



European Sovereignty Index

Jana Puglierin, Pawel Zerka (eds.) · June 2022

The EU can overcome the new challenges it faces and can shape the global order. To achieve this, Europeans will need to improve their joint capacity to act.


 Check out all the interactive charts and data at ecfr.eu/special/sovereignty-index

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OVERVIEW

European sovereignty is not about building fences or retreating from the world stage; nor should it stand in opposition to national sovereignty. Instead, it is about boosting the European Union’s capacity to manage the complex interdependencies that characterise today’s world. In the emerging global order, Europe needs to act according to its principles and values without being bullied by others. This requires both greater capabilities of its own and reliable alliances; openness and resilience; and some strategic protections but without drifting towards protectionism. For the EU to succeed, all member states will need to contribute their fair share – and it cannot afford weak links that other powers could use to divide them.

This index scores EU member states on their contribution to European sovereignty on six terrains: climate, defence, economy, health, migration, and technology. It covers their capabilities and commitments in these areas separately. The analysis is not limited to contributions within the framework of the EU, but also includes other initiatives that allow Europeans to work together to enhance Europeans’ capacity to act. The index draws on the scores of the 27 member states to produce an overall score for the EU on the six terrains. It also places the countries in four groups that reflect their varying roles in the EU’s efforts to build European sovereignty.

How sovereign is Europe in these areas?

