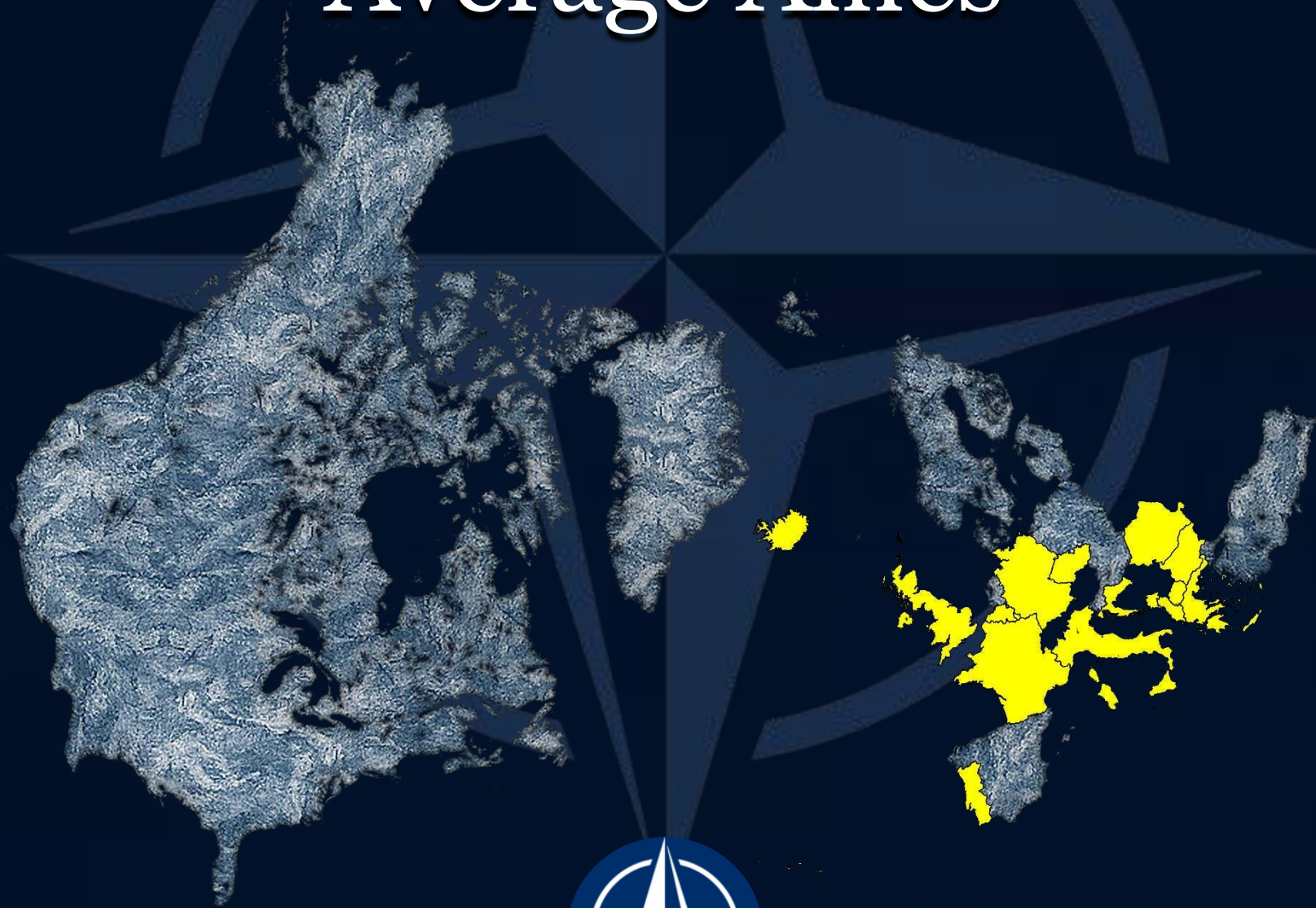




TIER 2

Average Allies



TIER 2

At A Glance

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

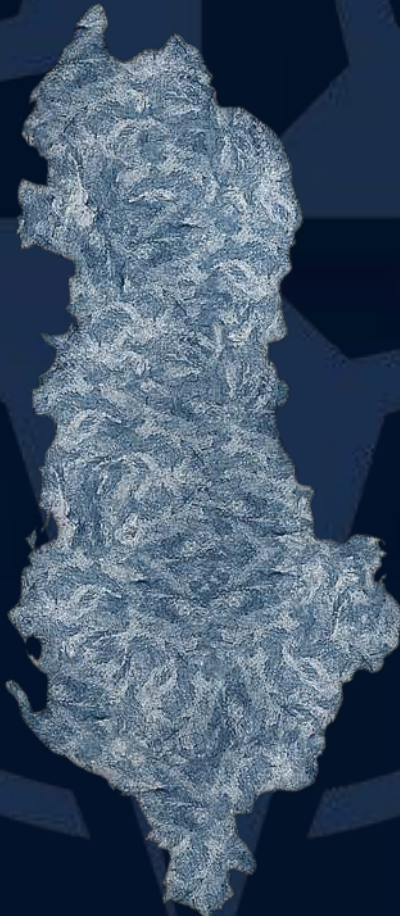




ALBANIA

NATO Country Assessment — *TIER TWO* —

CAPABILITY MODERNIZATION • NATO UNITY • LATE TO 2%





AT A GLANCE

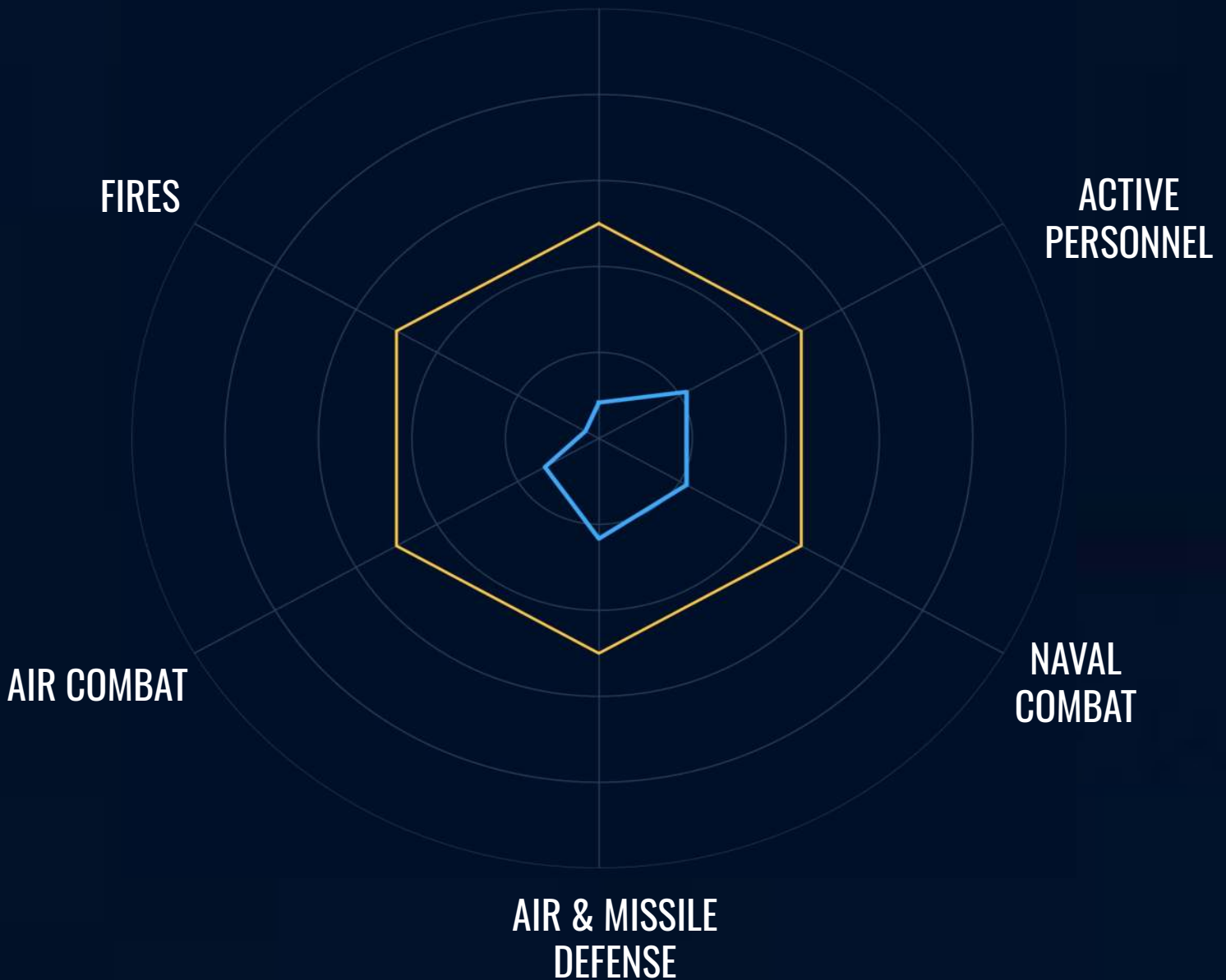
Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



AIR & MISSILE
DEFENSE

— ALBANIA
— NON-US NATO MEDIAN

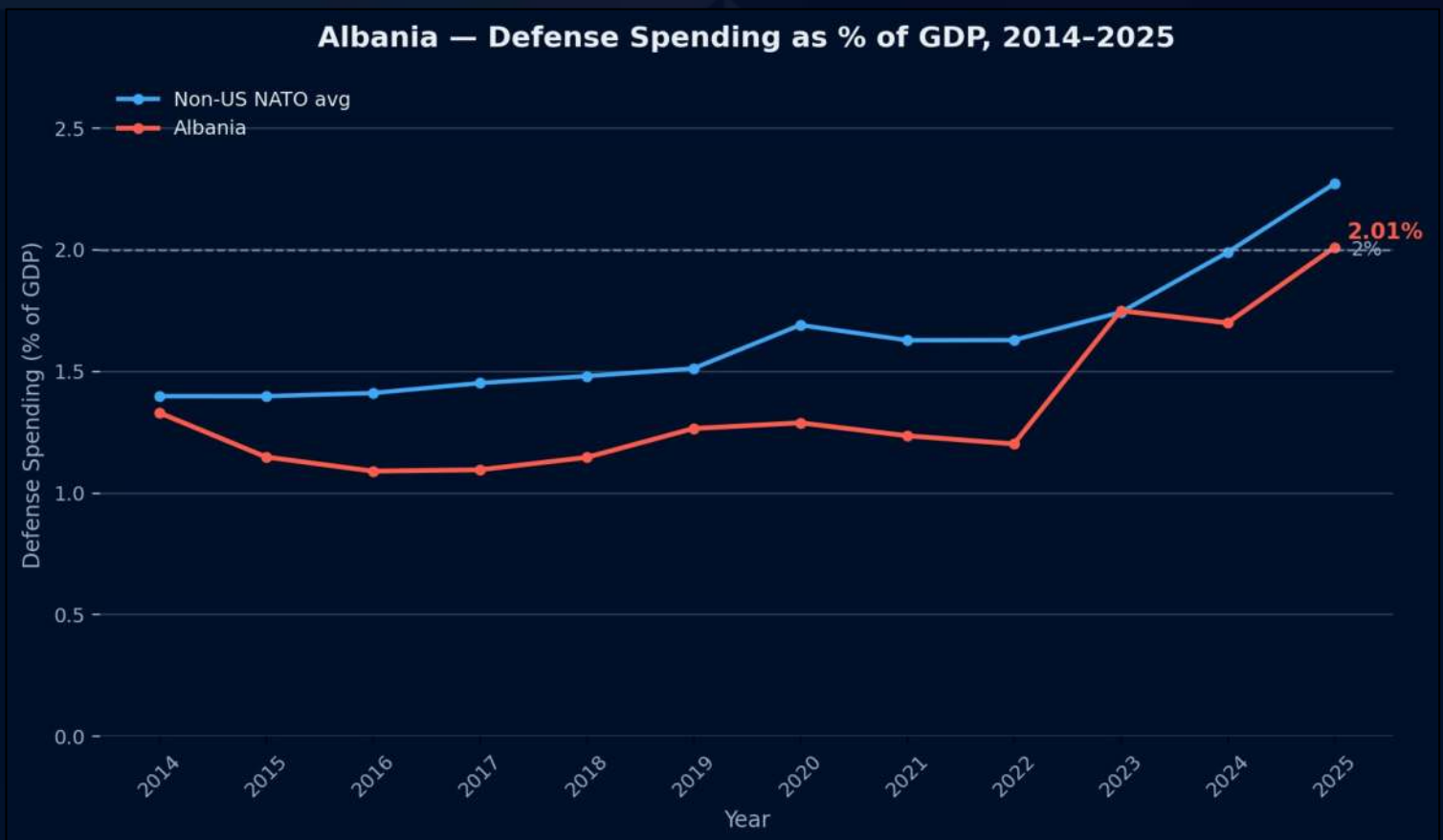
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.



MILITARY CONTRIBUTIONS

Defense Spending Level

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

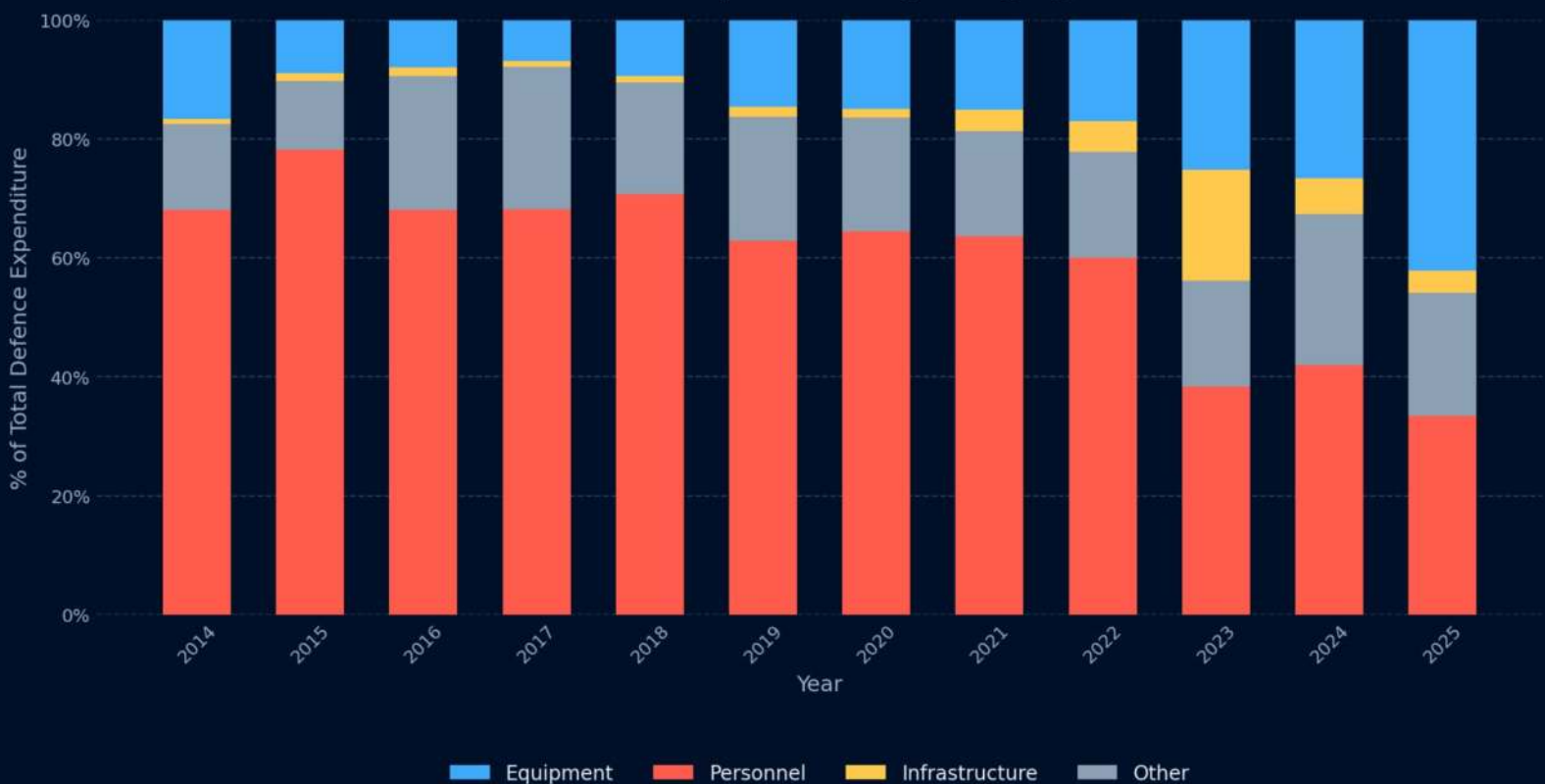


MILITARY CONTRIBUTIONS

Equipment Share

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

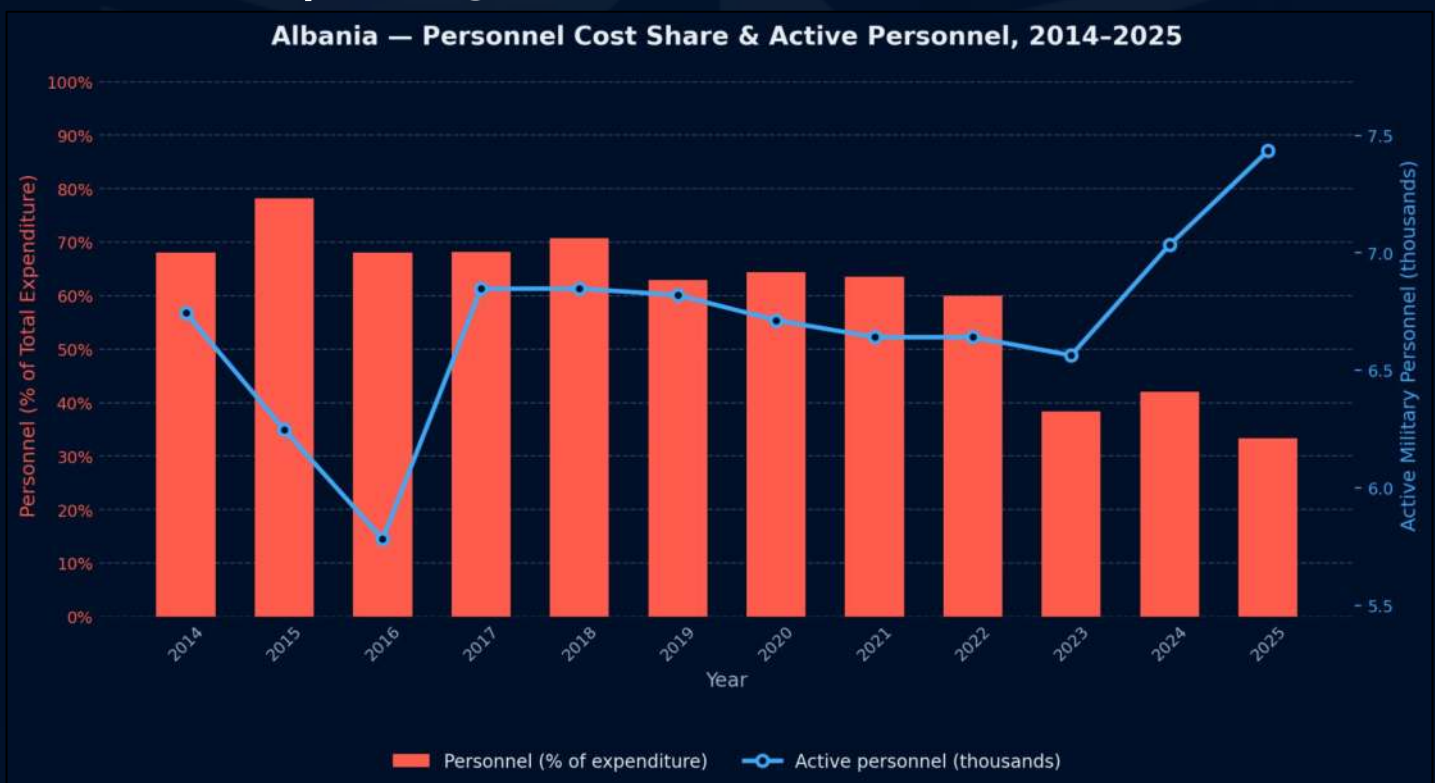
Albania — Defence Expenditure by Category, 2014-2025



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



STRATEGIC ALIGNMENT

Ukraine Support

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



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





Belgium

NATO Country Assessment —TIER TWO—

ALLIANCE HEADQUARTERS • SUSTAINED UKRAINE SUPPORT • RUSSIAN ENERGY





AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



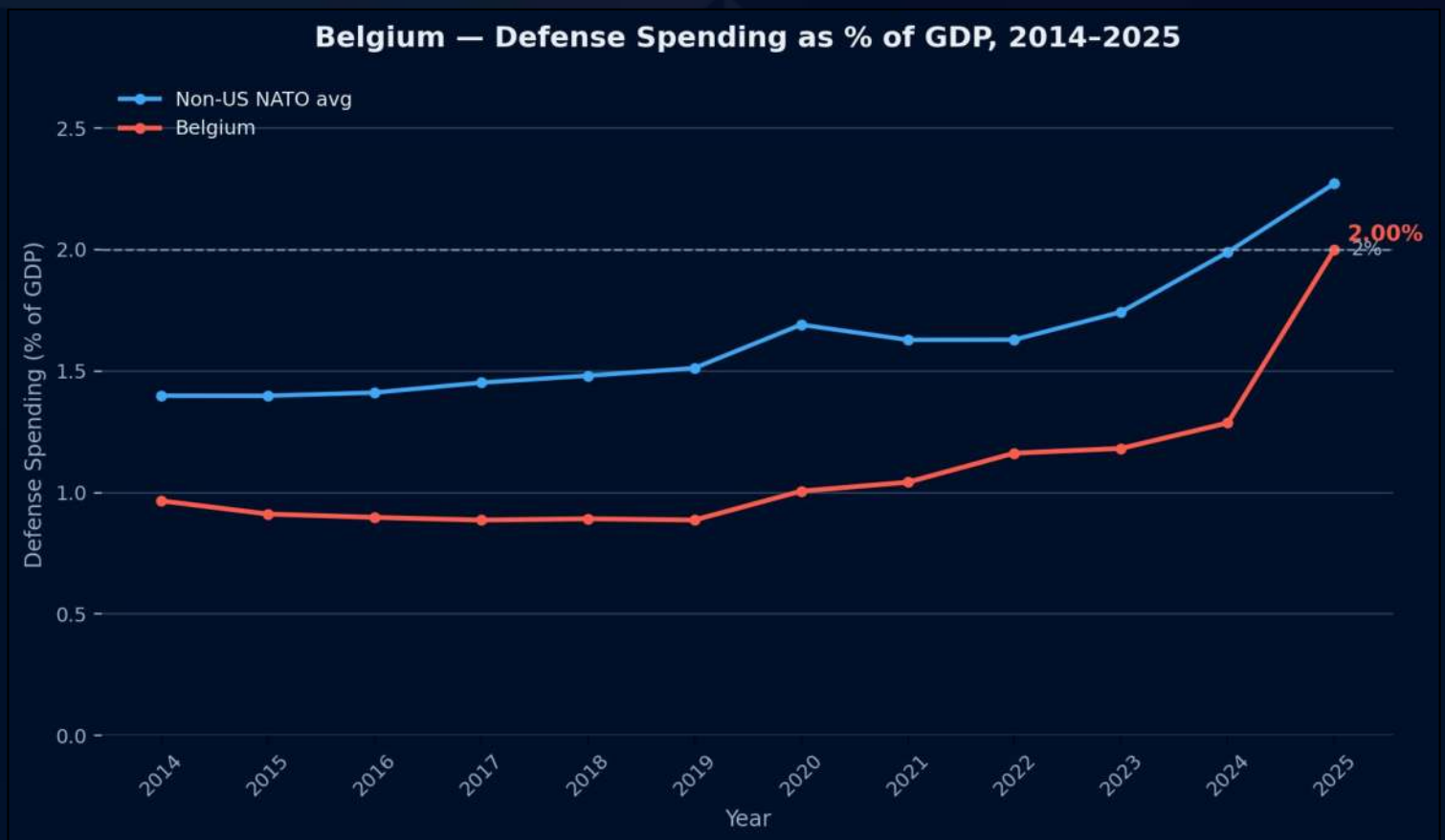
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MILITARY CONTRIBUTIONS

Defense Spending Level

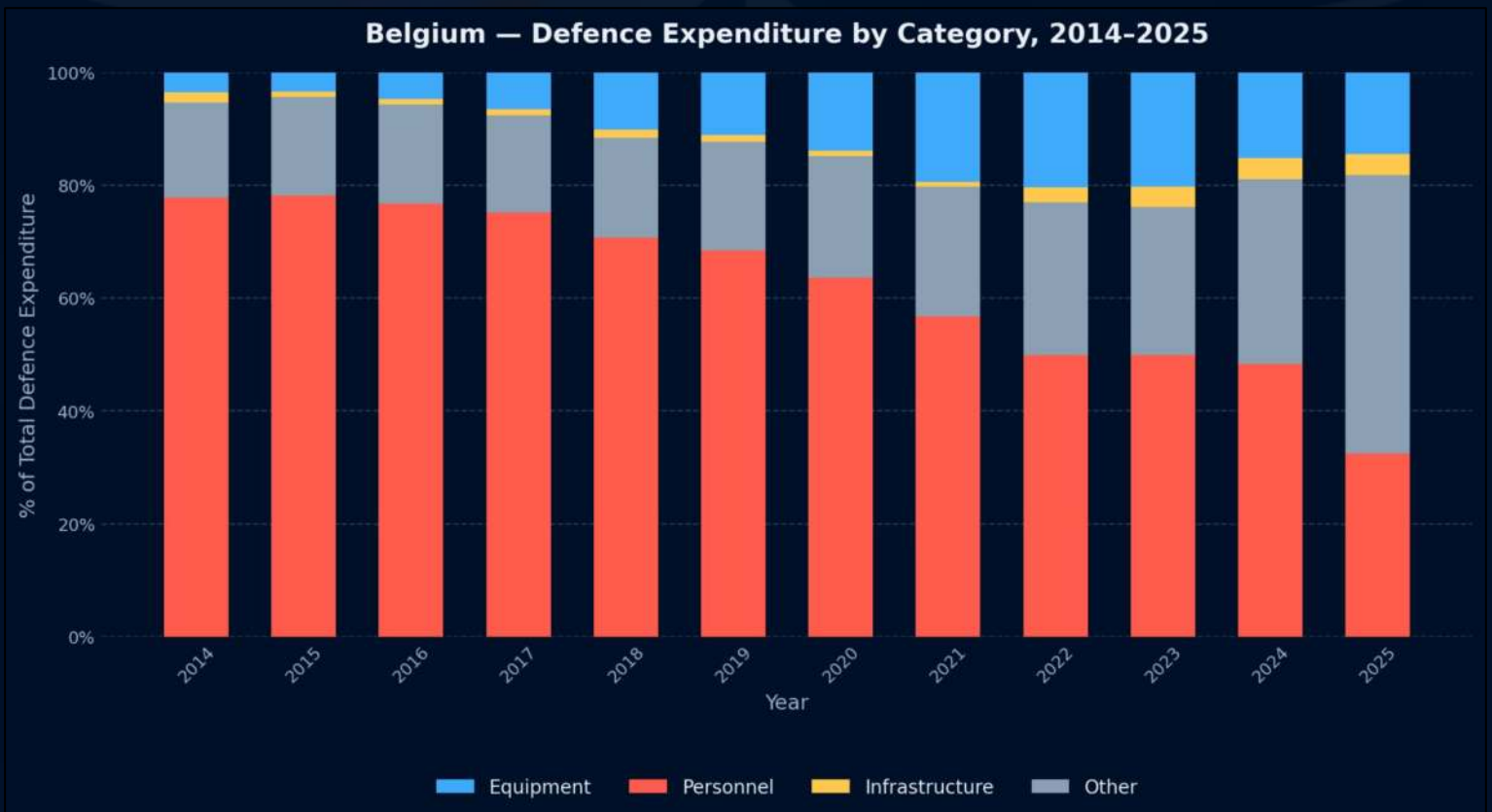
Belgium's [defense spending](#) trajectory is one of the most dramatic reversals in NATO's recent history, if belated. NATO figures show expenditure at just 0.97% of GDP in 2014, barely improving through the decade, reaching 1.29% in 2024 before a sharp 59% jump to 2.00% in 2025. The De Wever [government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



MILITARY CONTRIBUTIONS

Equipment Share

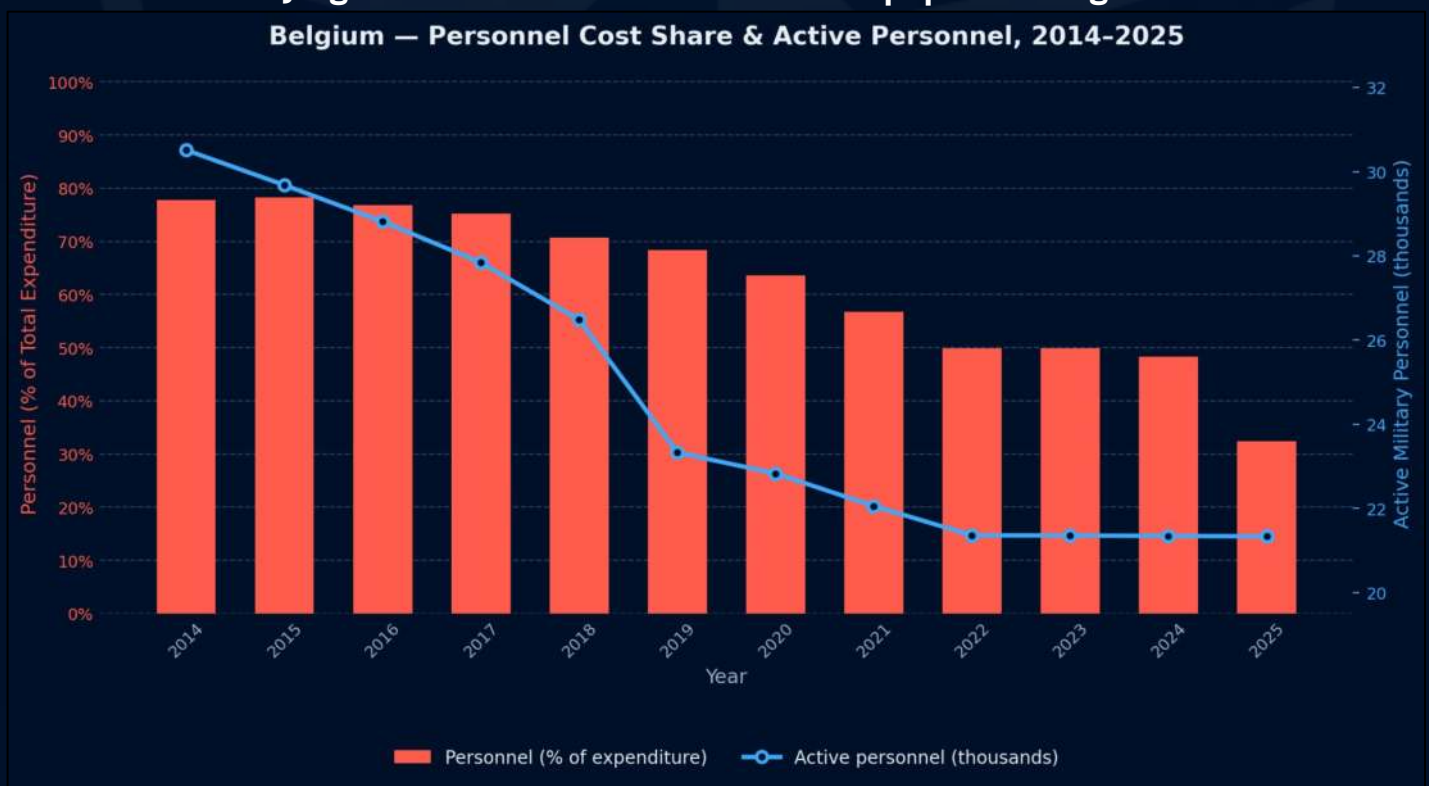
Belgium's [equipment share](#) trajectory is a promising but incomplete. For most of the past decade, equipment investment was essentially negligible—barely registering in the budget while personnel consumed roughly 78–79% of total expenditure in 2014–2015. That began shifting around 2021–2022, and by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



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



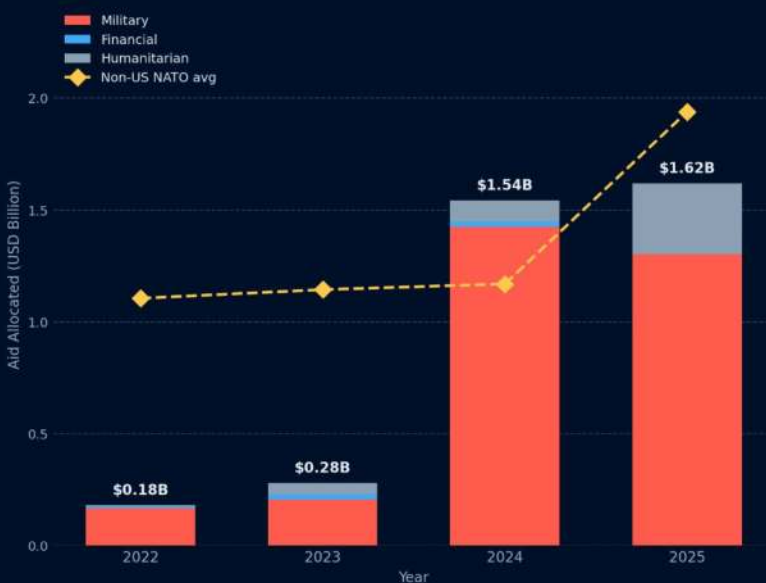
STRATEGIC ALIGNMENT

Ukraine Support

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

Belgium — Ukraine Aid, 2022-2025

Belgium: Aid to Ukraine by Type



Belgium: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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



