



# TIER 3

Lagging Allies



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# TIER 3

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## *At A Glance*

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





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# CANADA

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## NATO Country Assessment — *TIER THREE* —

VOTERS DEMAND REARMAMENT • CHINA DELUSION • CHRONIC FREE-RIDER





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# AT A GLANCE

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## *Toplines*

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



# FORCE STRUCTURE AT A GLANCE



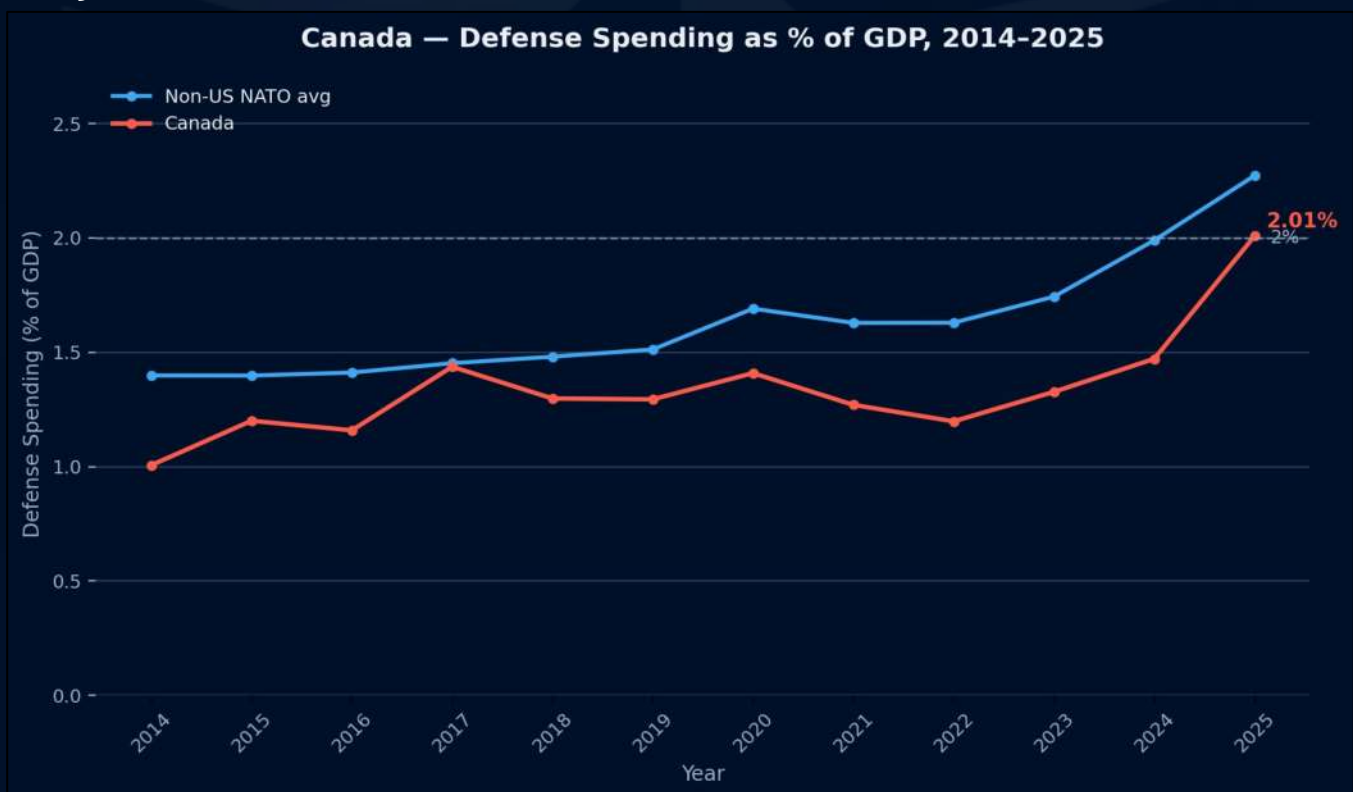
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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

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

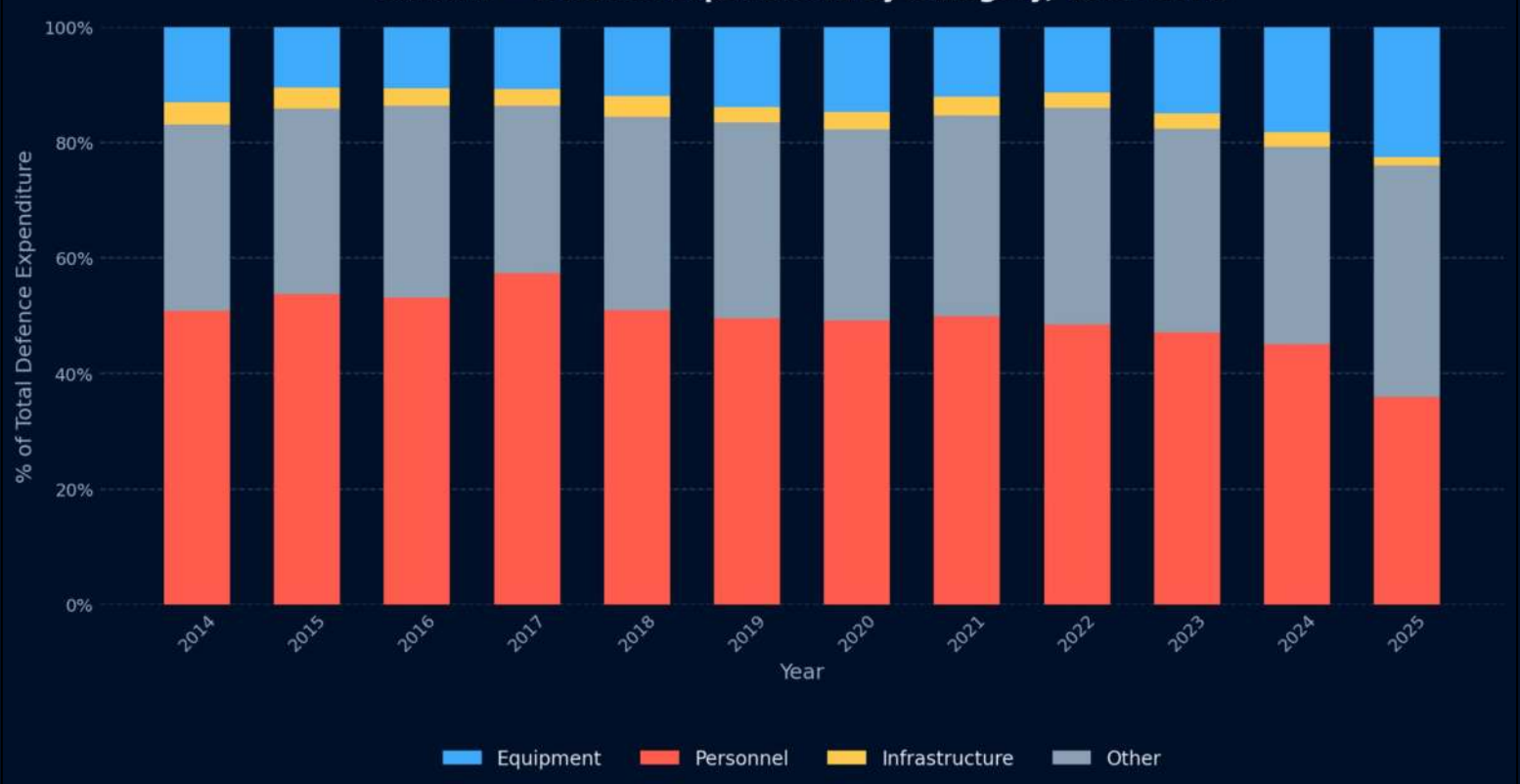


# MILITARY CONTRIBUTIONS

## *Equipment Share*

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

Canada — Defence Expenditure by Category, 2014-2025



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

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



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

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



# MILITARY CONTRIBUTIONS

## *Force Posture*

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





# STRATEGIC ALIGNMENT

## *Declared Posture*

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



# STRATEGIC ALIGNMENT

## *Ukraine Support*

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

Canada — Ukraine Aid, 2022–2025

Canada: Aid to Ukraine by Type



Canada: Aid to Ukraine as % of GDP



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

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



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

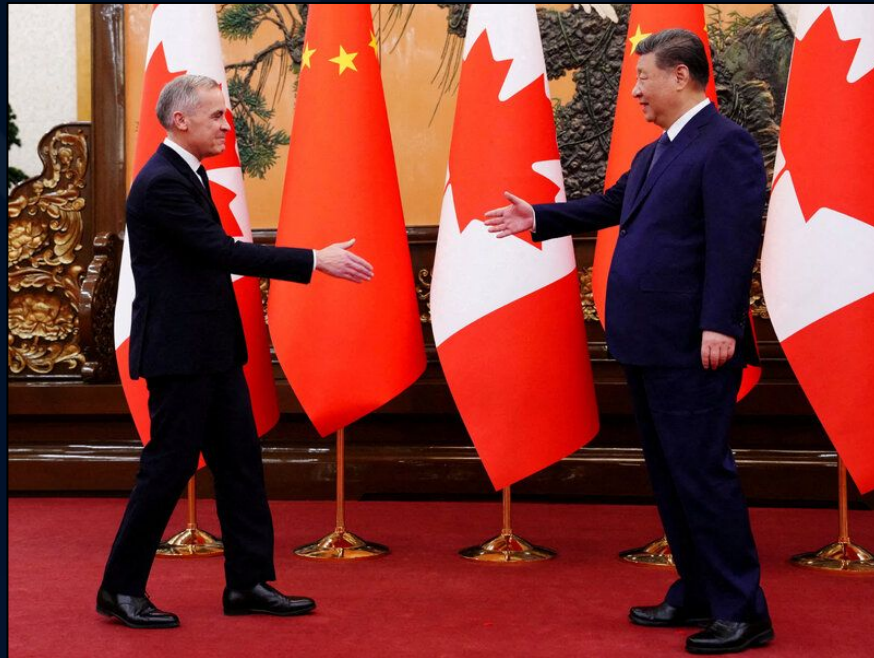
In the [2024 NATO survey](#), 72% of Canadians said they would vote to stay in NATO, 63% agreed Canada should defend another NATO ally if attacked, and around 67% supported continuing to provide Ukraine assistance. Thirty-nine percent favored increased defense spending in 2024, a figure that rose sharply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



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

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



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

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





# HUNGARY

## NATO Country Assessment — *TIER THREE* —

MODERNIZING MILITARY • WEAK UKRAINE SUPPORT • RUSSIAN GAS SPENDER





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# AT A GLANCE

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## *Toplines*

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



# FORCE STRUCTURE AT A GLANCE

## LAND COMBAT



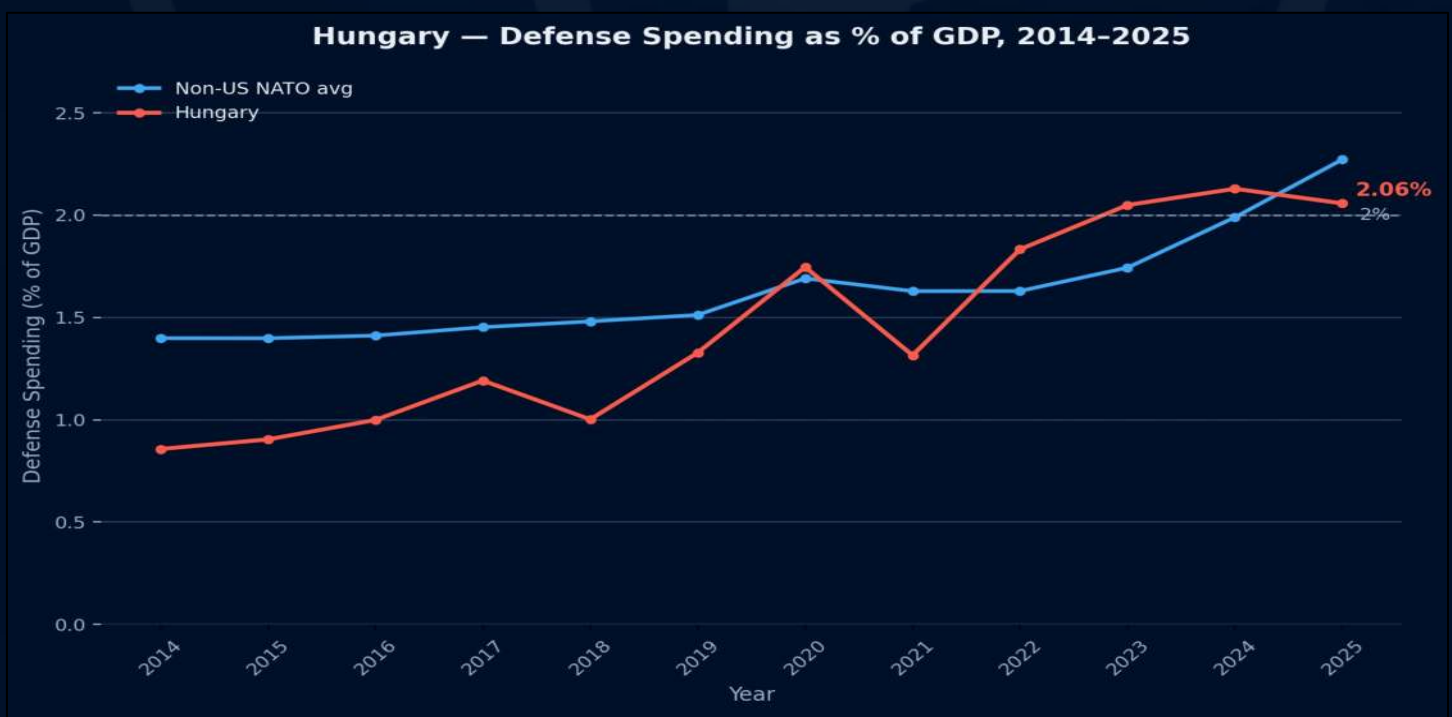
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# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

