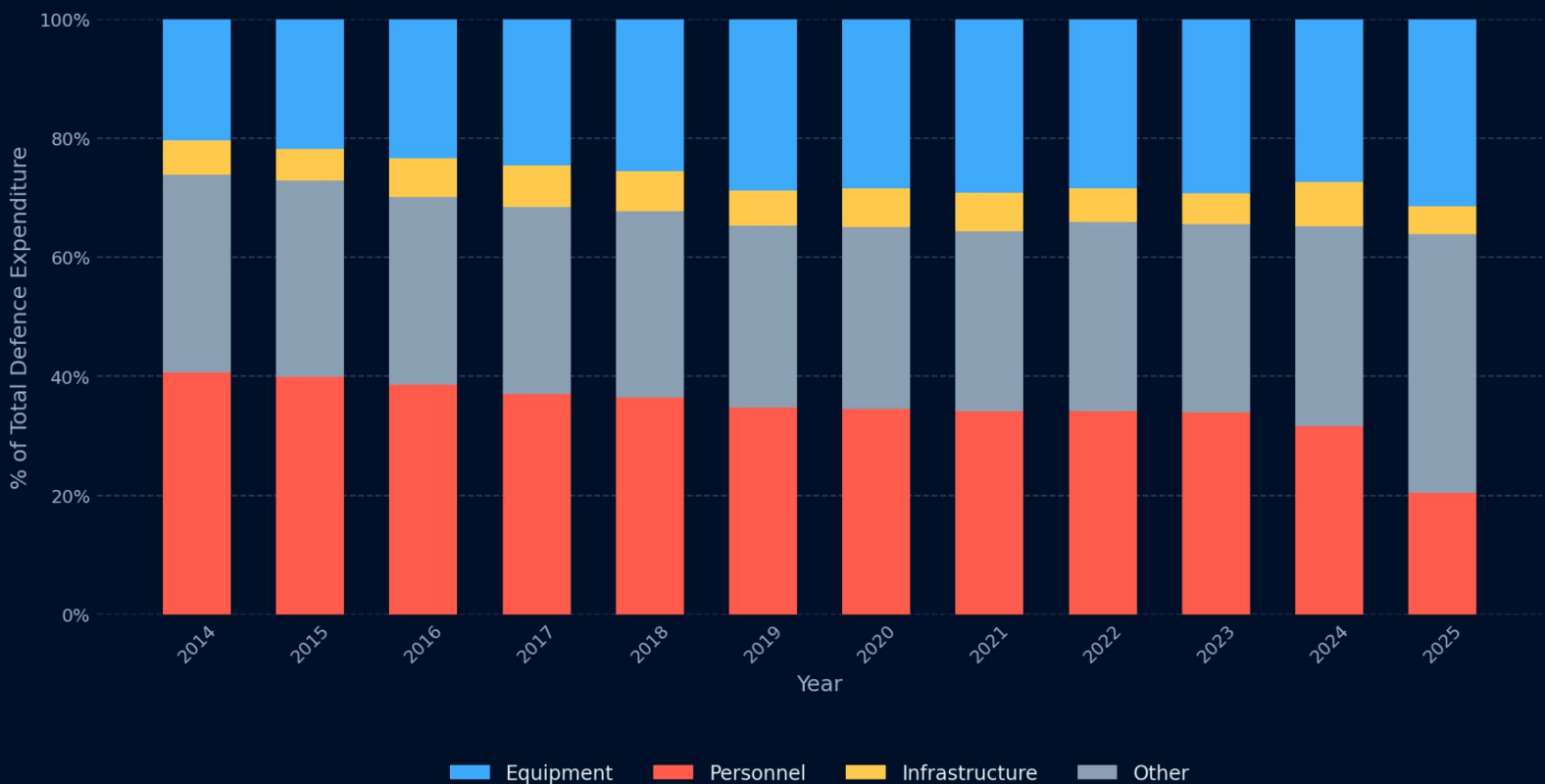


# MILITARY CONTRIBUTIONS

## *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.

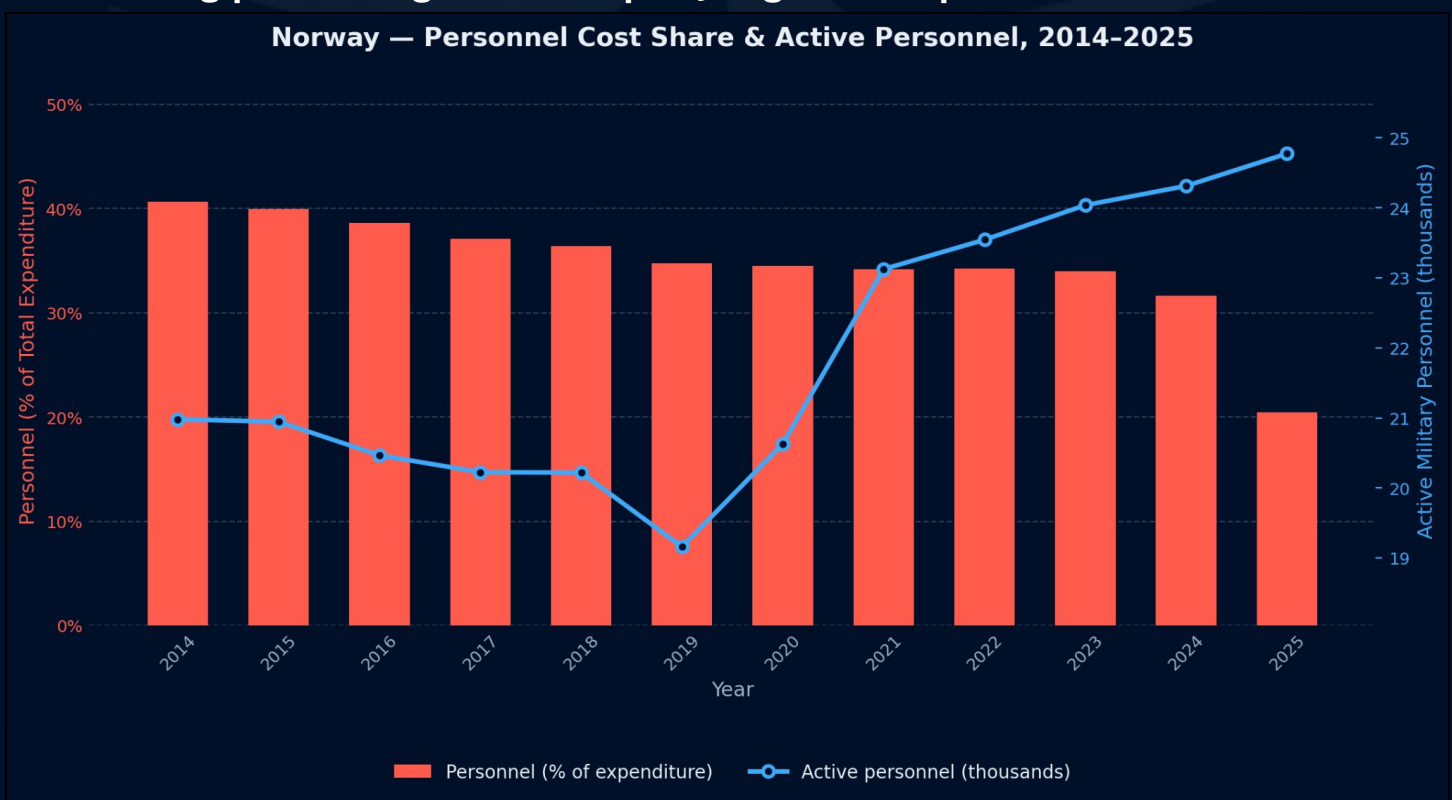
Norway — Defence Expenditure by Category, 2014-2025