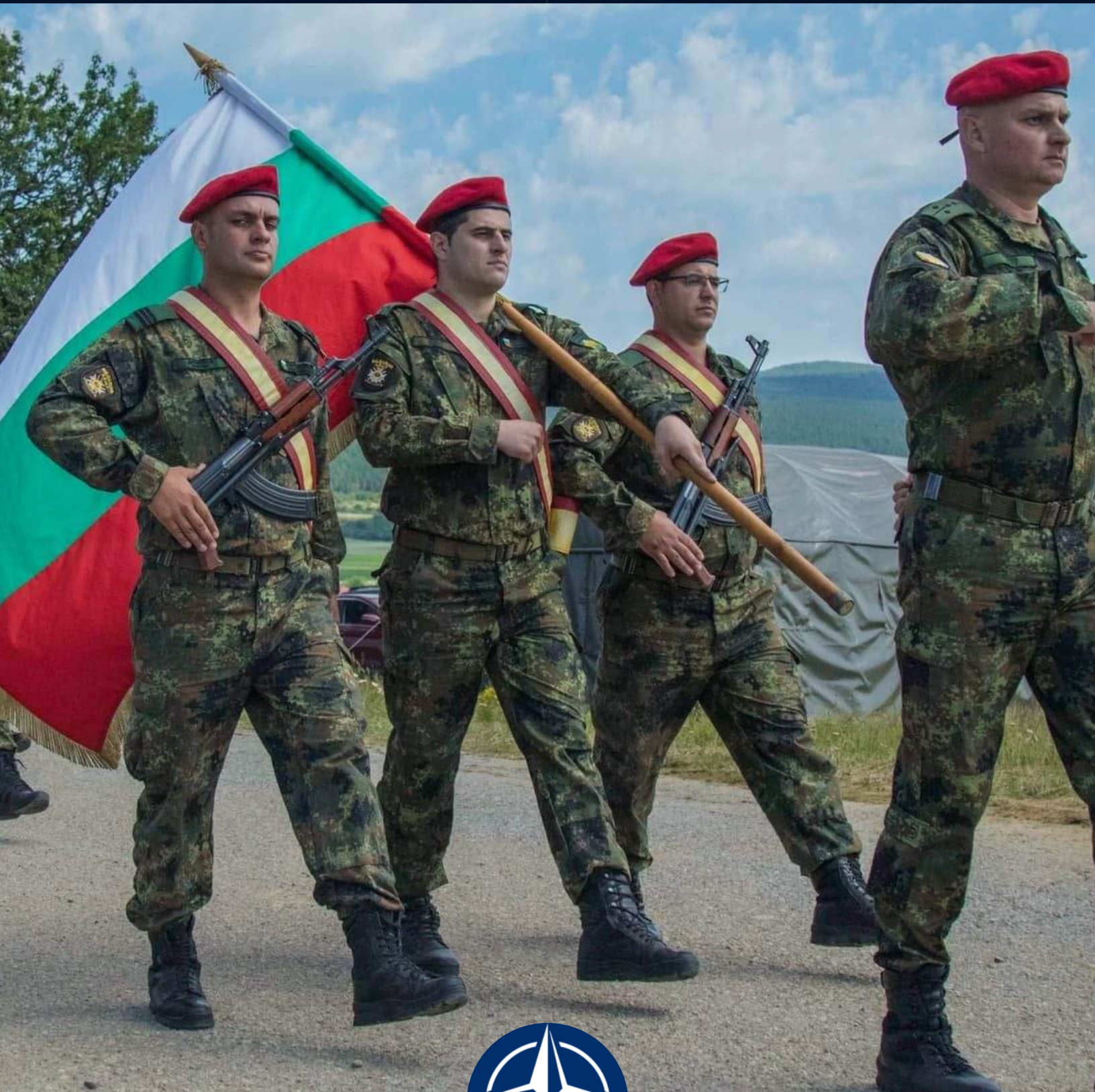


Bulgaria

NATO Country Assessment —TIER TWO—

BLACK SEA ACCESS • PRIORITY ALIGNMENT • WEAK SPENDING SUPPORT





AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

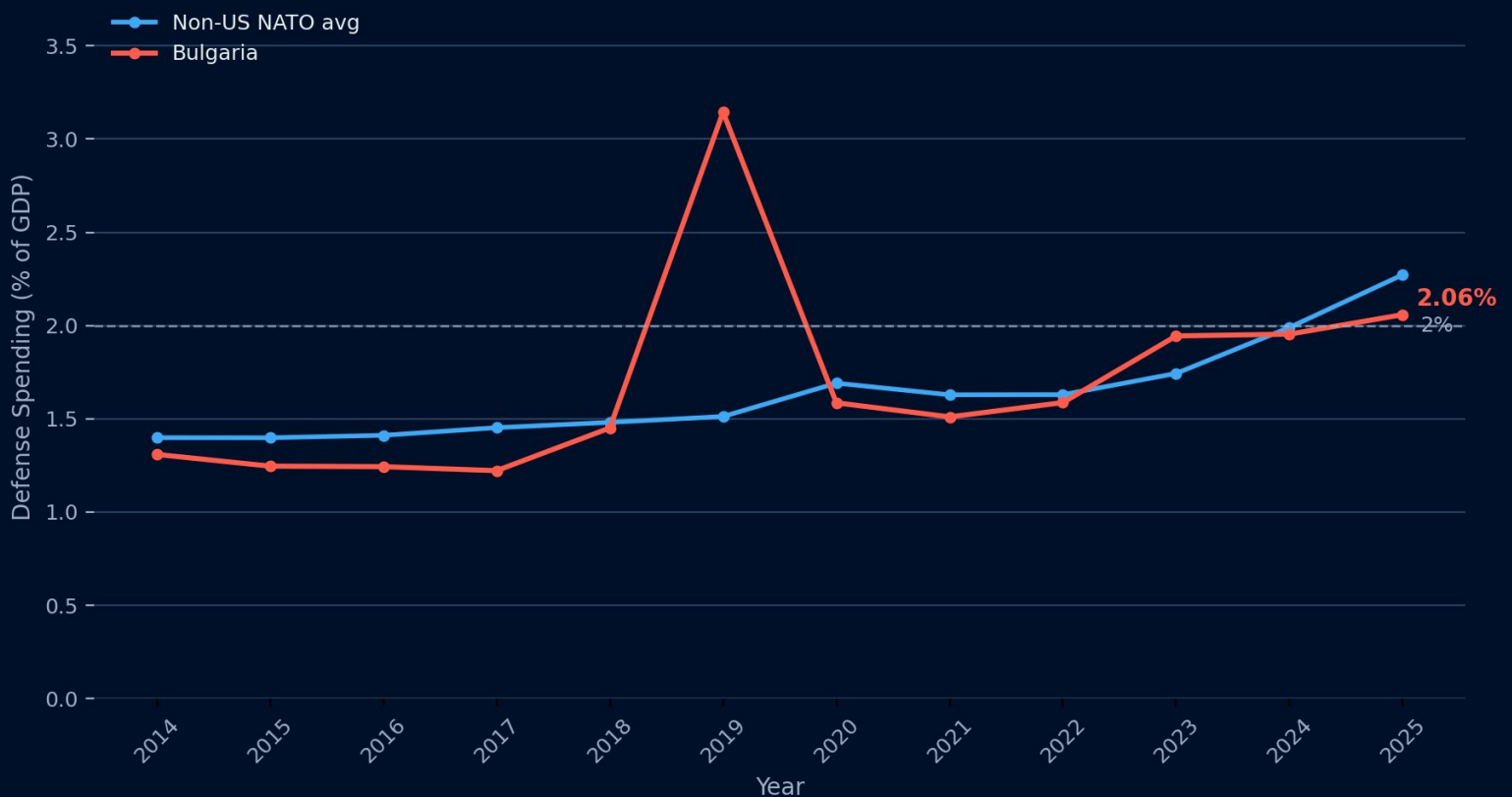


MILITARY CONTRIBUTIONS

Defense Spending Level

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

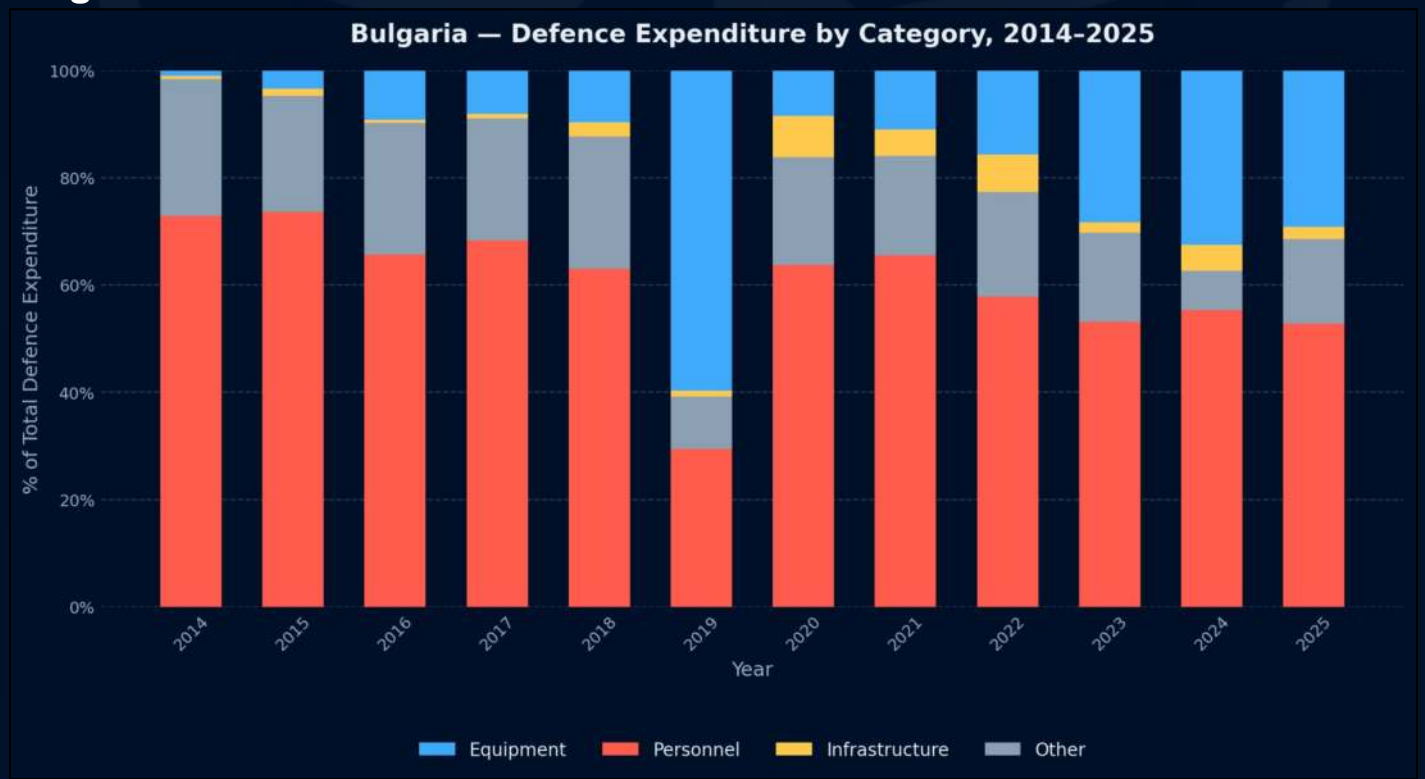
Bulgaria — Defense Spending as % of GDP, 2014-2025



MILITARY CONTRIBUTIONS

Equipment Share

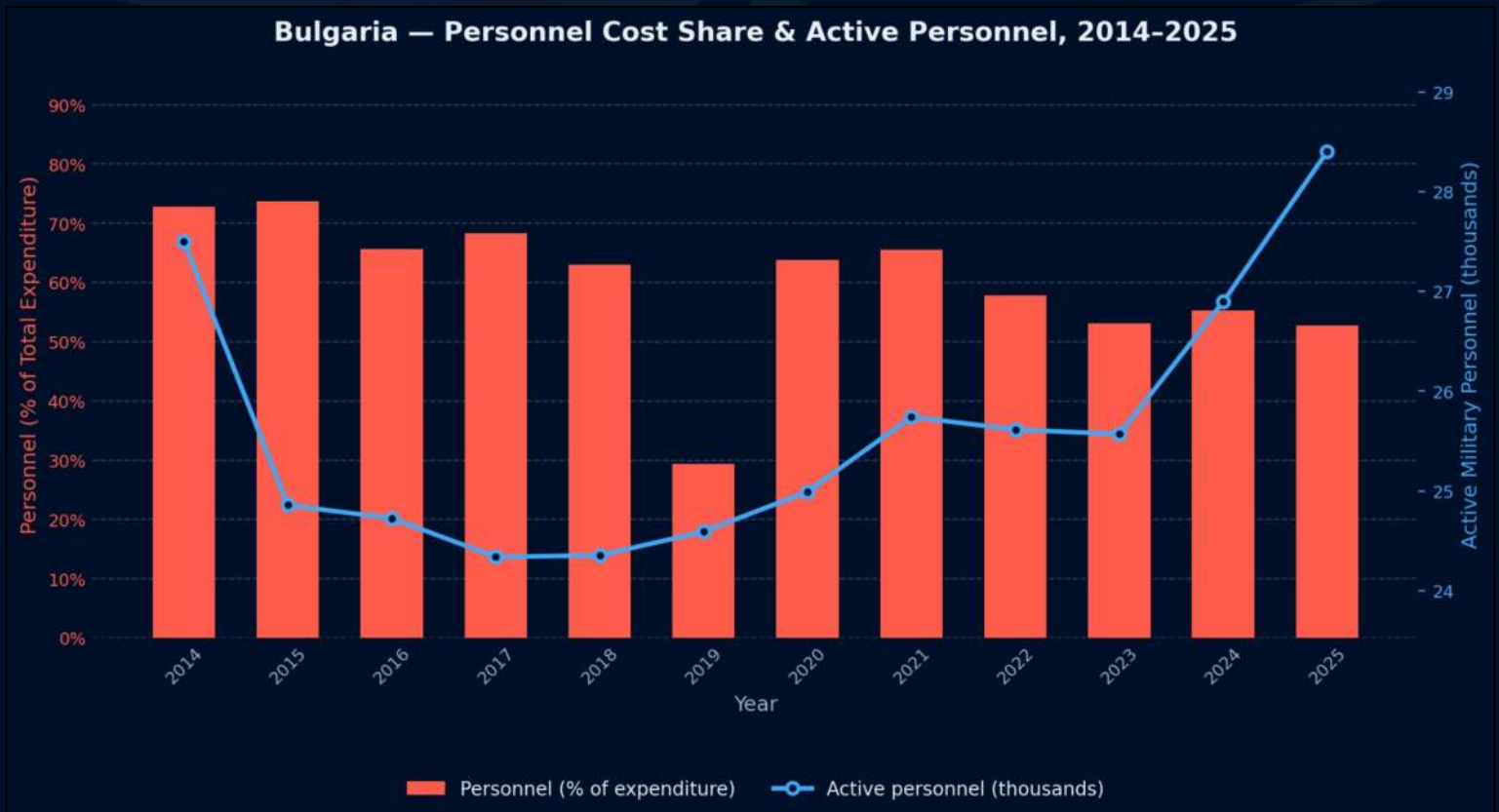
Bulgaria's [equipment share](#) tells a story of growing investment after decades of neglect. Personnel costs ran at roughly 60–75% of the defense budget through 2014–2018, leaving almost nothing for procurement. The 2019 spike in equipment share is due to major procurement decisions, primarily the F-16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



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

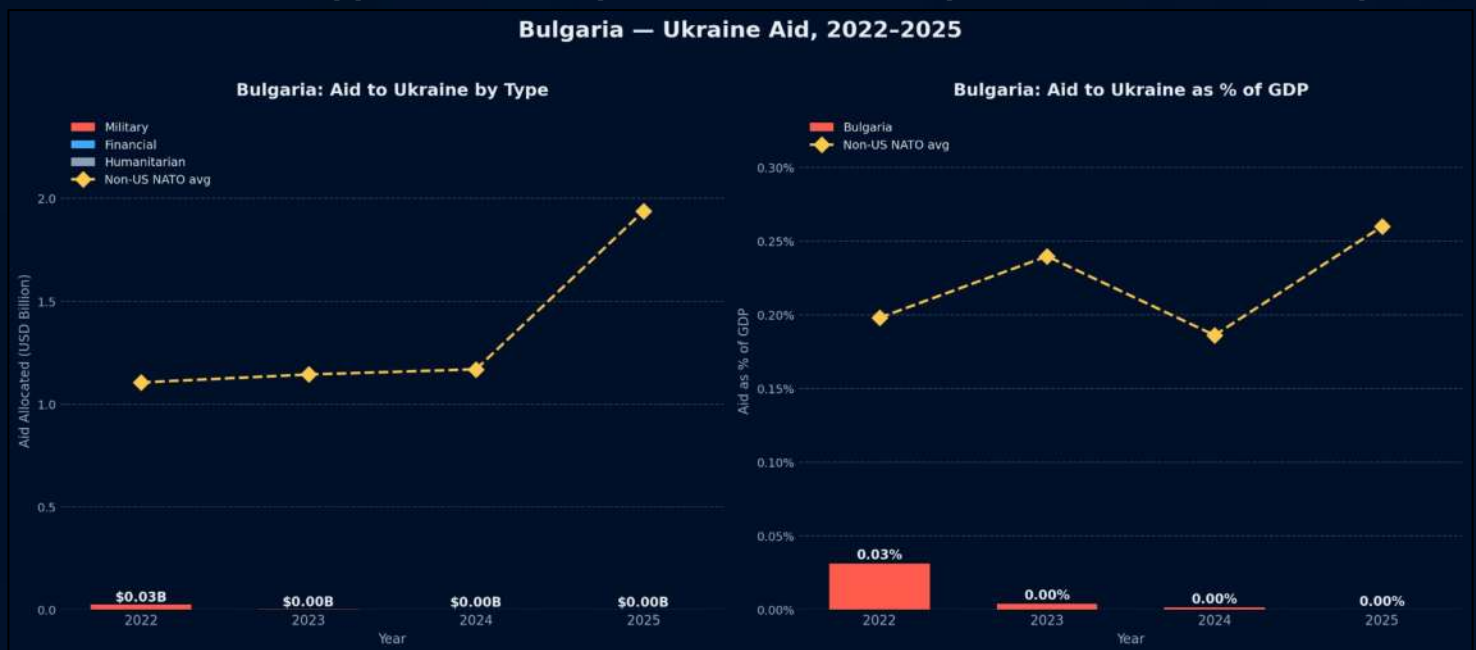
Bulgaria's declared posture underwent a significant transformation in March 2025 with the adoption of the [National Defence Strategy](#). For the first time Bulgaria designated Russia as the biggest threat to national security. The [State Agency for National Security](#) has identified Russia as the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



STRATEGIC ALIGNMENT

Ukraine Support

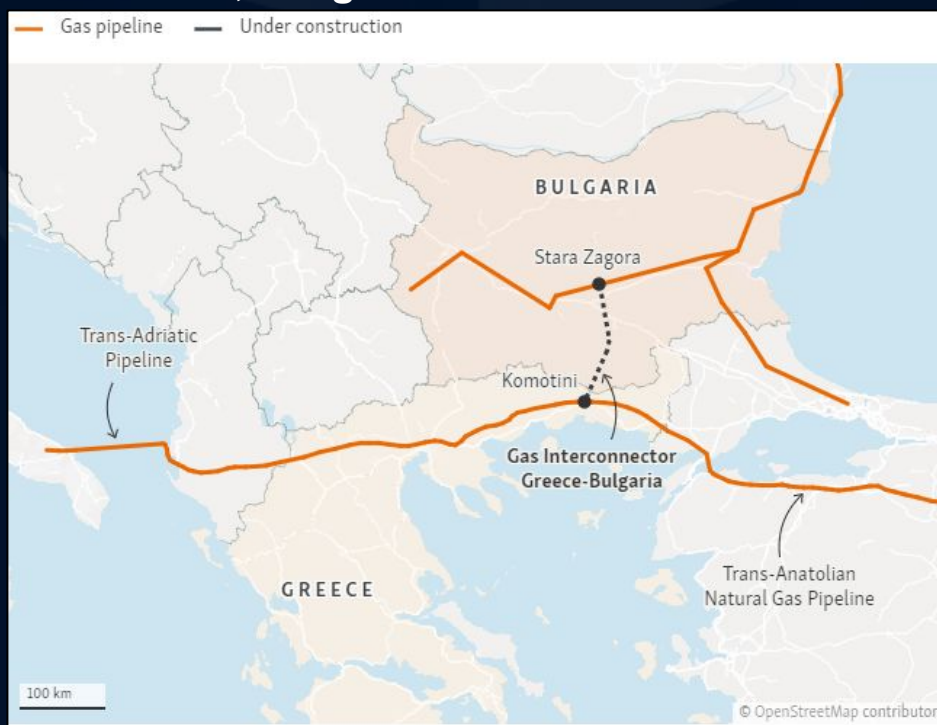
Bulgaria's [Ukraine support](#) doesn't show up in the formal Kiel Institute's tracking because most of it was done through intermediaries. Bulgaria [secretly supplied](#) roughly 30% of Ukraine's Soviet-caliber ammunition needs and up to 40% of diesel during the critical early months of the war. Formal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



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





Croatia

NATO Country Assessment —TIER TWO—

ANSWERING NATO CALL • DOMESTIC DEFENSE INVESTMENT • FALTERING ON UKRAINE





AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE



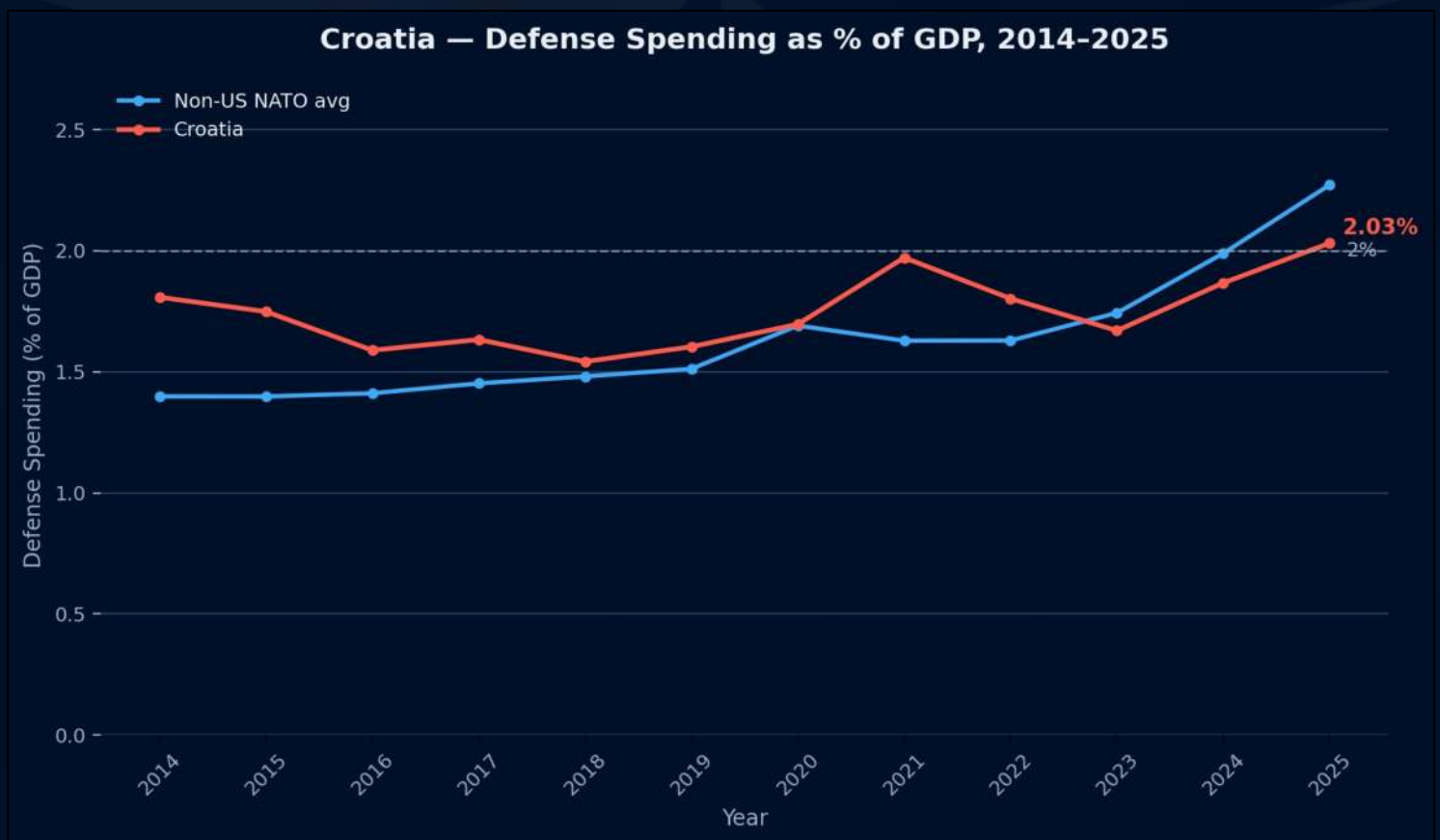
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.



MILITARY CONTRIBUTIONS

Defense Spending Level

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

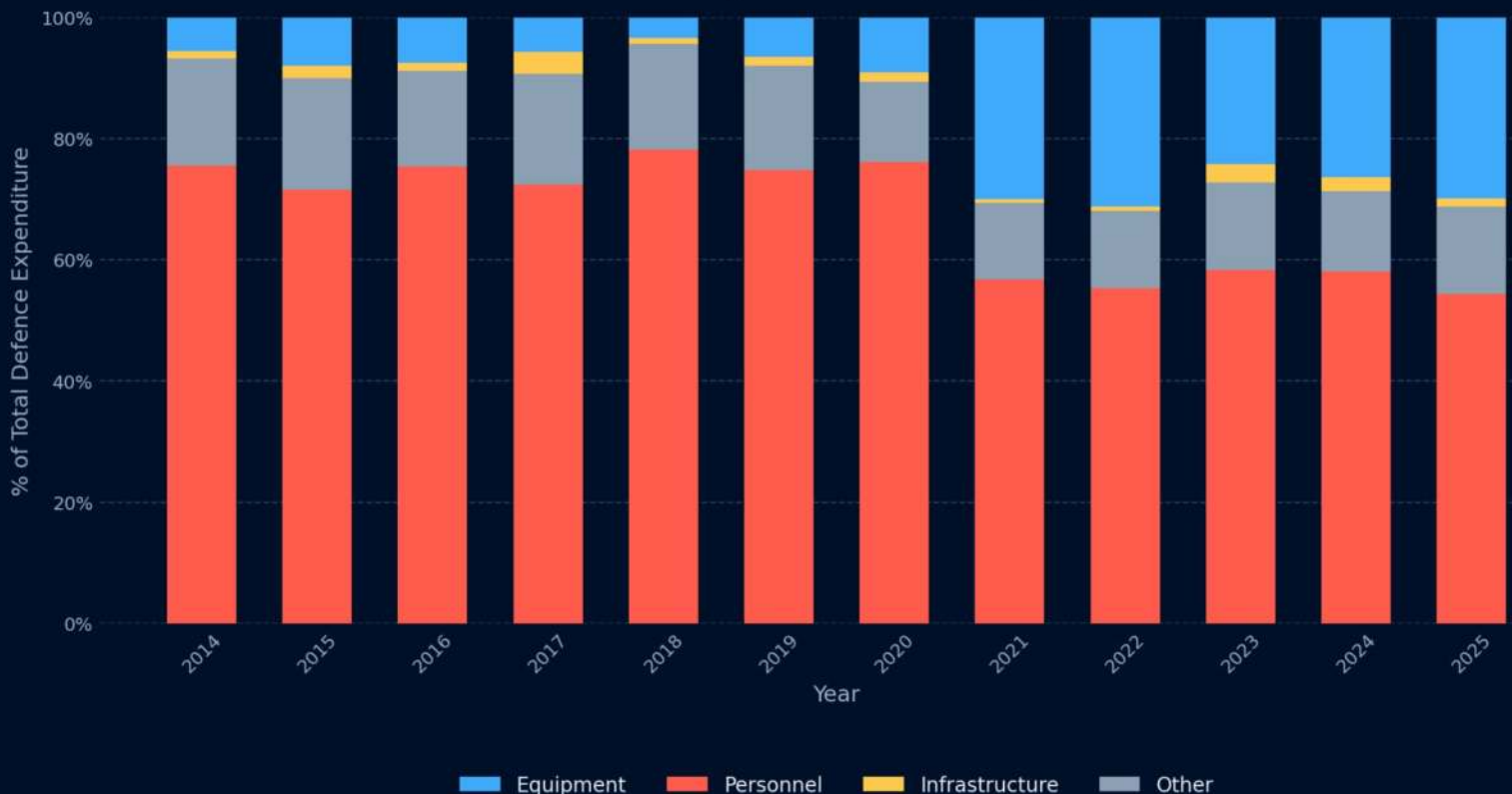


MILITARY CONTRIBUTIONS

Equipment Share

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

Croatia — Defence Expenditure by Category, 2014-2025

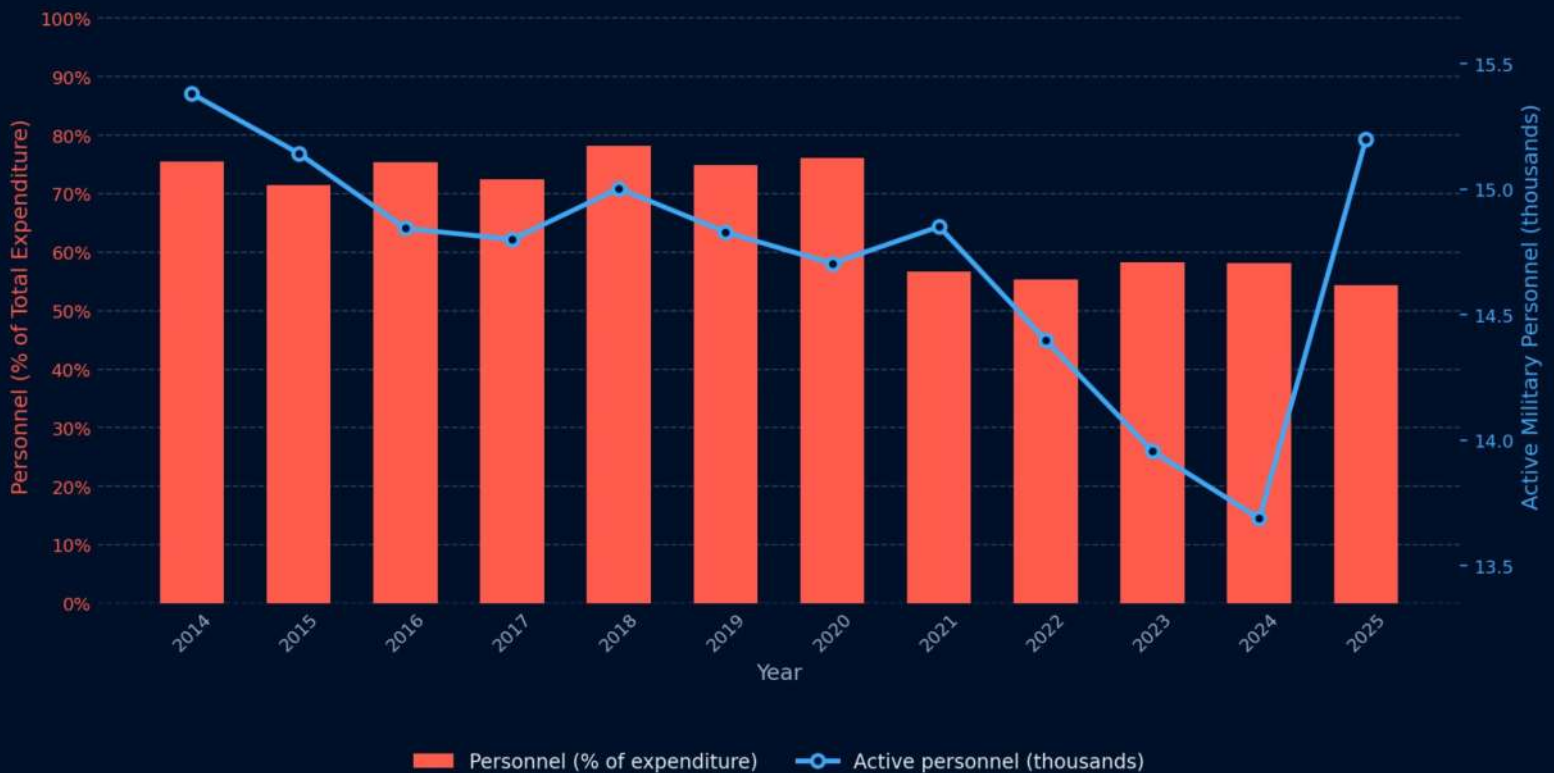


MILITARY CONTRIBUTIONS

Manpower & Recruitment

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

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



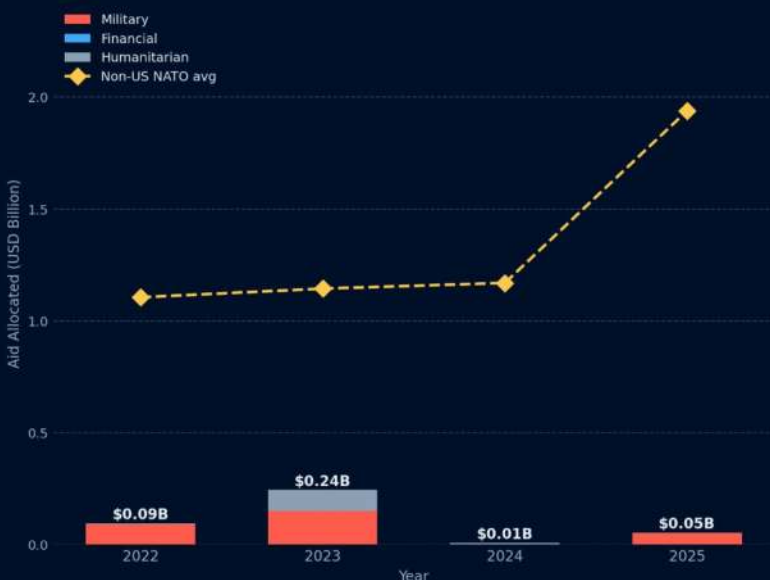
STRATEGIC ALIGNMENT

Ukraine Support

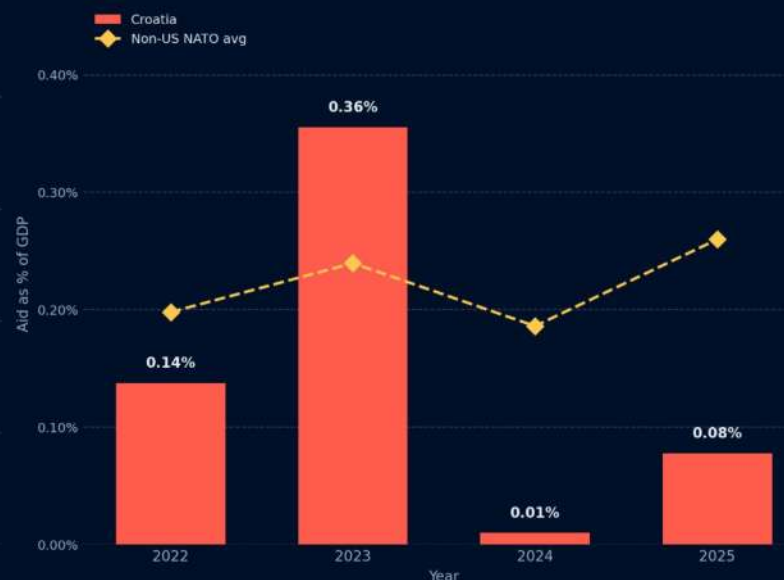
Croatia's Ukraine aid peaked at 0.36% of GDP in 2023 before dropping sharply. Croatia fell below the non-US NATO average in 2024 and recovering only modestly to 0.08% in 2025. The headline Kiel figures (€0.355B allocated, €0.360B committed) understate the significance of Croatia's donation. Croatia donated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