The overall performance of the EU is weighted by population

● Excellent ● Good ● Satisfactory ● Poor ● Failing



Climate

5.4



Defence

5.9



Economy

6.2



Health

6.7



Migration

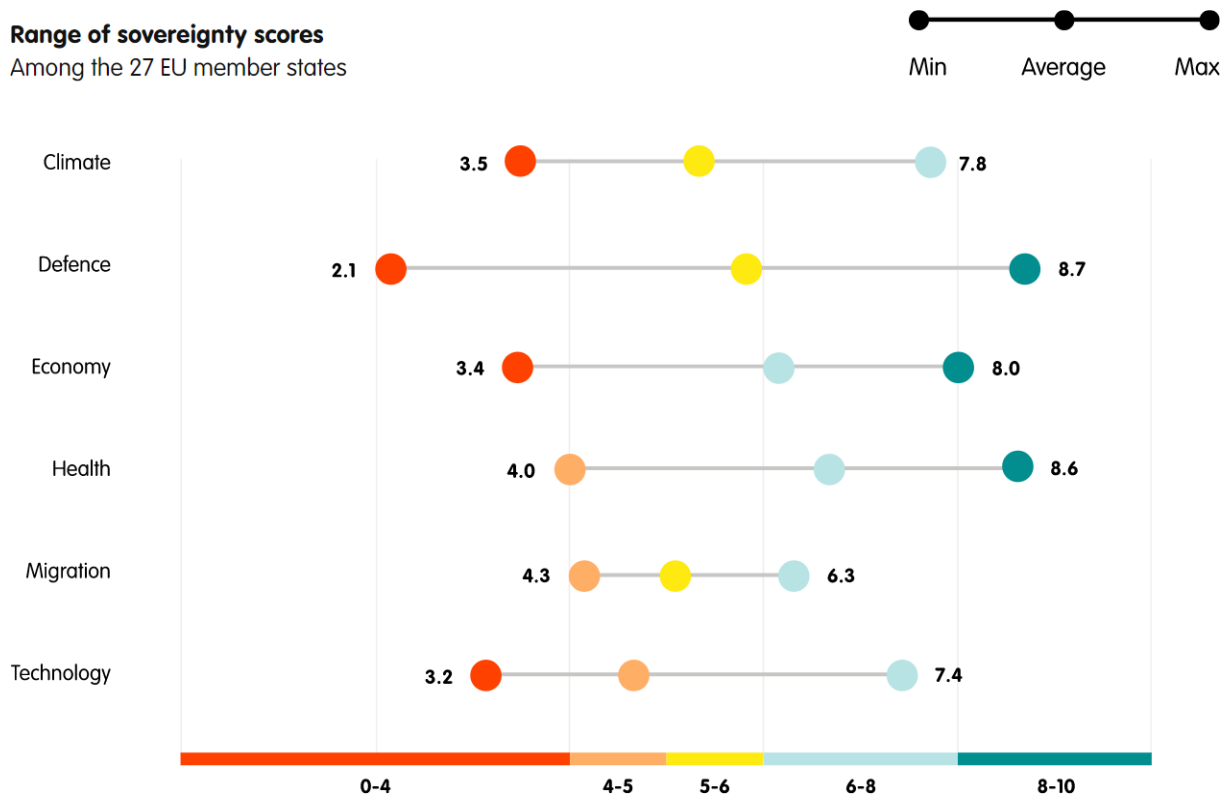
5.2



Technology

4.8

Range of sovereignty scores
Among the 27 EU member states



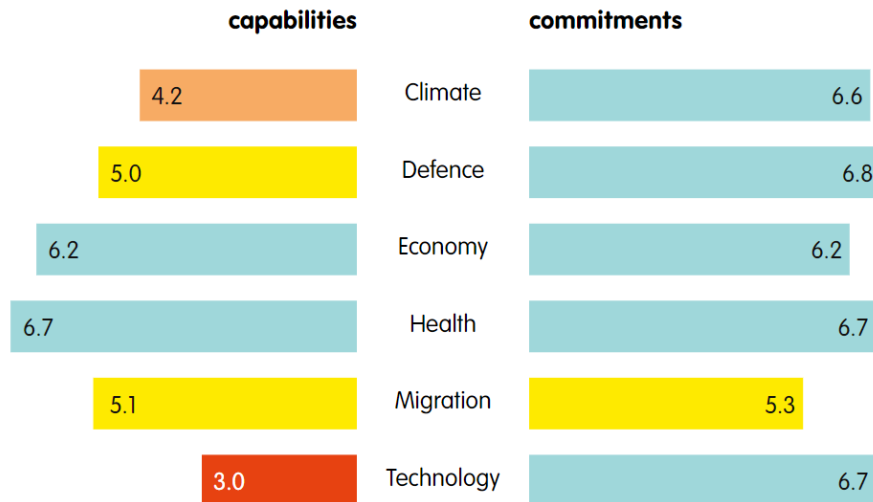
The index is designed to help the union identify its main strengths and weaknesses. The EU's scores are mixed:

- European sovereignty is 'good' in health and economy – but only 'satisfactory' in defence, climate, and migration, and 'poor' in technology. In no area is European sovereignty either 'excellent' or 'failing'.
- In technology, climate, and defence, the EU is doing much better on commitments than on capabilities. This appears to show that, while the union has the will to act, it lacks the resources to do so. But it could also signify that Europeans are not putting their money where their mouth is.
- The spread – the difference between the best- and worst-performing countries – is highest in defence. This shows that some countries are close to fulfilling their potential in contributing to European defence sovereignty, while others are failing terribly. The spread is lowest in migration: an area in which almost every country receives a 'satisfactory' or 'poor' grade – meaning that they are collectively responsible for the EU's mediocre score in that field.
- While five countries take on the role of 'leaders' of European sovereignty, more than twice as many are 'underperformers'. In total, only eight countries receive a 'good' score on average – while two are 'failing' not just in specific terrains but also in their average score.

How do sovereignty commitments and capabilities compare in Europe?

Among the 27 EU member states

● Excellent ● Good ● Satisfactory ● Poor ● Failing



There are two complementary ways of exploring the results of the index:

- One can look at country groups and profiles, and the ranking to see how EU member states compare to one another – and the main strengths and weaknesses of each.
- One can also look at the analysis of specific terrains to understand how the 27 EU members are doing on climate, defence, economy, health, migration, or technology – and to explore the differences between their contributions to European sovereignty in these areas.

The authors of this index believe that the EU can both overcome the new challenges it faces and shape the global order. To achieve this, EU member states will need to steadily expand their joint capacity to act. The best way to adjust to this new era is to build European sovereignty.

BY COUNTRY

Gosia Piaskowska, Pawel Zerka



Each country has been grouped according to its overall position, with additional consideration of high performance in specific areas.

The four groups are: ● leaders, ● strivers, ● one-hit wonders, and ● underperformers.

● Check out all the interactive profiles and data at ecfr.eu/special/sovereignty-index/#profiles

● Leaders

Countries that champion European sovereignty through their excellent contribution in specific areas or very strong performance overall.