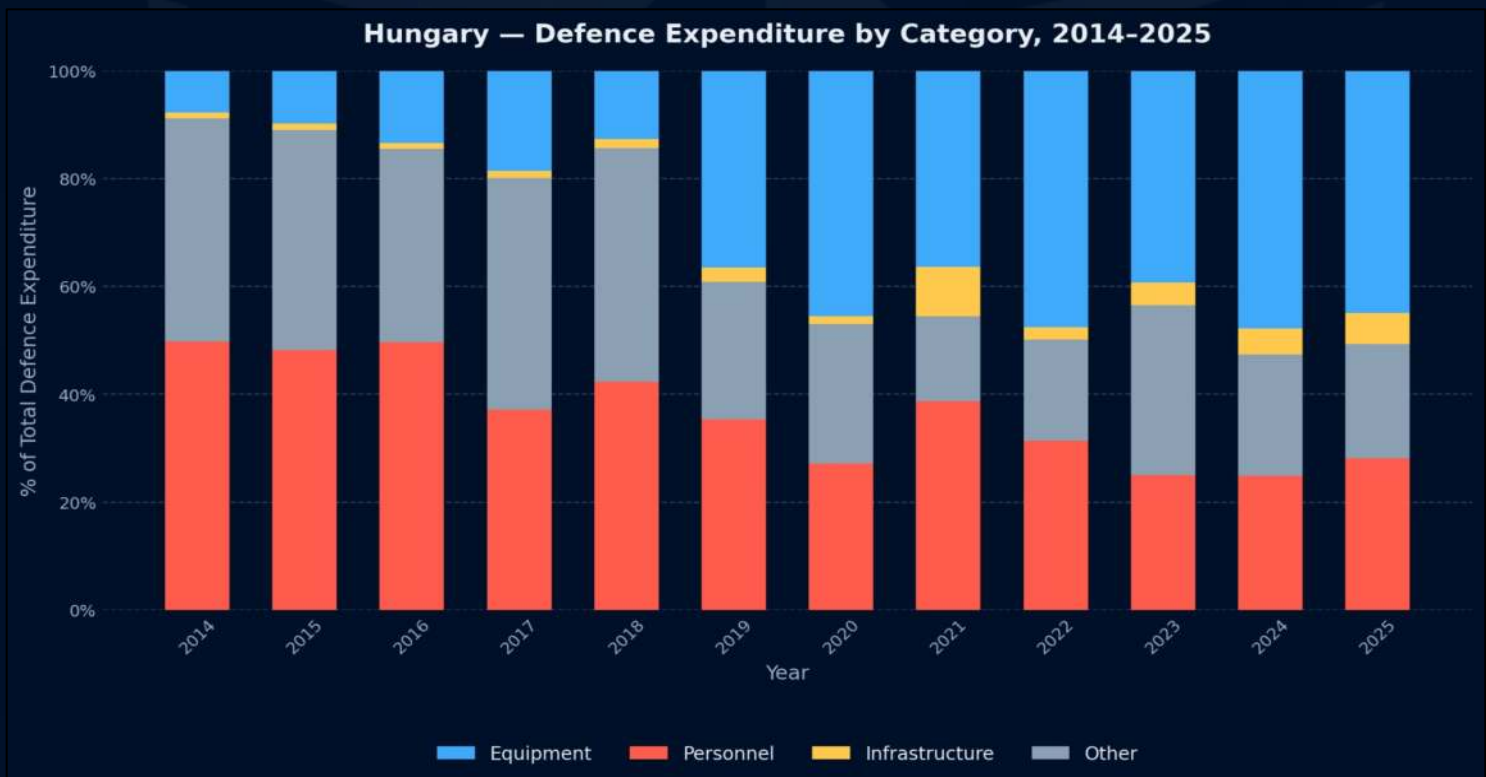
Hungary spent below 1% of [GDP on defense](#) as recently as 2018—one of the worst records in the alliance—before a belated acceleration brought it to roughly 2.1% by 2023. Hungary's spending is well below the non-US NATO average for most of the past decade, only converging with it in 2022-2024. Under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



# MILITARY CONTRIBUTIONS

## *Equipment Share*

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



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

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



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

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



# MILITARY CONTRIBUTIONS

## *Force Posture*

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



# MILITARY CONTRIBUTIONS

## *Industrial Base*

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



# STRATEGIC ALIGNMENT

## *Declared Posture*

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



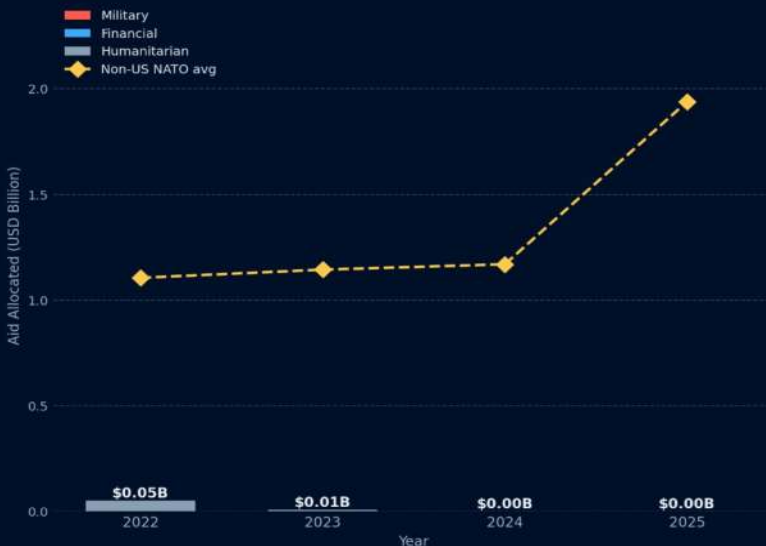
# STRATEGIC ALIGNMENT

## *Ukraine Support*

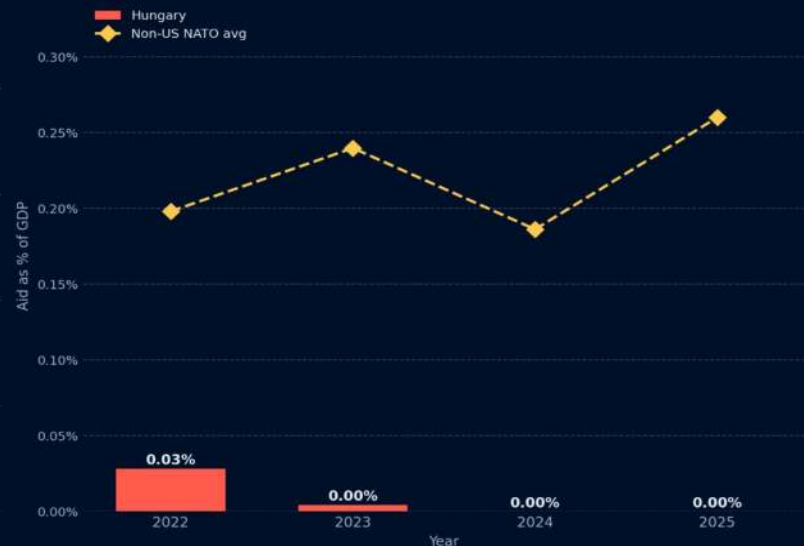
Hungary's [Ukraine aid data](#) is stark: \$0.05B in 2022 (0.03% of GDP), dropping to \$0.01B in 2023, and zero in 2024 and 2025—entirely humanitarian, with zero military aid across the entire period. Kiel tracks just €0.054B total, the worst record in the alliance by every measure. Under Orbán, Hungary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