# 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.



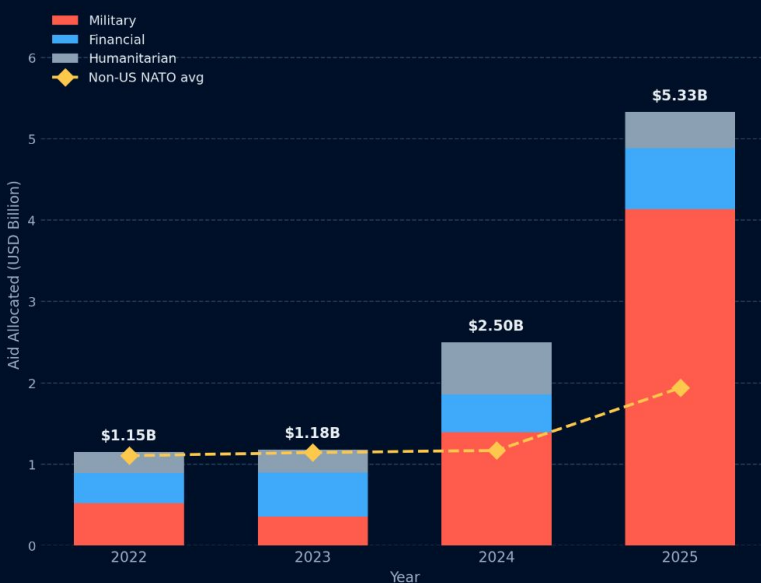
# STRATEGIC ALIGNMENT

## *Ukraine Support*

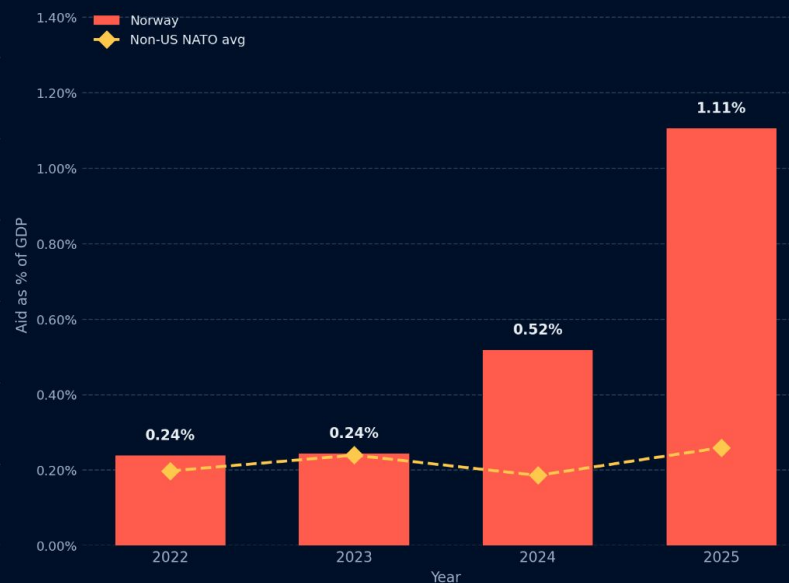
Norway's [Ukraine aid data](#) demonstrated sustained commitment: contributions running at \$1.15-1.18B (0.24% of GDP) in 2022-2023, before surging to \$2.50B (0.52%) in 2024 and \$5.33B (1.11%) in 2025, far above the alliance average. Kiel tracks €10.005B allocated and €24.724B committed (2.454% and 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.