France

France is among the key contributors to European sovereignty. Its leadership position stems from its ‘excellent’ contribution to the European Union’s security and defence policy. For many years, France has championed the EU’s collective interests in these areas – as demonstrated by its high score on commitment – and it continues to play a key role on defence issues within the EU. France also receives ‘good’ scores in health and economy. However, it is ‘poor’ in migration and ‘satisfactory’ in climate and technology. If France is to achieve its goal of building European strategic autonomy – including by establishing what the Office of the Ecological Transition Minister calls “a true ecological sovereignty for Europe” – it will need to increase its contribution in these domains.

The Netherlands

The Netherlands stands out as a leader of economic and health sovereignty in the EU. The country receives the highest score of any member state on the economic terrain, due to its exceptional capabilities. Yet, despite this, the Netherlands’ commitment to strengthening European sovereignty tends to exceed its capabilities. The country also ranks highly in technology and defence. The fact that it is in the top ten member states on every terrain underscores its place as a leader of European sovereignty.

Germany

Germany is one of the champions of European sovereignty, not least due to its ‘excellent’ score on health. It has some of the highest scores in migration, defence, and economy of any member state. These strengths, which align with Germany’s image as the leader of the EU, are the result of its investment in the union’s capacity to act and its public displays of commitment to European sovereignty. However, Germany has disappointing scores in technology and climate, mostly because its capabilities have fallen far short of its commitments. And, while Germany has the EU’s largest and most powerful economy, it is ranked only fifth on its contribution to European economic sovereignty – partly reflecting its complacency towards interdependencies with Russia and China. In this context, the way in which Berlin responds to Russia’s war on Ukraine could redefine the EU’s relations with other major economies.

Sweden

Sweden is a leader in European sovereignty thanks to its exceptional performance in five out of the six domains. This means that, across all areas aside from defence, Sweden is contributing extensively to the EU's capabilities and commitments. This position in the vanguard, and a growing need to improve the EU's collective defences following Russia's full-scale invasion of Ukraine, might suggest that Sweden will contribute more to common EU efforts on security and defence – the only area in which it is currently 'failing' the sovereignty project by not channelling its military activity through the EU. Now, with NATO membership on the horizon, and France and Germany taking a credibility hit over their muted response to the Ukraine crisis, Sweden might become a leader in EU defence.

Denmark

Denmark performs well in all areas of European sovereignty. The country makes a particularly significant contribution to the EU's health, economic, and climate sovereignty. Denmark's strongest capabilities are in health sovereignty – in which it is third only to Germany and the Netherlands – and it is most committed to economic and climate sovereignty, areas in which it is just behind Sweden in the overall rankings. While Denmark is not doing badly on defence compared to other member states, its capabilities and commitments in this area fall short of those in others. But this may now change following the country's referendum decision to remove its opt-out from the EU's Common Security and Defence Policy.

● Strivers

Countries that receive relatively high scores overall – and that make an important contribution to European sovereignty in at least three areas.

Belgium

Belgium is a reliable supporter of European sovereignty in all areas, receiving ‘good’ scores in health, economy, and defence, and ‘satisfactory’ scores in other domains. It is in fifth place overall in defence, due to its strong involvement in multilateral security cooperation backed by strong public support; it is sixth in economy and health. Therefore, Belgium is doing its part to bolster European sovereignty across the board. Migration is Belgium’s biggest weakness. In this, the country receives only a ‘satisfactory’ score.

Finland

Finland is one of several countries that scores relatively highly on all terrains. The country is in first place in technological sovereignty due to its good capabilities and excellent commitment to supporting common EU efforts. It is in third place in climate – only behind the other two Nordic EU members – for the same reasons. Defence is the one area in which Finland is lagging behind in its contribution to EU sovereignty, especially considering its potential. It remains to be seen how the war in Ukraine and NATO membership will affect Finland’s role in shaping the discourse on European security and defence, amid growing distrust in Germany and France.

Ireland

Ireland earned its place among the strivers through its adequate overall contribution to European sovereignty, with at least ‘good’ scores in economy, technology, and health. The country scores particularly highly in technology and economy, putting it in fourth place in both domains. Still, Ireland’s contribution to European sovereignty is not perfect. It is – alongside Malta – one of the EU’s least important contributors to defence sovereignty, an area in which it is ‘failing’.