Hungary — Ukraine Aid, 2022-2025

Hungary: Aid to Ukraine by Type



Hungary: Aid to Ukraine as % of GDP



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

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



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

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



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

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



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

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

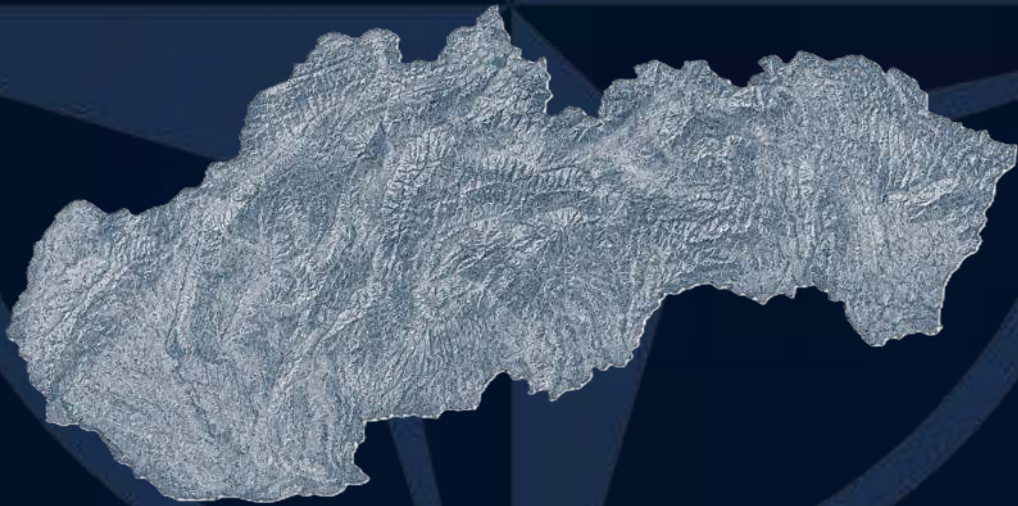




# SLOVAKIA

## NATO Country Assessment — *TIER THREE* —

EARLY UKRAINE DONOR • ACTIVE COUNTER-ALIGNMENT • POOR SPENDER





# AT A GLANCE

## *Toplines*

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



# FORCE STRUCTURE AT A GLANCE

LAND COMBAT



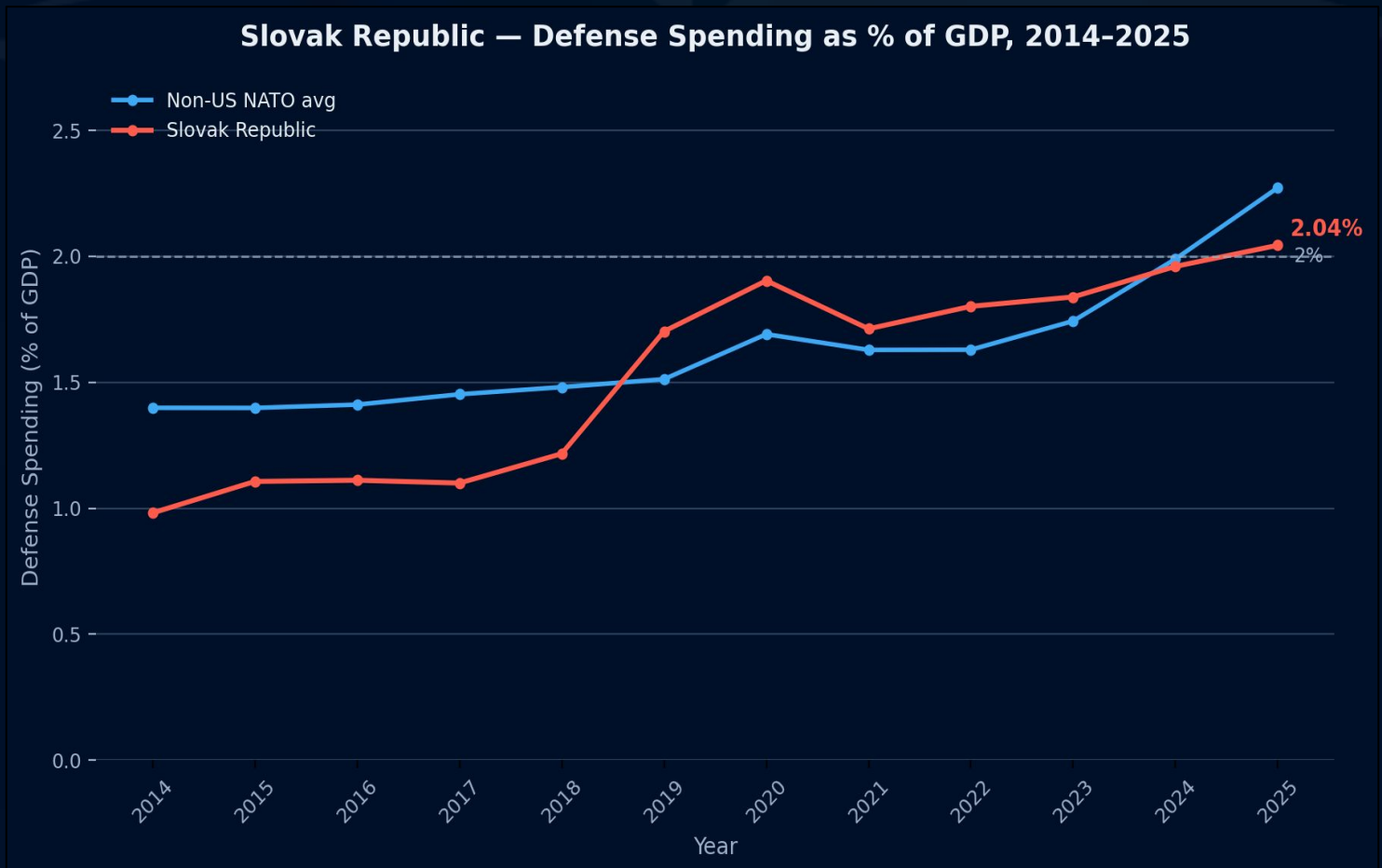
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# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

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

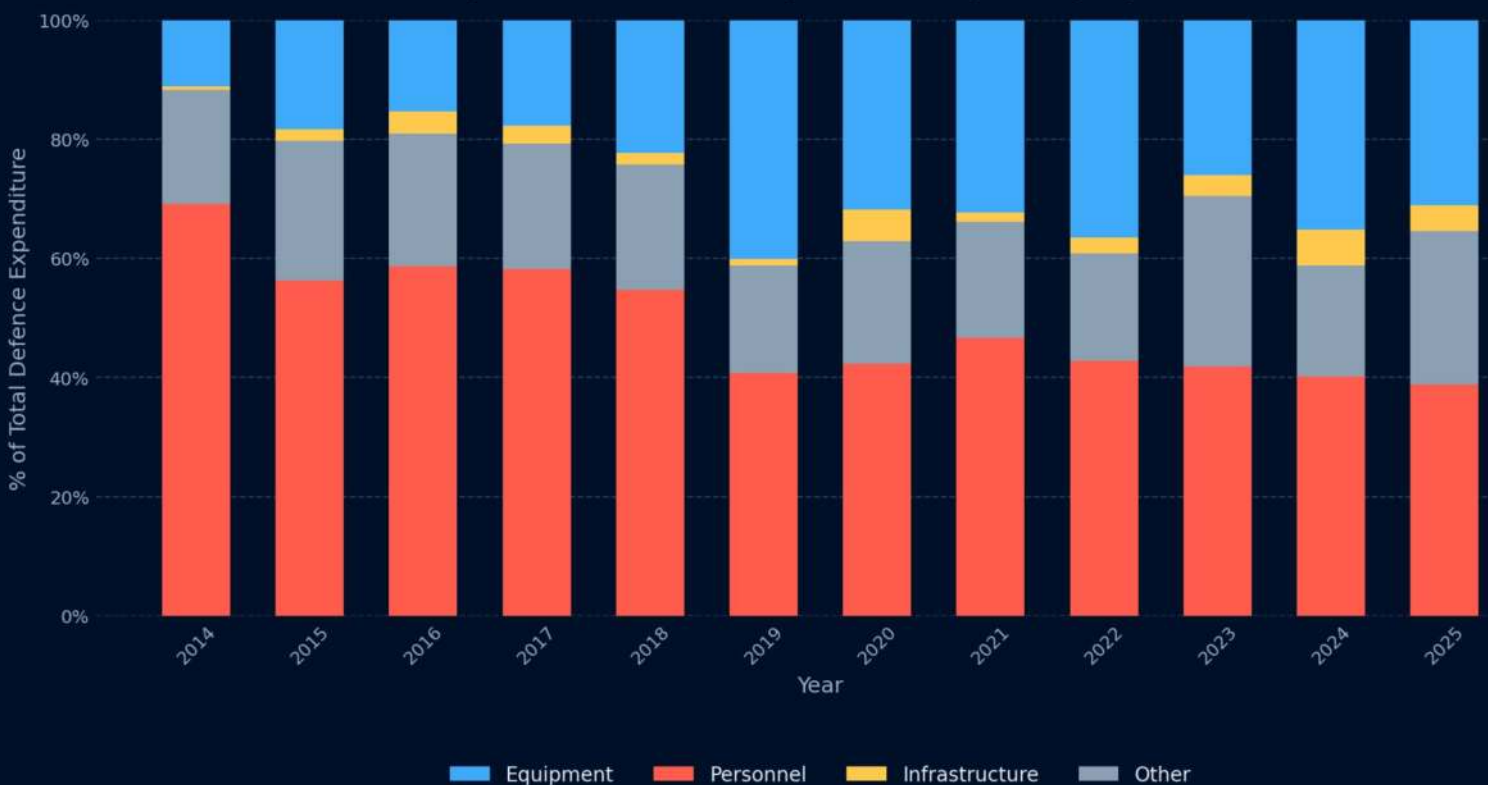


# MILITARY CONTRIBUTIONS

## *Equipment Share*

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

Slovak Republic — Defence Expenditure by Category, 2014-2025

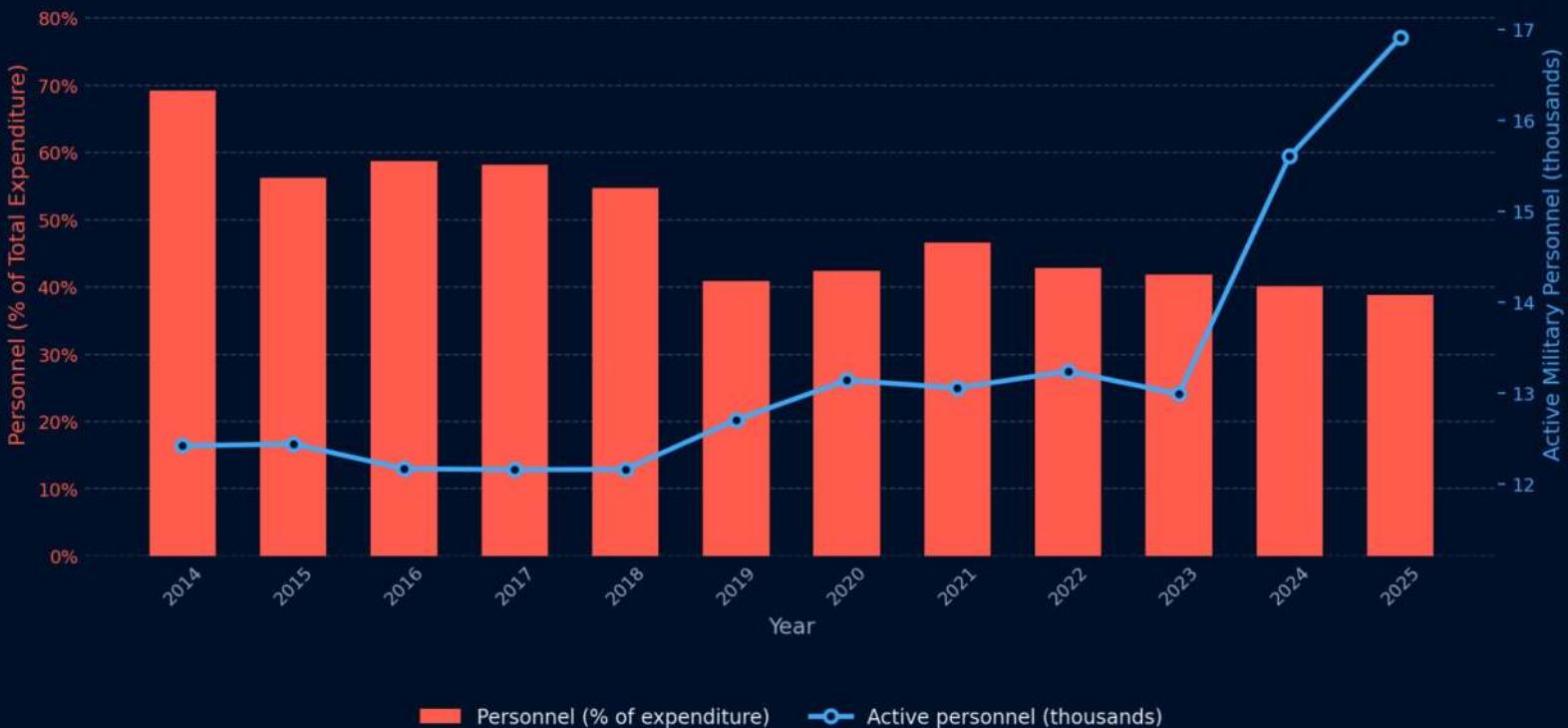


# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

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

Slovak Republic — Personnel Cost Share & Active Personnel, 2014-2025



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

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



# MILITARY CONTRIBUTIONS

## *Force Posture*

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



# MILITARY CONTRIBUTIONS

## *Industrial Base*

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



# STRATEGIC ALIGNMENT

## *Declared Posture*

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



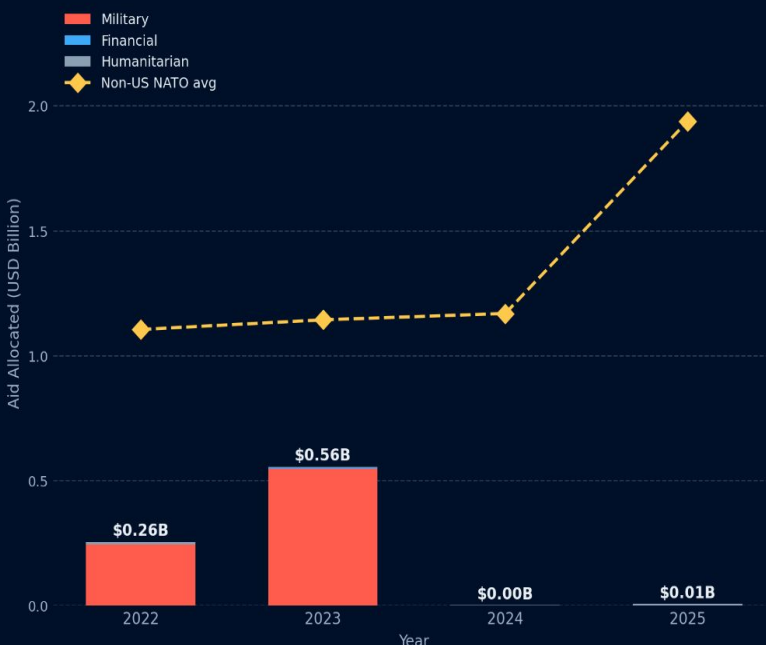
# STRATEGIC ALIGNMENT

## *Ukraine Support*

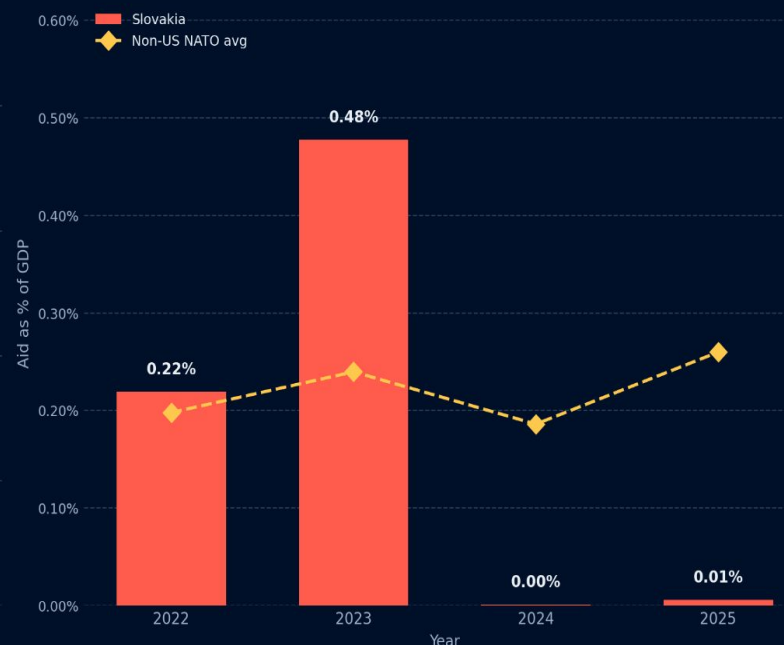
Slovakia's [Ukraine support](#) is dramatically bifurcated. Under pre-Fico governments through October 2023, [Slovakia delivered](#) ~€691M in aid including the S-300 air-defense system, 13 MiG-29s, and Zuzana-2 howitzers—among the most consequential early-war transfers by any NATO ally. The Kiel headline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