Norway — Ukraine Aid, 2022-2025

Norway: Aid to Ukraine by Type



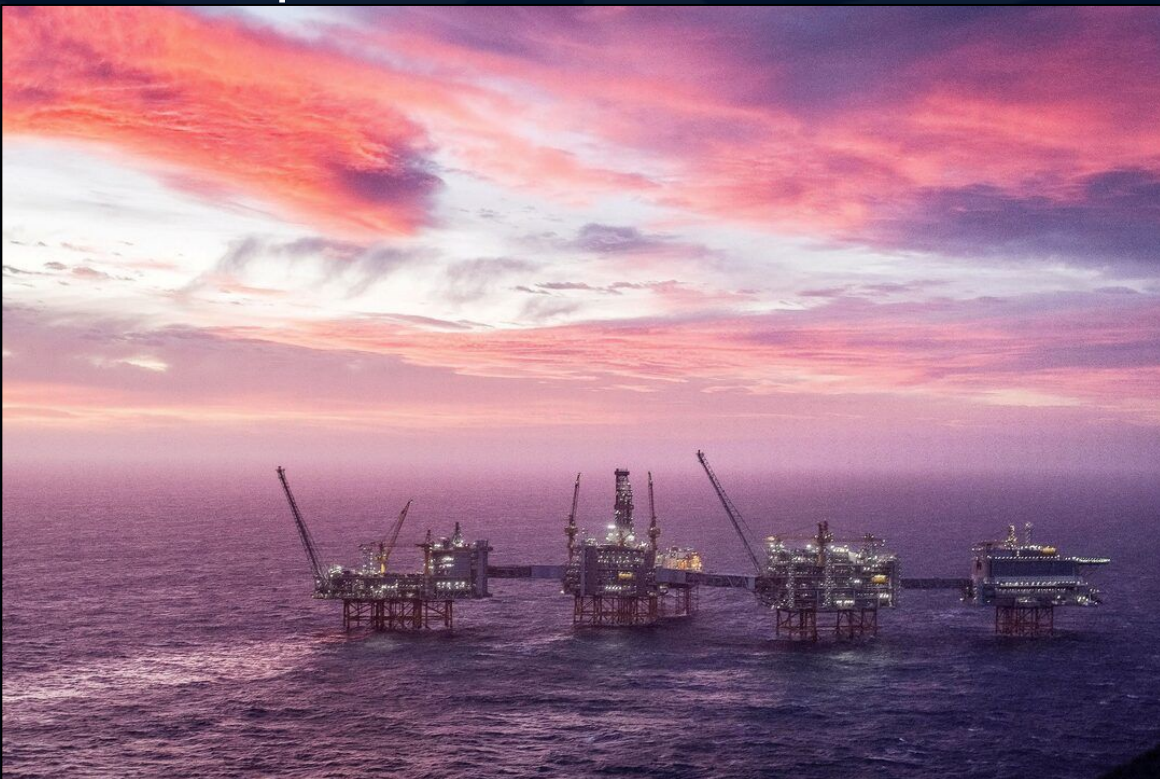
Norway: Aid to Ukraine as % of GDP



# 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





# 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.

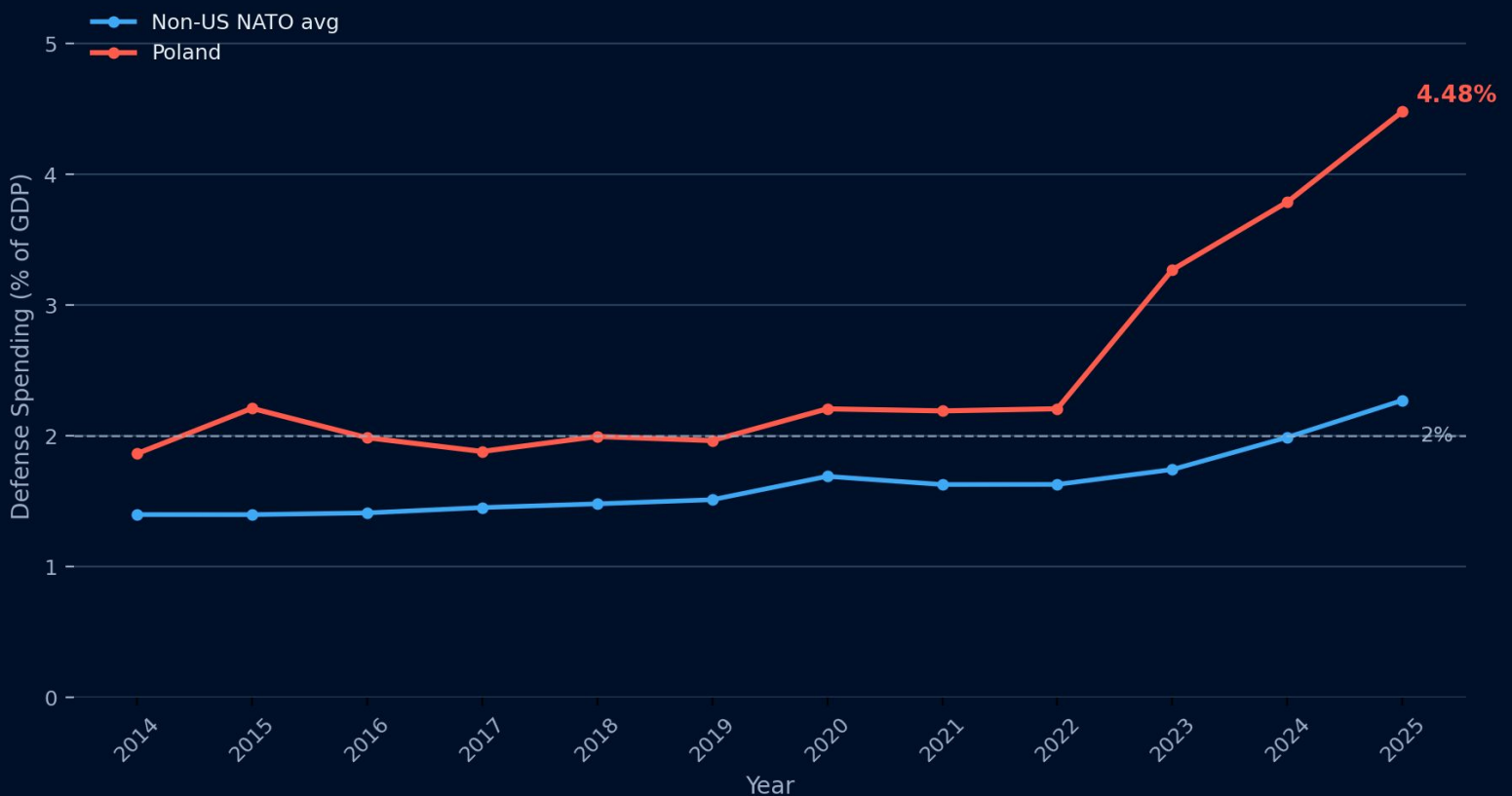


# MILITARY CONTRIBUTIONS

## *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.

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