Croatia — Ukraine Aid, 2022-2025

Croatia: Aid to Ukraine by Type



Croatia: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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

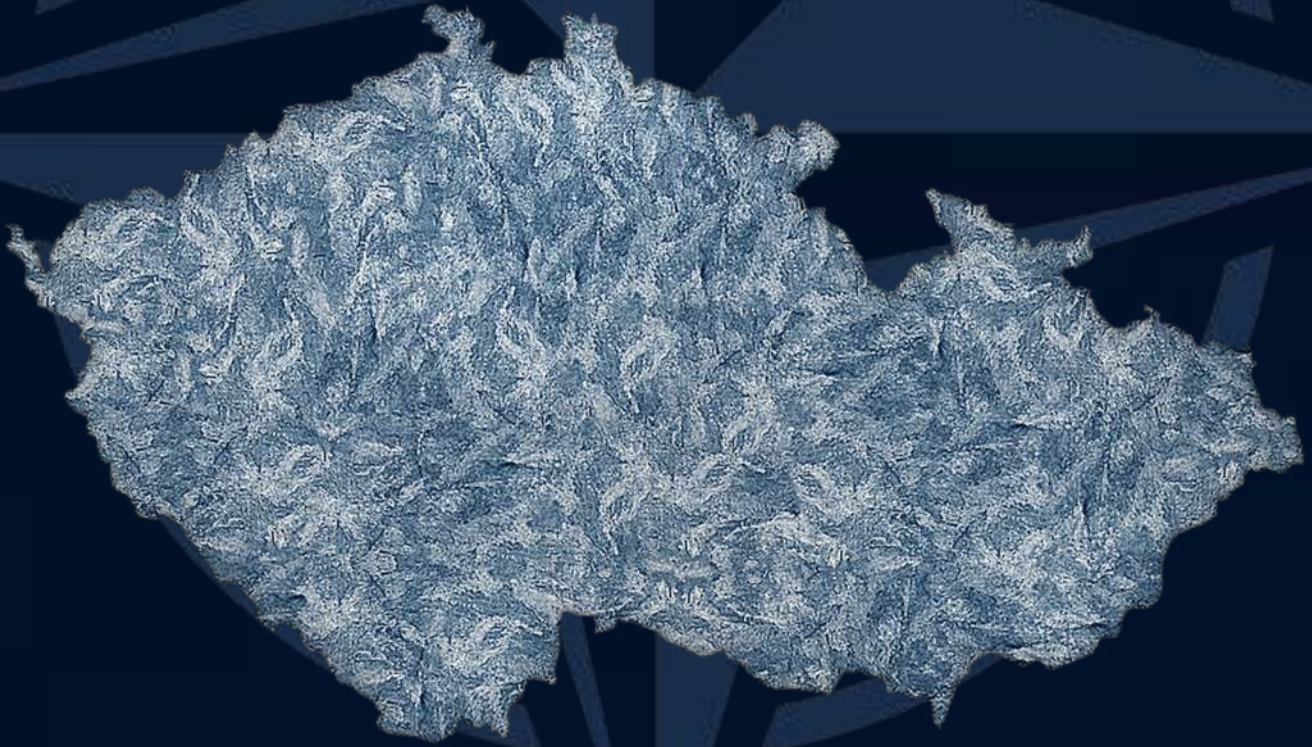




Czech Republic

NATO Country Assessment —*TIER TWO*—

ARMING EUROPE • CONFRONTING CCP • CHEATING ON DEFENSE





AT A GLANCE

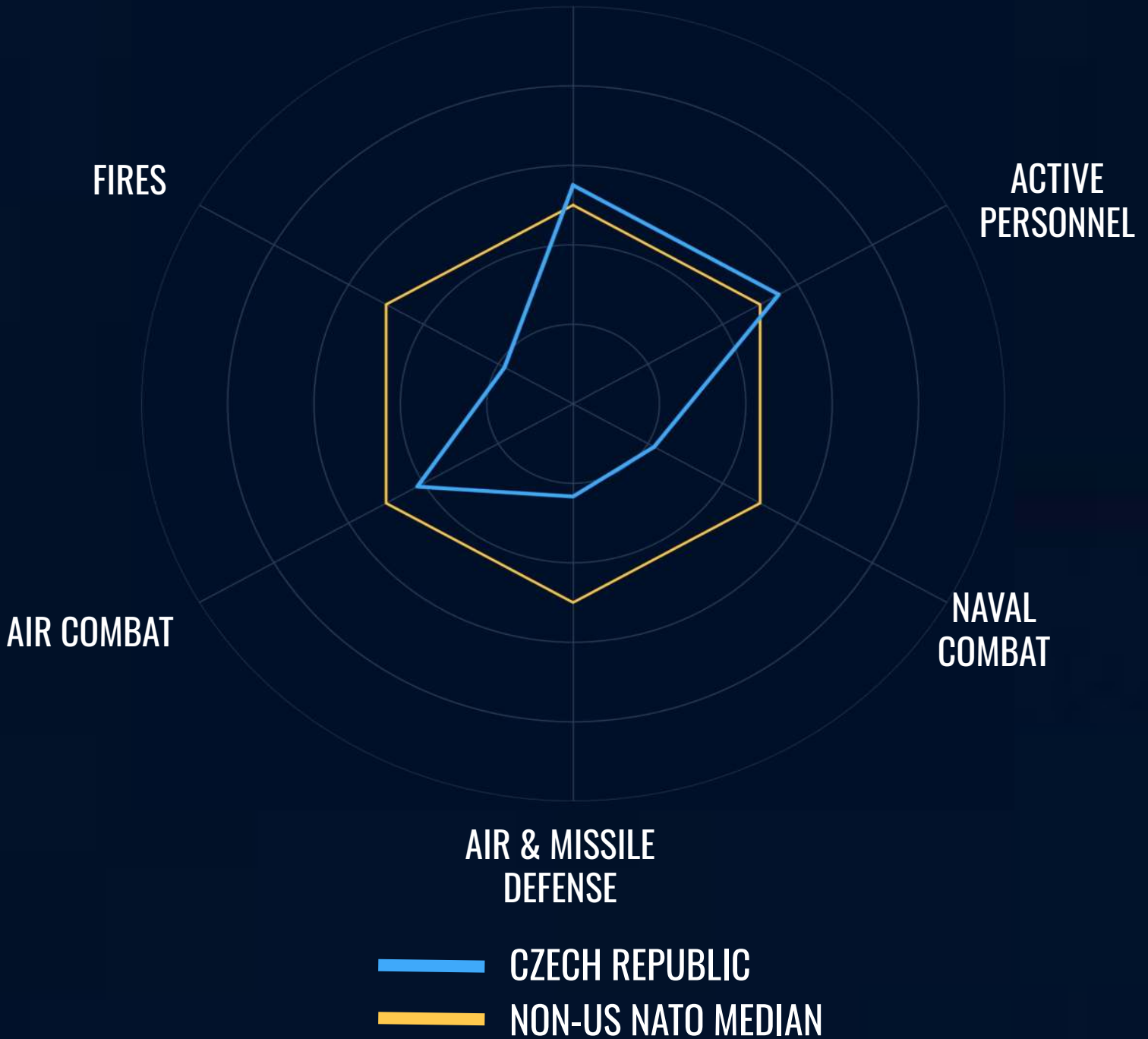
Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



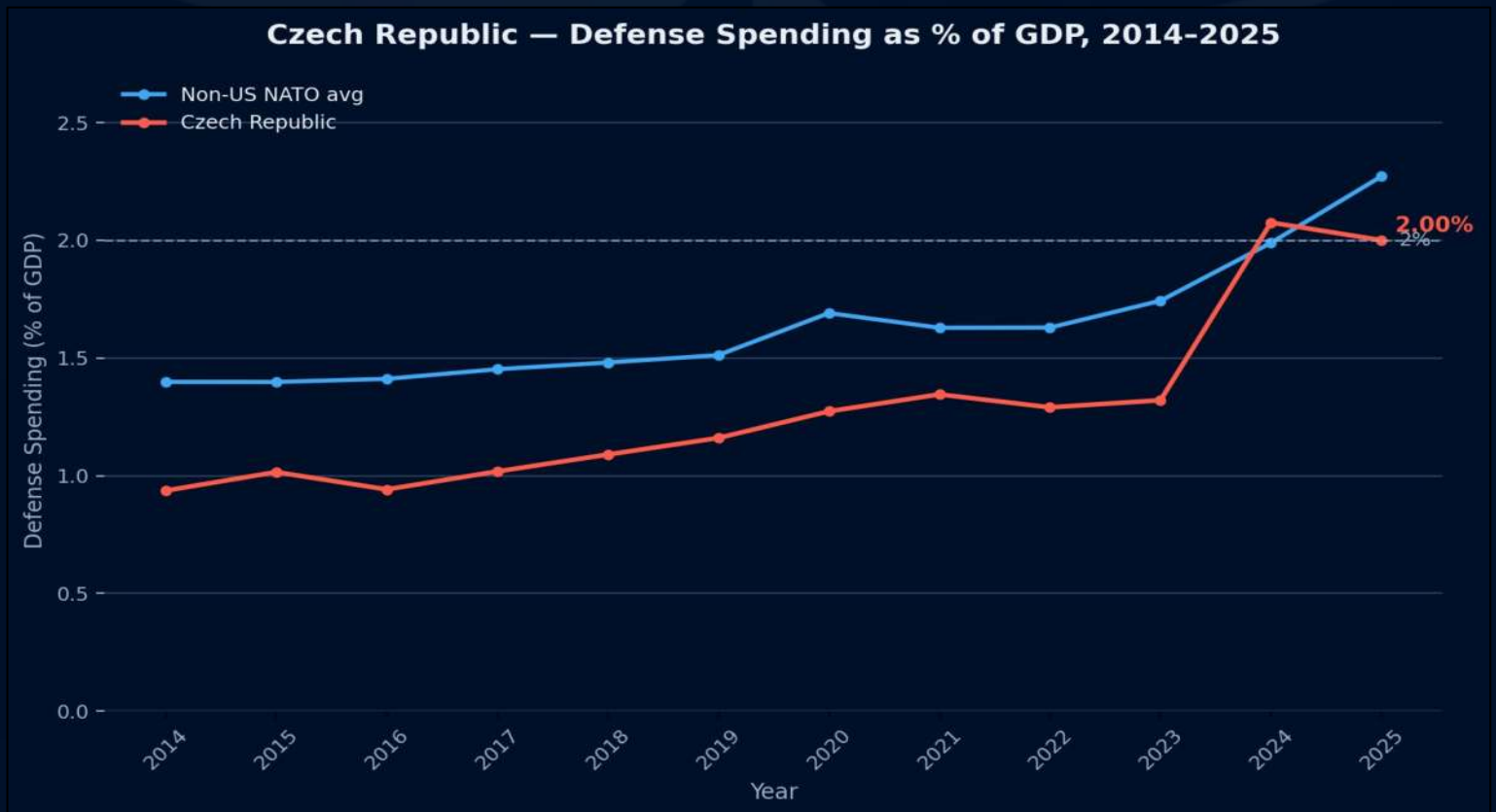
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MILITARY CONTRIBUTIONS

Defense Spending Level

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

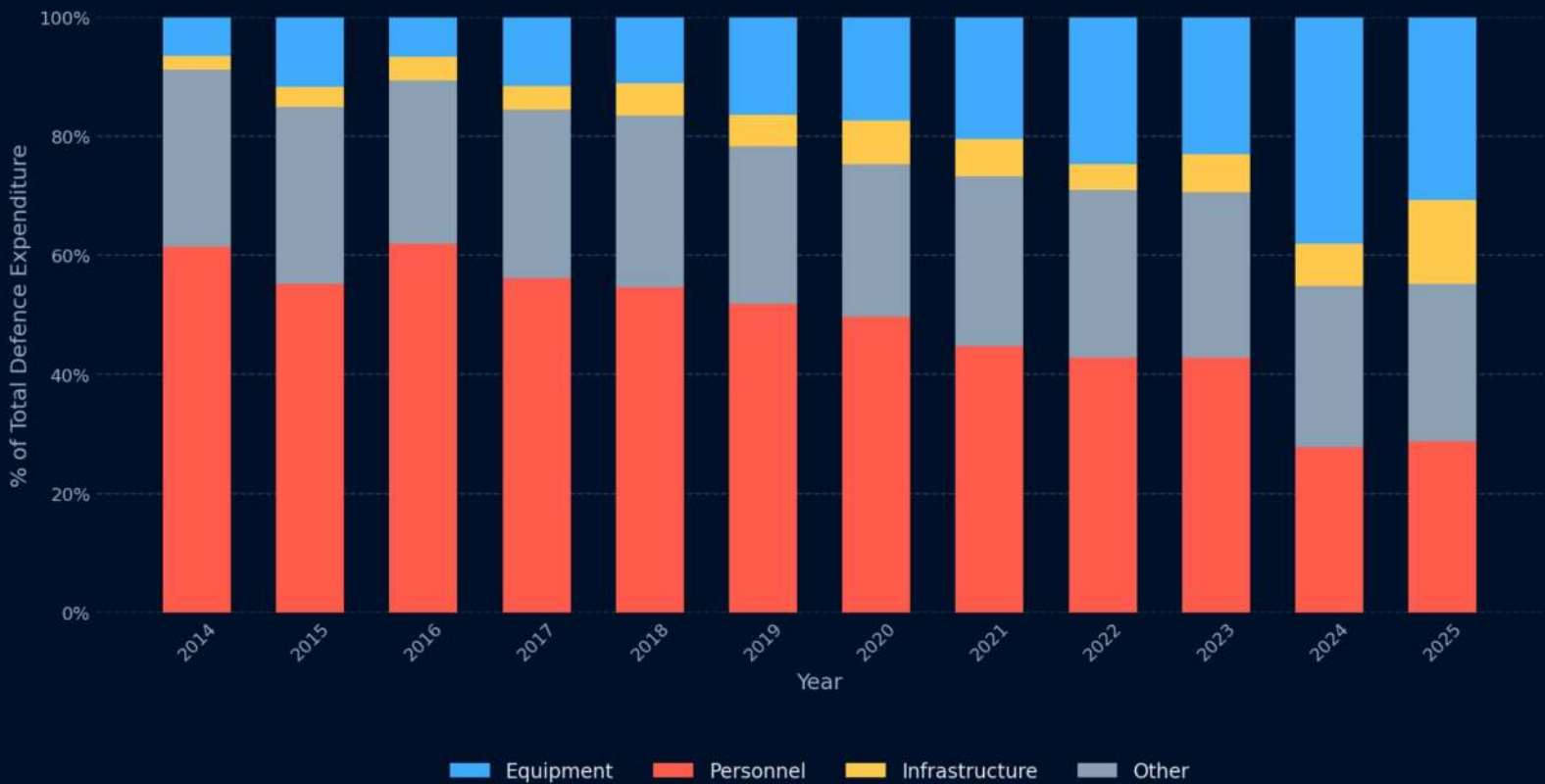


MILITARY CONTRIBUTIONS

Equipment Share

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

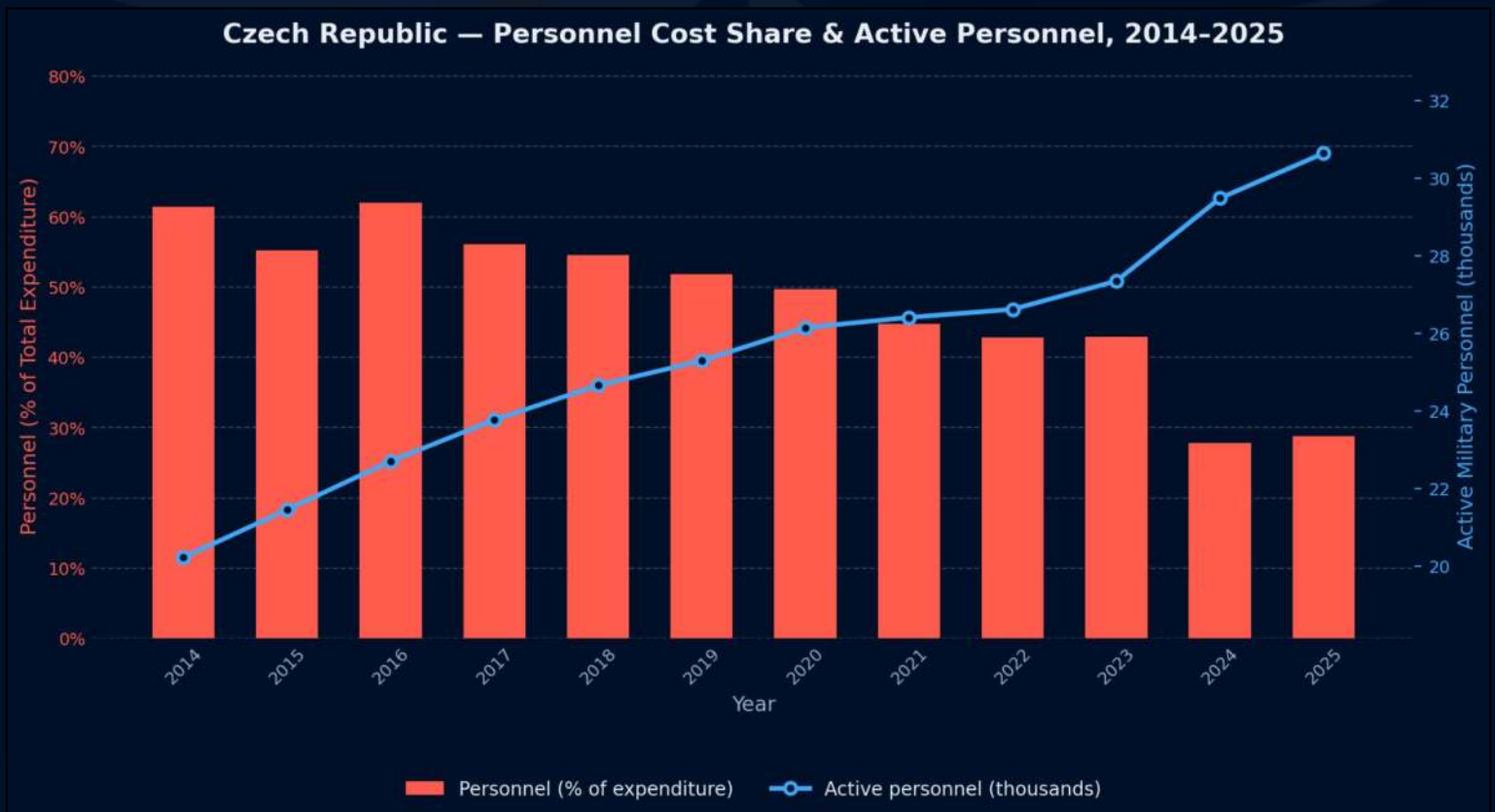
Czech Republic — Defence Expenditure by Category, 2014–2025



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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

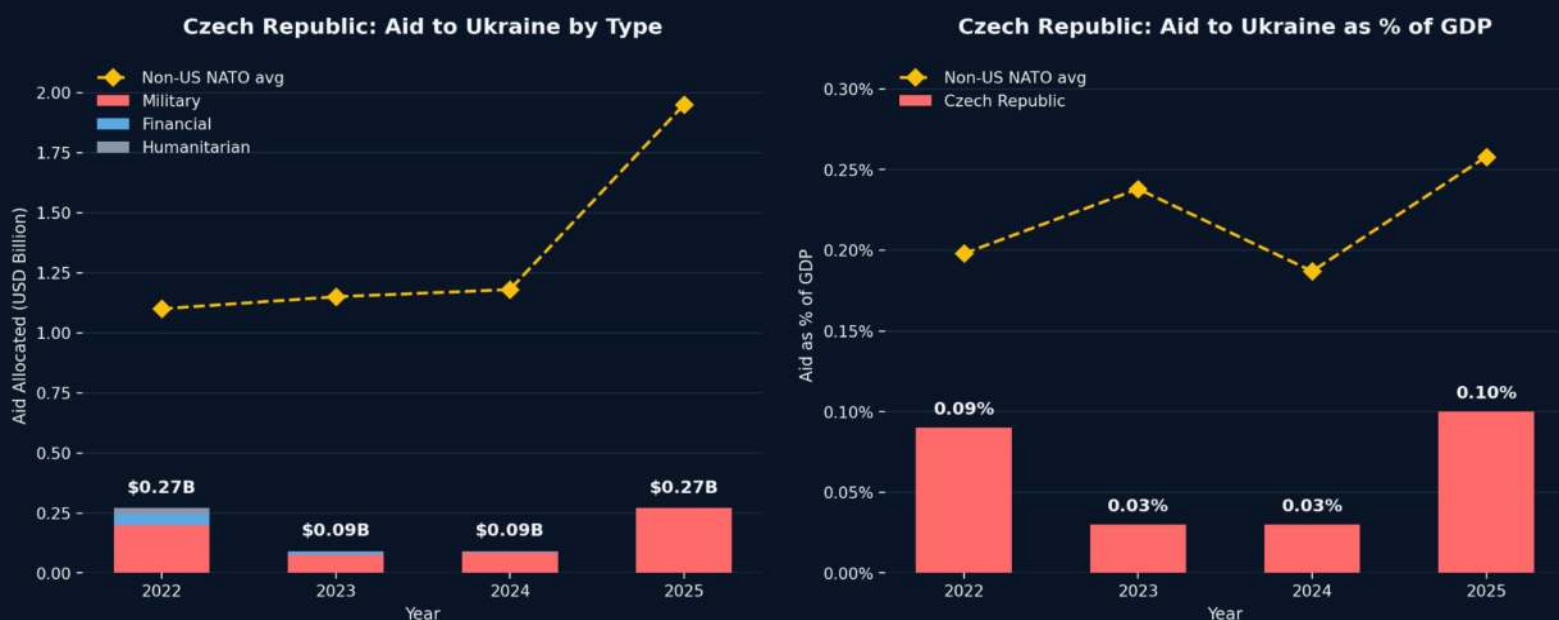


STRATEGIC ALIGNMENT

Ukraine Support

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

Czech Republic — Ukraine Aid, 2022-2025



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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



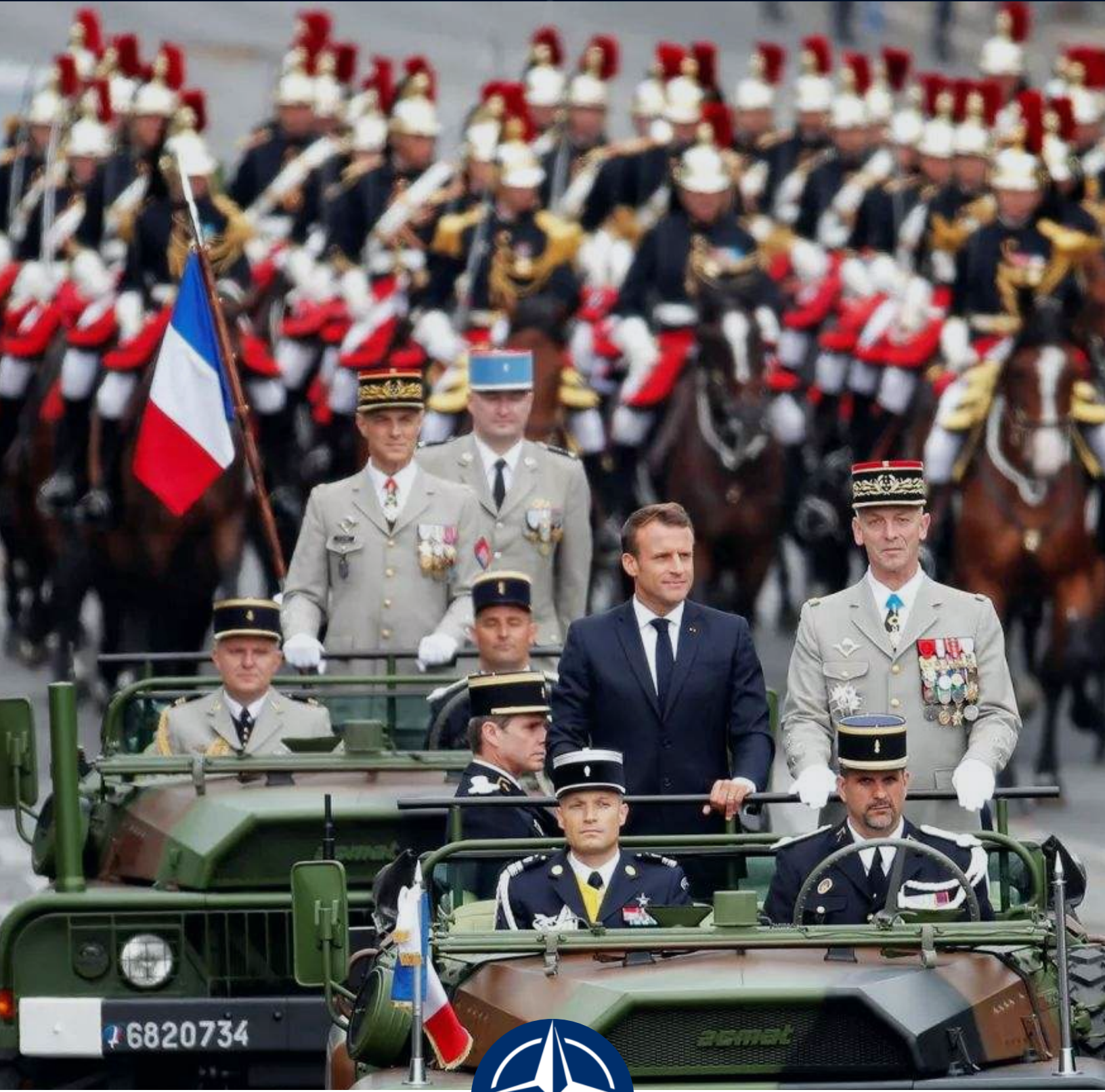


France

NATO Country Assessment —TIER TWO—

DEFENSE INDUSTRY • TAKING THREATS SERIOUSLY • UNDERMINING SECURITY





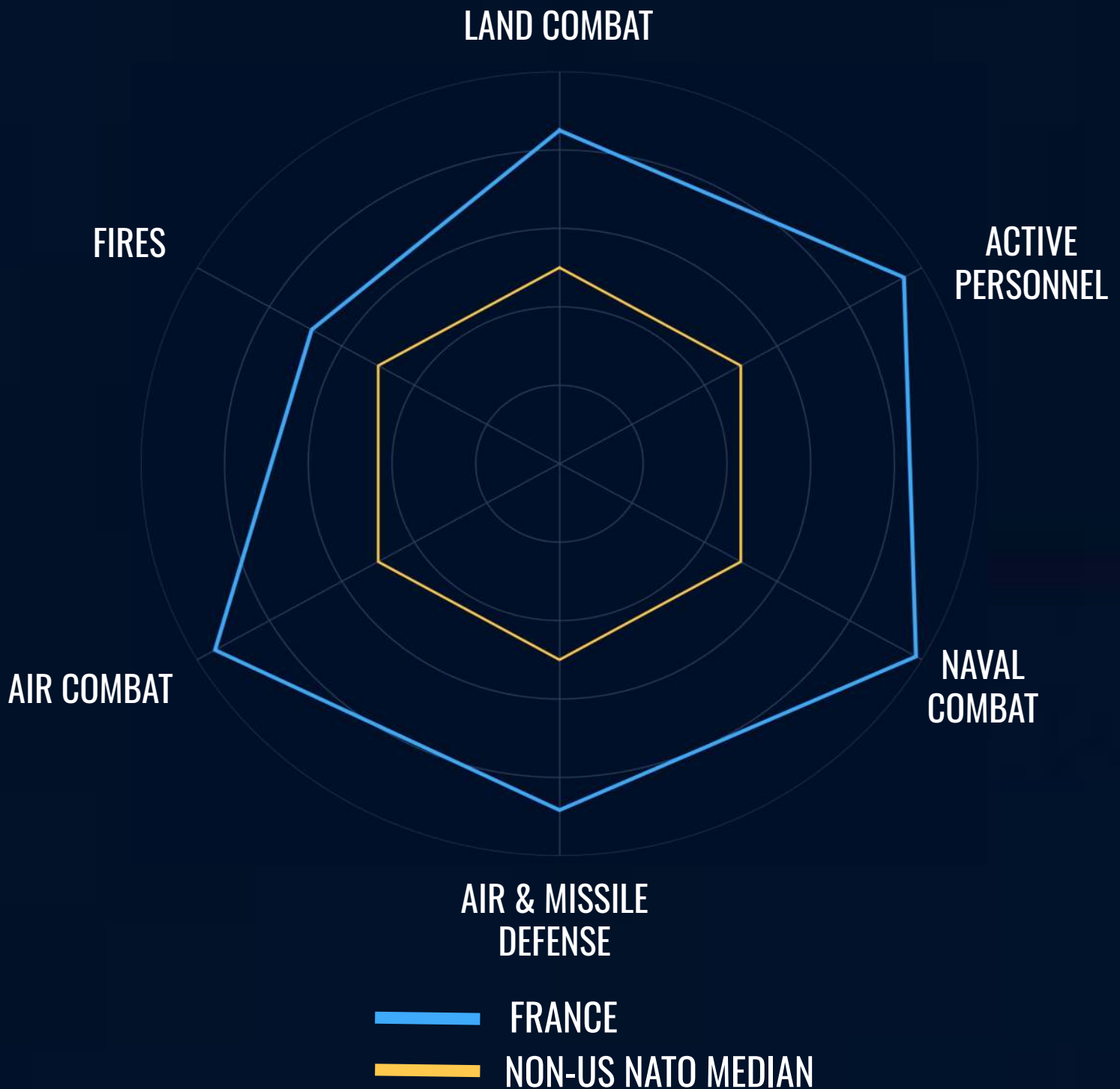
AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE



This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

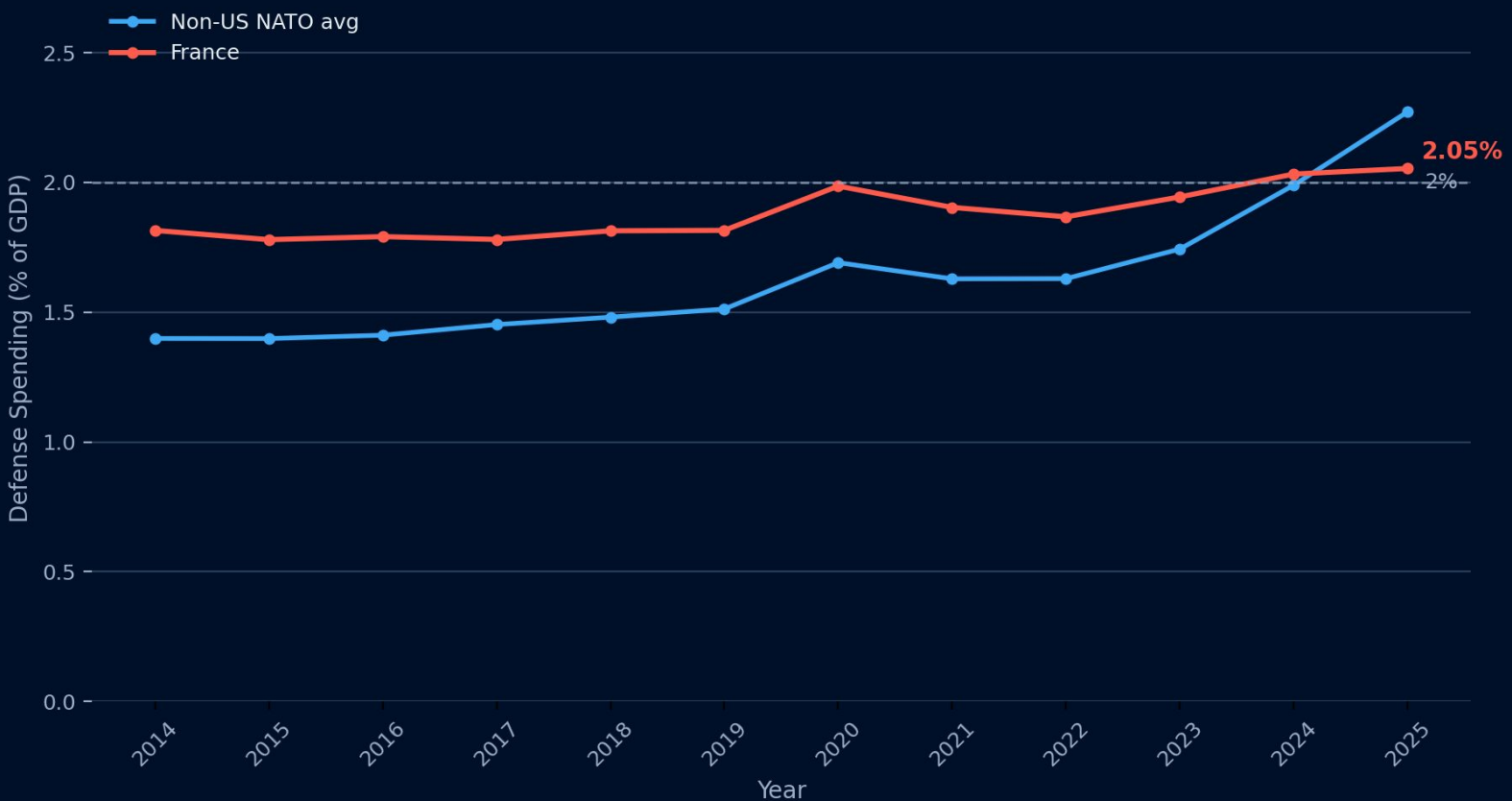


MILITARY CONTRIBUTIONS

Defense Spending Level

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

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

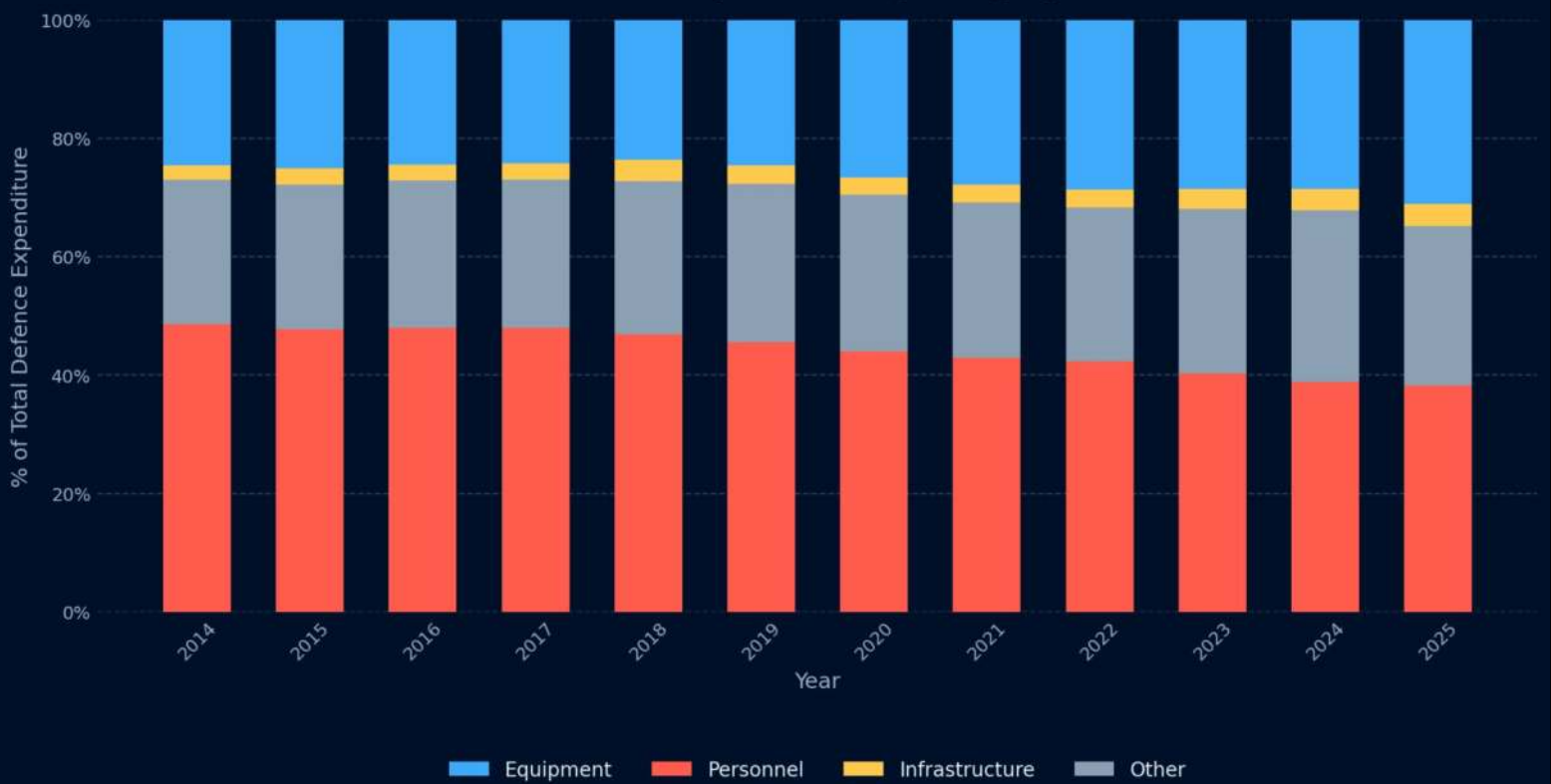


MILITARY CONTRIBUTIONS

Equipment Share

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

France — Defence Expenditure by Category, 2014-2025



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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

France — Personnel Cost Share & Active Personnel, 2014-2024



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



STRATEGIC ALIGNMENT

Ukraine Support

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

France — Ukraine Aid, 2022-2025

France: Aid to Ukraine by Type



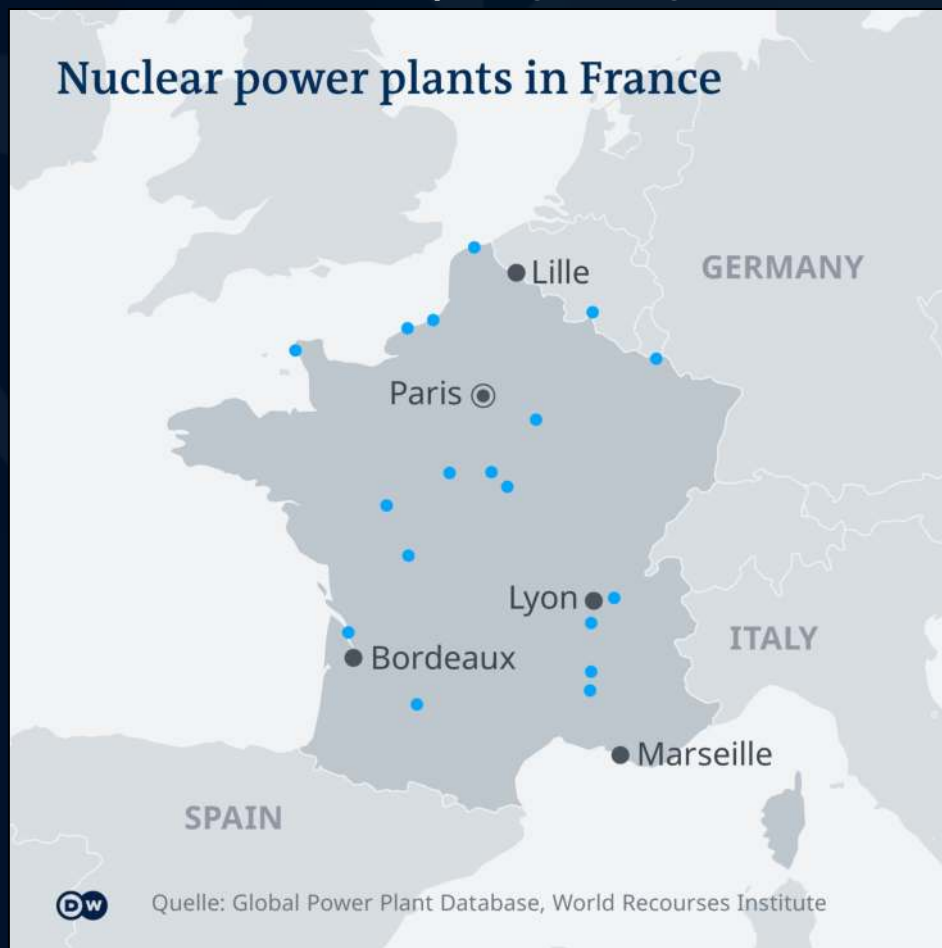
France: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

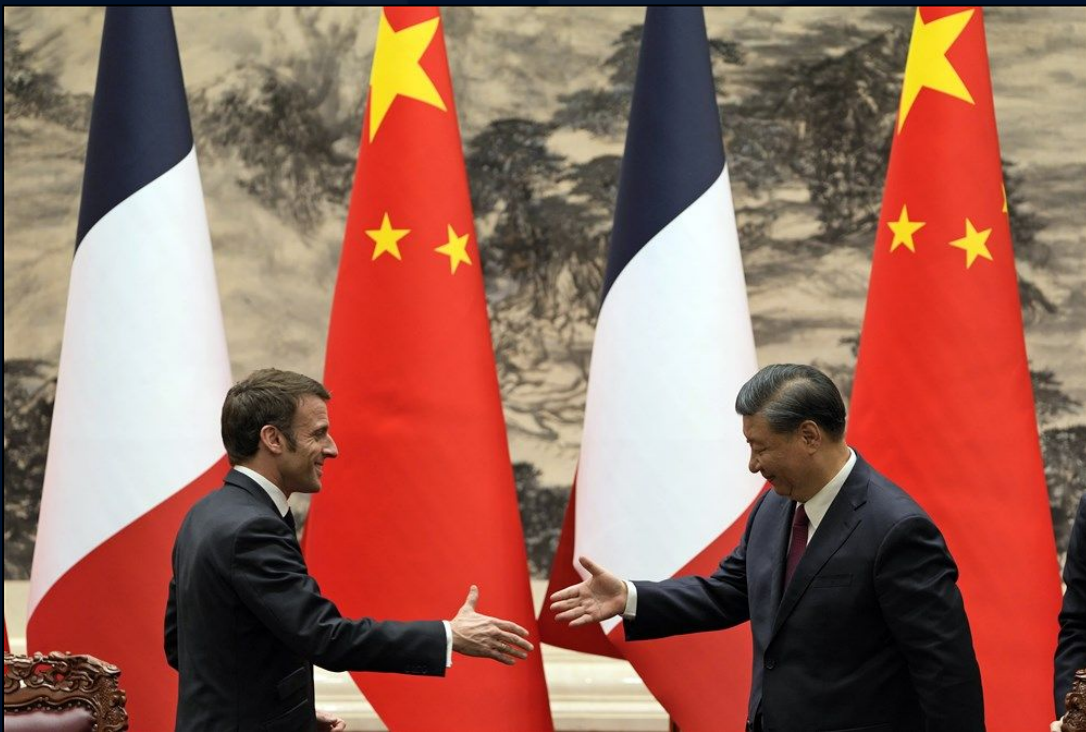
France recorded only 61% for staying in [NATO in 2024](#), one of the lowest figures in the alliance, and just 50% felt more safe due to NATO cooperation, tied for the lowest figure. Only 56% agreed France should defend another ally if attacked, and Ukraine support stood at roughly 56% combined, below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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





Germany

NATO Country Assessment —TIER TWO—

BURDEN SHARING • GROWING COURAGE & FORCE • CAPABILITY CONCERNS





AT A GLANCE

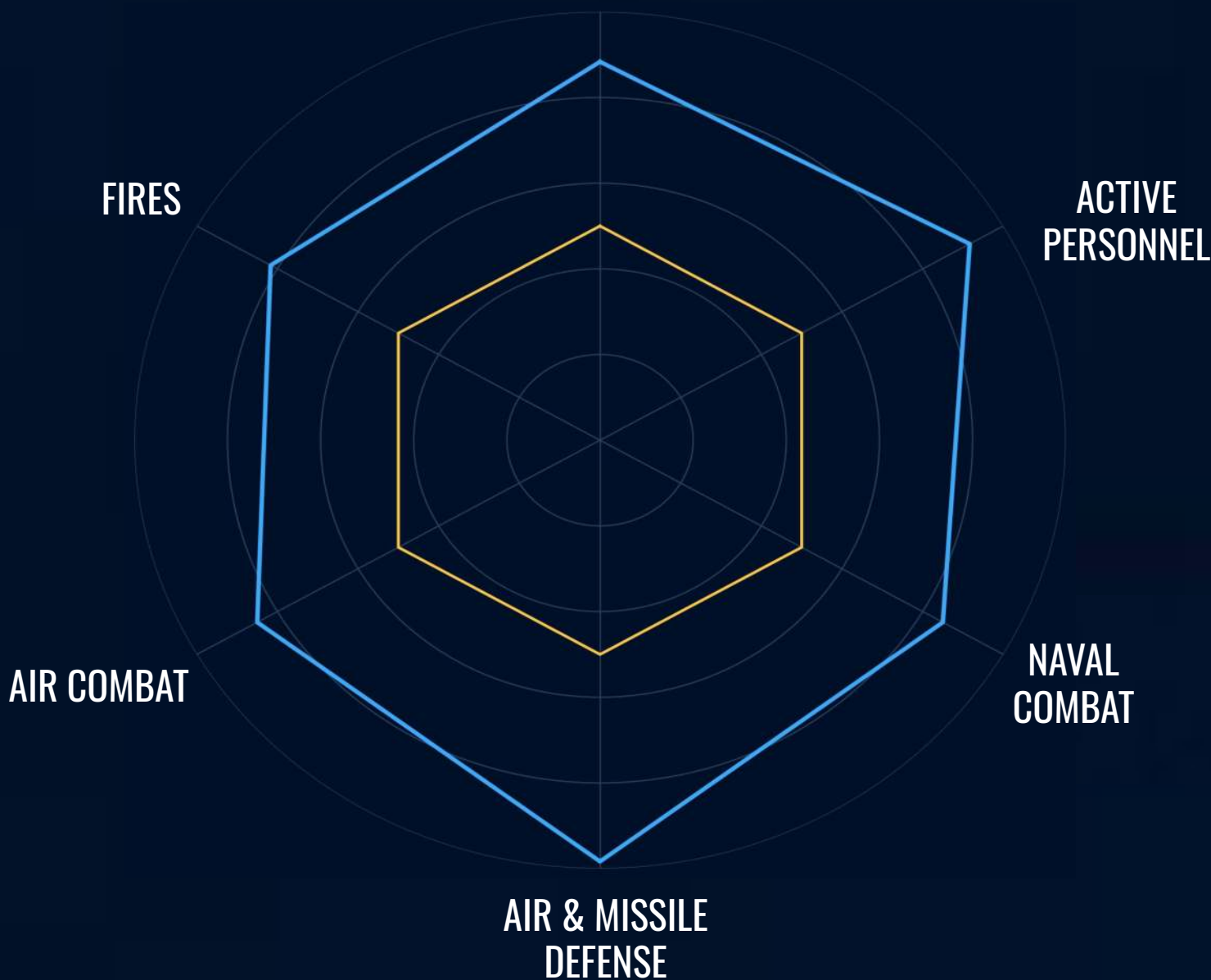
Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



— GERMANY
— NON-US NATO MEDIAN

This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

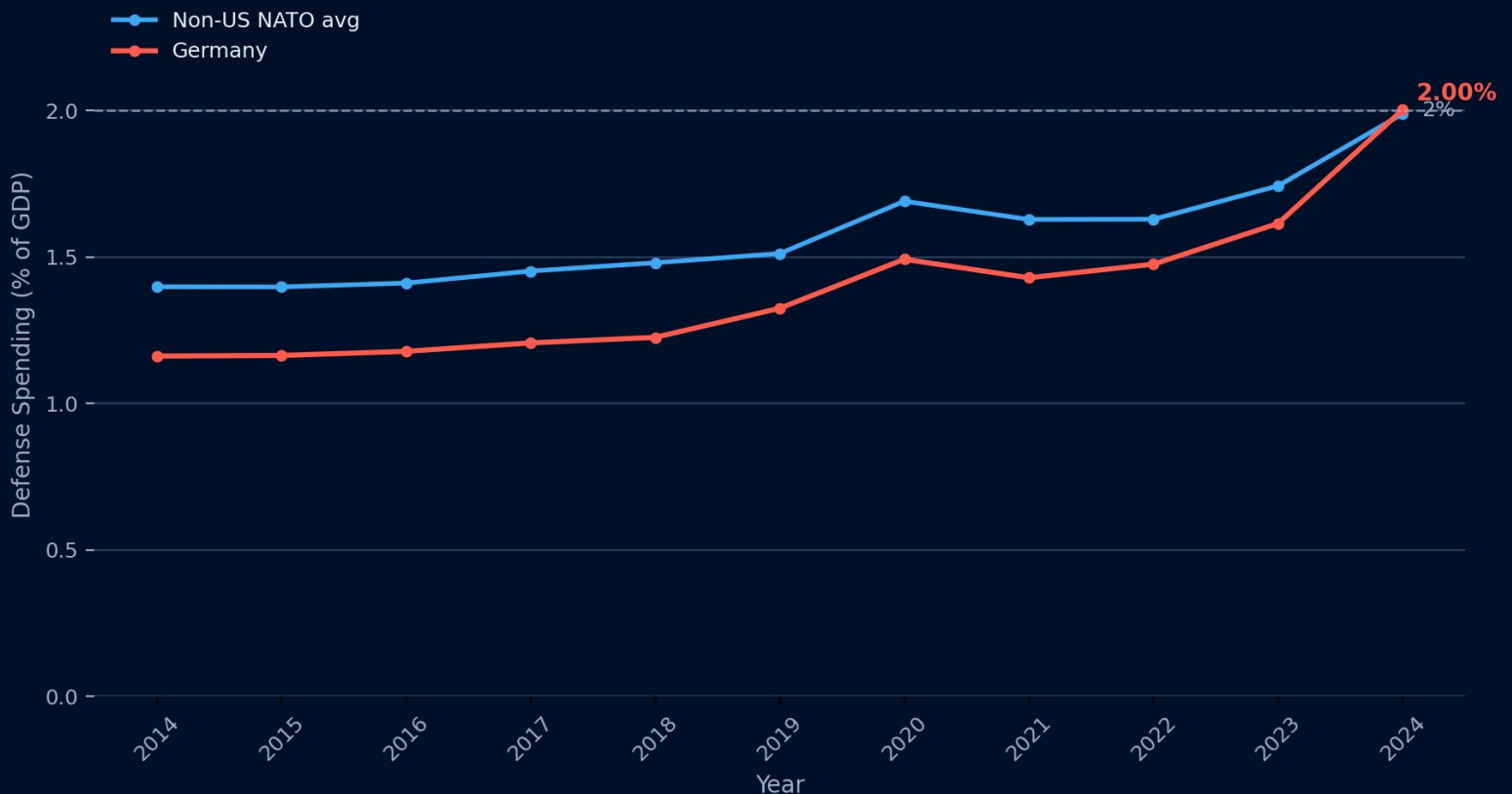


MILITARY CONTRIBUTIONS

Defense Spending Level

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

Germany — Defense Spending as % of GDP, 2014-2024

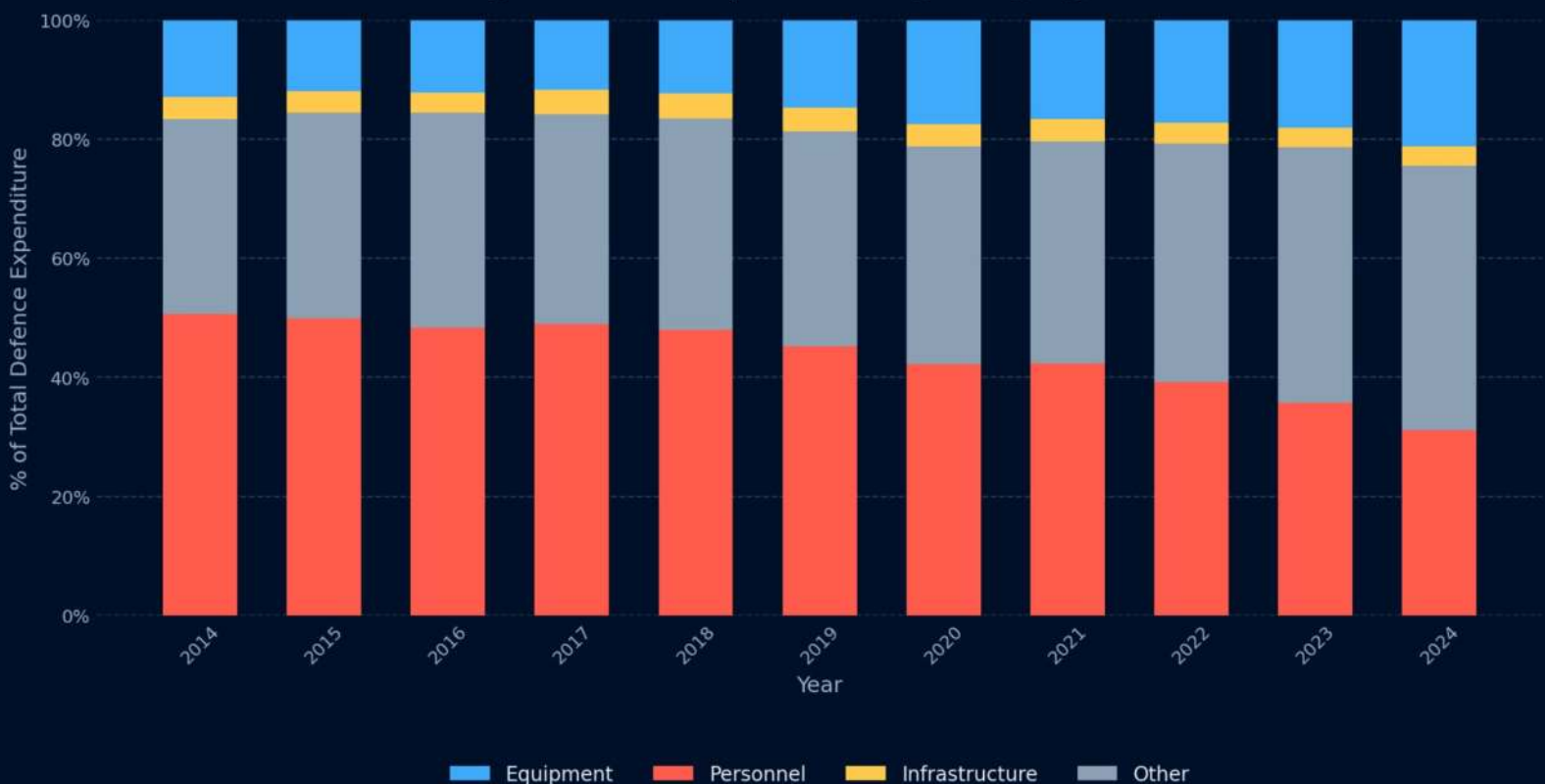


MILITARY CONTRIBUTIONS

Equipment Share

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

Germany — Defence Expenditure by Category, 2014-2024



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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

Germany — Personnel Cost Share & Active Personnel, 2014-2024



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



STRATEGIC ALIGNMENT

Ukraine Support

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

Germany — Ukraine Aid, 2022-2025

Germany: Aid to Ukraine by Type



Germany: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

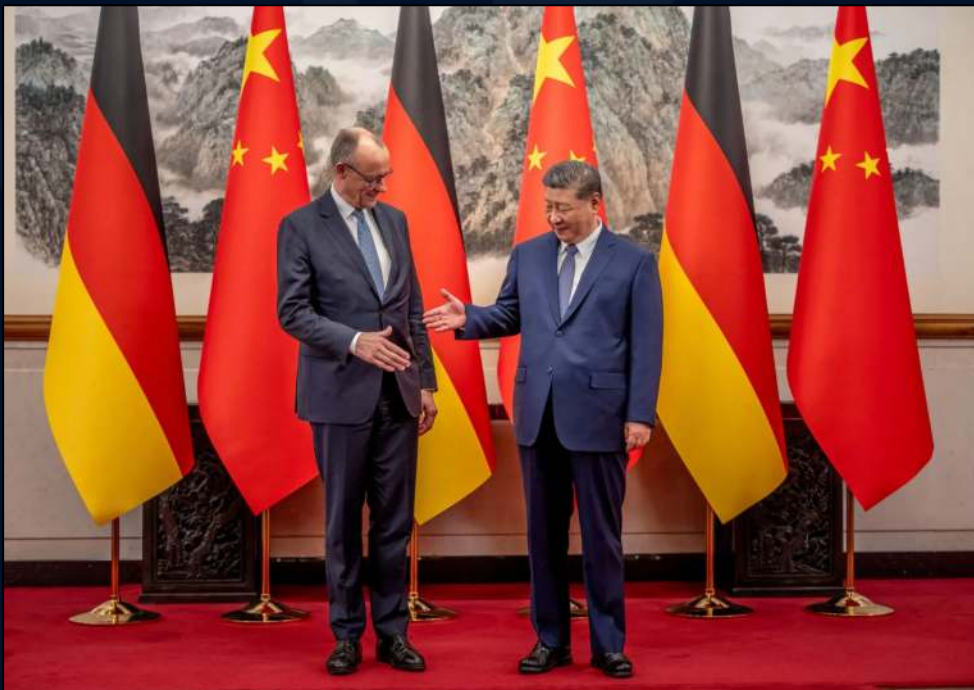
Seventy-seven percent of Germans [said in 2024](#) they would vote to stay in NATO, with 54% favoring increased defense spending, a significant shift from Germany's pre-2022 baseline. Sixty-five percent agreed Germany should defend another ally if attacked, and 62% agreed NATO membership makes a foreign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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