Luxembourg

Luxembourg makes a ‘good’ contribution to European health, technological, economic, and climate sovereignty. In technology, it is second only to Finland; in health, it has fourth place. Still, this is often thanks to its strong commitments rather than its capabilities, which are especially weak in climate, technology, and health. Interestingly, the reverse is true for its contribution in economy, where it is among the EU’s most capable countries but not the most committed.

● One-hit wonders

Countries that are doing neither particularly well nor poorly overall – but that are helpful in one or two areas of European sovereignty.

Austria

Austria has found a niche in its contribution to European sovereignty. The country plays a vital role in building up Europe's sovereignty in multilateral cooperation through its contributions in climate and health. It is in fifth place in its contribution to climate sovereignty. However, the country is not doing as well in the other areas. It is among the 11 countries that are 'failing' in their contribution to defence sovereignty. And, in economy, it has a lower score than any of the other fiscally conservative member states (which also include Denmark, Finland, the Netherlands, and Sweden). This is mainly due to its asymmetric dependencies on Russia. The war in Ukraine has prompted Austria to revisit its economic policies – but not its defence policies – in relation to Russia.

Italy

Like Spain, Italy has 'good' scores in two areas – defence and health – but those in other areas are 'poor' or 'satisfactory'. With strong commitments and capabilities in defence, Italy is only behind France and Germany in its contribution to European defence sovereignty. And, in health, it has made significant efforts to shape the global agenda and protect Europe's sovereignty on issues related to the pandemic. The Draghi government's commitment to both the EU and multilateralism is a promising sign that Italy can become an influential player in Europe. But, as one of the EU's five largest member states and given its potential, Italy needs to invest more in its capabilities – especially in climate and technology.

Malta

Despite only receiving a 'poor' score on average and 'failing' in one area (defence), Malta stands out in its contribution to European sovereignty in migration – where it ranks below only Sweden, and shares second place with Germany. Malta hosts a disproportionately large share of migrants relative to its population and shows a strong commitment to the EU's common approach to the issue. However, with the joint-lowest score in defence (along with Ireland) and 'poor' or 'satisfactory' results in other terrains, Malta has a lot of work to do – especially in its capabilities – if it wants to increase its contribution to European sovereignty.

Portugal

Despite receiving only a 'satisfactory' score overall, Portugal makes a significant contribution to European climate sovereignty. Its commitments are particularly strong in this area, while

its capabilities are weaker – the reverse of Finland’s situation. Portugal receives only a ‘satisfactory’ score on migration but is still among the best-performing EU members in this area – far ahead of Spain, France, and Italy. Nonetheless, this is largely due to the country’s strong commitments. Therefore, Portugal will need to invest in its capabilities if it is to boost its overall contribution to European sovereignty.

Slovenia

Slovenia makes a ‘satisfactory’ overall contribution to European sovereignty, with middling scores in all areas – except for health, where it has an especially positive impact. Moreover, Slovenia is the EU’s eighth-biggest contributor to technology sovereignty; a rare achievement among the countries that have joined the union since 2004. With its new liberal, pro-European government led by an environmentalist, Slovenia has the potential to become a more important player by expanding its portfolio and investing more in its capabilities – which tend to lag behind its commitments, especially in technology, climate, and defence.

Spain

Spain receives ‘good’ scores in health and economy, while performing relatively well in other domains overall. Its performance is ‘satisfactory’ in climate and defence, and ‘poor’ in technology and migration – in which its commitments and capabilities are equally inadequate. Although it is among the member states most committed to European climate sovereignty, Spain has relatively weak capabilities in this area. Meanwhile, in technology, Spain’s performance is above average in the areas of connectivity, regulation, and cybersecurity but poor overall due to shortcomings in other areas. Despite its average overall results, Spain is distinct from countries such as Poland in the sense that it is not ‘failing’ in any area.

Estonia

Estonia has the highest average score among the 13 countries that have joined the EU since 2004. It makes a relatively strong contribution to European migration sovereignty, with both good capabilities and commitments to supporting the EU’s efforts on this front. The country receives average scores in other areas thanks to the mismatch between its strong commitments and weak capabilities, one of the biggest divides of this kind in the EU.