Slovakia — Ukraine Aid, 2022-2025

Slovakia: Aid to Ukraine by Type



Slovakia: Aid to Ukraine as % of GDP



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

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



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

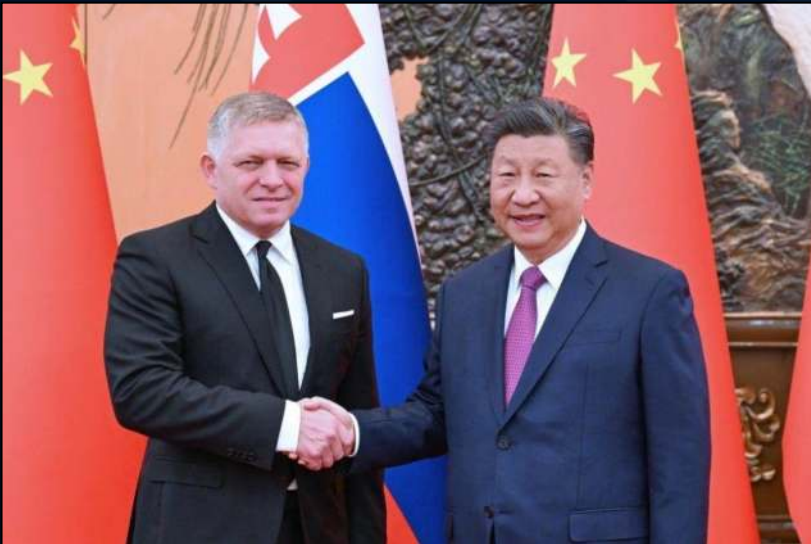
Slovakia recorded only 65% for staying in [NATO in 2024](#), among the lowest in Central Europe, while 61% agreed NATO membership makes a foreign attack less likely and 53% agreed Slovakia should defend another ally. Ukraine support was among the weakest in the survey at around 41% combined, consistent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



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

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



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

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





# SLOVENIA

## NATO Country Assessment —*TIER THREE*—

TROOP CONTRIBUTOR • UKRAINE DONOR • MANIPULATING SPENDING





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# AT A GLANCE

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## *Toplines*

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



# FORCE STRUCTURE AT A GLANCE



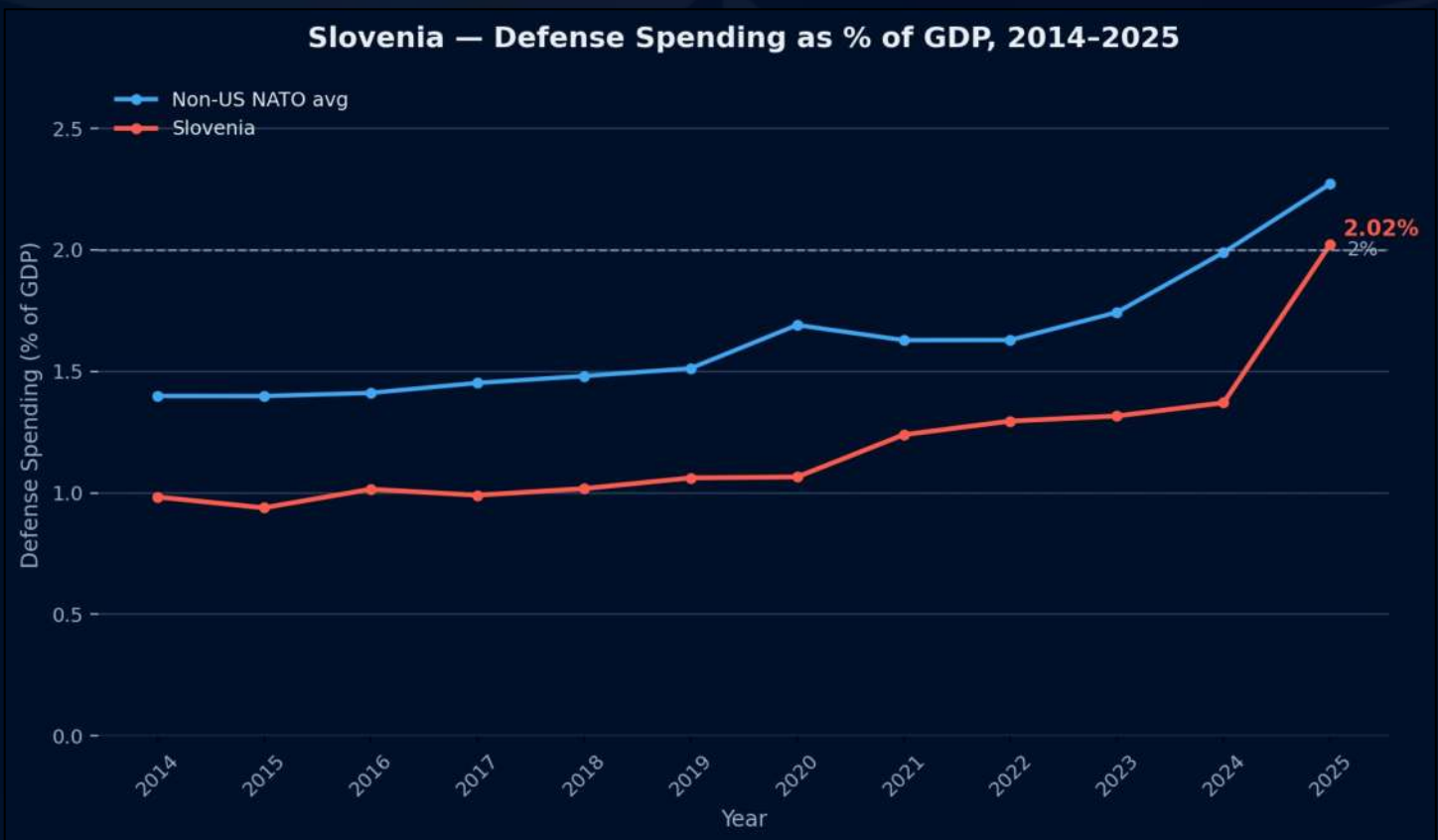
This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense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



# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

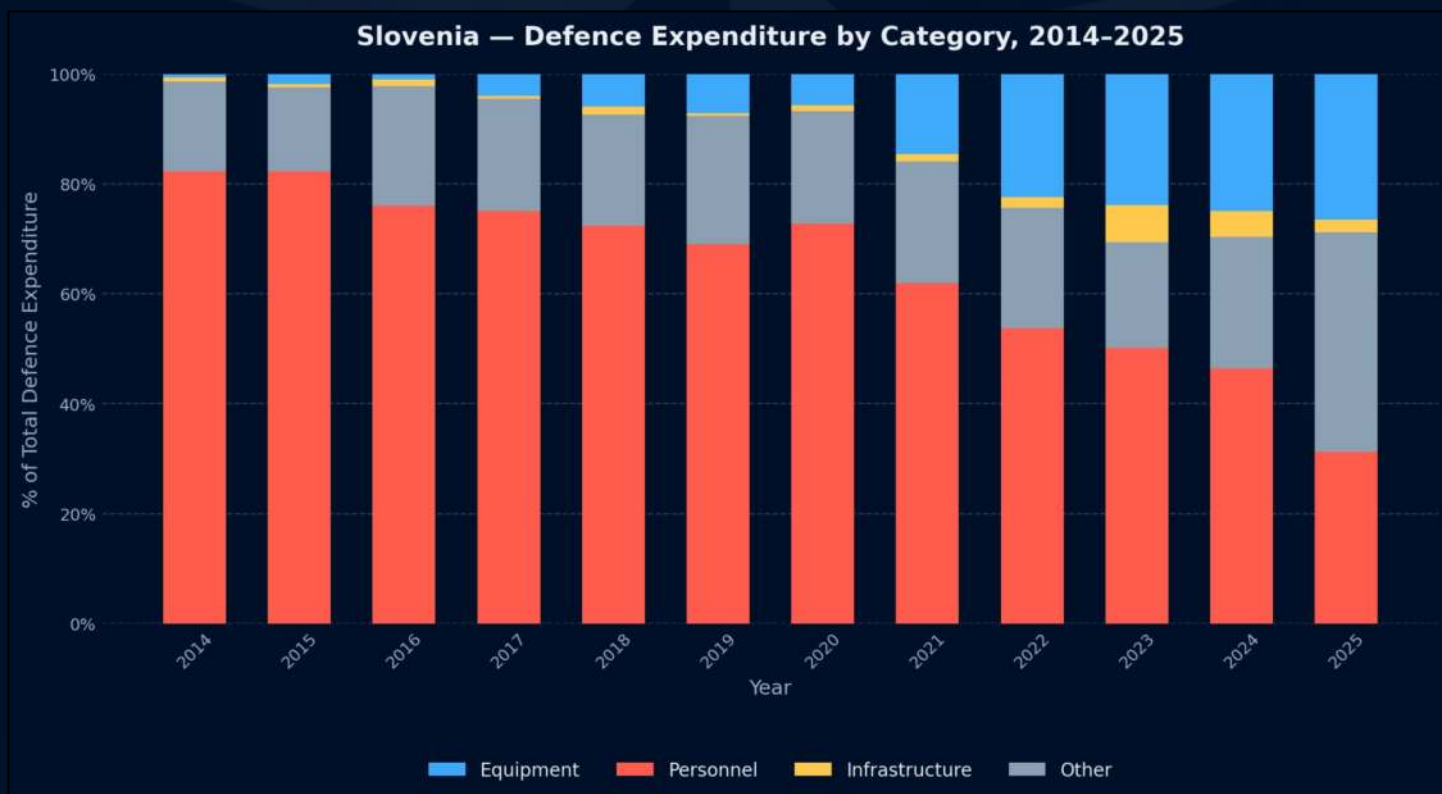
Slovenia's [defense spending](#) story is one of constant underinvestment with recent positive movement. Slovenia reached 2.02% of GDP in 2025, among the last NATO allies to hit the floor after spending below 1.1% from 2014 to 2019. The figure is contested: NATO Secretary General Rutte's May 2026 warning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