Greece

NATO Country Assessment —*TIER TWO*—

BOOSTING CAPABILITY • STRENGTHENING SECURITY • WEAK SUPPORT





AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

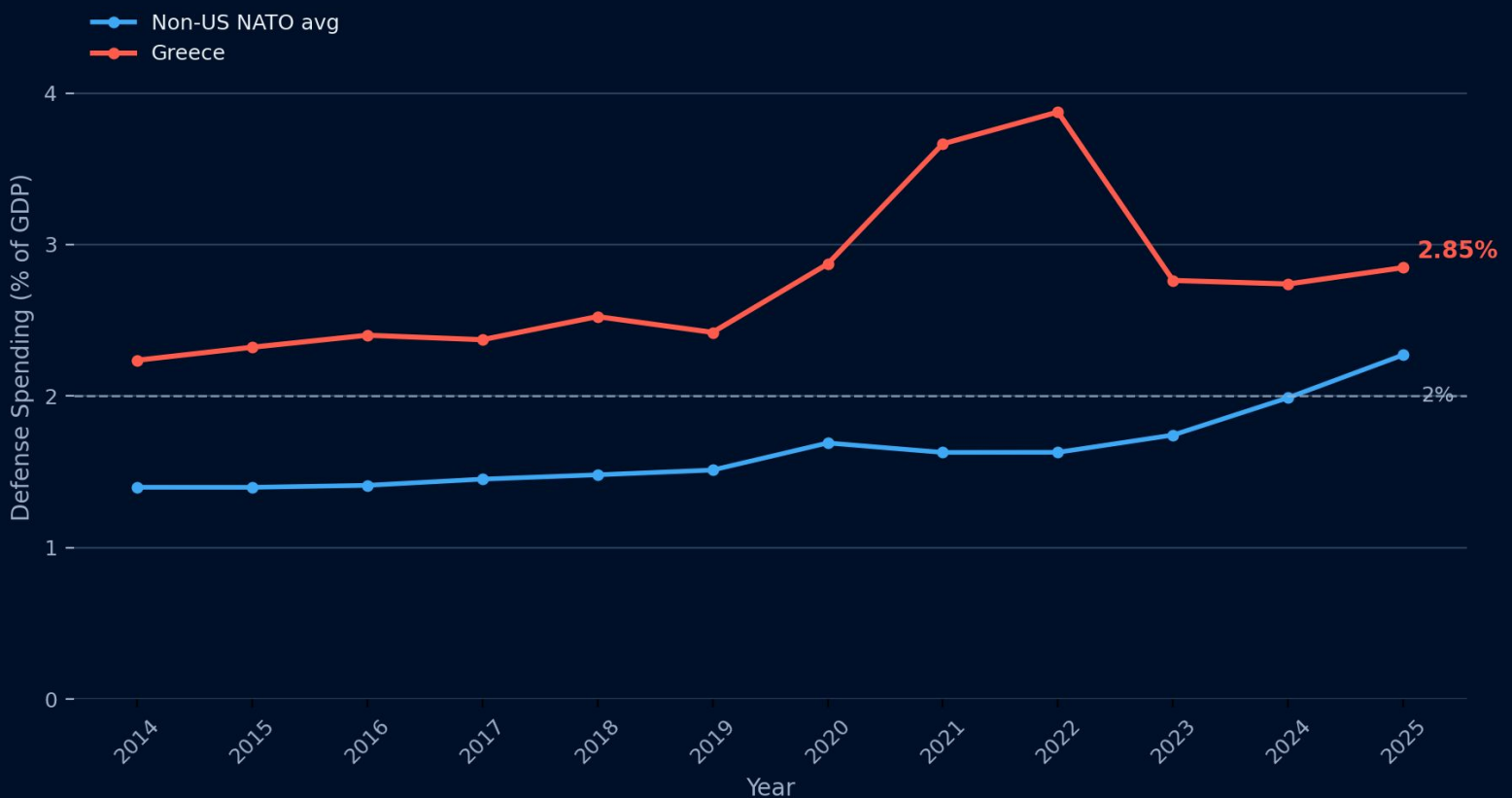


MILITARY CONTRIBUTIONS

Defense Spending Level

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

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

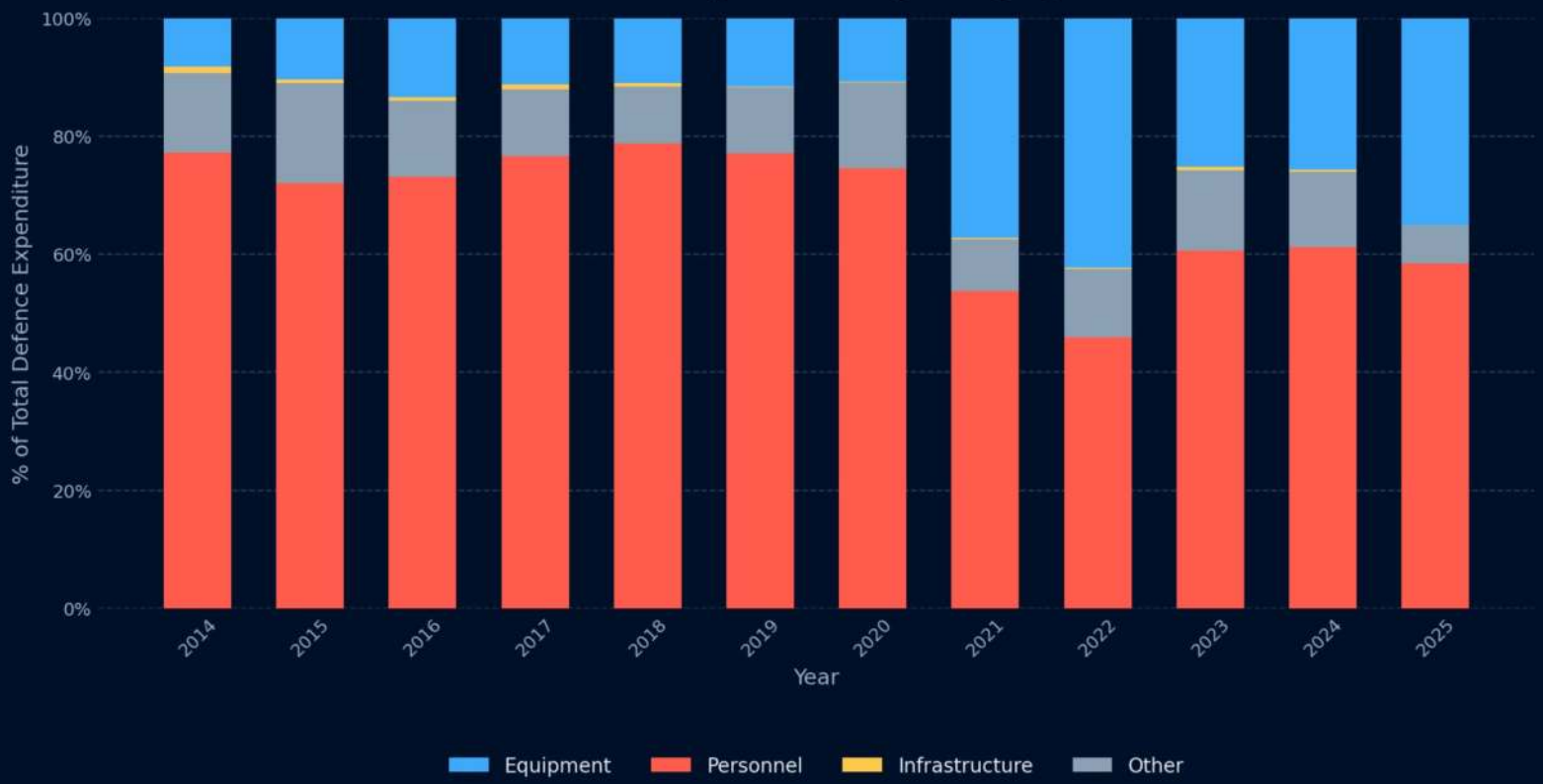


MILITARY CONTRIBUTIONS

Equipment Share

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

Greece — Defence Expenditure by Category, 2014-2025

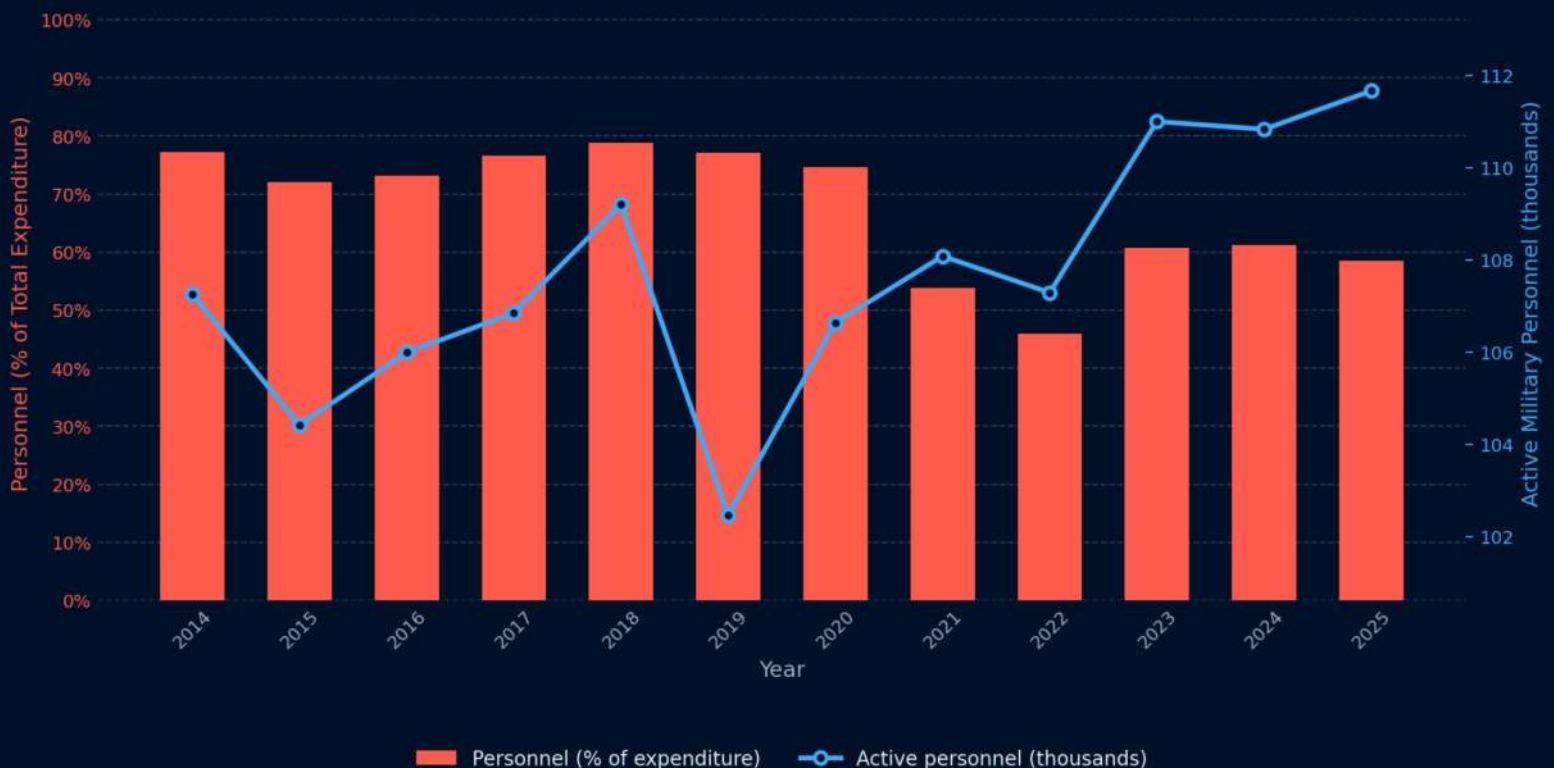


MILITARY CONTRIBUTIONS

Manpower & Recruitment

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

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



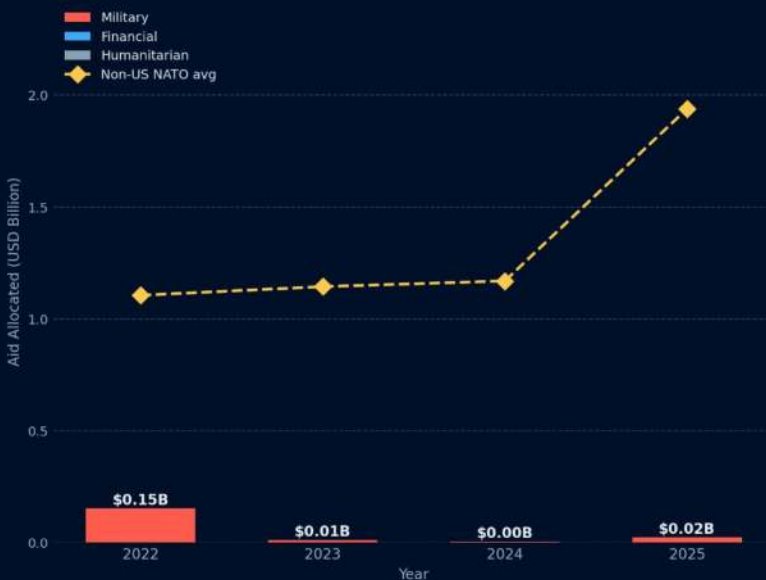
STRATEGIC ALIGNMENT

Ukraine Support

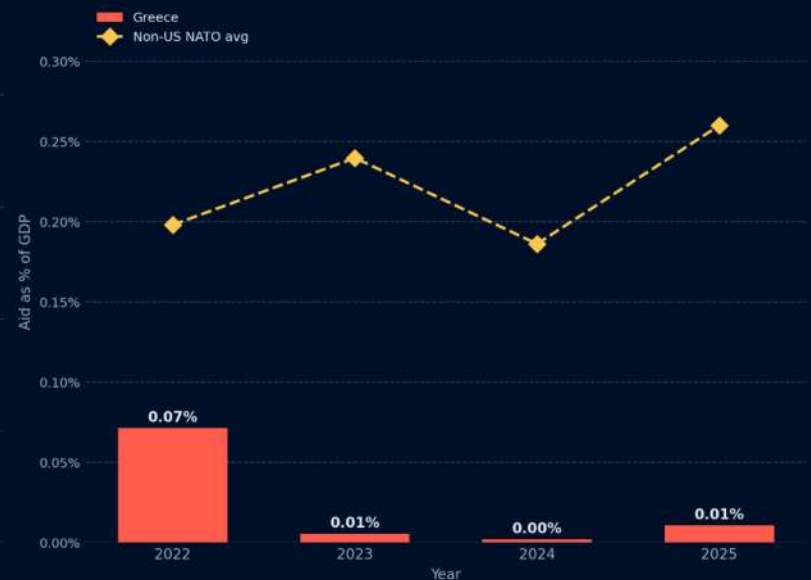
Greece's [Ukraine aid figures](#) tell a clear story: \$0.15B in 2022 (0.07% of GDP), collapsing to \$0.01B in 2023, essentially zero in 2024, and \$0.02B in 2025—consistently far below the non-US NATO average every year. Kiel tracks just €0.169B allocated total, placing Greece near the bottom of NATO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

Greece — Ukraine Aid, 2022-2025

Greece: Aid to Ukraine by Type



Greece: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





Iceland

NATO Country Assessment — *TIER TWO* —

GIUK GAP LYNCHPIN • NORTH ATLANTIC LAUNCHPAD • SUBVERSION RISK





AT A GLANCE

Toplines

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



MILITARY CONTRIBUTIONS

Defense Spending Level

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



MILITARY CONTRIBUTIONS

Equipment Share

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



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

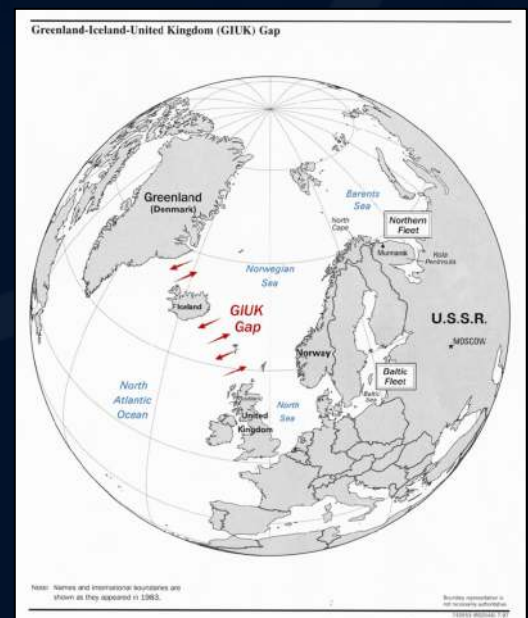
Iceland has no defense procurement program in the conventional sense. Its modernization story is entirely about infrastructure hosting and surveillance system upgrades. [Keflavík's rebuilding](#) after the 2006 US withdrawal corrected a serious capability gap that Russia exploited through increased submarine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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



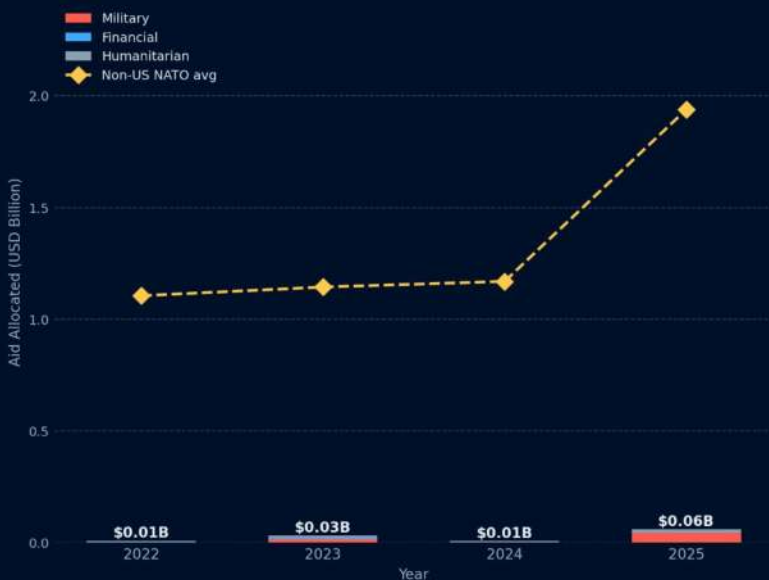
STRATEGIC ALIGNMENT

Ukraine Support

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

Iceland — Ukraine Aid, 2022-2025

Iceland: Aid to Ukraine by Type



Iceland: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

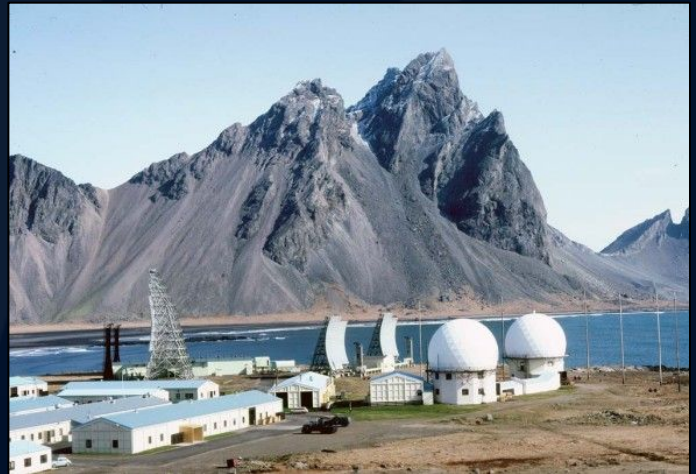
Iceland's hedging behavior record is clean across all major dimensions with one structural China caveat. There is no BRI participation, no high-level Moscow, Beijing, or Tehran engagement during the war period, and no obstruction of any NATO or EU consensus position. Iceland moved against Moscow by suspending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



STRATEGIC ALIGNMENT

Operational Cooperation

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





ITALY

NATO Country Assessment —*TIER TWO*—

BASING HUB • REVERSING CHINESE INFLUENCE • UNDERMINED EPIC FURY





AT A GLANCE

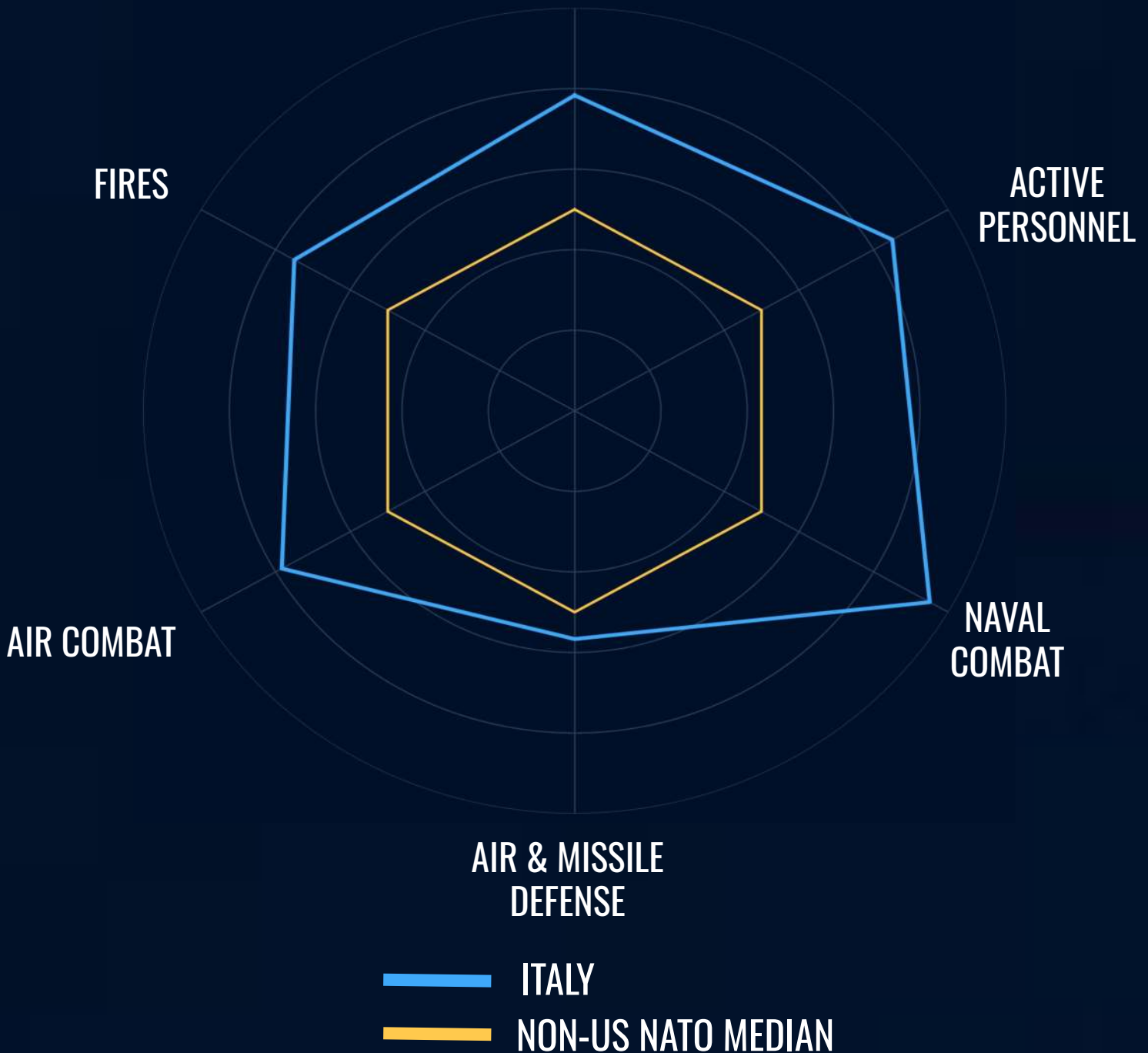
Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



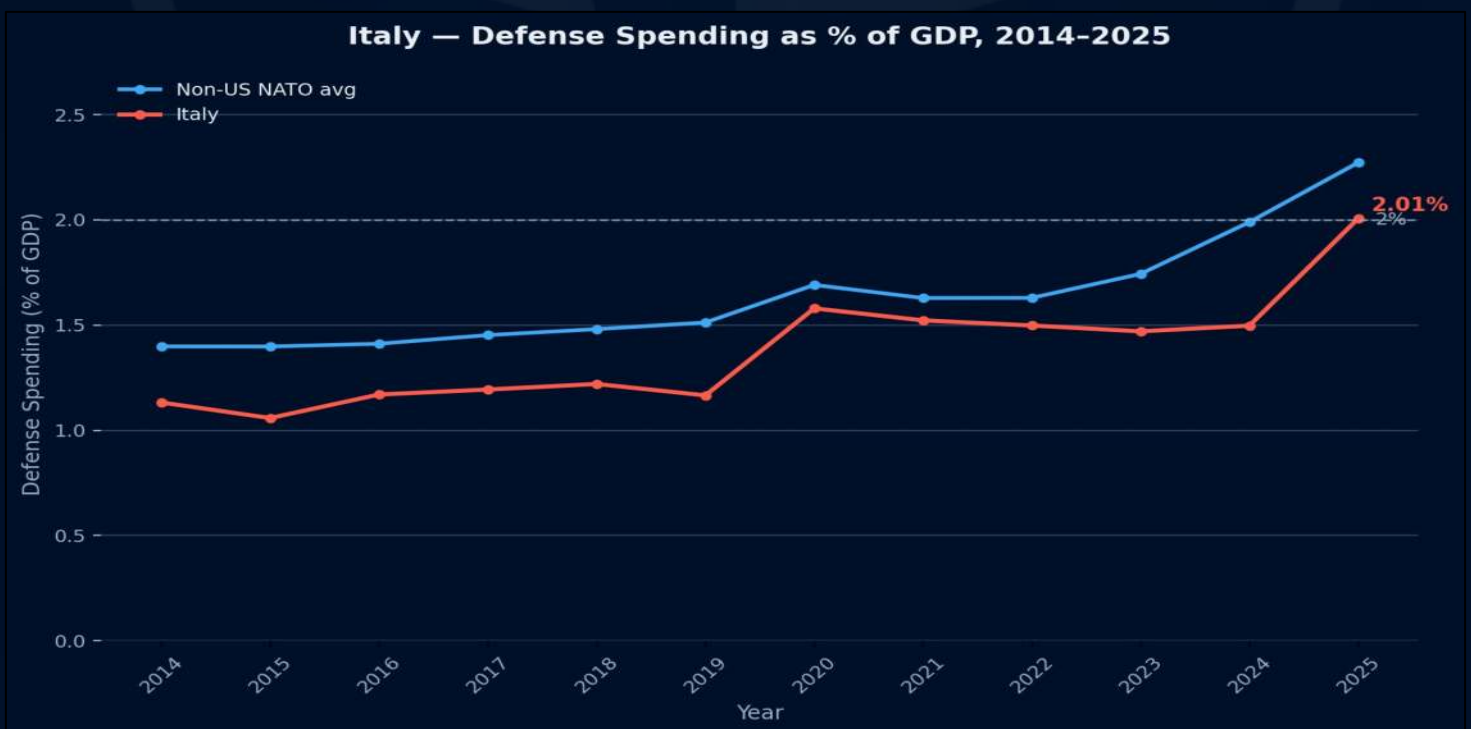
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.



MILITARY CONTRIBUTIONS

Defense Spending Level

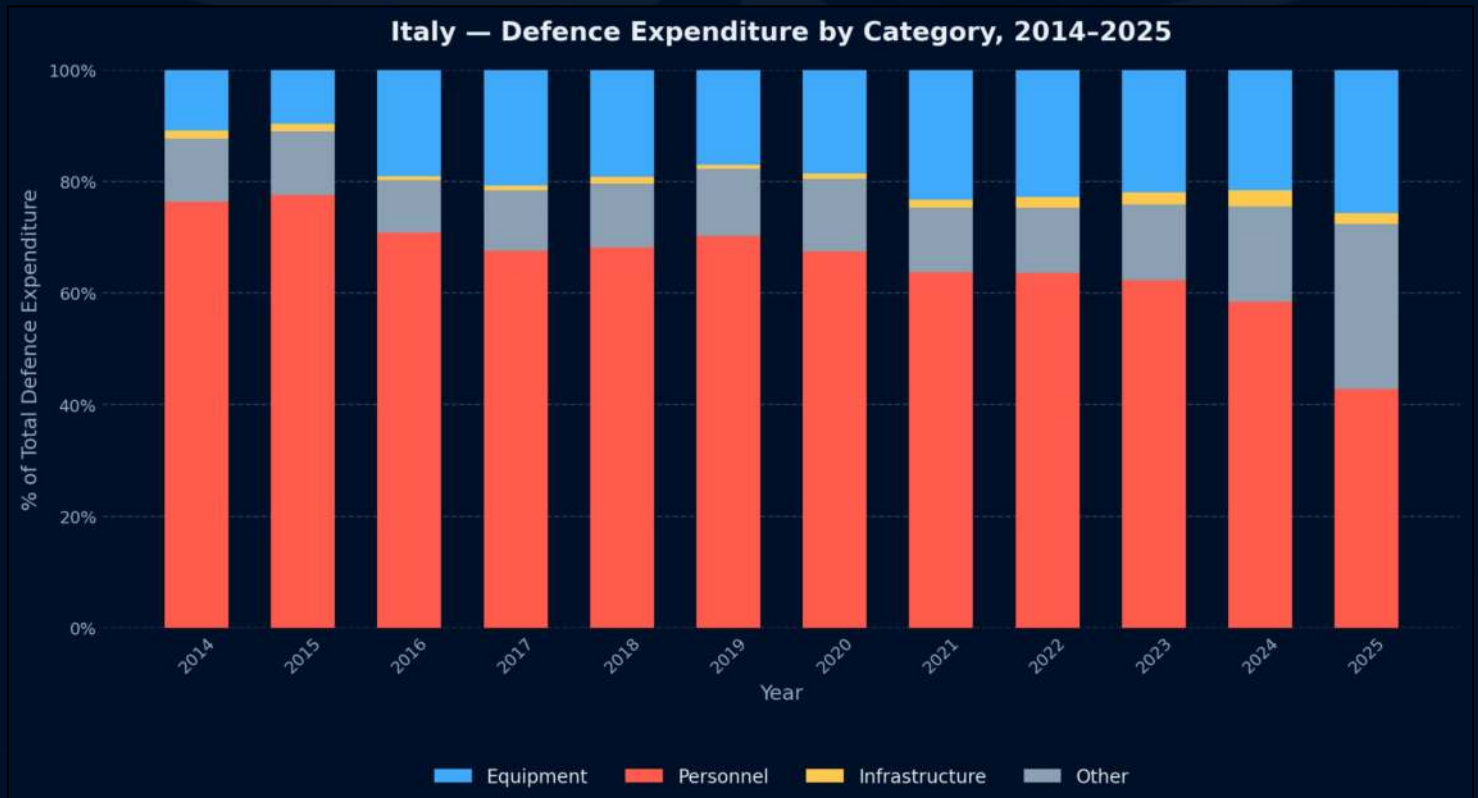
Italy's [defense spending](#) chart shows a country that has exclusively tracked below the non-US NATO average for over a decade, spending around 1.1-1.6% of GDP through 2014-2024 while the alliance average rose steadily above it. The jump to 2.01% in 2025 is real but contested: Italy reached the NATO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



MILITARY CONTRIBUTIONS

Equipment Share

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



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



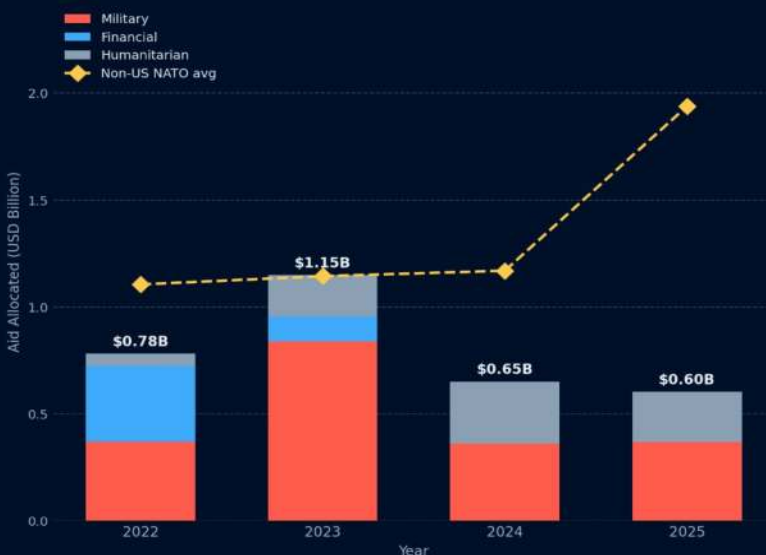
STRATEGIC ALIGNMENT

Ukraine Support

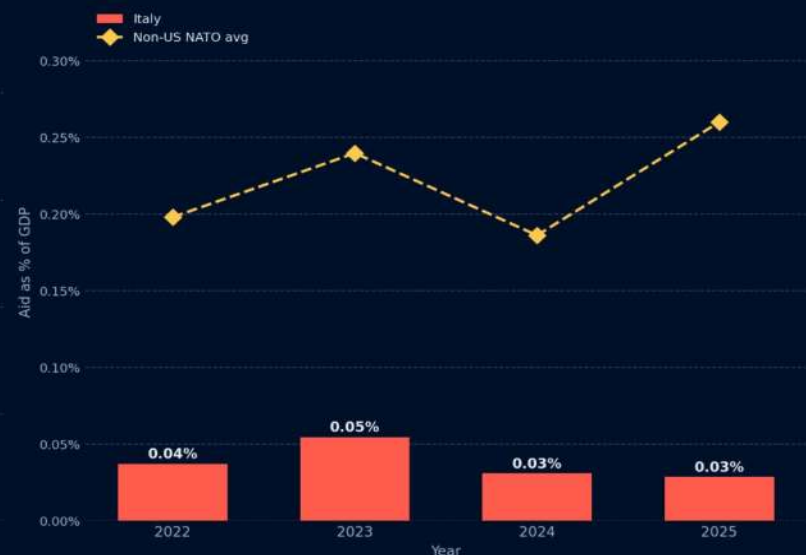
Italy's [Ukraine aid](#) shows a consistent but under performing contributor: \$0.78B in 2022, peaking at \$1.15B in 2023, then declining to \$0.65B and \$0.60B in 2024-2025. This runs at just 0.03-0.05% of GDP every year, consistently well below the non-US NATO average. Kiel tracks €4.095B allocated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

Italy — Ukraine Aid, 2022-2025

Italy: Aid to Ukraine by Type



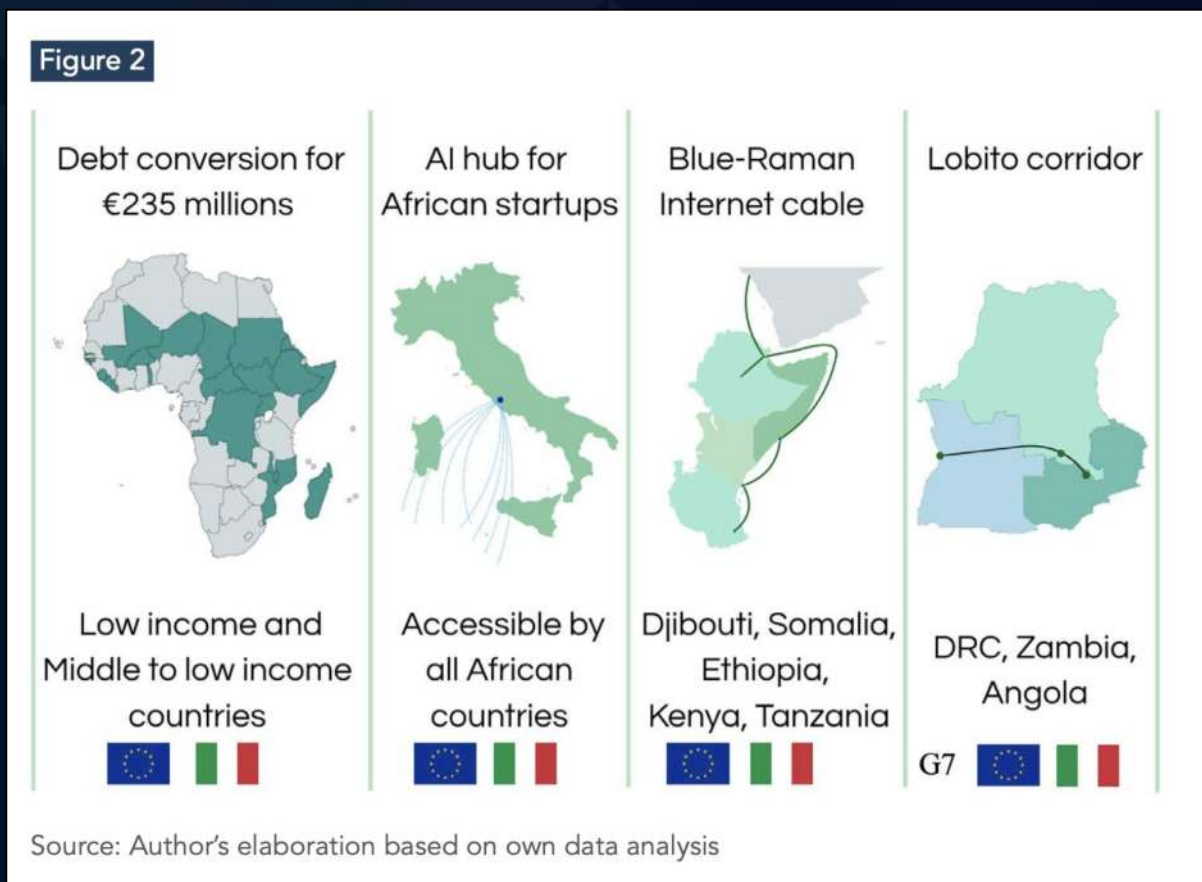
Italy: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



© Gregorio Borgial/AP Photopicture alliance



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





LUXEMBOURG

NATO Country Assessment —*TIER TWO*—

TRIPLED SPENDING • MILITARY MODERNIZATION • CHINESE FINANCIAL HUB





AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



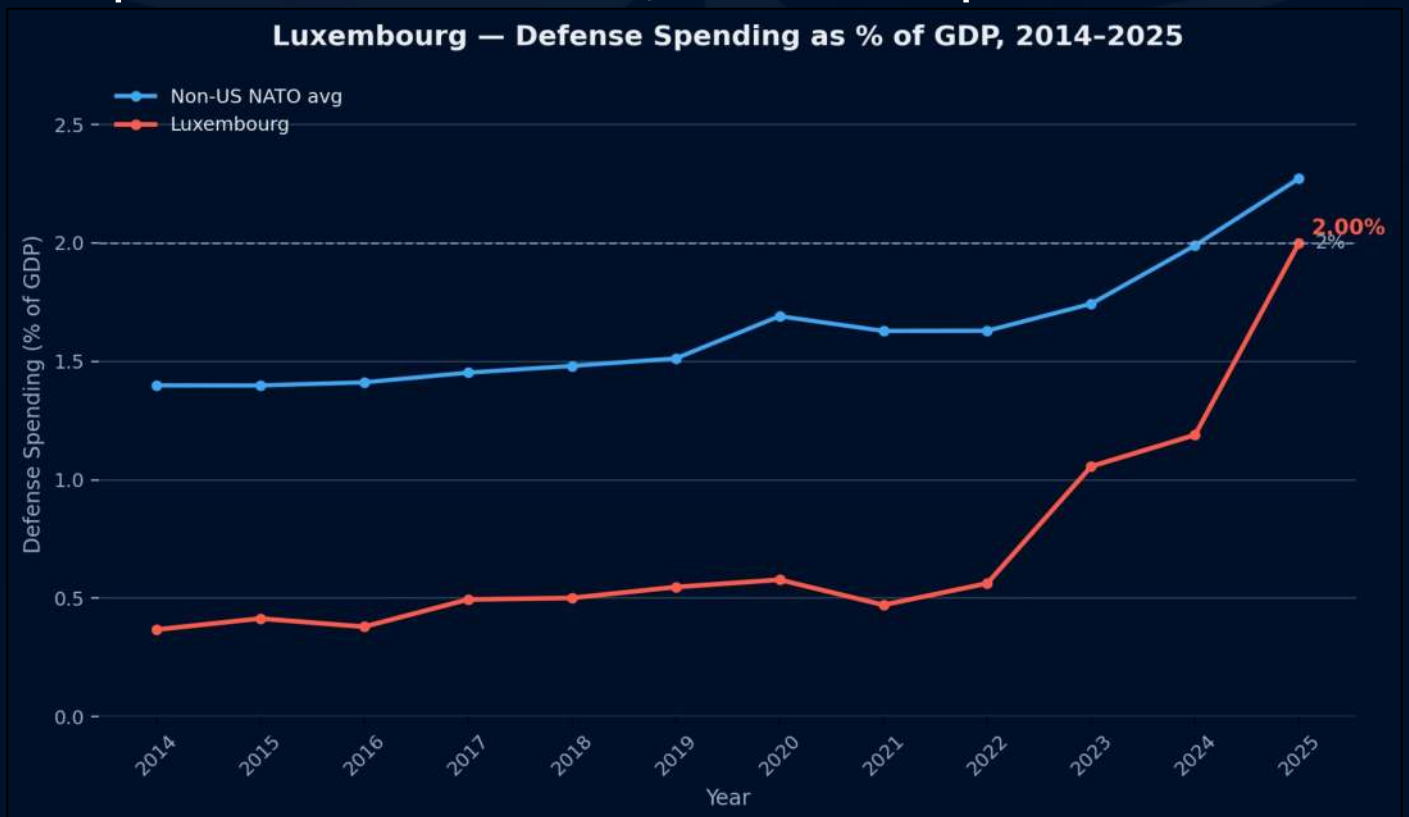
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.