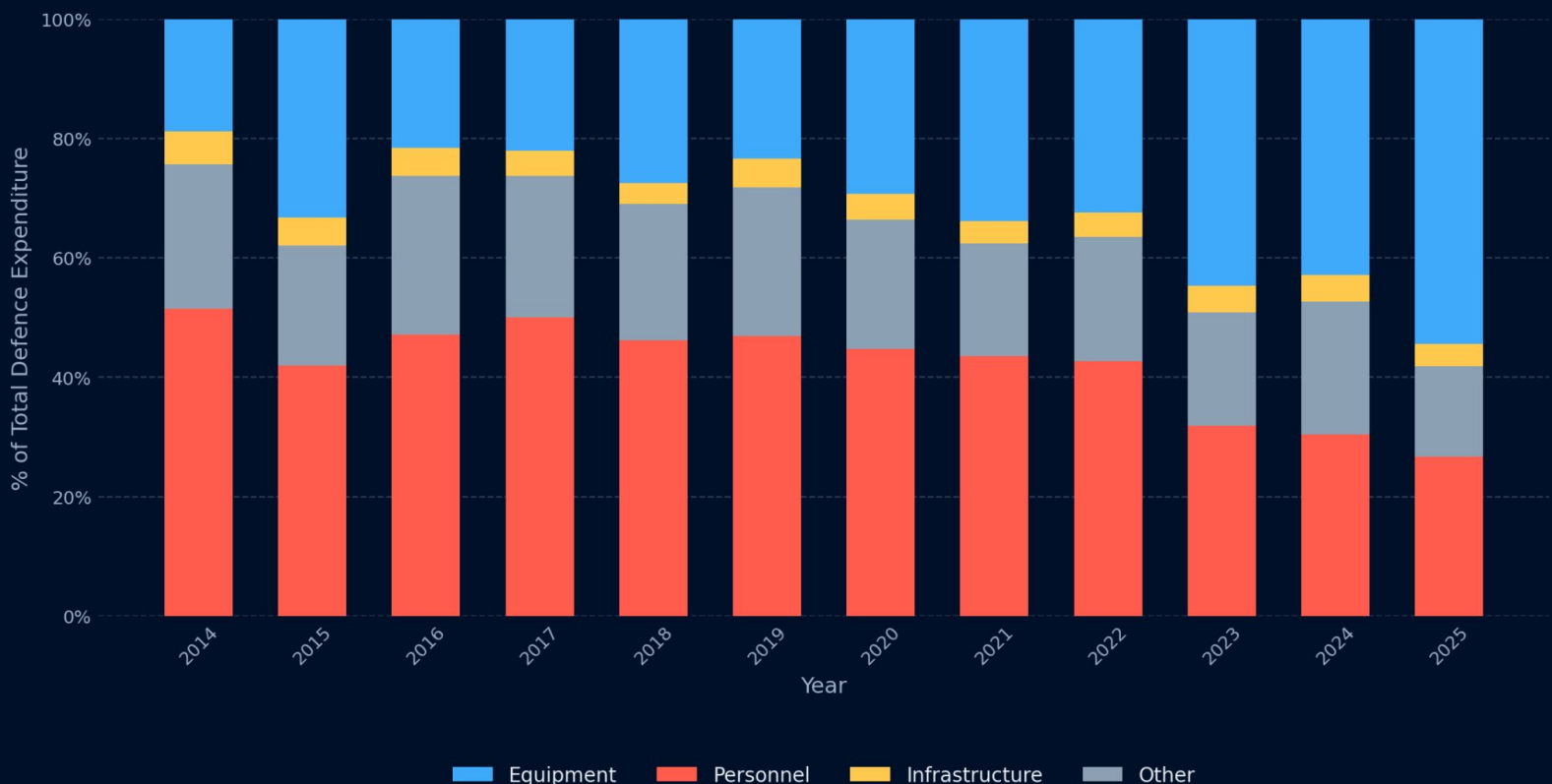


# MILITARY CONTRIBUTIONS

## *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.

Poland — Defence Expenditure by Category, 2014-2025

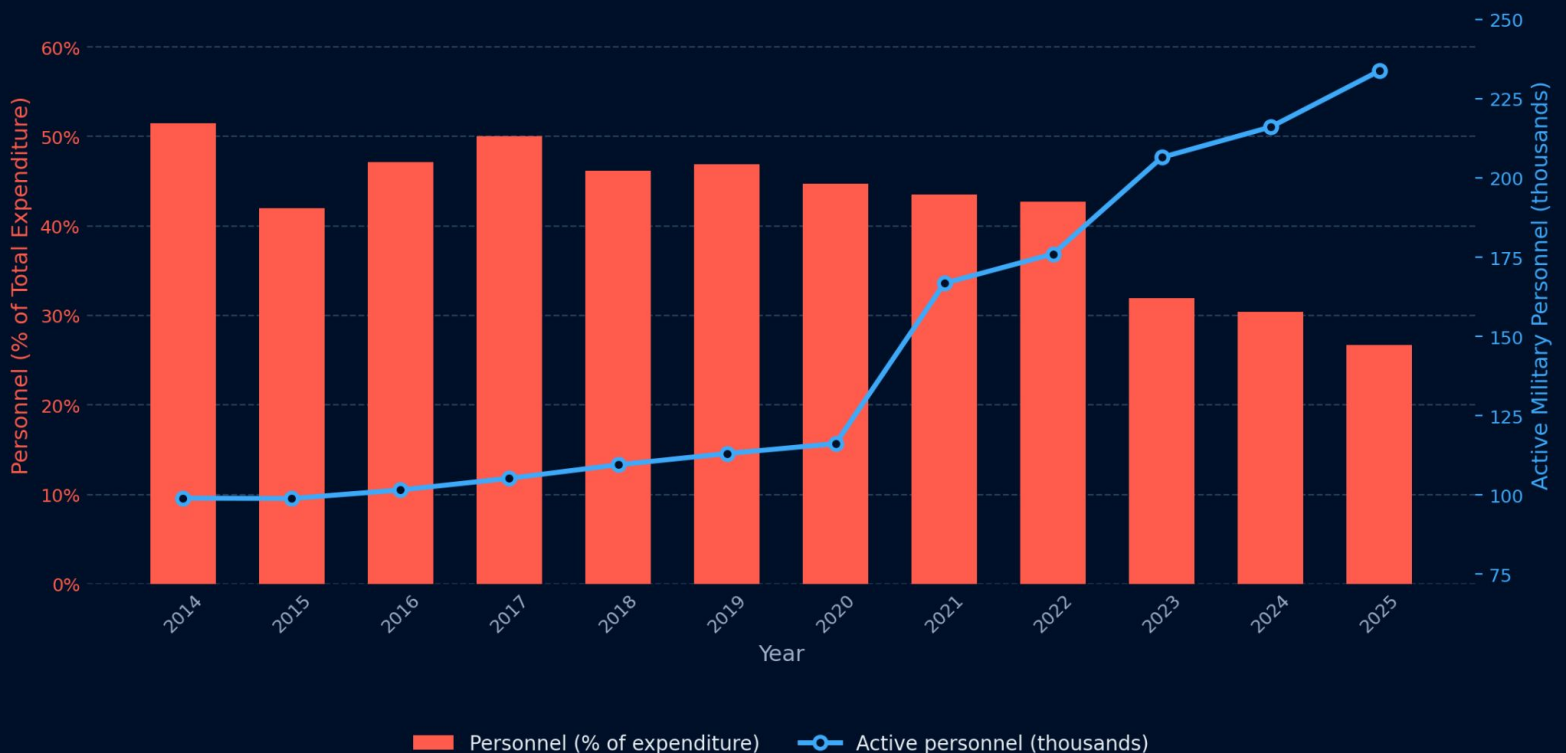


# MILITARY CONTRIBUTIONS

## *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.

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



# 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.



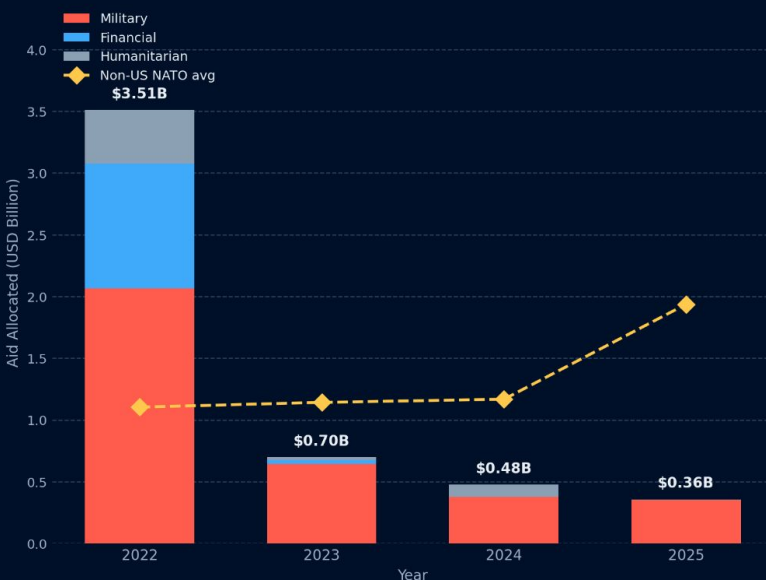