# MILITARY CONTRIBUTIONS

## *Equipment Share*

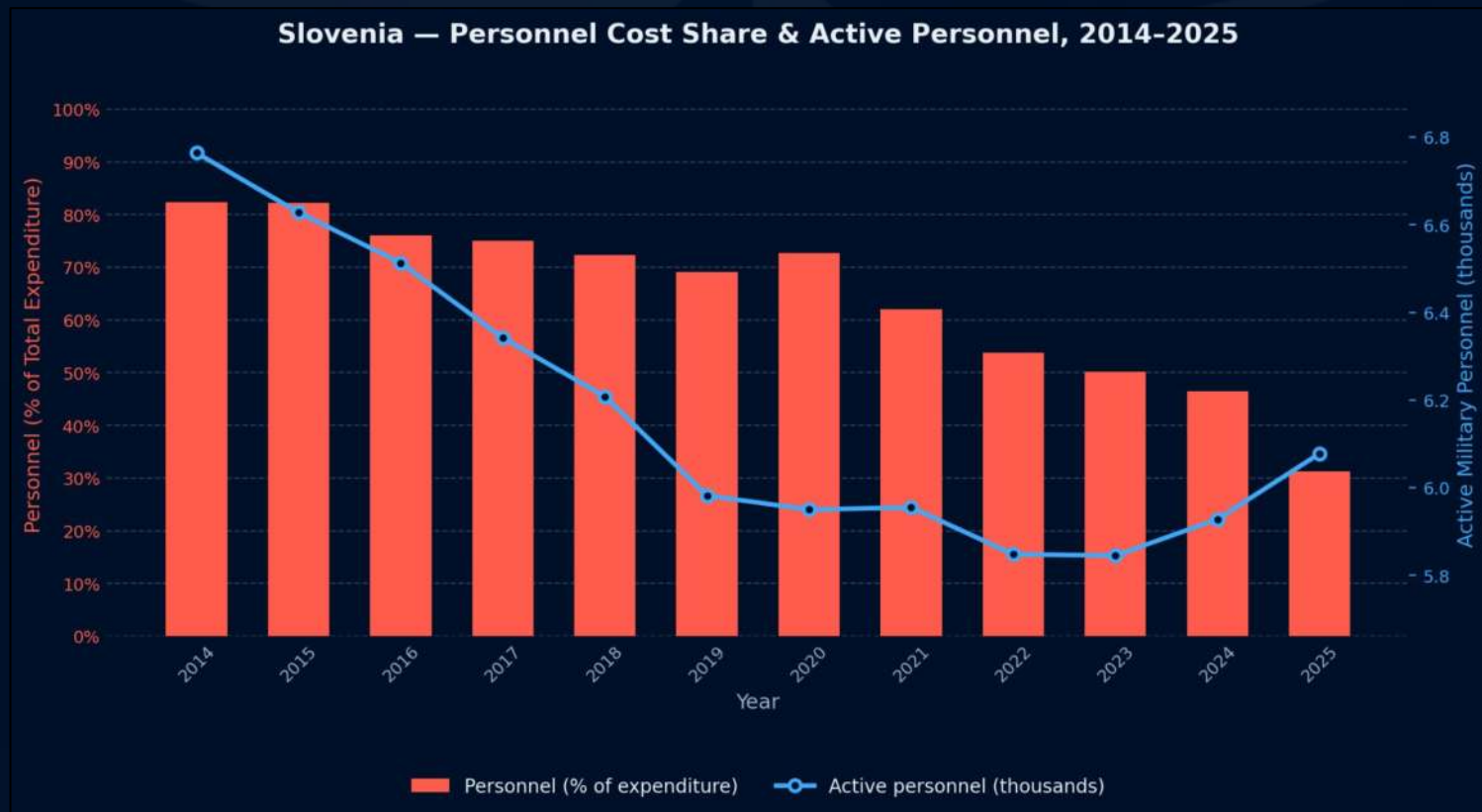
Slovenia's [equipment share](#) has risen dramatically—from near zero in 2014 to roughly 26% by 2025—reflecting deliberate readjustment away from a salary-heavy legacy structure. Major commitments include three IRIS-T SLM fire units, 12 CAESAR 155mm howitzers ordered June 2025, and a Letter of Intent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



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

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



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

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



# MILITARY CONTRIBUTIONS

## *Force Posture*

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



# MILITARY CONTRIBUTIONS

## *Industrial Base*

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



# STRATEGIC ALIGNMENT

## *Declared Posture*

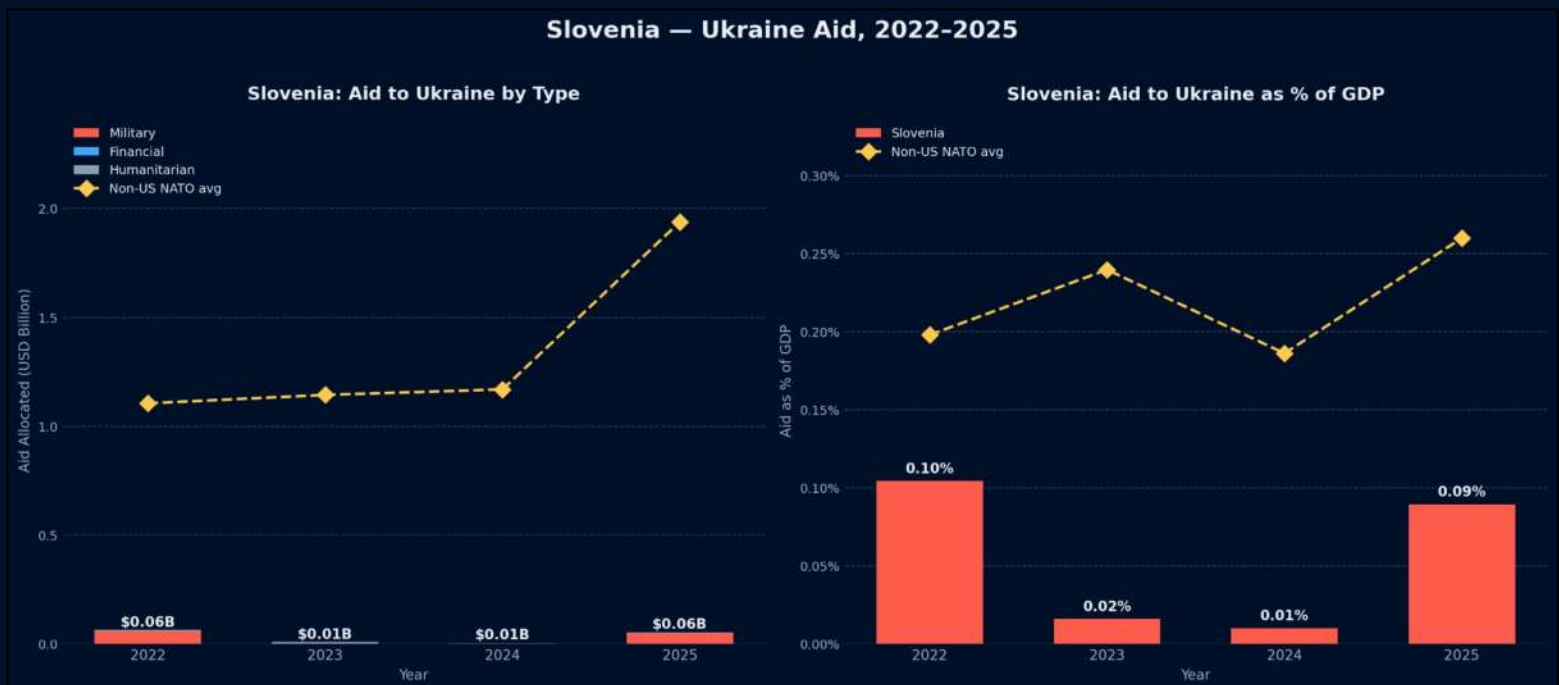
Slovenia's [2019 National Security Strategy](#) frames Russia's war against Ukraine as a fundamental deterioration in European security, though without the existential threat language used by front-line allies. On China, Slovenia's posture is weaker than most NATO peers—its October 2024 no-vote on Chinese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



# STRATEGIC ALIGNMENT

## *Ukraine Support*

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



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

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



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

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



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

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



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

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





# SPAIN

## NATO Country Assessment — *TIER THREE* —

CRITICAL BASING • FLAGRANT FREE-RIDER • UNDERMINING ALLIANCE





# AT A GLANCE

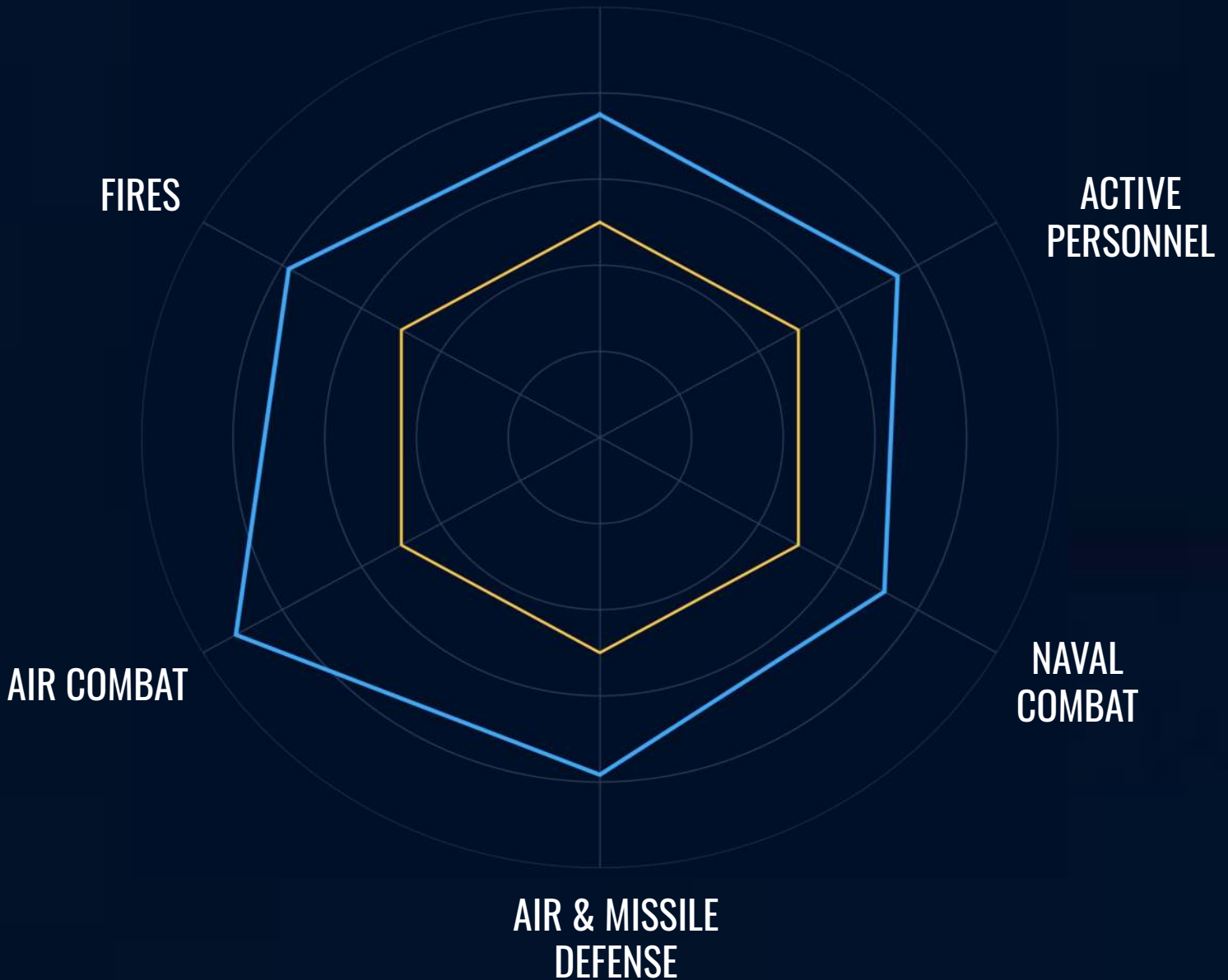
## *Toplines*

- **Critical Basing Infrastructure for American and European Security:** Spain hosts two of NATO's most valuable US basing assets at Rota Naval Base and Morón Air Base making Spain critical to US and NATO naval and crisis-response operations across the Mediterranean, Atlantic, and North Africa.
- **Flagrantly Rejecting Responsibility and Actively Free-Riding:** Spain was the only NATO member to formally reject the Hague 3.5% core defense target, despite smaller and poorer allies signing on.
- **Damaging Regional Security and Undermining the Alliance:** Spain denied US use of Rota and Morón and closed Spanish airspace during Operation Epic Fury, directly undermining the United States ability to take action to protect the West.



# FORCE STRUCTURE AT A GLANCE

LAND COMBAT



AIR & MISSILE  
DEFENSE

— SPAIN  
— 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.