MILITARY CONTRIBUTIONS

Defense Spending Level

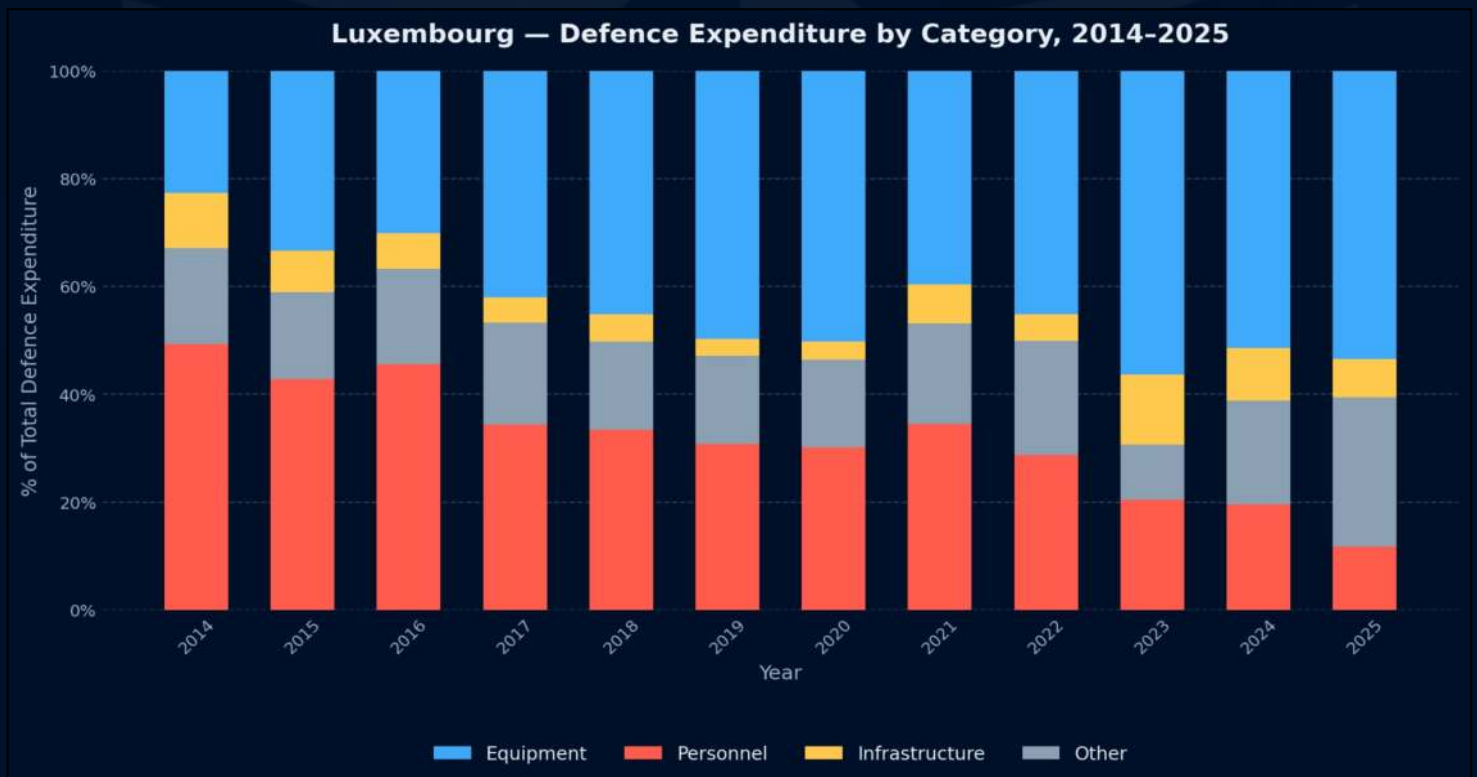
Luxembourg's [defense spending](#) trajectory is one of the most dramatic accelerations. The data shows spending running at just 0.37–0.58% of GDP from 2014 through 2022—the worst sustained record in NATO—before tripling to [2.0% of GNI](#) by 2030. Luxembourg measures against GNI rather than GDP because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



MILITARY CONTRIBUTIONS

Equipment Share

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



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

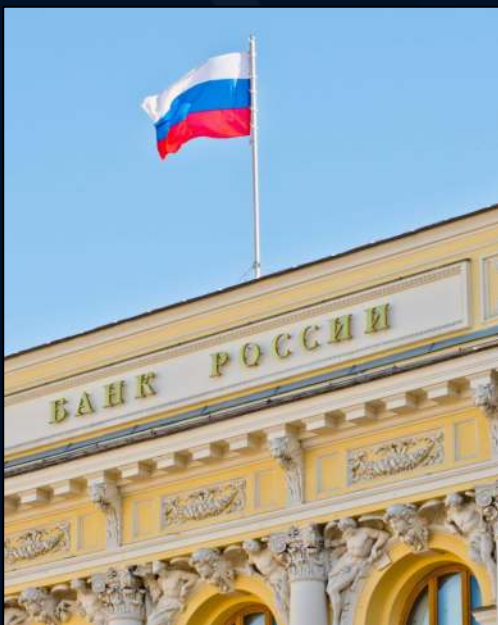
Luxembourg has no traditional defense manufacturing sector. Luxembourg has no sovereign combat aircraft, naval vessel, or major platform production capability and depends entirely on allied production for heavy equipment. Luxembourg's [Defense Industry Strategy](#) white paper emphasizes utilizing cutting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



STRATEGIC ALIGNMENT

Declared Posture

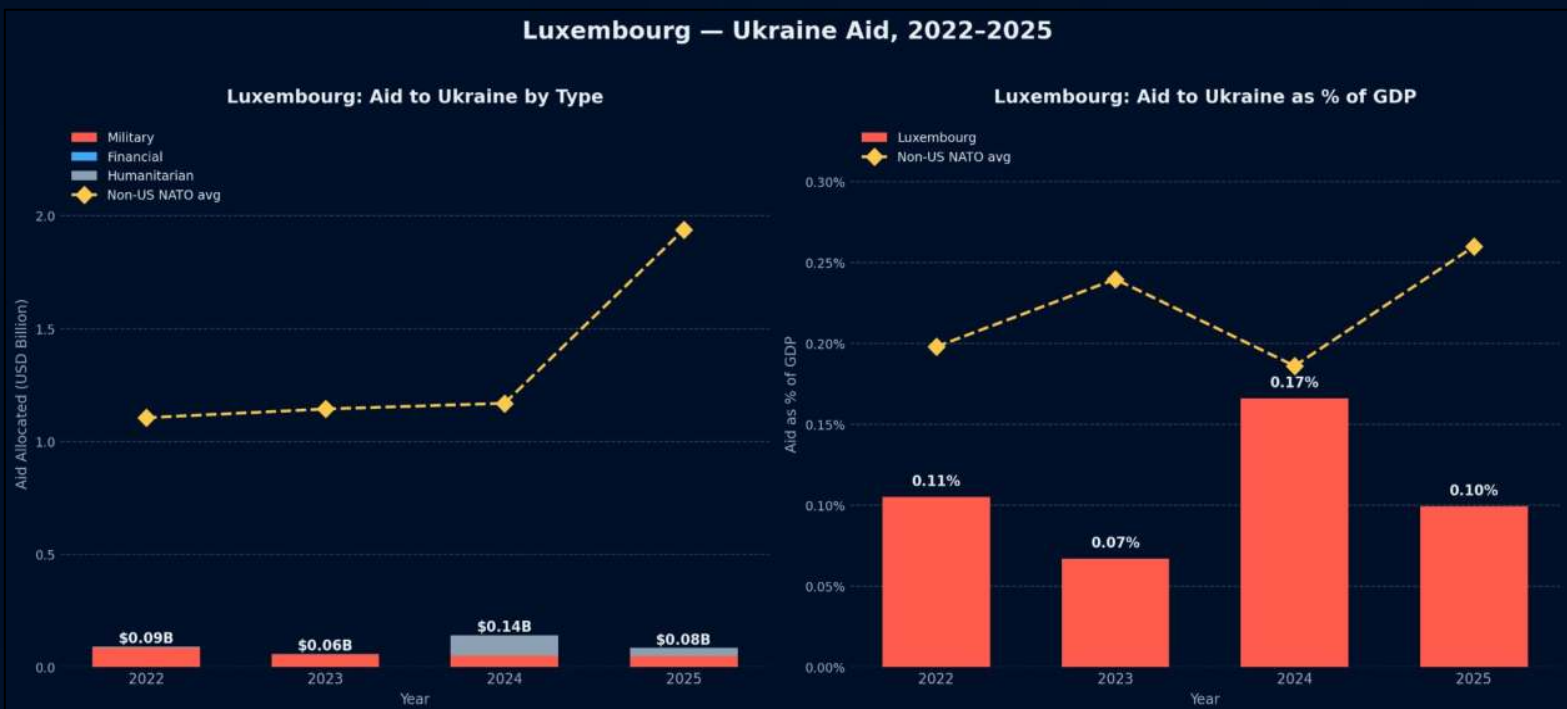
Luxembourg's declared posture tracks NATO's 2022 Strategic Concept on Russia. The [Defence 2035 Guidelines](#) structure policy around solidarity, capability development, multinational cooperation, and deployability. The Frieden government has maintained a strongly pro-Ukraine line: Defense Minister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



STRATEGIC ALIGNMENT

Ukraine Support

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



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





MONTENEGRO

NATO Country Assessment —*TIER TWO*—

ACCELERATION TO 2% • MILITARY MODERNIZATION • WEAK PUBLIC SUPPORT





AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



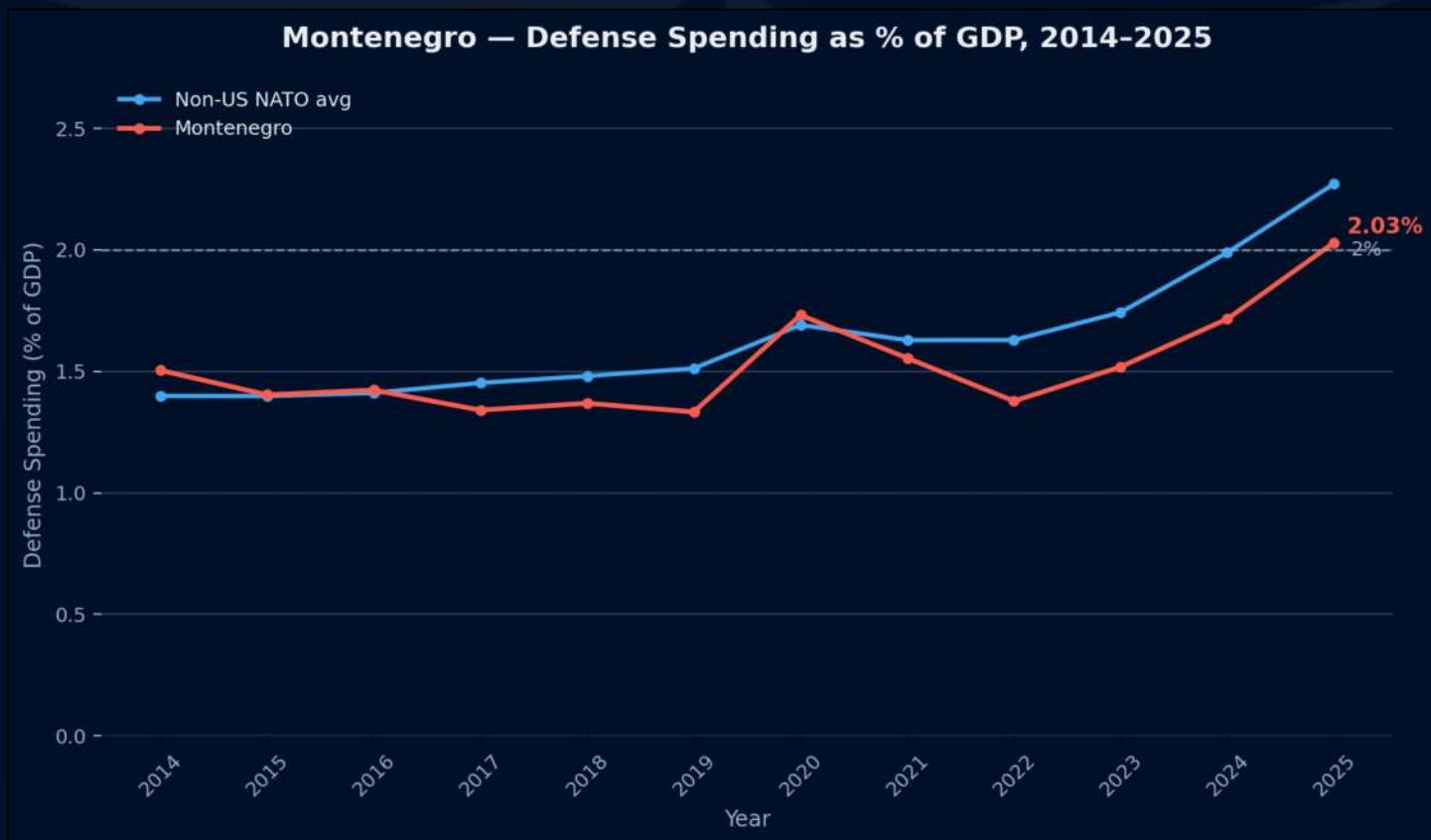
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MILITARY CONTRIBUTIONS

Defense Spending Level

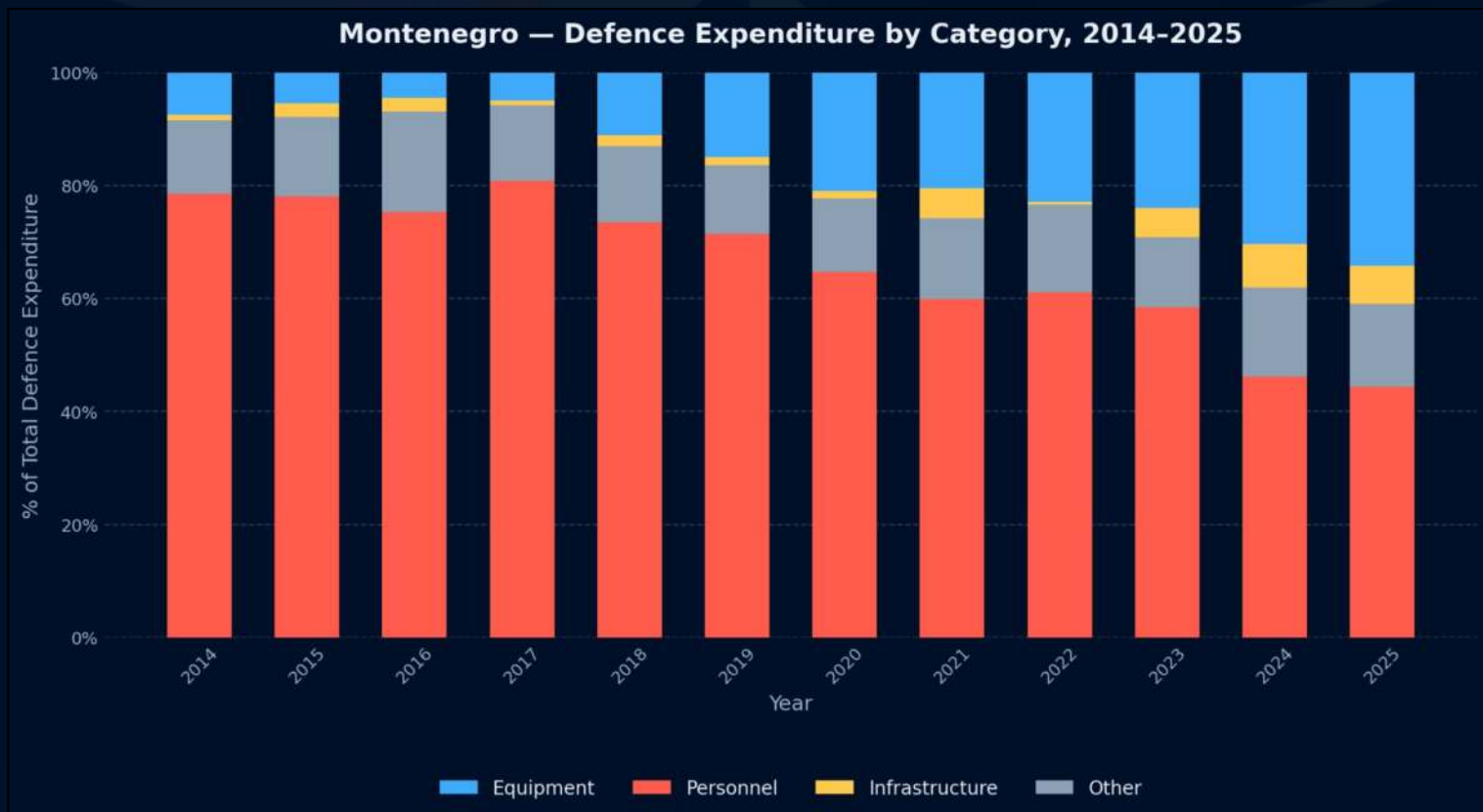
Montenegro reached 2.03% of GDP in 2025—meeting the NATO floor for the first time in years, up from 1.37% in 2022, a nearly 50% increase in GDP share over three years. The [data shows](#) Montenegro tracking close to the non-US NATO average through 2018-2020, dipping below after 2021, and recovering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



MILITARY CONTRIBUTIONS

Equipment Share

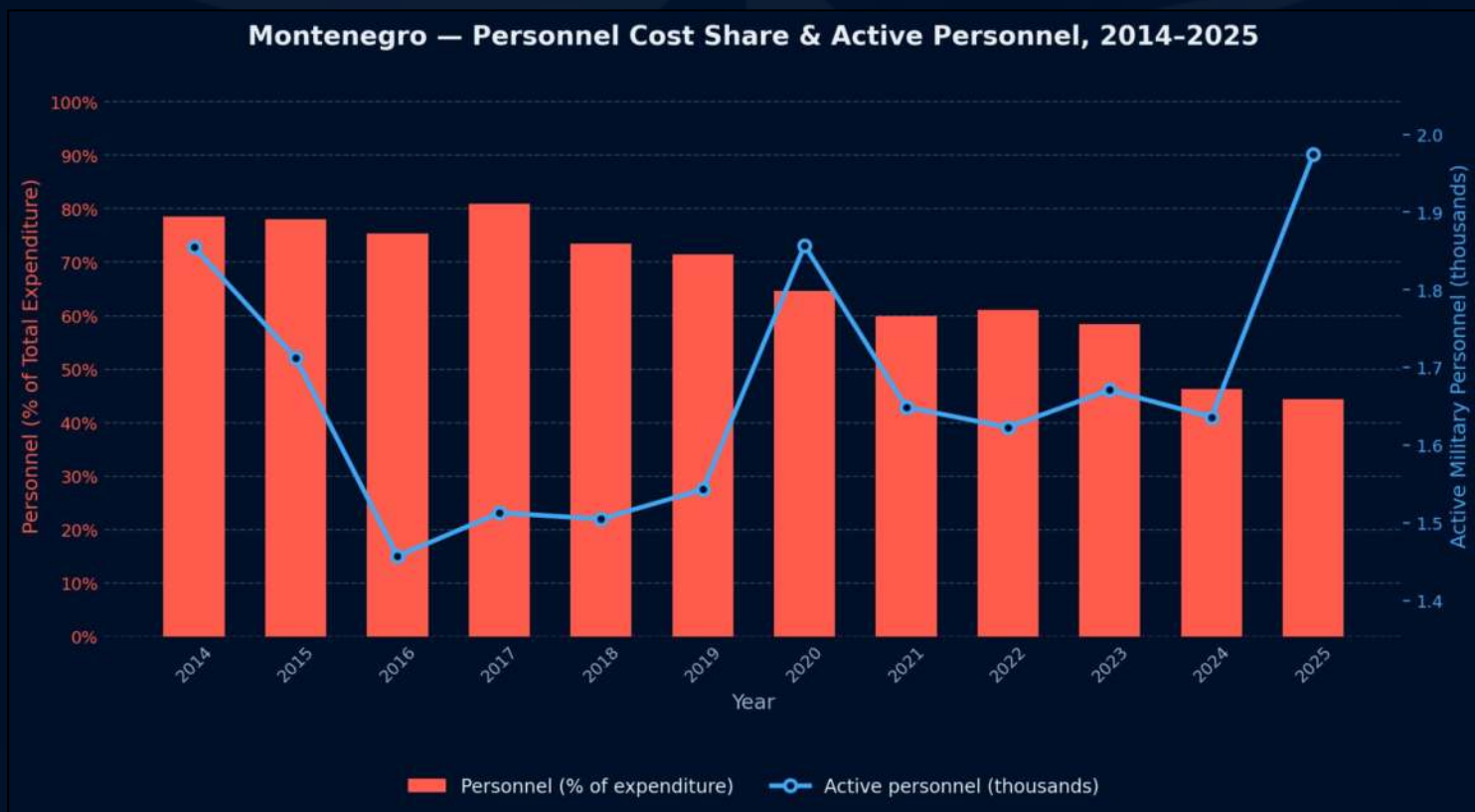
Montenegro's equipment share has risen from roughly 7.5% in 2014 to approximately 34.3% in 2025—well above NATO's 20% benchmark—as personnel costs fell from 78.5% to 44.4% over the same period. The chart shows a clear inflection from 2021 onward as equipment investment began dominating the growing budget.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



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



STRATEGIC ALIGNMENT

Ukraine Support

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



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





NORTH MACEDONIA

NATO Country Assessment —*TIER TWO*—

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





AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



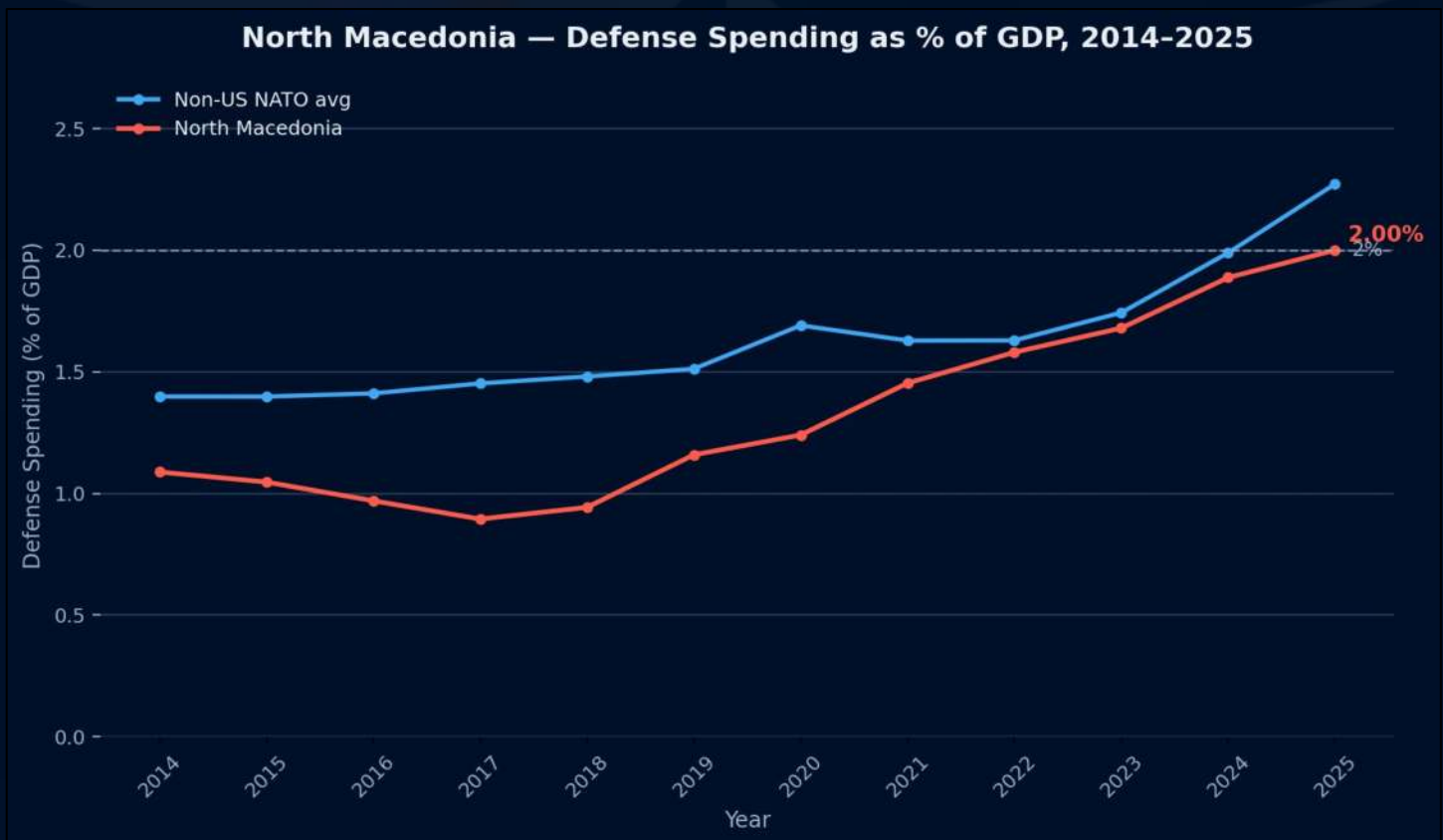
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MILITARY CONTRIBUTIONS

Defense Spending Level

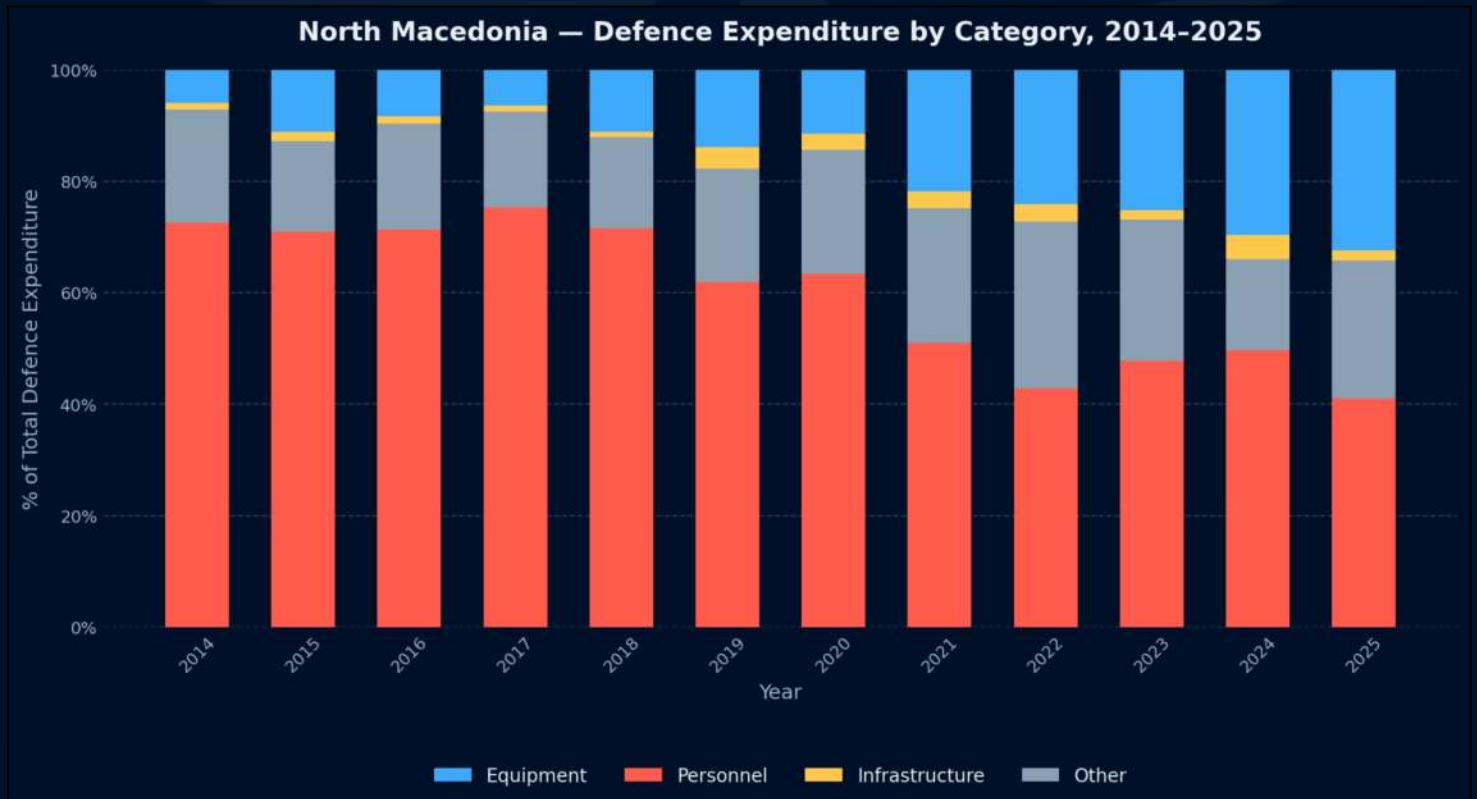
North Macedonia's [defense spending](#) trajectory shows consistent improvement from a low baseline. The data shows spending dipping below 1% of GDP in 2016-2018 before a sustained acceleration to 2.00% by 2025—meeting the NATO floor for the first time, though still well below the non-US NATO average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



MILITARY CONTRIBUTIONS

Equipment Share

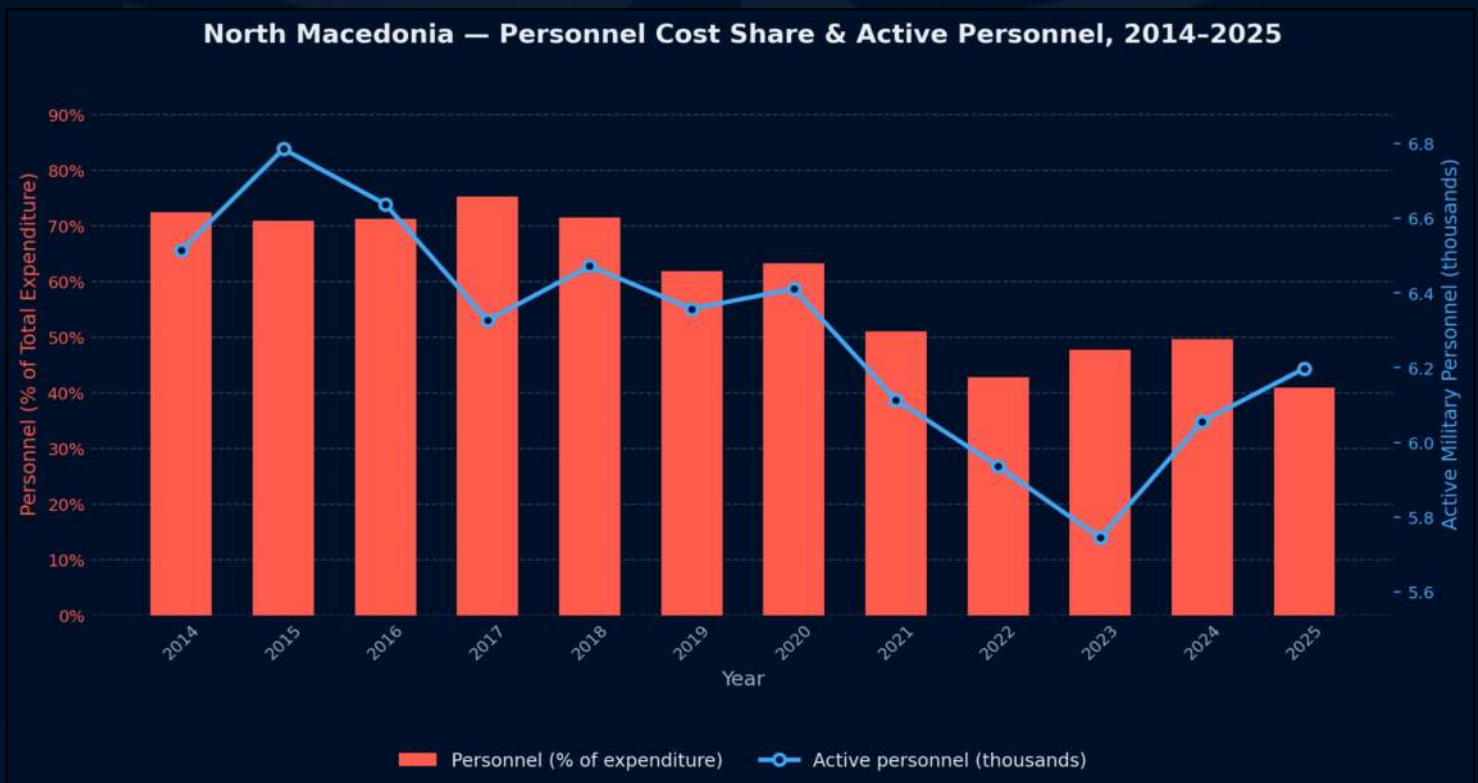
North Macedonia's equipment share transformation is visible in the data—rising from roughly 6-7% in 2014-2017 to approximately 32% by 2025, well above NATO's 20% benchmark, while personnel costs fell from roughly 72% to 41% over the same period. The inflection from 2021 onward reflects deliberate procurement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



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

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



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



STRATEGIC ALIGNMENT

Ukraine Support

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



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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





PORTUGAL

NATO Country Assessment —*TIER TWO*—

VITAL BASING • PUBLIC SUPPORT FOR NATO • UNACCEPTABLE HEDGING





AT A GLANCE

Toplines

- **A Critical Alliance Outpost Opened for Business:** Lajes Air Base in the Azores is Portugal's central alliance contribution. Lajes is a critical mid-Atlantic hub equidistant between North America, Europe, and the Middle East that no other ally can replicate, and Portugal's authorization of 76 US aircraft landings and 25 overflights during Operation Epic Fury.
- **Strong Domestic Support for the Alliance:** Public NATO support is among the strongest in Southern Europe with 87% favor staying in NATO, 72% say Portugal should defend another ally if attacked, and Ukraine support stands at 81% combined.
- **Unacceptable Alliance Hedging for Political Posturing:** Defense Minister Melo's March 2025 framing of the F-35 cancellation around criticisms of Trump was an unnecessary diplomatic provocation from an ally whose Azores basing access makes the bilateral relationship one of the most strategically valuable in Southern Europe.