# STRATEGIC ALIGNMENT

## *Ukraine Support*

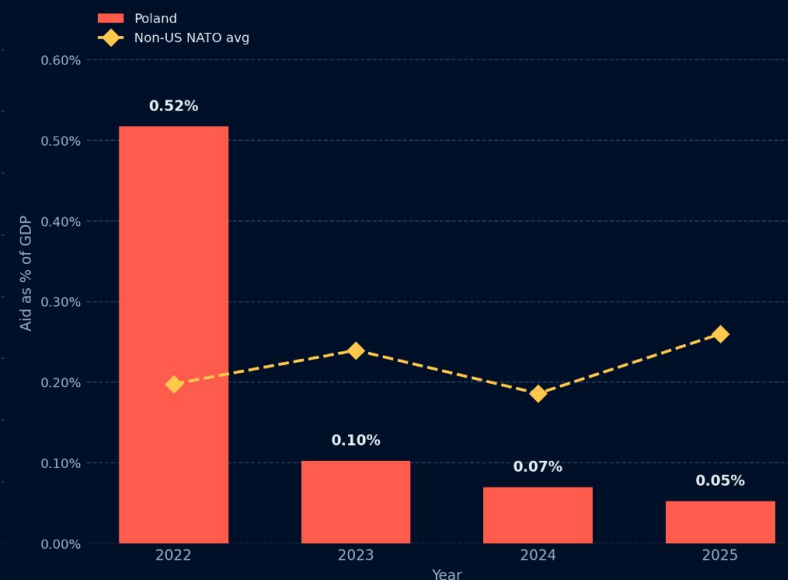
Poland is a near top-tier [Ukraine donor](#). Bilateral commitments reached 0.52% of GDP in 2022—among the highest in the alliance—placing Poland in the leading cluster alongside the Nordics and Baltics. Poland was the second-largest bilateral supporter globally in early-war tallies, providing military 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.