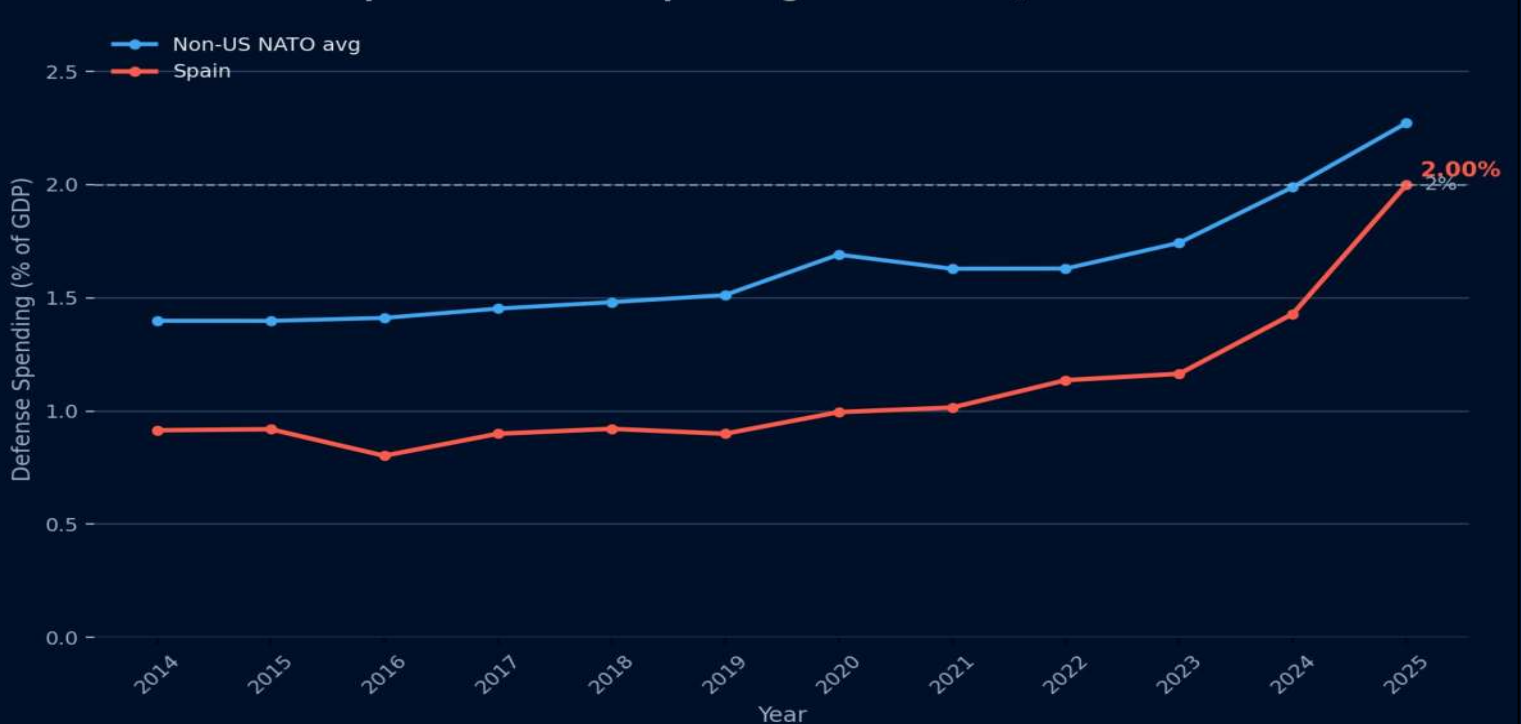


# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

Spain's [defense spending](#) record is the most problematic of any major NATO economy. Spain reached 2.00% of GDP in 2025—nominally meeting the NATO floor for the first time—but the [figure is contested](#), with roughly a third of the increase attributed to telecommunications and cybersecurity spending classified under looser categories rather than core military capability. Spain spent below 1% of GDP for most of the post-Cold War period and just barely hit 1% in 2021. At the June 2025 Hague Summit, Spain was the [only NATO member](#) to formally reject the 3.5% core defense target within the 5% framework—a commitment every other member signed, including countries far smaller and poorer. The April 2025 €10.471B spending increase was driven by sustained allied pressure rather than strategic conviction, and the trajectory beyond 2% remains the alliance's most contested open question among major economies.

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

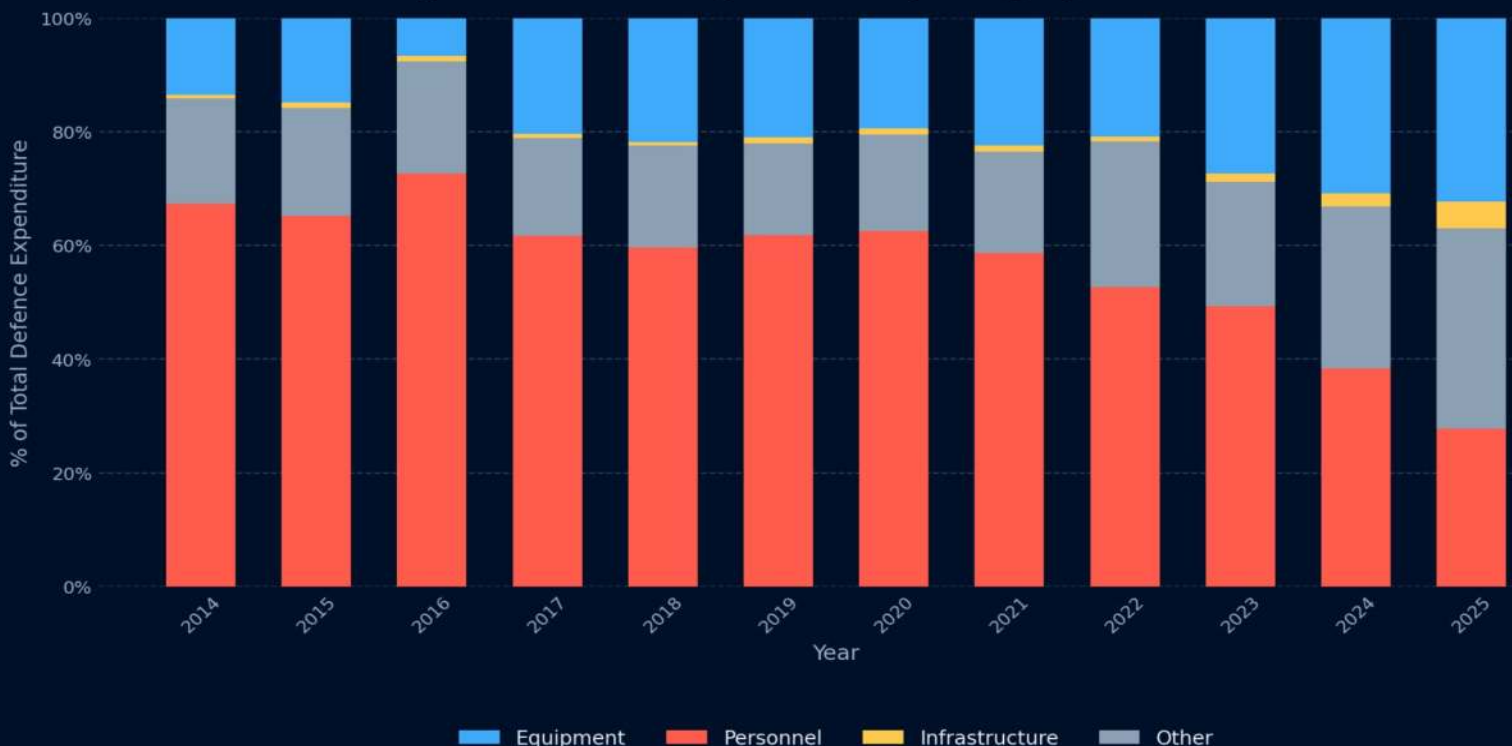


# MILITARY CONTRIBUTIONS

## *Equipment Share*

Spain's [equipment share](#) reached ~32% in 2025, above NATO's 20% guideline. The most consequential equipment gap is combat air: Spain ruled out F-35 acquisition in August 2025 in favor of waiting for FCAS—which France and Germany formally cancelled on June 8, 2026—leaving Spain an entirely fourth-generation air force with no fifth-generation path and no timeline for one. Spain's [Chief of Defense Staff](#) [acknowledged](#) the gap directly, stating the country will have to “survive with the fourth generation we have and wait for the FCAS someday.” Eight Patriot Configuration-3+ batteries (four contracted 2023, four late 2025) represent real air defense progress, but ground forces have no HIMARS, no long-range rocket artillery, and no standoff strike capability.

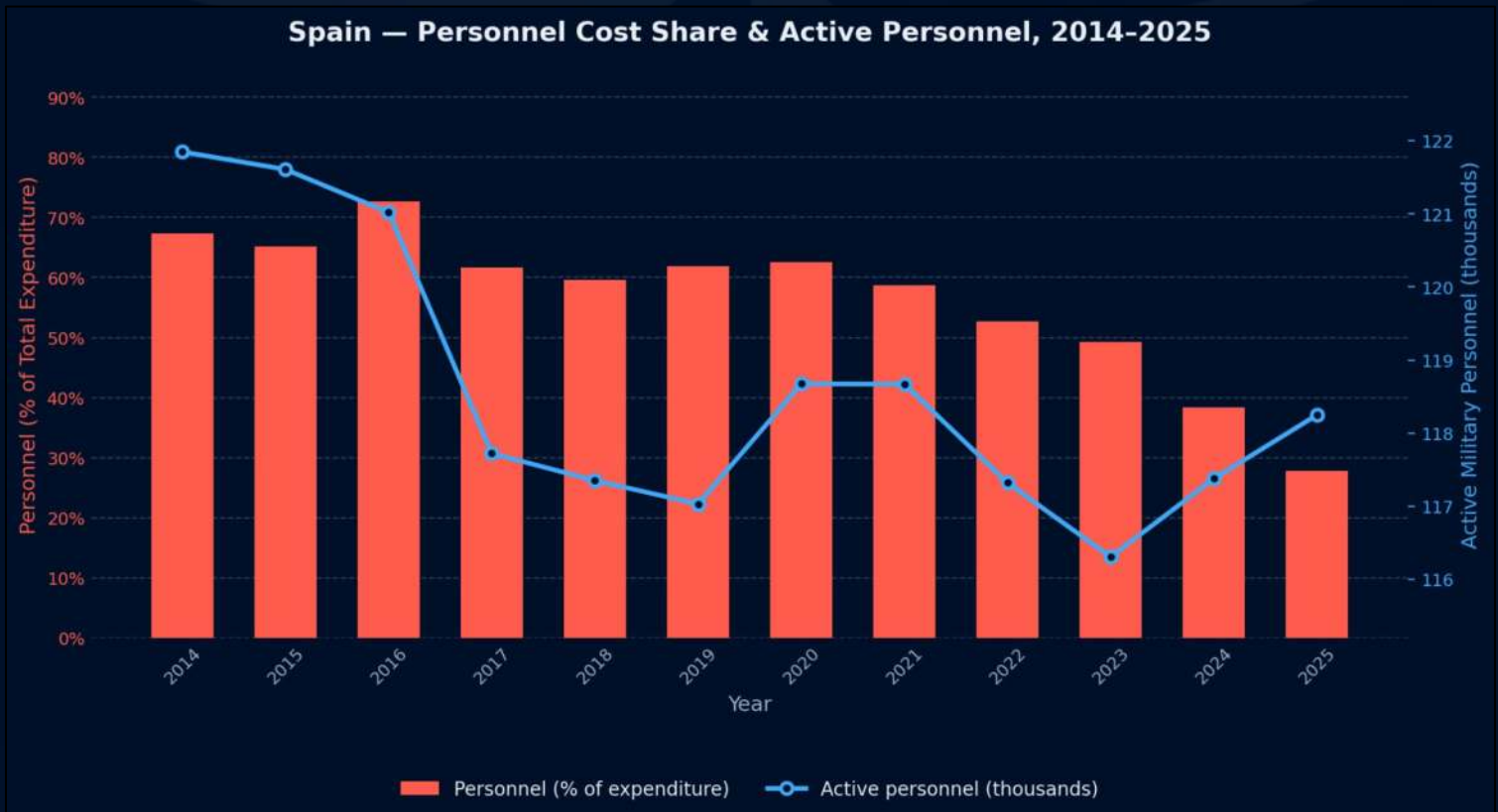
Spain — Defence Expenditure by Category, 2014-2025



# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

Spain's personnel cost share has fallen sharply (from ~67% in 2014 to ~28% by 2025), one of the more dramatic re-budgeting shifts in the alliance. Active personnel have declined modestly from ~122,000 to ~120,000 over the period, reflecting a professional all-volunteer force that eliminated conscription in 2001. Spain has not set aggressive personnel expansion targets comparable to eastern front allies, and recruitment has been a persistent challenge for a country where military service carries limited benefits. For a country of 47 million and the 14th-largest global economy, 120,000 active personnel is a reasonable absolute number—the quality and equipping of that force, rather than its size, is Spain's primary manpower challenge.



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

Spain's [modernization strategy](#) prioritizes naval capability and air defense while accepting a severe and now open-ended gap in combat air. The Patriot upgrade—eight Configuration-3+ batteries across two contracts (\$2.8B in 2023, four more in late 2025)—is the most consequential near-term improvement. Naval forces represent Spain's strongest domain: five Álvaro de Bazán Aegis destroyers, the Juan Carlos I, and four S-80 Plus submarines entering service. Ground forces have 274 Leopard 2 tanks but no HIMARS, no long-range rocket artillery, and no standoff precision strike capacity. The defining modernization failure is combat air: Spain ruled out F-35 acquisition in favor of FCAS—which France and Germany cancelled on June 8, 2026—leaving Spain with no fifth-generation path.