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



AIR & MISSILE DEFENSE

— PORTUGAL
— NON-US NATO MEDIAN

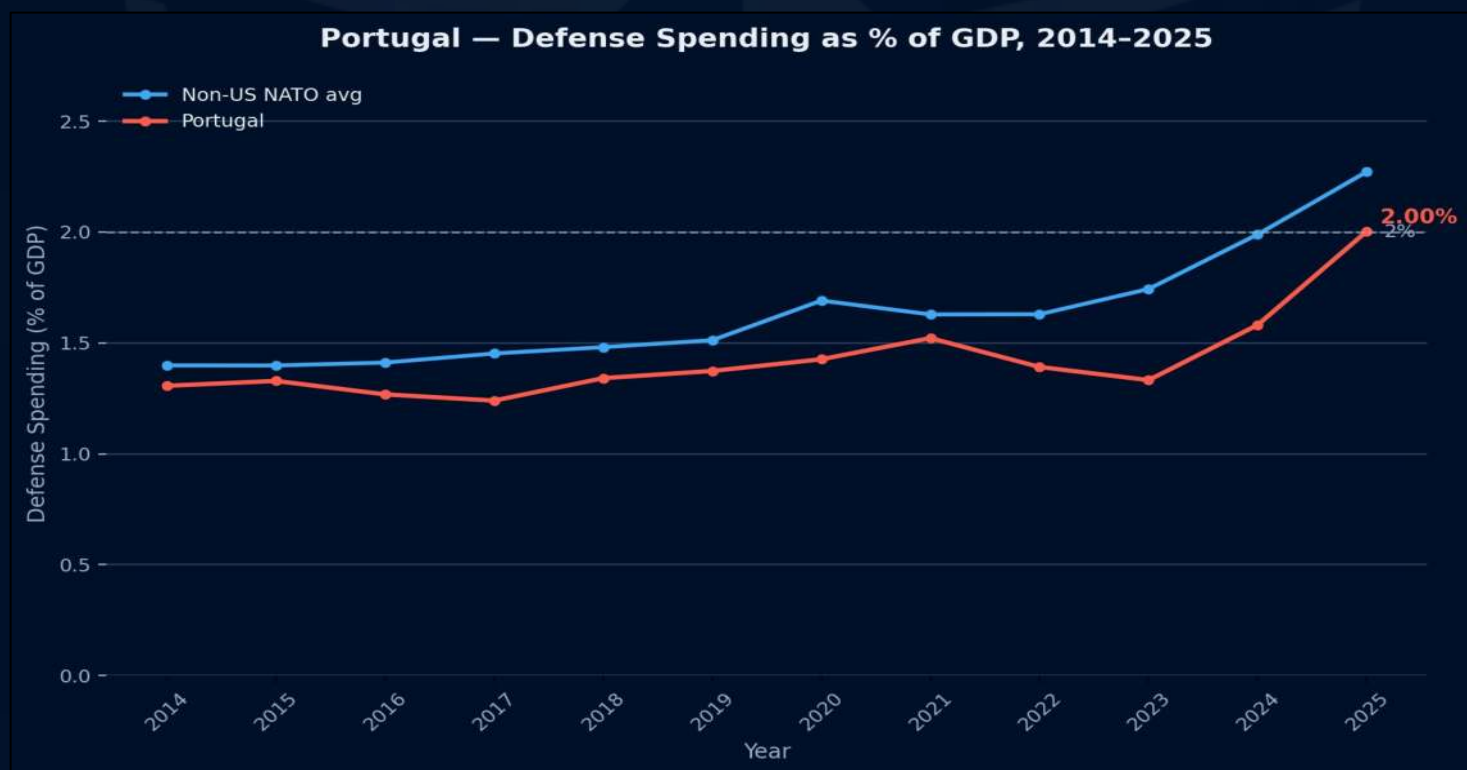
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.



MILITARY CONTRIBUTIONS

Defense Spending Level

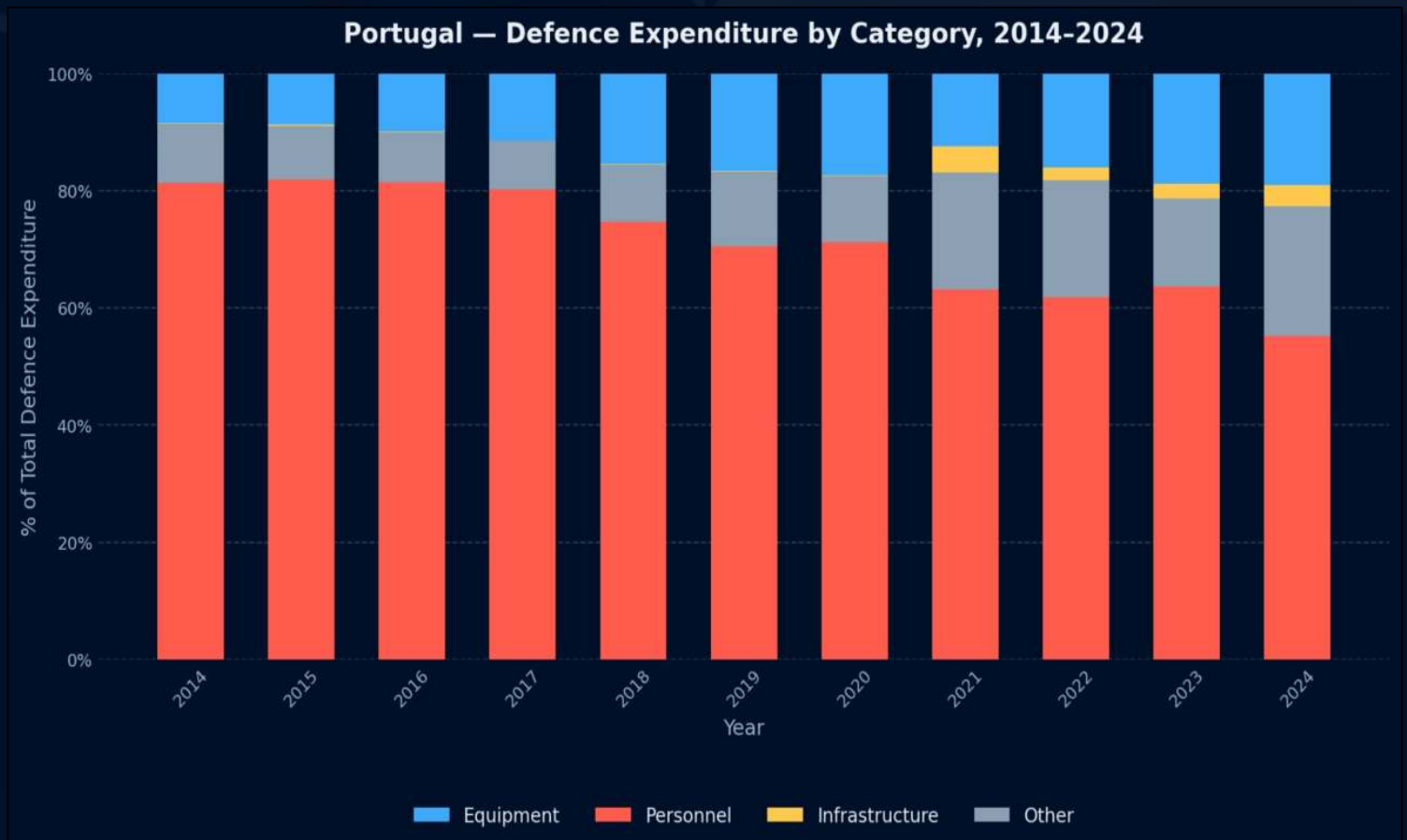
Portugal's [defense spending](#) data shows it has consistently tracked below the non-US NATO average for over a decade: spending 1.25-1.55% of GDP through 2014-2024 while the alliance average rose steadily above it. The jump to 2.00% in 2025 is real and represents the fastest single-year acceleration in Portugal's recent history. Portugal accepted the Hague 3.5% core plus 1.5% framework. The [Military Programming Law 2023-2034](#) allocates €5.57B, covering cyber and space for the first time. Portugal remains in the bottom tier by GDP share and has decades of underfunding to correct. The path from 2% to 3.5% by 2035 requires sustained annual increases that Portugal has not historically demonstrated.



MILITARY CONTRIBUTIONS

Equipment Share

Portugal's [equipment share](#) has improved slowly. The data shows personnel costs falling from roughly 81% in 2014 to approximately 55% by 2024, with equipment rising correspondingly to almost 20%, approaching NATO's 20% benchmark. The rebalancing reflects the [Military Programming Law](#) investment beginning to register in actual expenditure. Equipment share is improving but the absolute budget limits simultaneous procurement across multiple domains.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Portugal's [personnel picture](#) shows a force that has been both shrinking and trying to recover. Active military personnel fell from roughly 31,000 in 2014 to approximately 22,000 by 2023 before rebounding to approximately 25,000 by 2025. Personnel costs have fallen significantly, a combination of falling headcount and equipment investment. Portugal has invested in recruitment initiatives including improved pay scales and expanded reserve integration under the Military Programming Law, targeting [further personnel growth](#) to support modernization ambitions. The structural challenge is that at roughly 25,000 active personnel, Portugal remains thin with significant Atlantic maritime responsibilities, and a historically tight labor market creates persistent competition for technical and specialist roles.

Portugal — Personnel Cost Share & Active Personnel, 2014-2024



MILITARY CONTRIBUTIONS

Capability Modernization

Portugal's [modernization is focused](#) on maritime patrol, transport, and modest ground force improvement rather than comprehensive reequipping. On maritime patrol, six P-3C Orions acquired from Germany with first delivery in February 2024 address the surveillance and ASW gap across Portugal's vast Atlantic EEZ. On transport, the KC-390 provides modern strategic airlift. On ground forces, 34 Leopard 2A6 MBTs anchor a small armored capability, with Pandur II APC upgrades underway. On drones, [Tekever](#) has emerged as an operationally significant Portuguese manufacturer with Ukraine deployment experience. The most pressing gap is combat aircraft: the March 2025 reversal of the F-35A decision leaves 28 aging F-16AM/BMs without a contracted successor, with Eurofighter, Gripen E, and Rafale under evaluation.



MILITARY CONTRIBUTIONS

Force Posture

Portugal's force posture is defined primarily by [Lajes Air Base](#) on Terceira Island in the Azores: a critical mid-Atlantic hub for transatlantic force flow, ASW patrol coordination, and maritime surveillance roughly equidistant between Europe and the US East Coast, with 250 US EUCOM personnel permanently based there. During Operation Epic Fury, Lajes authorized 76 US aircraft landings and 25 overflights. Portugal deploys 235 troops to Romania's eFP and 147 to Slovakia's eFP, demonstrating Eastern Flank reach beyond its Atlantic orientation. Portugal hosts NATO's [Cyber Security Academy](#) and relocated Ukrainian F-16 pilot training from Denmark. Baltic Air Policing rotations since 2007 show consistent deployable air contribution. Force posture is modest in mass but outsized in geographic value through the Azores.



MILITARY CONTRIBUTIONS

Industrial Base

Portugal's [defense industrial base](#) is modest with one standout. Portugal's Tekever has supplied its AR5 drone to Ukraine, where it has been credited with battlefield effect. [Traditional strengths](#) include shipbuilding and naval maintenance capacity. Portugal has no sovereign combat aircraft, submarine, or missile production. On raw materials, [Portugal holds](#) one of Europe's most significant critical minerals profiles: substantial lithium reserves plus tungsten, tin, and copper deposits relevant to defense manufacturing and battery supply chains. The EU's [Critical Raw Materials Act](#) has identified Portuguese lithium as strategically important, and several mining and processing projects are in development that could make Portugal a meaningful contributor to NATO's critical minerals de-risking agenda.



STRATEGIC ALIGNMENT

Declared Posture

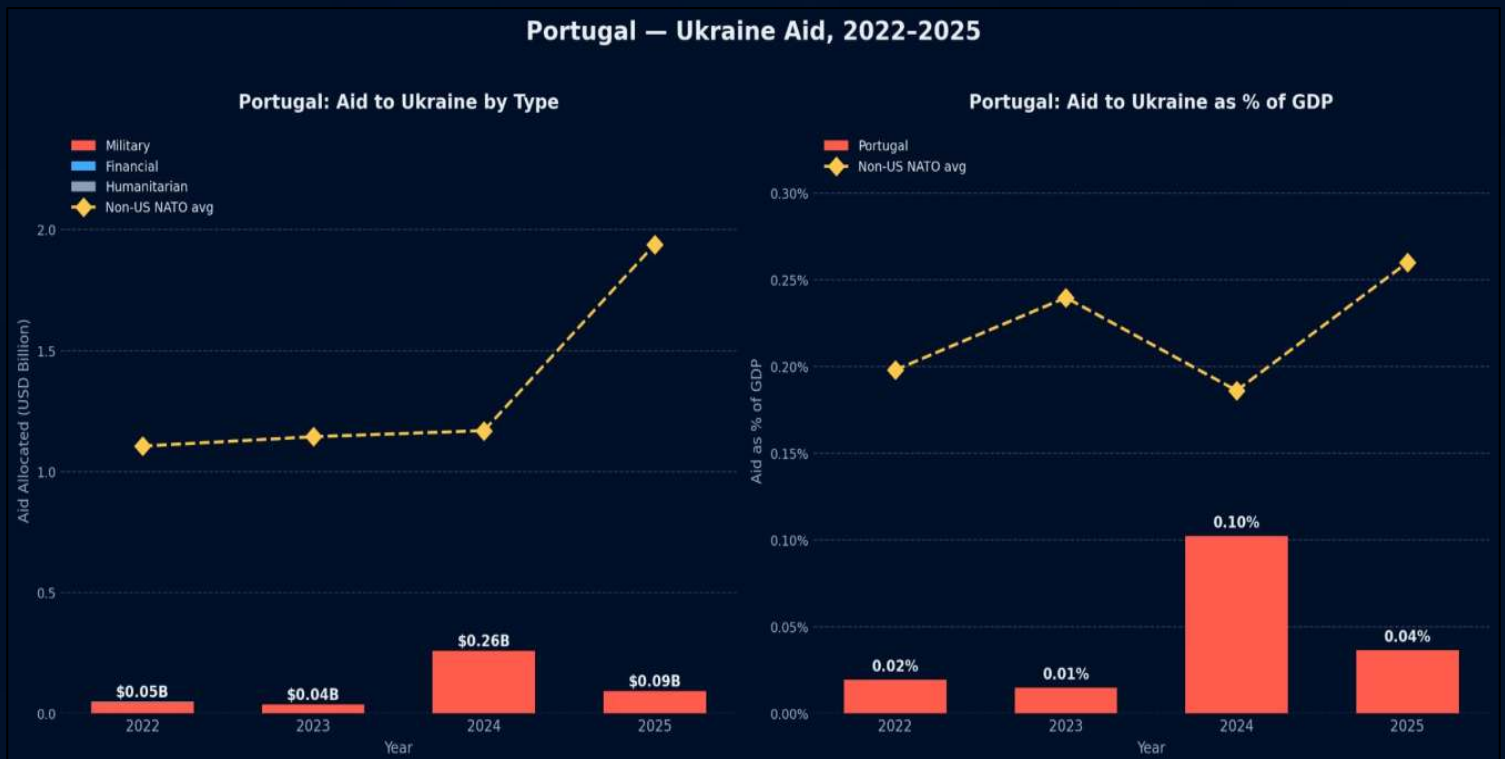
Portugal's declared posture aligns with NATO 2022. NATO Secretary General Rutte explicitly framed [Portugal's Lajes role](#) as central to NATO's Russia deterrence architecture in January 2025. On China, Portugal is subject to meaningful exposure: China Three Gorges holds roughly [19-21% of EDP](#), Portugal's largest utility, and BRI cooperation documents were signed in 2018. Portugal's 5G Huawei ban among the EU's toughest is the clearest China-security positive. On Iran, [Lajes authorization](#) for 76 US aircraft landings and 25 overflights during Epic Fury distinguishes Portugal from Spain, France, and Italy. The one posture concern: Defense Minister Melo's March 2025 framing of the [F-35 reversal](#) around criticisms of Trump introduced uncertainty that the US ambassador publicly pushed back on in February 2026.



STRATEGIC ALIGNMENT

Ukraine Support

Portugal's [Ukraine aid data](#) shows an underwhelming picture: very low contributions in 2022-2023 (0.02% and 0.01% of GDP, well below the NATO average) before a notable surge to 0.10% in 2024—driven by €100M to the Czech Ammunition Initiative and €52M to the Drone Coalition—then falling back to 0.04% in 2025. Kiel tracks €0.385B allocated and €0.528B committed, approximately 0.179% and 0.246% of GDP. Direct transfers include 3 Leopard 2A6 tanks, roughly 60 M113 APCs, Ka-32 and Puma helicopters, howitzers, and Tekever drones with confirmed battlefield effect. The [10-year bilateral security agreement](#) signed May 2024 provides a multi-year framework. Portugal's contribution is below the NATO average by GDP share in all years.



STRATEGIC ALIGNMENT

Russian Decoupling

Portugal's Russian energy decoupling is among NATO's cleanest. Russian gas imports were roughly 15% of total before 2022 and ceased in mid-2022, substituted through the Sines LNG terminal, alongside Iberian and North African pipeline connections. No Russian oil pipeline, Rosatom nuclear, or LNG structural dependence. Portugal supported every EU Russia sanctions package through the 20th without obstruction. The separate concern is China Three Gorges holding 19-21% of EDP, Portugal's largest utility—Chinese leverage over energy infrastructure that is worth monitoring independently of Russia decoupling.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

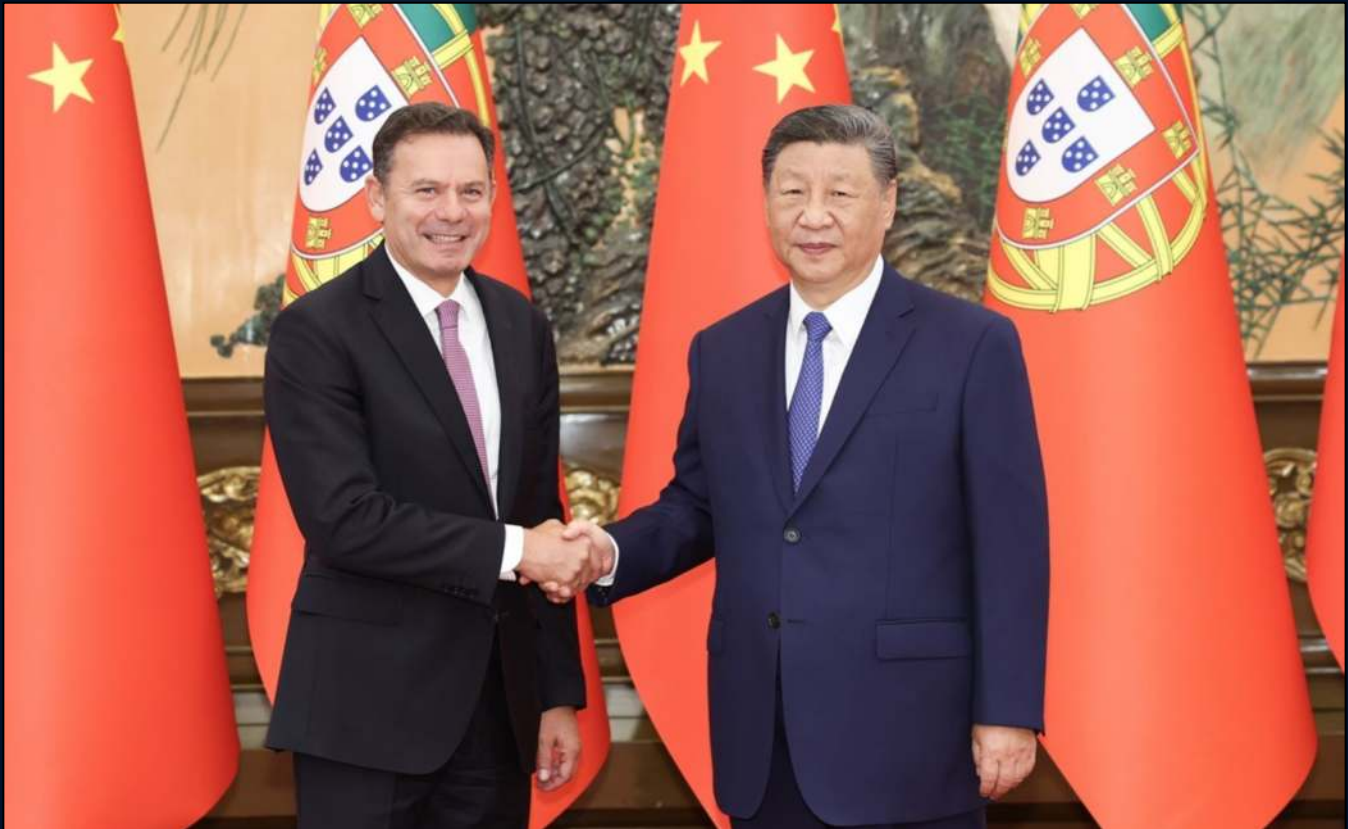
Portugal recorded 87% for staying in NATO, 72% agreeing the country should defend another ally, and 73% agreeing NATO membership makes a foreign attack less likely, all above the alliance median. Fifty percent favored increasing defense spending in 2024, high given Portugal's historically modest contribution levels, and Ukraine support stood at around 81% combined, one of the stronger figures in Southern Europe. The AD government under Montenegro is pro-NATO, and the PS (Socialists) in opposition is broadly aligned. Chega, the far-right second-largest party, has made some sympathetic noises toward Russia but has not taken a posture of opposition to NATO membership, while the PCP (Communists, around 4 to 6% of voters) calls openly for Portuguese withdrawal but carries no governing leverage. Portugal's combination of high public NATO support, above-average Ukraine solidarity, and minimal parliamentary opposition to the alliance makes it a more reliable Southern European partner than its capability contributions alone would suggest.



STRATEGIC ALIGNMENT

Hedging Behavior

Portugal's hedging record is broadly positive with two concerns worth noting. On China, Three Gorges holds roughly [19-21% of EDP](#), Portugal's largest utility. BRI cooperation documents were signed in 2018, though the footprint never became significant. The 5G Huawei ban is the clearest positive, among the toughest in Europe and explicitly praised by the US ambassador. On US alignment, Defense Minister Melo's March 2025 framing of the [F-35 cancellation](#) around criticisms of Trump was a concerning action—a real hedge against Washington that the US ambassador publicly pushed back on in February 2026. No high-level Moscow, Beijing, or Tehran engagement during the war period.



STRATEGIC ALIGNMENT

Operational Cooperation

Portugal contributed forces to [Afghanistan under ISAF](#) and to coalition [operations in Iraq](#). On recent US operations, Portugal's most consequential decision was authorizing 76 US aircraft landings and 25 overflights at Lajes during Operation Epic Fury. Lajes Field on Terceira Island a critical mid-Atlantic hub equidistant between North America, Europe, and the Middle East that provides refueling and staging capability no other ally can replicate at that geographic position. The P-3C Orion acquisition restores Atlantic ASW capacity feeding NATO's picture of Russian submarine activity across Portugal's enormous EEZ. [Portugal contributes](#) 235 troops to Romania's eFP and 147 to Slovakia's eFP, with Baltic Air Policing rotations since 2007. Portugal does not participate in Operation Aspides or Prosperity Guardian—its operational value is Atlantic, Azores-centric, and eastern front rotational.





ROMANIA

NATO Country Assessment —*TIER TWO*—

NEW AIR BASE • EPIC FURY SUPPORT • COMPETING BUDGET PRIORITIES





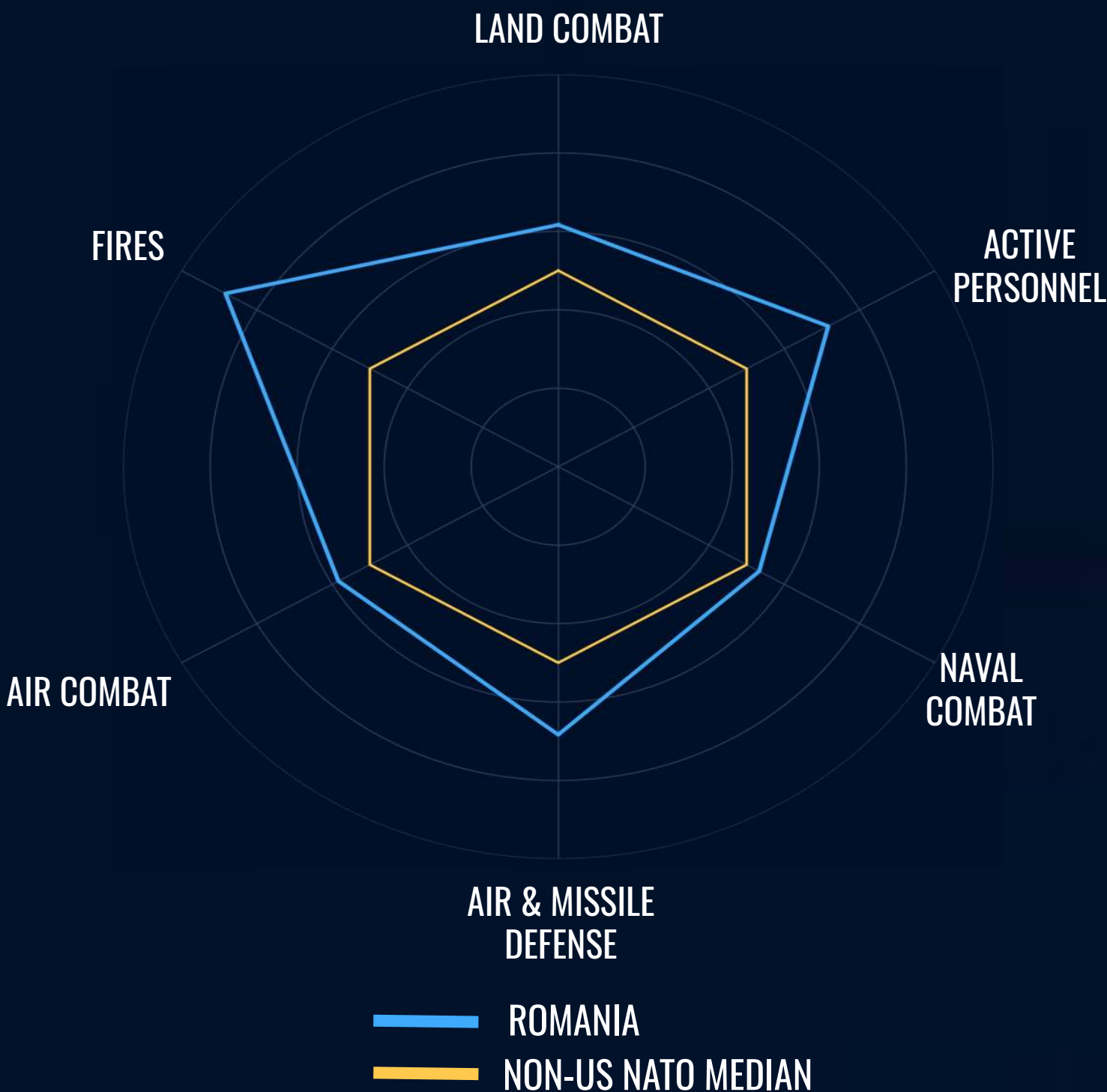
AT A GLANCE

Toplines

- **Building Ties That Bind:** Romania is building what may become NATO's largest European air base at Mihail Kogălniceanu. It is a \$2.3B expansion to 10,000-troop capacity that formally anchors American power projection on NATO's southeastern front in a way that directly enables Washington's forward posture.
- **Standing by Your Allies When it's Hard:** Romania authorized US use of Mihail Kogălniceanu and Câmpia Turzii for refueling and monitoring during Operation Epic Fury, one of the most operationally significant Iran conflict basing decisions by any Eastern European NATO state.
- **Righting the Ship to Fund Tomorrow's Deterrence:** Romania missed its 2023 defense target significantly, budgeting at 2.5% but spending roughly 1.6% due to a high budget deficit, which jeopardizes their Hague 3.5% commitment.



FORCE STRUCTURE AT A GLANCE



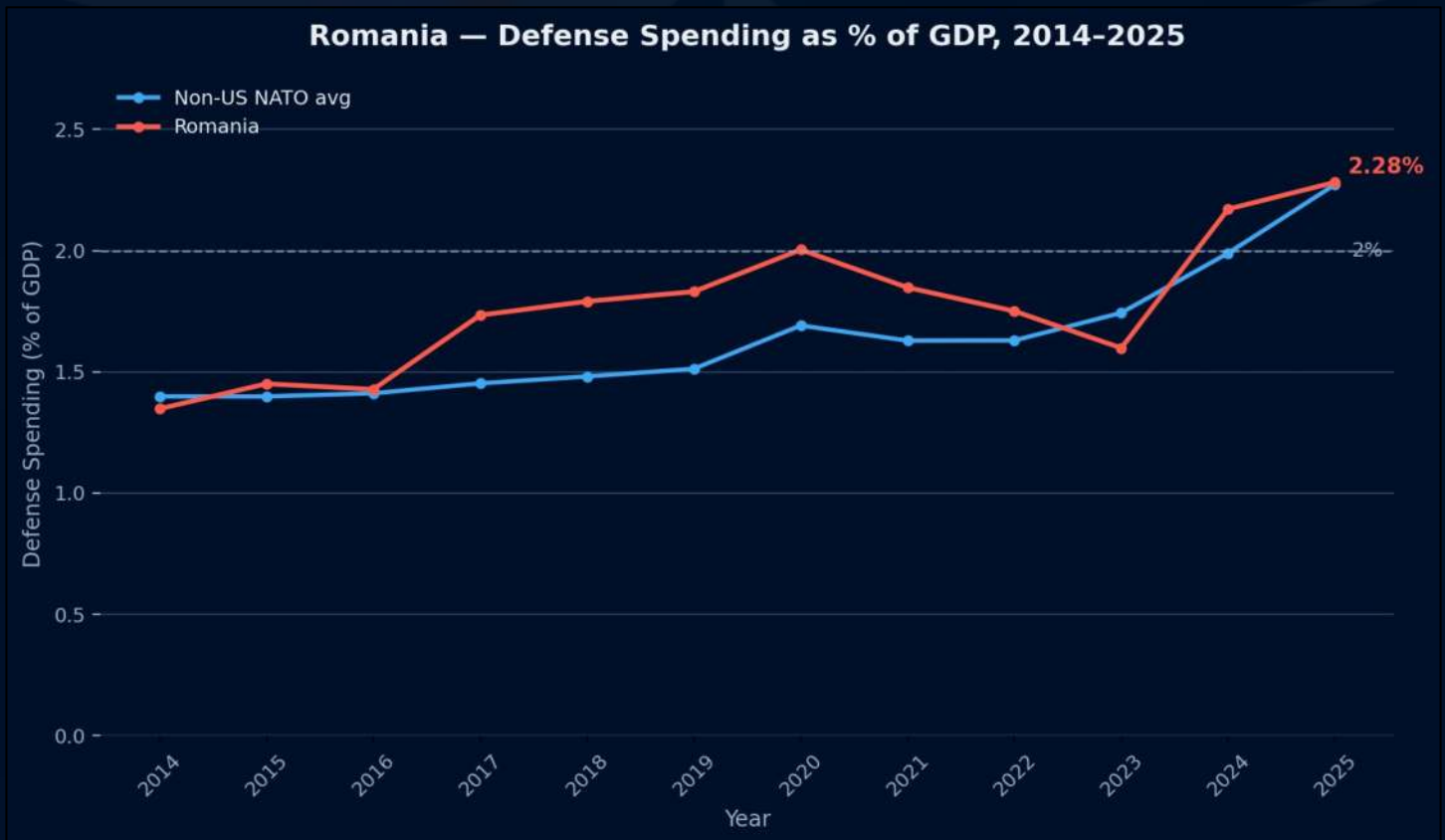
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.