Poland — Ukraine Aid, 2022–2025

Poland: Aid to Ukraine by Type



Poland: Aid to Ukraine as % of GDP



# 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





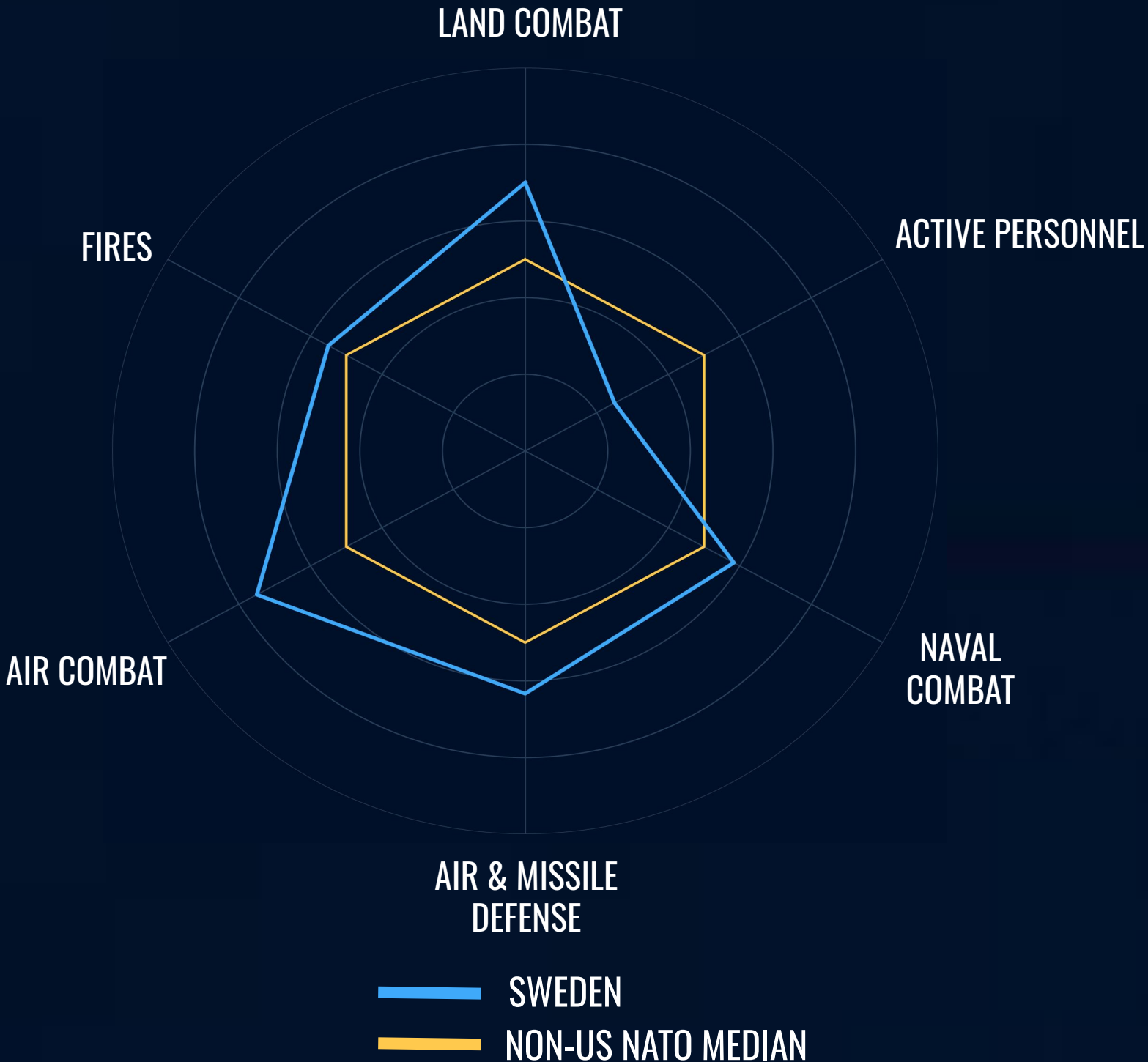
# AT A GLANCE

## *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.