# MILITARY CONTRIBUTIONS

## *Force Posture*

Spain hosts two of NATO's most strategically significant US basing assets. [Rota Naval Base](#) is home to US forward-deployed Arleigh Burke-class Aegis destroyers under the European Phased Adaptive Approach, agreed to expand from four to six, making Rota one of the most important US naval access points in Europe for Mediterranean, Atlantic, African, and Middle Eastern operations. [Morón Air Base](#) provides US crisis-response, airlift, and support infrastructure with relevance for North African and Mediterranean contingencies. Spain has led NATO's [Multinational Battlegroup Slovakia](#) since July 2024—its primary eastern front ground contribution. NATO's Rapid Deployment Corps headquarters at Bétera gives Spain a high-readiness corps command role, and the Combined Air Operations Center at Torrejón provides alliance air-command infrastructure for Southern Europe.



# MILITARY CONTRIBUTIONS

## *Industrial Base*

Spain's [defense industrial base](#) has meaningful strengths in naval systems and defense electronics. [Navantia](#) is a capable naval platforms, producing the Álvaro de Bazán destroyers and S-80 Plus submarines with genuine export potential. Spain holds approximately 13% of Eurofighter workshare through Airbus Defence and Space. [Indra](#) provides radar, C4ISR, and defense electronics with alliance-relevant capabilities. Spain has no significant armored vehicle or missile production, and the F-35 rejection removed Spain from the global F-35 industrial supply chain. With FCAS now cancelled, Spain's aerospace industrial positioning requires reassessment. Raw material contributions are limited: Spain has no significant critical mineral or defense-relevant resource base that distinguishes it.



# STRATEGIC ALIGNMENT

## *Declared Posture*

Spain's [2021 National Security Strategy](#) frames Spain as a committed NATO ally with support for Ukraine and eastern front deterrence, while identifying the Sahel, North Africa, and Maghreb as primary threat vectors. Spain has a [Mediterranean-first orientation](#) that de-prioritizes eastern front deterrence relative to front-line allies. On China, [Sánchez has argued explicitly](#) that Europe and China should forge closer ties, framing engagement as a strategic alternative rather than a risk to manage. Spain's posture toward China has drawn repeated US and NATO warnings about Chinese data and telecommunications access. On spending, Spain's formal rejection of the Hague 3.5% target is the clearest gap between declared alliance commitment and actual policy, with Sánchez describing the requirement as "unreasonable and counterproductive." The declared posture is nominally NATO-aligned at the document level; the operational and diplomatic conduct represents one of the alliance's widest strategy-behavior gaps.



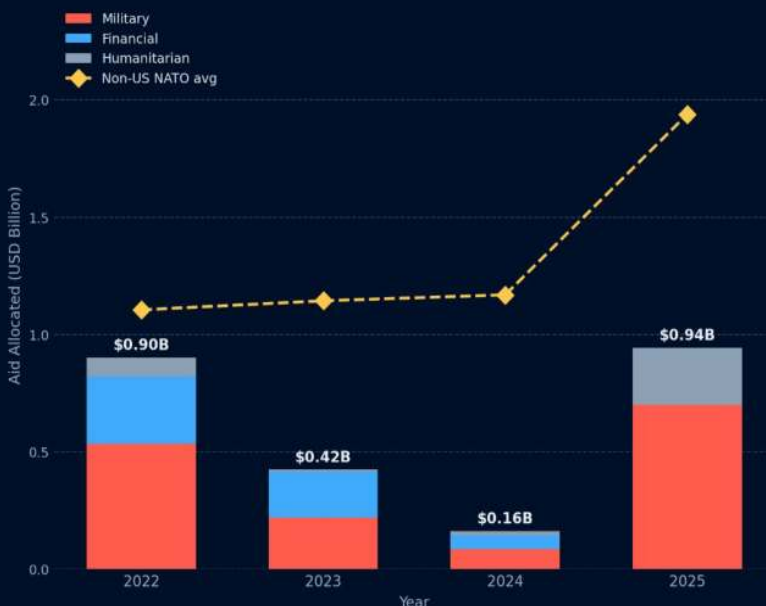
# STRATEGIC ALIGNMENT

## *Ukraine Support*

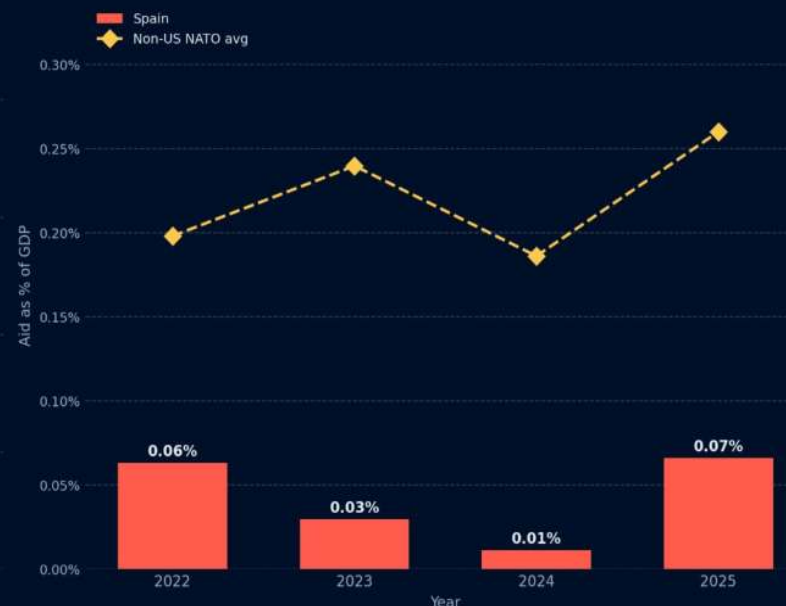
Spain's [Ukraine support](#) is disappointing for a major NATO ally. Despite the relatively low aid, it has provided meaningful capabilities. Kiel tracks €2.228B allocated: roughly 0.05% of GDP annually, well below the non-US NATO average and Spain's peer group. Confirmed transfers include Patriot interceptors, a HAWK battery, 20 Leopard 2A4 tanks, Aspide air-defense systems, OTO Melara howitzers, and ammunition. Spain's most distinctive contribution is the [Toledo Training Coordination Center](#): over 9,000 Ukrainian personnel trained across 230+ modules covering Patriot, HAWK, Leopard 2, artillery, and combined-arms tactics by May 2026, one of NATO's most comprehensive Ukraine training programs. Spain reportedly resisted a fixed 0.25% GDP annual military-aid benchmark, consistent with its broader resistance to binding alliance spending commitments.

Spain — Ukraine Aid, 2022-2025

Spain: Aid to Ukraine by Type



Spain: Aid to Ukraine as % of GDP



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

Spain's Russian energy decoupling is clean on pipeline gas and oil—Algerian and Norwegian supply dominate, with no Rosatom nuclear dependence. The complication is LNG: Spain emerged as one of the EU's [larger Russian LNG importers](#) post-2022, with Spanish ports serving as notable re-export nodes garnering EU scrutiny. Spain has supported every EU sanctions package without obstruction but has not been consistent for shadow-fleet listings or tougher enforcement. The EU's progressive LNG phaseout measures will close the re-export channel over time, but until they do, Spain's role as a Russian LNG transit node remains a live decoupling concern that sits awkwardly alongside its declared Russia posture.



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

Spain recorded 73% for staying in [NATO in 2024](#), 68% willing to defend another ally, and 70% agreeing NATO membership makes a foreign attack less likely, reasonable aggregate numbers. Forty-five percent favored increasing defense spending, and Ukraine support stood at around 77% combined, above the Southern European average. The Sánchez PSOE-Sumar coalition rejected the Hague 5% framework, with Sánchez publicly calling the goal “unreasonable,” while Sumar’s left flank contains forces that hold even more anti-NATO positions. The PP (Partido Popular) in opposition is more conventionally pro-NATO and has attacked Sánchez’s public theatrics against Trump as damaging to alliance cohesion. Spain is the one ally where the governing coalition’s left flank creates active downward pressure on defense spending rather than passive reluctance.



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

Spain's hedging behavior is the most concerning of any major NATO country. There is no adversary arms procurement, but Spain has generated sustained alliance friction across three simultaneous dimensions. On China, Sánchez's April 2025 and April 2026 [Beijing visits](#), King Felipe VI's November 2025 state visit, and Sánchez's explicit argument that Europe and China should forge closer ties drew consecutive [US ambassador warnings](#) and Treasury Secretary criticism. Spain's hedging toward China is the most sustained US-NATO bilateral friction over China engagement issued to any ally. The US ambassador's May 2026 [warning about Chinese-linked](#) companies in sensitive Spanish public contracting is the most specific recent concern. On Iran, [Spain denied US use](#) of Rota and Morón and closed Spanish airspace during Operation Epic Fury—crossing from rhetorical autonomy into damaging operational obstruction. Spain's behavior consistently undermines shared goals and has generated more sustained alliance friction across China, Iran, and defense spending simultaneously than any comparably-sized NATO member.



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

Spain's operational cooperation record is split between a strong historical baseline and a significant recent rupture. Spain deployed thousands of troops to both [Iraq](#) and [Afghanistan](#), sustaining casualties, and contributed to NATO-led Libyan operations in 2011. Spanish basing and airspace access [supported US counterterrorism](#) operations in North Africa and the Sahel across both the Obama and Trump administrations, with Morón serving as a key hub for AFRICOM rapid-response operations including the 2013 Mali intervention support. Toledo Training Center's 9,000+ trained Ukrainian personnel across 40 specialties represents one of NATO's most valuable per-euro Ukraine contributions. Spain has led NATO's Multinational Battlegroup Slovakia since July 2024 and participates in [EU NAVFOR MED IRINI](#) and NATO maritime missions. Against this baseline, the decision to deny basing access for Operation Epic Fury represents the most damaging operational obstruction of US military operations by any NATO ally in the current crisis. Trump's justified frustration with Spain at the 2026 NATO Summit illustrates that the alliance is also economically linked and failure in security cooperation can lead to a degradation in economic cooperation.





# TURKEY

## NATO Country Assessment — *TIER THREE* —

MIDDLE EAST BASING • RUSSIAN ARMS PURCHASES • ENGAGING THE ENEMY





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# AT A GLANCE

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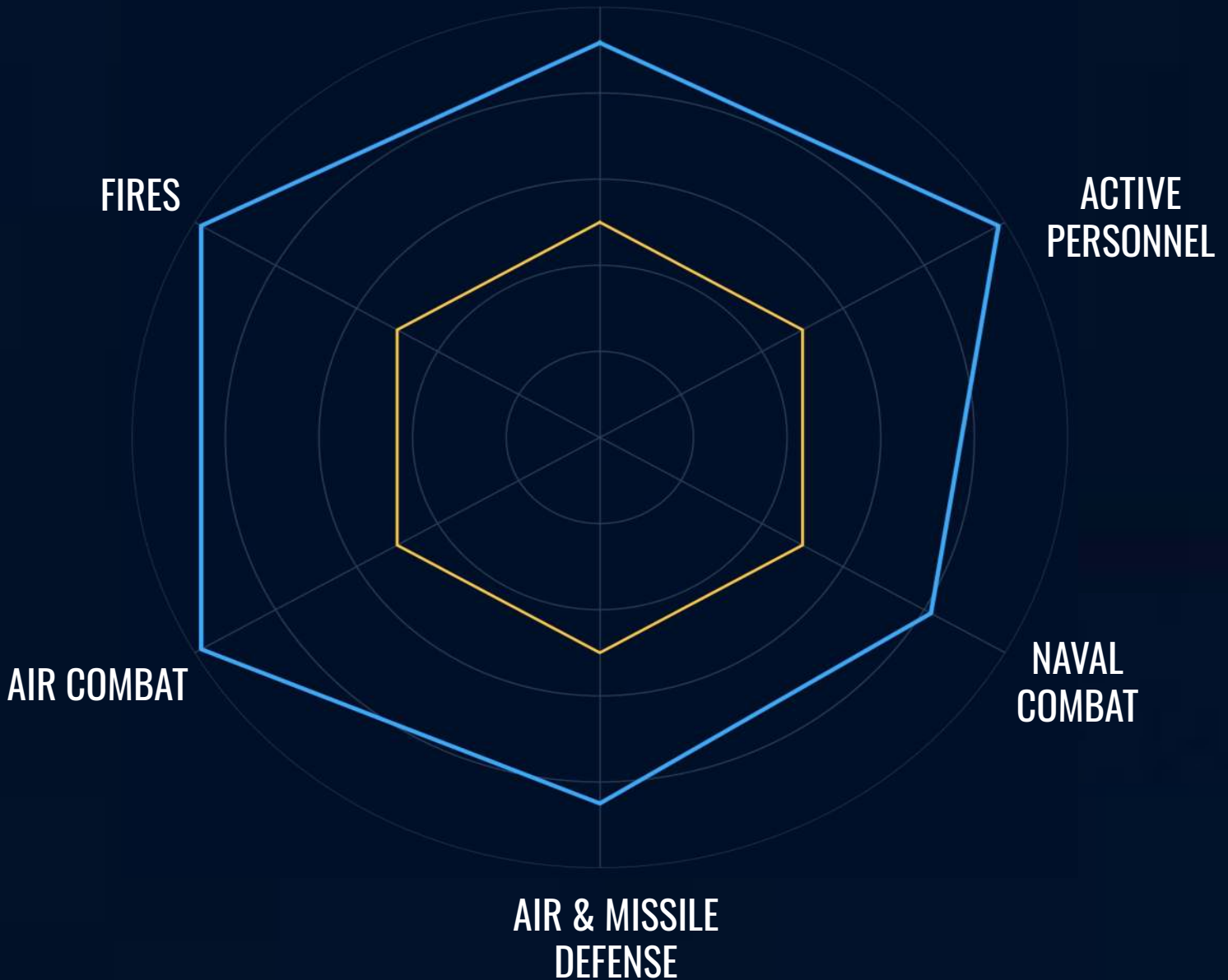
## *Toplines*

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



# FORCE STRUCTURE AT A GLANCE

LAND COMBAT



AIR & MISSILE  
DEFENSE

— TURKEY  
— 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.