MILITARY CONTRIBUTIONS

Defense Spending Level

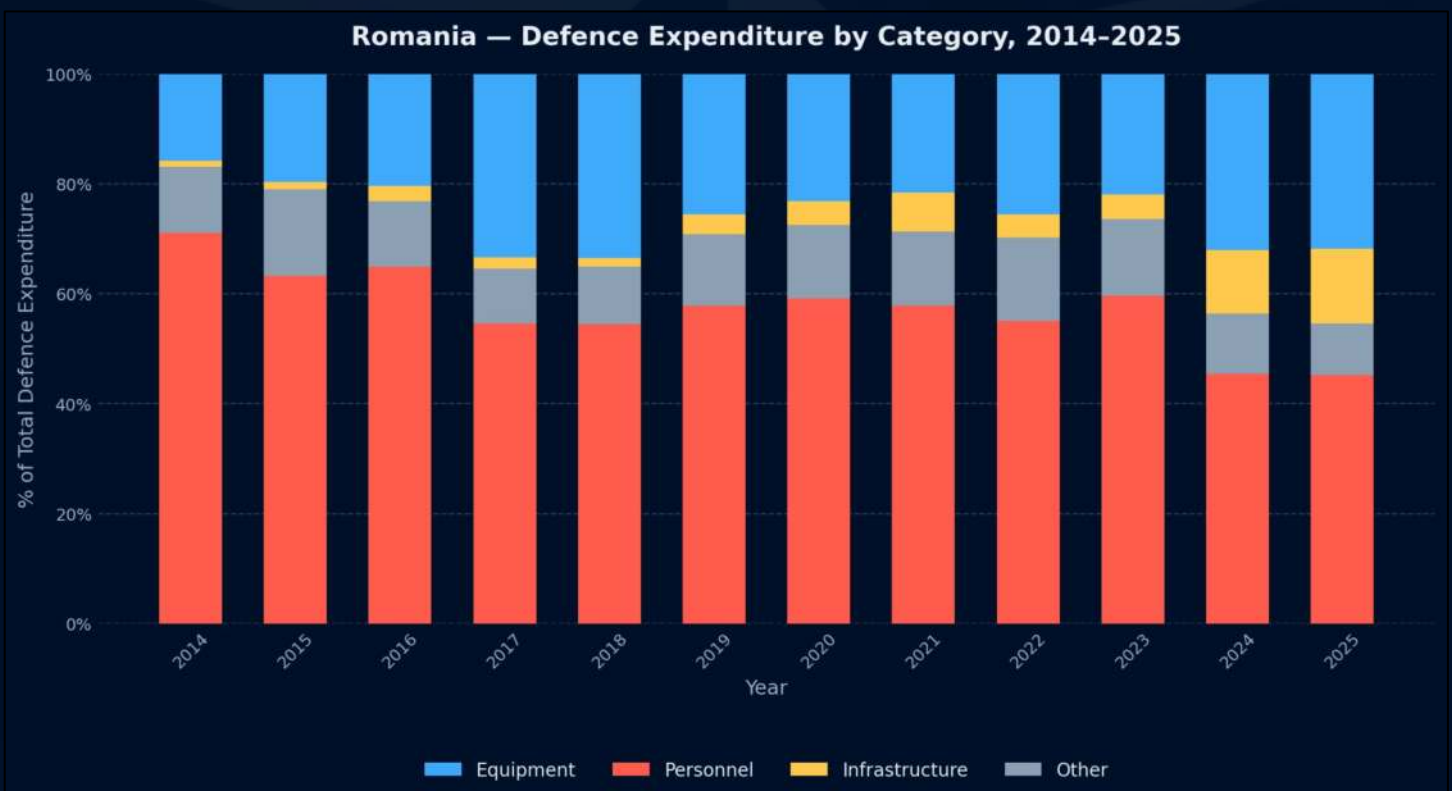
Romania has been one of NATO's more consistent eastern front spenders, consistently above the non-US NATO average. [Defense spending](#) reached 2.28% of GDP in 2025, and President Dan committed Romania to the Hague 3.5% framework after his May 2025 election. The critical constraint is Romania's high budget deficit, which forces difficult choices between defense investment and fiscal stability. Romania missed its 2023 defense target significantly—budgeting at 2.5% but spending roughly 1.6%—reflecting a chronic financial vulnerability between announced ambition and delivered expenditure that the Dan government has not yet fully resolved.



MILITARY CONTRIBUTIONS

Equipment Share

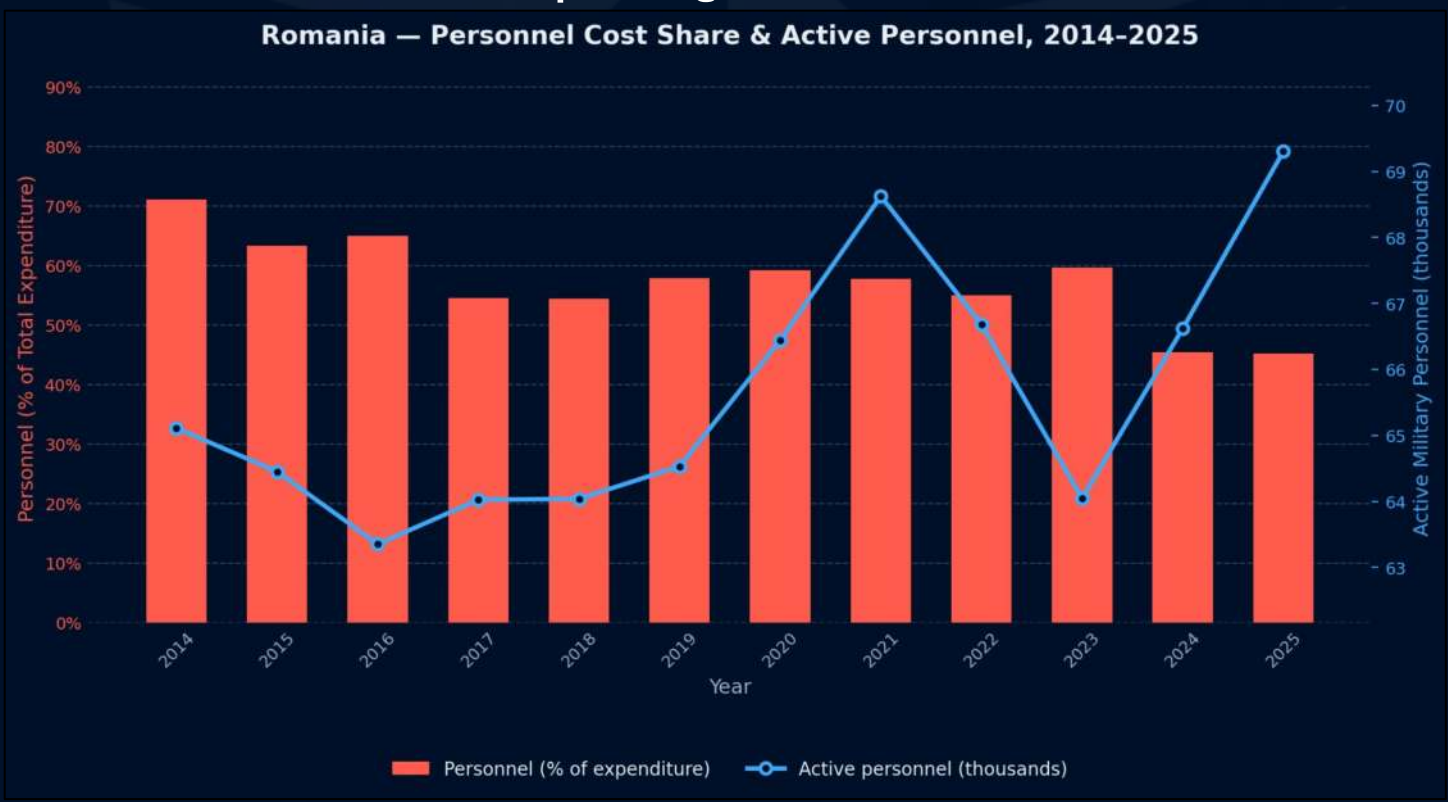
Romania's [equipment share](#) reflects a comprehensive reequipment program: 32 F-35As, 54 M1A2 SEPv3 Abrams with 216 more approved, 227 Piranha V IFVs assembled domestically, a tracked IFV competition at ~€2.5B, two Scorpène submarines, Black Sea corvettes, and 36 HIMARS already operational. The scale is extraordinary relative to Romania's budget, and implementation risk is real given the fiscal deficit. The most consequential long-term element is the [Rheinmetall armor partnership](#) produced on Romanian soil—converting procurement ambition into indigenous industrial capacity.



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Romania's personnel cost share has fallen from roughly 70% in 2014 to 45% by 2025—a budget rebalancing that reflects the procurement surge. Active personnel have grown modestly, from ~65,000 to ~70,000. Romania eliminated conscription in 2007 and has struggled with recruitment ever since; the armed forces have operated below authorized strength for most of the intervening period. The 2022 invasion accelerated efforts to close that gap, with Romania setting a target of 93,000 active personnel by 2030—roughly a 33% increase from current levels. Whether recruitment can deliver that expansion while simultaneously absorbing the procurement surge is the central manpower question for Romanian defense planning.



MILITARY CONTRIBUTIONS

Capability Modernization

Romania's [modernization program](#) is quite comprehensive. The air force fields 55 F-16AM/BMs after full MiG-21 retirement, with 32 F-35As contracted (delivery ~2031) and Norwegian F-16s bridging the transition. Air defense rests on 12 Patriot PAC-3 MSE launchers and Aegis Ashore BMD at Deveselu. Thirty-six HIMARS with ATACMS provide one of Europe's more capable deep-strike arsenals. Ground modernization replaces Soviet T-55 and TR-85 platforms with 54 M1A2 SEPv3 Abrams (216 more approved), 227 Piranha V IFVs assembled domestically, and a tracked IFV competition ongoing. Two Scorpène submarines mark Romania's first undersea capability in 20 years. The program is genuinely comprehensive. However, most major outputs far off, and delivery risk is real given budget constraints.



MILITARY CONTRIBUTIONS

Force Posture

Romania's force posture punches well above its size through hosting contributions. [Mihail Kogălniceanu](#) is being expanded into potentially NATO's largest European air base (\$2.3B+, 10,000-troop capacity), hosting US Army V Corps rotations and formalizing US Army Garrison Black Sea in 2024. Deveselu hosts one of NATO's two European Aegis Ashore BMD sites. [Romania leads both](#) Multinational Division Southeast and Multinational Corps Southeast, hosts the French-led eFP battlegroup at Cincu, and runs the Fetești F-16 Training Center training Ukrainian and allied pilots. Constanța port serves as the primary US military supply ingress to the region; Romania's 650km Ukraine border and Black Sea coastline make it geographically indispensable to NATO's southeastern deterrence architecture.



MILITARY CONTRIBUTIONS

Industrial Base

Romania's [defense industry](#) is transitioning from Soviet-era maintenance toward Western licensed manufacturing. Romarm subsidiaries have expanded 155mm ammunition production since 2022 under EU EDIRPA and ASAP funding. The Rheinmetall partnership for tank and IFV manufacturing on Romanian soil is the most consequential development—creating a CEE production node for Western armored vehicles. Piranha V assembly at the Bucharest Mechanical Plant demonstrates domestic APC capability, with 150 additional vehicles planned. Romania holds significant raw material advantages, including rare earth deposits and substantial mineral reserves. Romania has no sovereign combat aircraft, submarine, or precision missile design capability—its industrial value is as a licensed assembly, maintenance, and raw material platform rather than an independent design-and-manufacture base.



STRATEGIC ALIGNMENT

Declared Posture

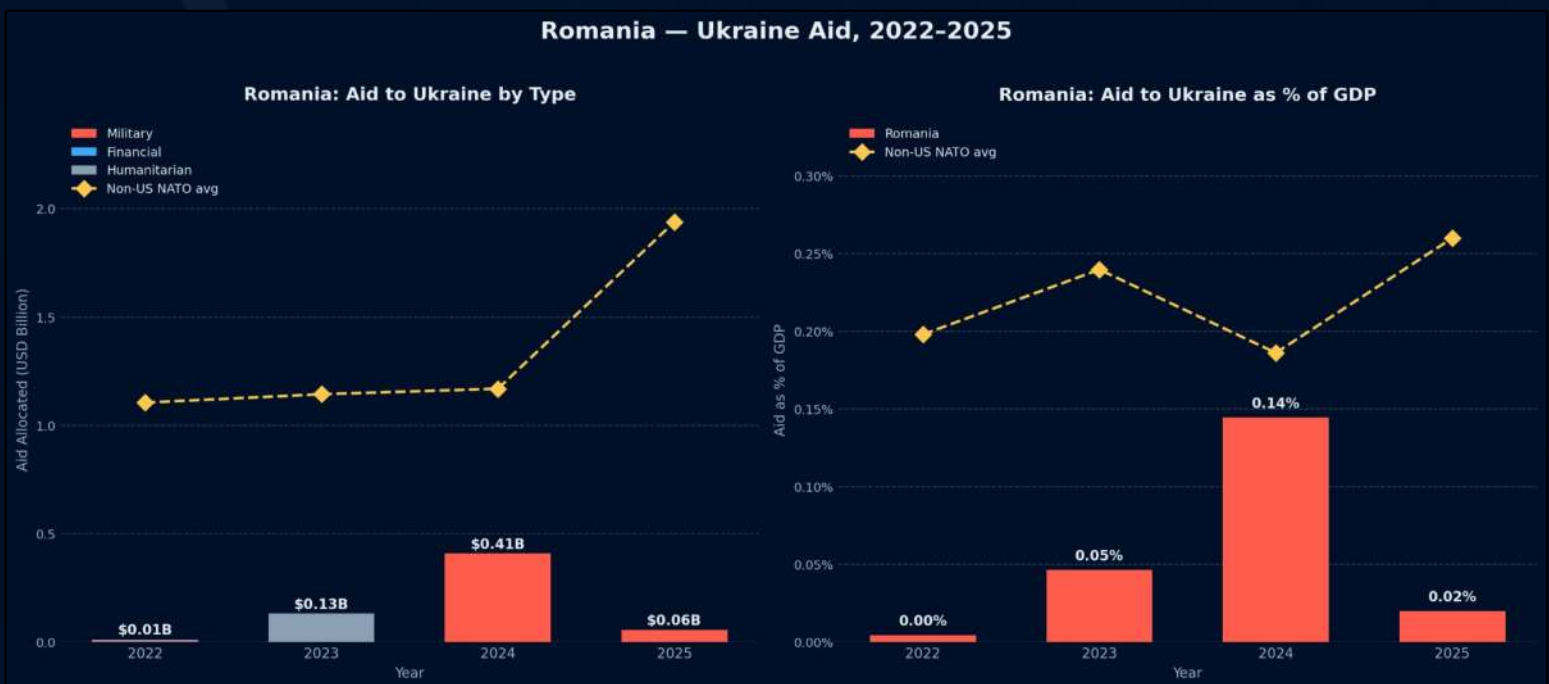
Romania's declared strategic posture is explicitly Russia-focused. The [2020 Defense Strategy](#) identified Russia's Crimea militarization as a central threat; the [2025–2030 Defense Strategy](#) under President Dan escalated to warning that Russia's military posture endangers Black Sea security and energy exploitation. On China, Romania has excluded Huawei and ZTE from 5G core networks. The decision to allow American use of basing for Operation Epic Fury in March 2026 demonstrated operational alignment extending well beyond Romania's formal doctrine.



STRATEGIC ALIGNMENT

Ukraine Support

Romania's [Ukraine support](#) is more significant than bilateral aid figures suggest. Kiel tracks €0.537B allocated—lower-middle NATO band proportionally—but the headline understates strategic contribution. The [Patriot donation](#) in September 2024 was among only a handful of complete system transfers by any NATO ally, with Norway and Sweden contributing ~\$151M toward replacement. The [Fetești F-16 Training Center](#) develops Ukrainian pilot capability. The Danube corridor through Constanța and Galați has been structurally decisive for Ukrainian grain exports during Russian Black Sea blockade periods. Additional transfers include APRA-40 launchers, TAB-71 armored vehicles, MiG-29 spare parts, and Soviet-caliber ammunition. Romania's lower aid transparency partly explains the gap between its strategic contribution and its tracked headline.



STRATEGIC ALIGNMENT

Russian Decoupling

Romania has a clean energy decoupling case. Domestic oil, gas, CANDU nuclear at Cernavodă, hydro, and renewables provide important independence from Russian energy with no Rosatom footprint. The [Neptun Deep offshore project](#) (~100 billion cubic meters recoverable, first gas 2027) is expected to double Romanian output and position Romania as the EU's largest gas producer. NuScale SMR cooperation makes Romania one of Europe's leading advanced nuclear cases entirely outside Russian technology. Romania has supported every EU sanctions package and is a push state for Black Sea maritime enforcement. Enforcement challenges are maritime—shadow-fleet activity and Danube dual-use transit risk—rather than energy dependence.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

Romania recorded 81% for staying in NATO, 65% agreeing the country should defend another ally, and 73% agreeing NATO membership makes a foreign attack less likely, with defense spending support at 53% favoring increases, above the alliance average. Ukraine support stood at around 58% combined, below the Western European average, reflecting a more complex public posture toward the conflict despite Romania's Black Sea position. The PSD/PNL coalition government is nominally pro-NATO and has committed to increased spending. The AUR (Alliance for the Unity of Romanians), a right wing party with Russian sympathies and significant vote growth since 2020, has used sovereignty framings to build a substantial popular base, and 2025's presidential election turmoil reflected the depth of that anti-establishment current. Romania's combination of a formally committed government, strategically valuable territory, and a fast-growing NATO-skepticism is one of the more concerning alignment trajectories in the Central-Eastern sector.



STRATEGIC ALIGNMENT

Hedging Behavior

Romania's hedging behavior is minimal. There is no meaningful BRI participation—Romania is functionally inactive in the China-CEE format with no major Chinese-controlled critical infrastructure. Huawei and ZTE are excluded from 5G core networks. Procurement is US and NATO-aligned with zero adversary procurement and Soviet platforms systematically retired. Romania provided US operational basing for Operation Epic Fury and has pursued no high-level Moscow, Beijing, or Tehran engagements during the war period. Romanian outreach to China has been limited to standard EU-framework trade and diplomatic contacts with no bilateral security or infrastructure agreements of note.



STRATEGIC ALIGNMENT

Operational Cooperation

Romania's operational cooperation is broad and deep. [Mihail Kogălniceanu's \\$2.3B+ expansion](#) into a potential 10,000-troop hub is the alliance's most consequential southeastern infrastructure investment, formalizing US Army Garrison Black Sea after rotational presence since 1999. Deveselu Aegis Ashore, one of only two European BMD installations, has been operational since 2016. Romania leads [Multinational Division Southeast](#) and hosts Multinational Corps Southeast and the French-led eFP battlegroup at Cincu. The March 2026 Operation Epic Fury basing decision—approving US use of MK and Câmpia Turzii for refueling and monitoring—is the most operationally significant Iran-relevant decision by any Eastern European NATO state. Romania contributed substantially to both [Iraq](#) and [Afghanistan](#), deploying thousands of troops across both campaigns and sustaining casualties, establishing a long operational cooperation record with US forces well before the current deterrence posture. Constanța port remains the primary US military supply ingress to NATO's eastern front.





UNITED KINGDOM

NATO Country Assessment —*TIER TWO*—

ROBUST DEFENSE SPENDER • UKRAINE SUPPORTER • WEAK LEADERSHIP





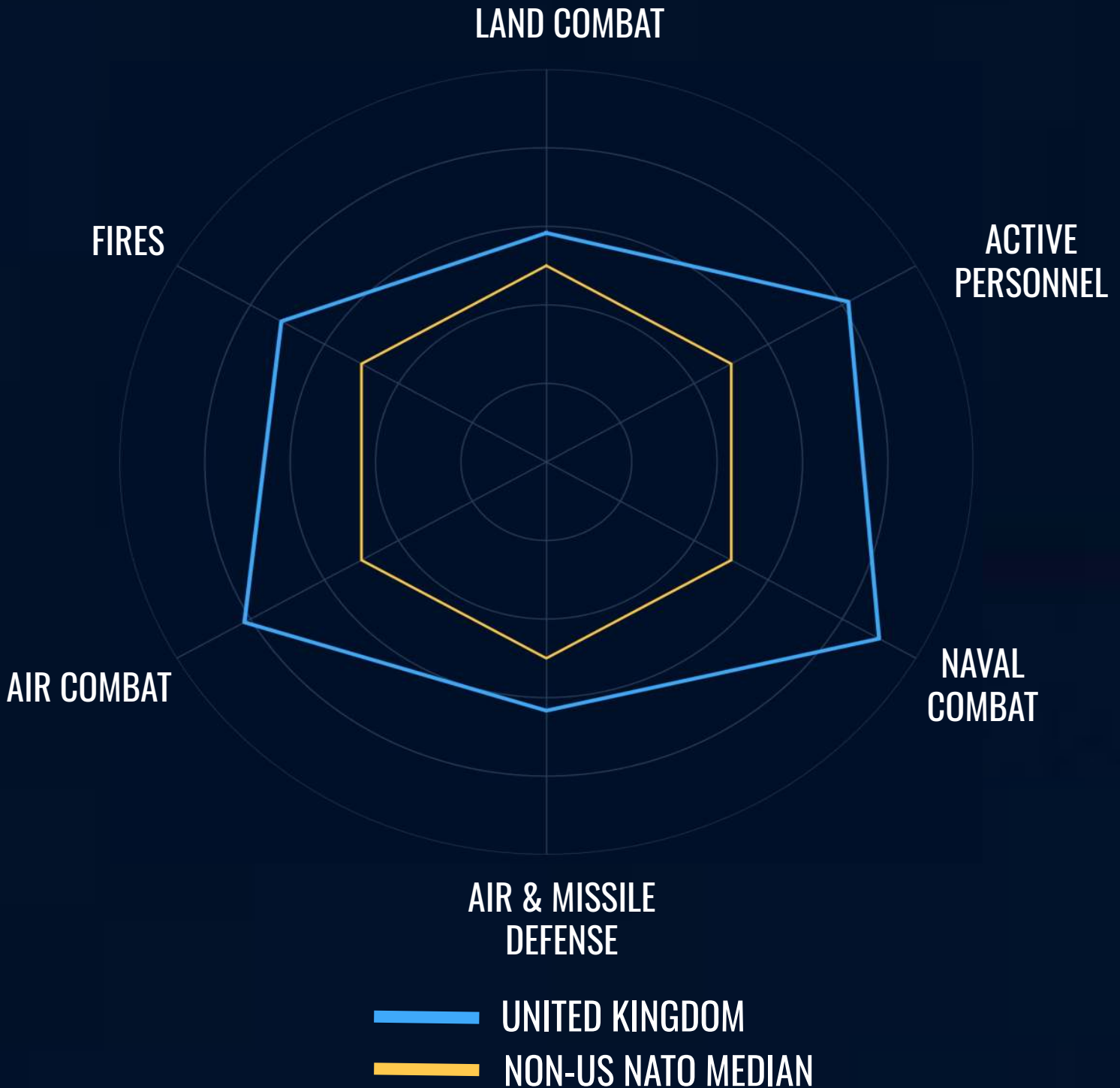
AT A GLANCE

Toplines

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



FORCE STRUCTURE AT A GLANCE



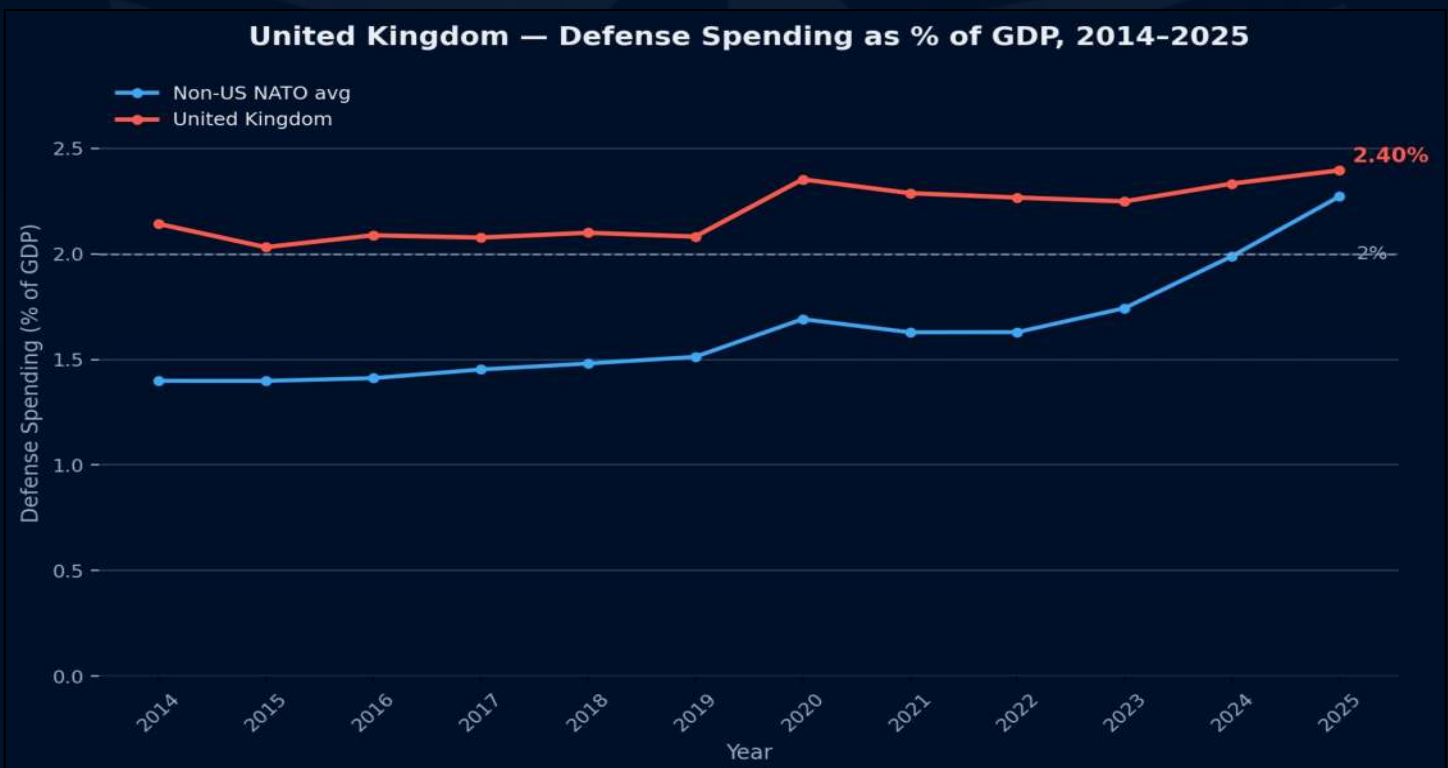
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MILITARY CONTRIBUTIONS

Defense Spending Level

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

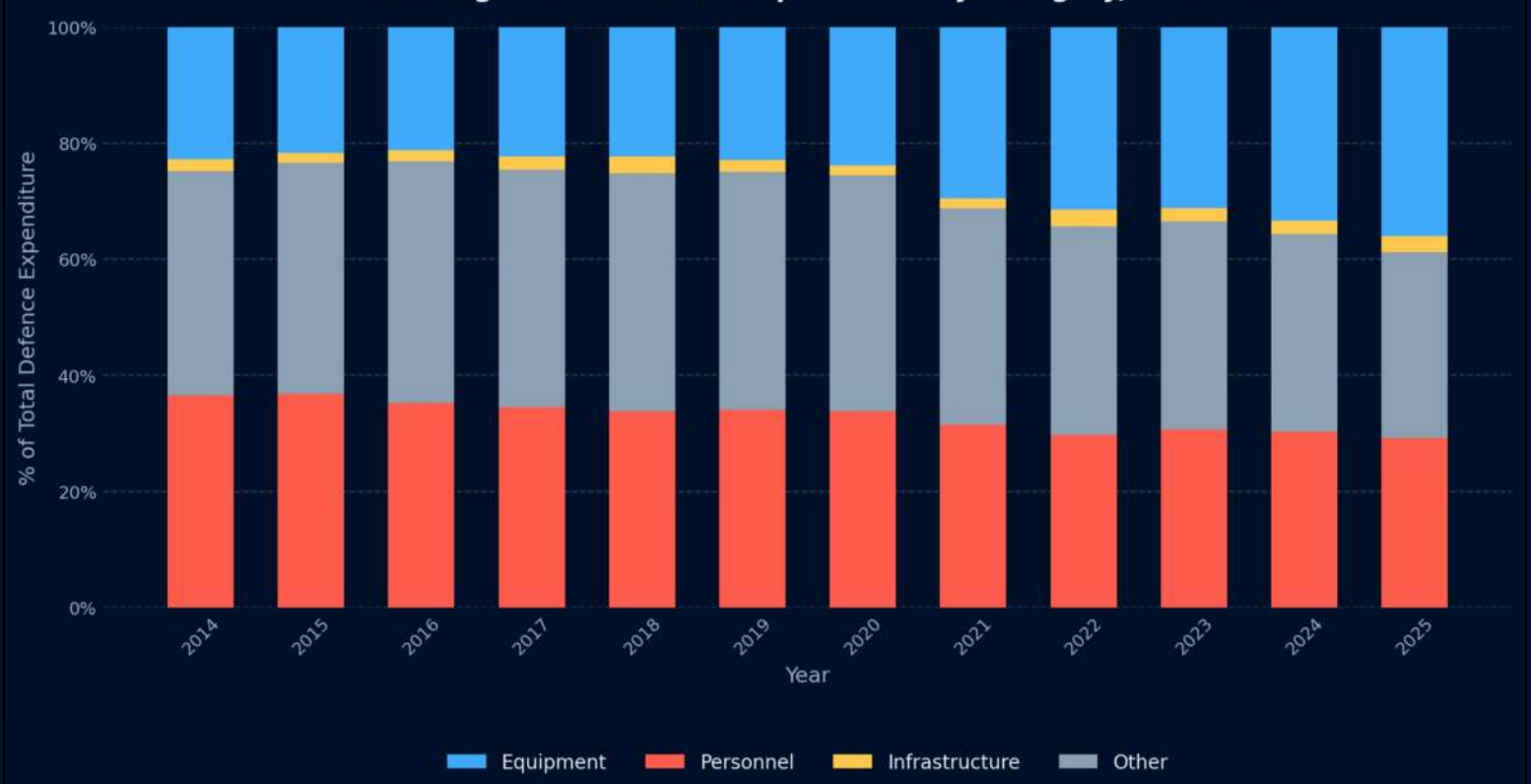


MILITARY CONTRIBUTIONS

Equipment Share

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

United Kingdom — Defence Expenditure by Category, 2014-2025



MILITARY CONTRIBUTIONS

Manpower & Recruitment

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



MILITARY CONTRIBUTIONS

Capability Modernization

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



MILITARY CONTRIBUTIONS

Force Posture

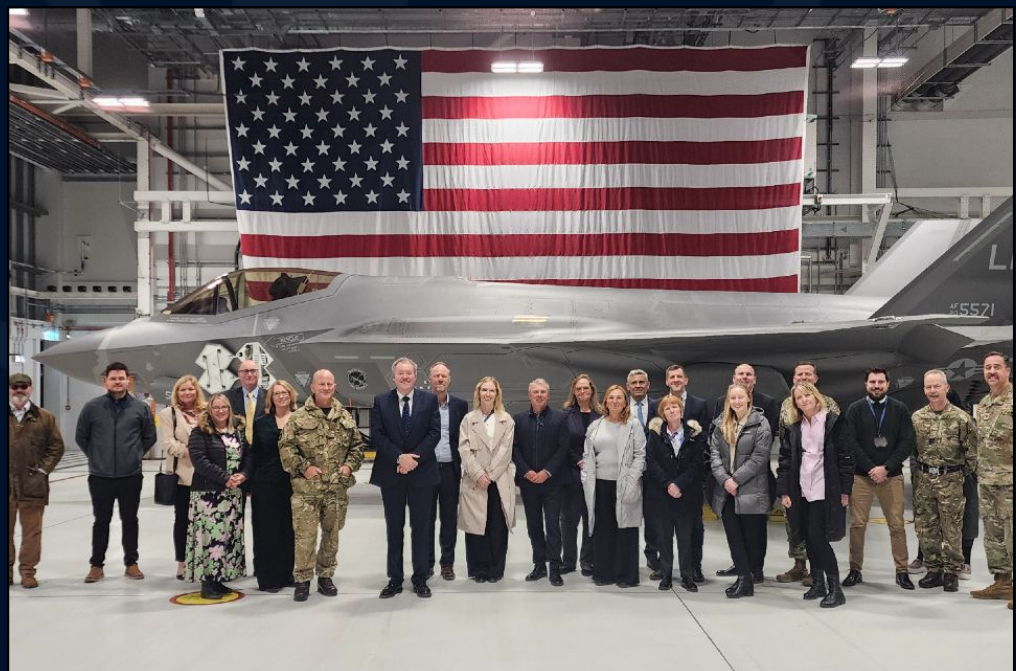
The UK hosts at least 24 US military sites including RAF Lakenheath—the largest US Air Force base in Europe with F-15E and F-35A squadrons—RAF Fairford for B-2 and B-52 rotations, and Fylingdales early warning radar providing ballistic missile tracking. The [UK leads](#) NATO Forward Land Forces Estonia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

US MILITARY AND INTEL SITES IN THE UK

1. Loosiemouth
2. Fylingdales
3. Menwith Hill
4. Digby
5. Alconbury
6. Feltwell
7. Lakenheath
8. Wyton
9. Mildenhall
10. Blenheim Crescent
11. Imperial College London
12. London
13. Oakhanger
14. Northwood
15. Bicester
16. Welford
17. Yeovilton
18. Bude
19. Fairford
20. Cawdor Barracks
21. Imjin Barracks
22. Barford St. John
23. Croughton
24. Molesworth



DC
UK



MILITARY CONTRIBUTIONS

Industrial Base

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



STRATEGIC ALIGNMENT

Declared Posture

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



STRATEGIC ALIGNMENT

Ukraine Support

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

United Kingdom — Ukraine Aid, 2022-2025

United Kingdom: Aid to Ukraine by Type



United Kingdom: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

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



STRATEGIC ALIGNMENT

Public Support & Political Resilience

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



STRATEGIC ALIGNMENT

Hedging Behavior

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



STRATEGIC ALIGNMENT

Operational Cooperation

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



TIER 2

Policy Recommendations

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