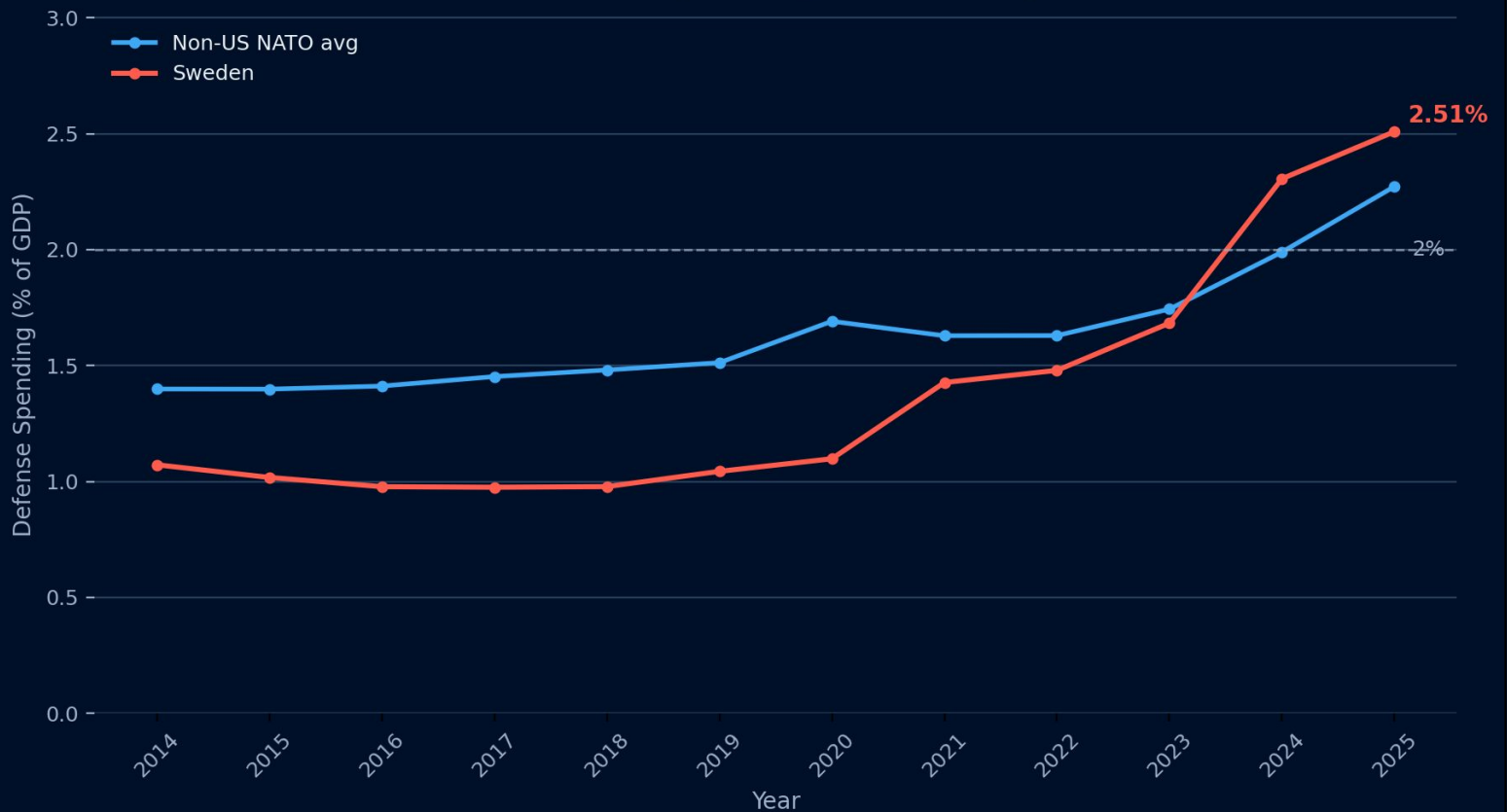


# MILITARY CONTRIBUTIONS

## *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.

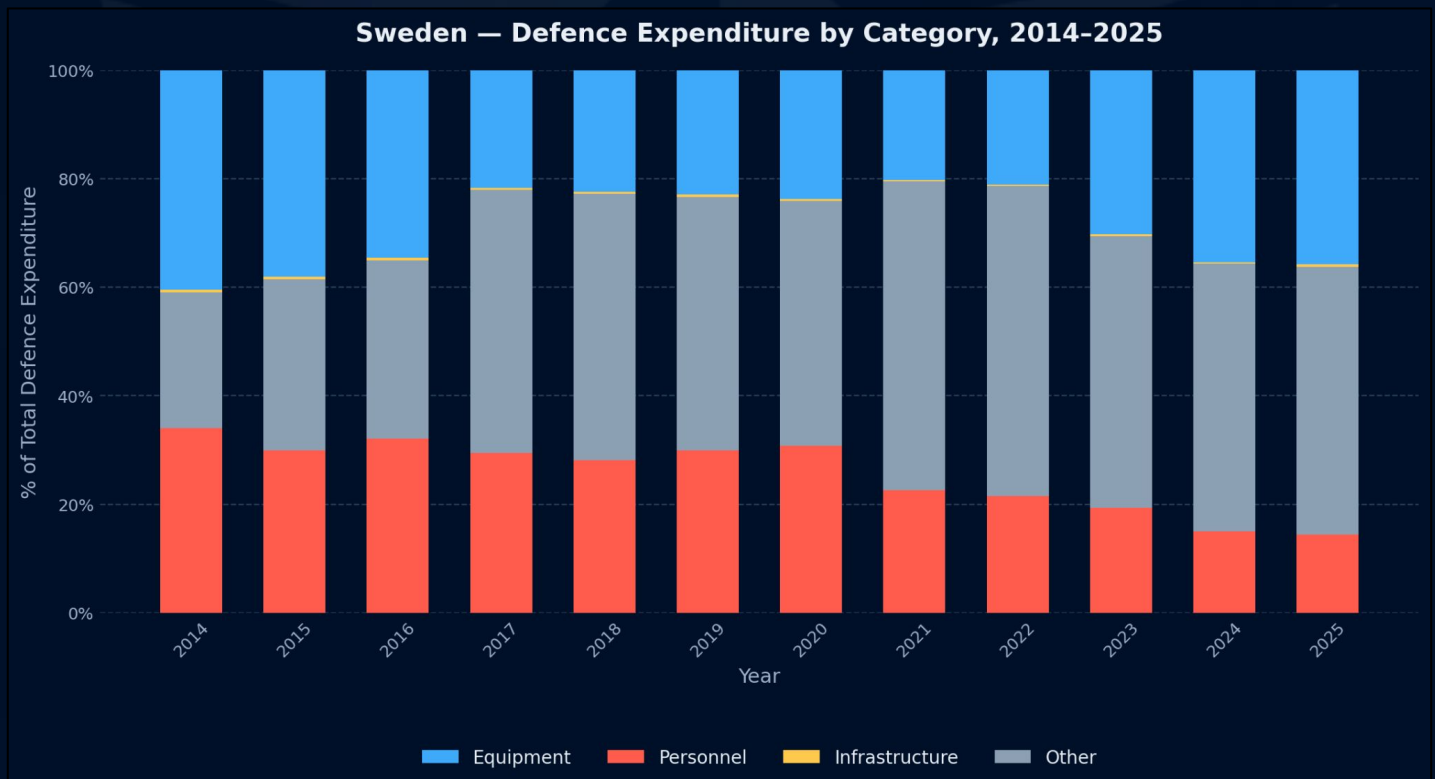
Sweden — Defense Spending as % of GDP, 2014-2025