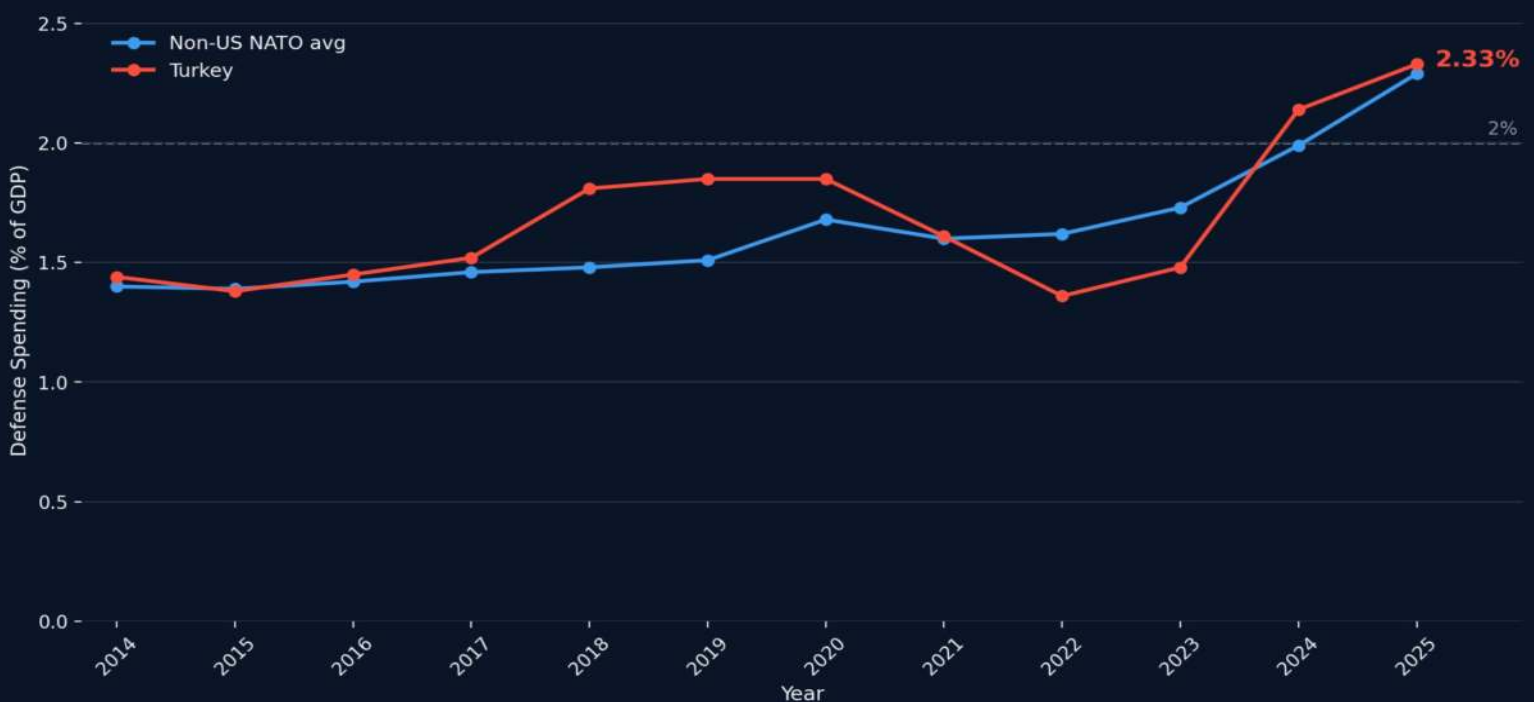


# MILITARY CONTRIBUTIONS

## *Defense Spending Level*

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

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

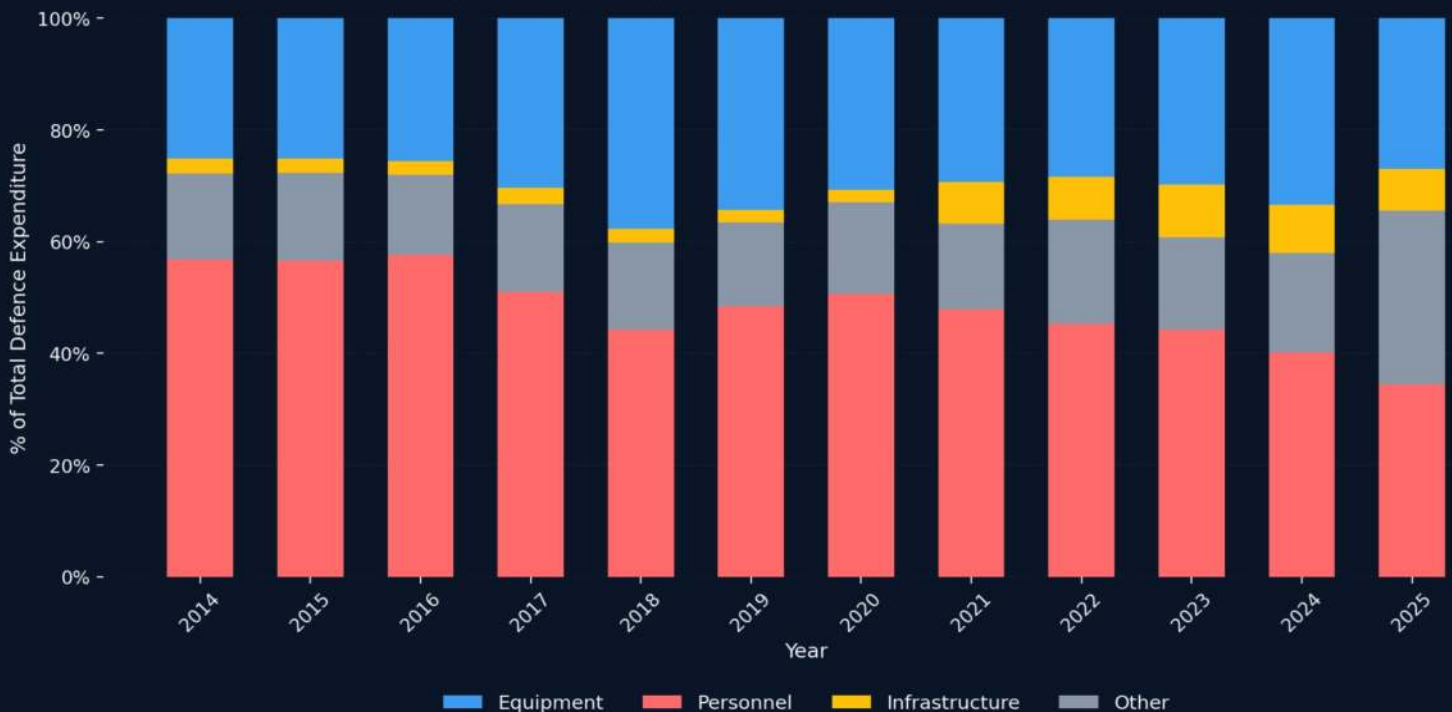


# MILITARY CONTRIBUTIONS

## *Equipment Share*

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

Turkey — Defence Expenditure by Category, 2014-2025

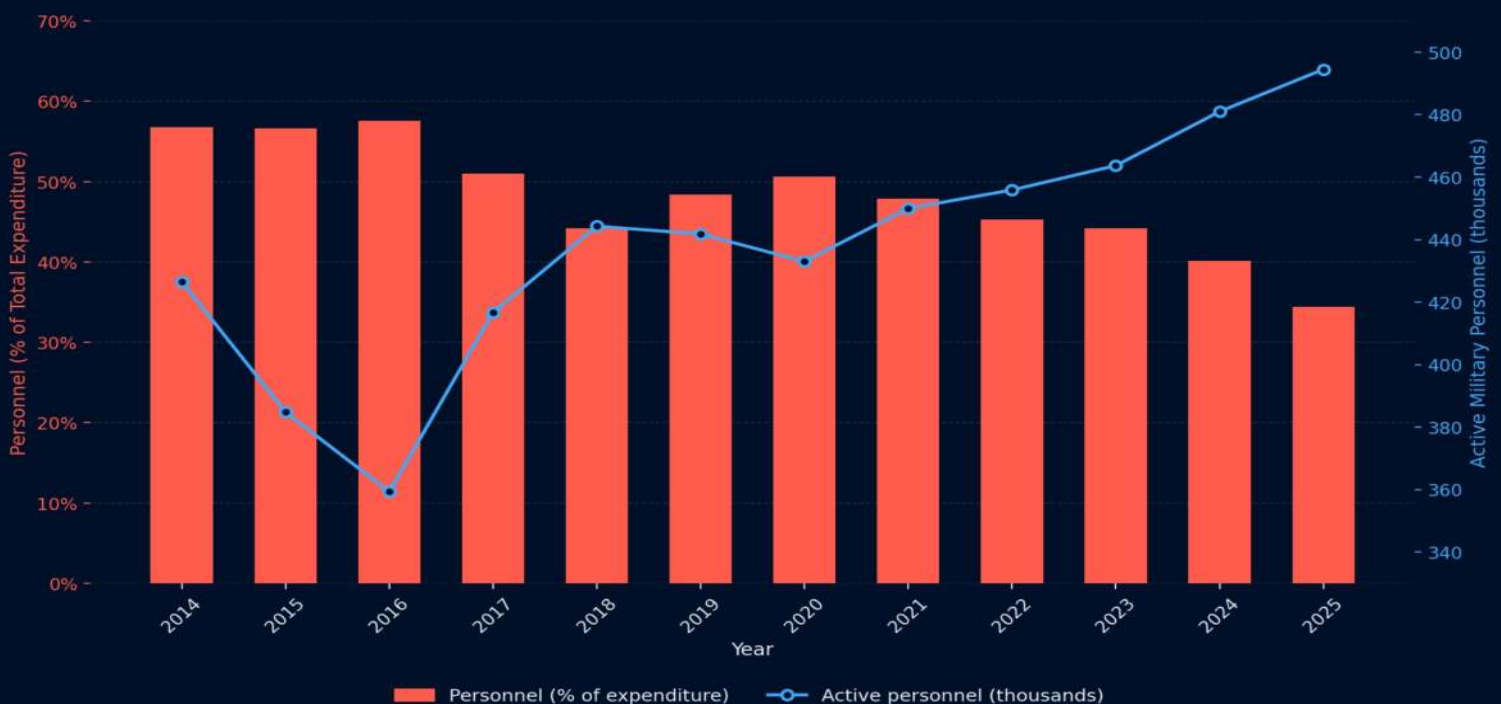


# MILITARY CONTRIBUTIONS

## *Manpower & Recruitment*

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

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



# MILITARY CONTRIBUTIONS

## *Capability Modernization*

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



# MILITARY CONTRIBUTIONS

## *Force Posture*

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



# MILITARY CONTRIBUTIONS

## *Industrial Base*

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



# STRATEGIC ALIGNMENT

## *Declared Posture*

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



# STRATEGIC ALIGNMENT

## *Ukraine Support*

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



# STRATEGIC ALIGNMENT

## *Russian Decoupling*

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

### Russia-Turkey gas pipeline plans

Moscow and Ankara seek to develop Turkey as a transit route for Russian gas to Europe, avoiding Ukraine



# STRATEGIC ALIGNMENT

## *Public Support & Political Resilience*

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



# STRATEGIC ALIGNMENT

## *Hedging Behavior*

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



# STRATEGIC ALIGNMENT

## *Operational Cooperation*

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



# TIER 3

## *Policy Recommendations*

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