# MILITARY CONTRIBUTIONS

## *Equipment Share*

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

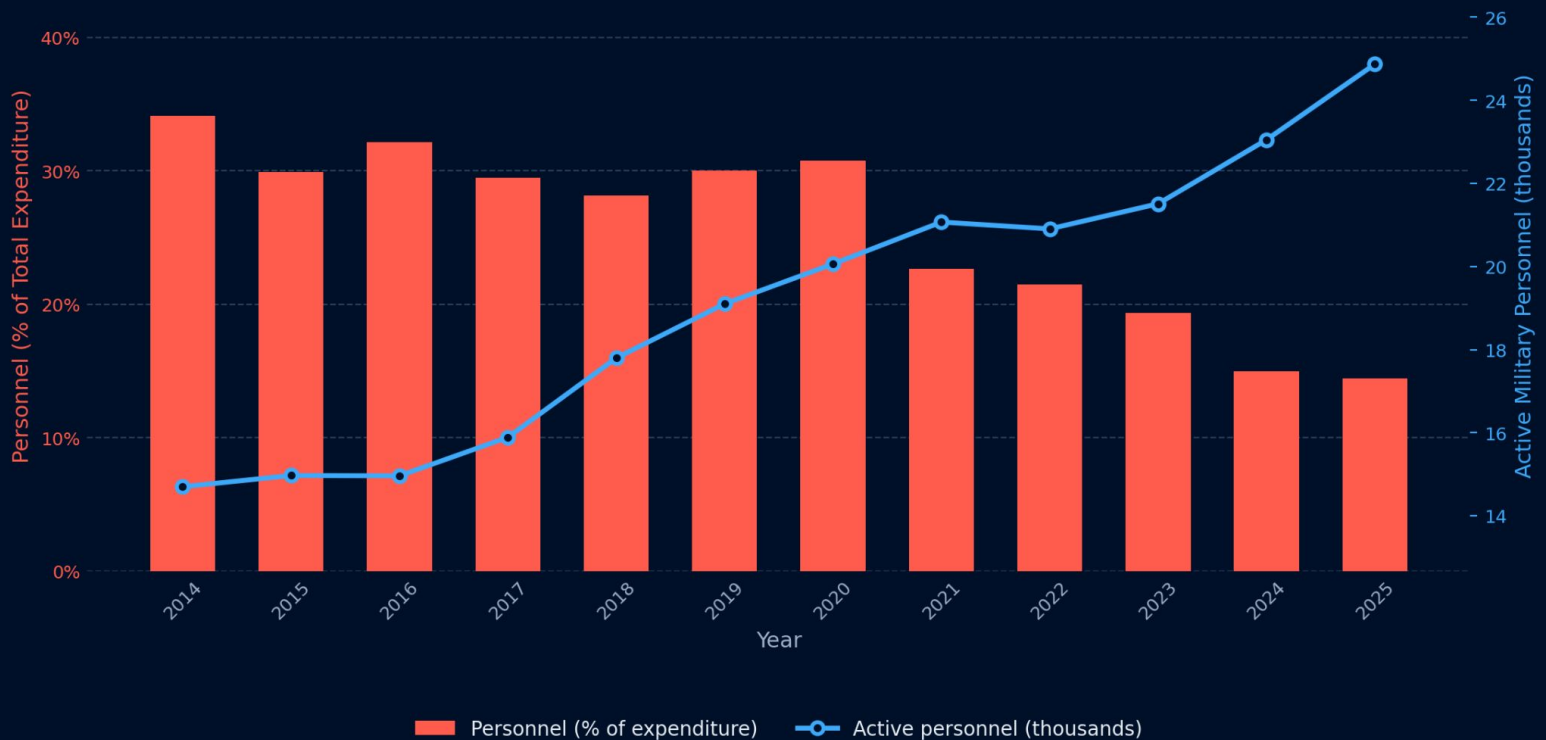


# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

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

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



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

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



# MILITARY CONTRIBUTIONS

## *Force Posture*

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



# MILITARY CONTRIBUTIONS

## *Industrial Base*

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



# STRATEGIC ALIGNMENT

## *Declared Posture*

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



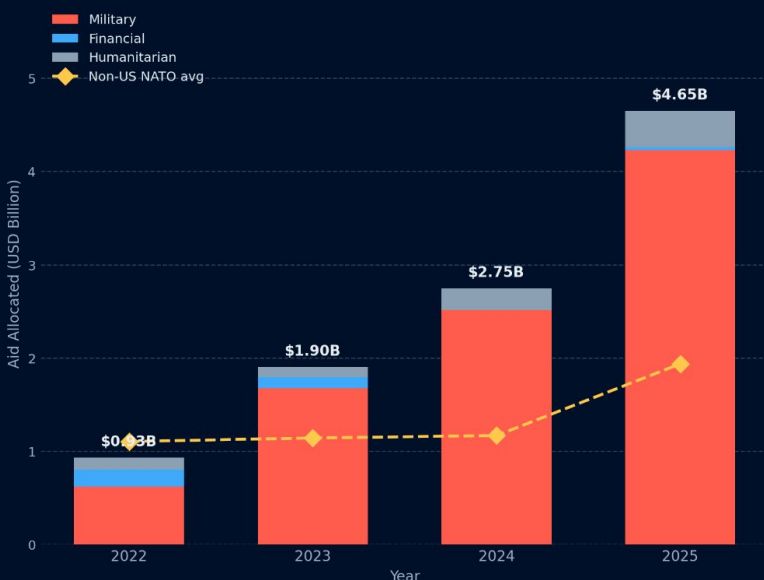
# STRATEGIC ALIGNMENT

## Ukraine Support

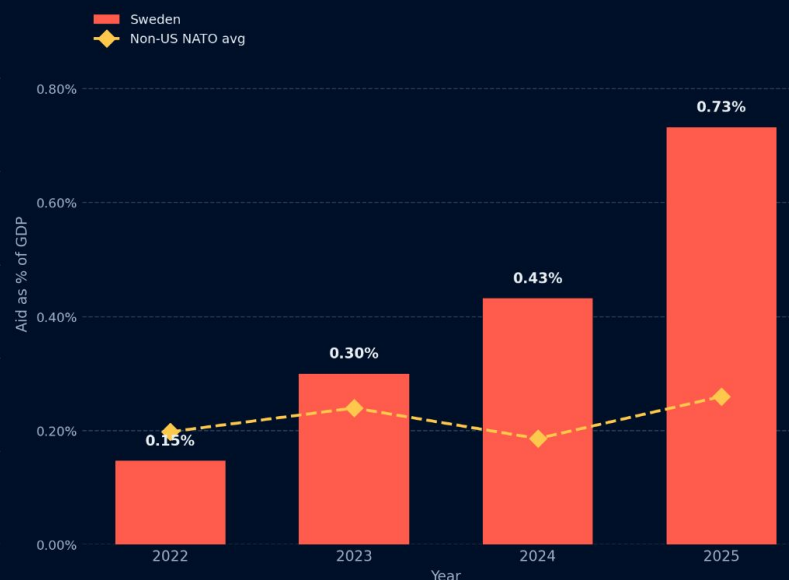
Sweden is among Ukraine's most [consequential supporters](#) by GDP share and absolute value. Kiel tracks €10.320B allocated—rising from 0.15% of GDP in 2022 to 0.73% in 2025, consistently above the non-US NATO average and top-tier alongside Denmark and the Baltics. Prior transfers include CV90 IFVs,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

Sweden — Ukraine Aid, 2022-2025

Sweden: Aid to Ukraine by Type



Sweden: Aid to Ukraine as % of GDP



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

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



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

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



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

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



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

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



# 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