● Underperformers

Countries with low or very low scores. They do not pull their weight in strengthening European sovereignty, due to insufficient resources, commitment, or both in multiple areas of sovereignty.

Greece

Greece's overall contribution to European sovereignty is middling across all domains – making it 'satisfactory' on average. Despite being relatively committed to building a sovereign EU, Greece lacks the capabilities to help achieve this across the board. The country's main shortcoming is its 'poor' contribution to European economic sovereignty, receiving one of the lowest scores in the area among the EU27. This is largely an effect of its limited capabilities – which make it vulnerable to the weaponisation of trade and investment by global powers.

Latvia

Latvia's scores are 'poor' on average – better than the Visegrad countries (the Czech Republic, Hungary, Poland, and Slovakia) but worse than the other two Baltic states, Lithuania and Estonia. Defence is Latvia's biggest weakness, as it is among 11 member states that are 'failing' in their contribution to European sovereignty in this area. Lithuania also receives some of the lowest scores in health and economy. It performs better – albeit still only 'satisfactory' – in climate and migration. In technology and economy, Latvia's commitments far exceed its capabilities – showing where it should invest in improving its contribution to European sovereignty.

Cyprus

Cyprus's scores range from 'failing' in economy and defence to 'satisfactory' in health, technology, and migration, to 'poor' in climate. The contrast between the country's strong commitments and weak capabilities is the starkest in the EU. For example, in technology and migration, it is among the most committed member states – but its capabilities are limited. The country's main weakness is economy, in which it receives the third-lowest score of any member state, partly due to its dependence on and complacency towards Russia.

Lithuania

Lithuania receives a 'satisfactory' score on average. Among the 13 countries that have joined the EU since 2004, only Estonia and Slovenia perform better. Lithuania's scores in technology and defence are 'poor' – but are 'satisfactory' in the remaining four terrains. One of the country's strengths is economy, in which it falls just short of receiving a 'good' score – mostly thanks to its almost 'excellent' commitment. Migration is another of its strengths:

despite receiving only a ‘satisfactory’ score, it is in ninth place. However, on all terrains – and in economy, climate, technology, and defence – its capabilities lag far behind its commitments. Therefore, to improve its overall contribution to European sovereignty, the country will need to make a significant investment in capabilities.

Bulgaria

Like Hungary, Bulgaria is one of the EU’s two worst-performing members on average. It receives the lowest score in economy of any member state, which partly reflects its asymmetric dependence on Russia. And it is also ‘failing’ in defence and technology. In no area does Bulgaria receive a ‘satisfactory’ or better score. The country might improve its performance under its new, pro-European government; however, this would require it to develop capabilities and not just show commitment.

Croatia

The EU’s newest member is also its fifth-worst performer overall. Croatia is especially weak in technology and defence, both areas in which it is ‘failing’. However, the country’s scores in climate, migration, and health are ‘satisfactory’, making them better than those of many other central or eastern European countries. Its commitment is ‘good’ in climate and migration – but, as in all the other domains, its capabilities are lagging behind.

Czech Republic

The Czech Republic is the EU’s seventh-worst performer overall in its contribution to European sovereignty. However, its scores are the highest among the Visegrad countries. Like Poland, the Czech Republic is only ‘failing’ in technology. It receives a ‘poor’ result in climate, migration, and defence – and a ‘satisfactory’ one in health and economy. Its highest score is in defence, where it is in 13th place. A mismatch between weak capabilities and strong commitments is the country’s biggest problem. For example, in economy, its commitment is ‘good’ but its capabilities are ‘poor’.

Romania

Romania is the EU’s third-worst performer in its overall contribution to European sovereignty. It is ‘failing’ in climate and technology, coming last in both areas. It also has the lowest score in health, even if this only means that it is ‘poor’ in the area. Migration is the only terrain on which Romania receives a ‘satisfactory’ score. And, even here, it is in the bottom half of the rankings. The country’s commitments tend to be higher than its capabilities – especially in defence and technology. But, in contrast to countries such as Poland and Slovakia, Romania does not have ‘good’ or better commitment in any area.

Slovakia

Slovakia is the EU's third-worst performer in its overall contribution to European sovereignty. It is 'failing' in technology and defence, and is 'poor' in the other four areas. Slovakia's commitment exceeds its capabilities on all six terrains – particularly climate, technology, and economy. Therefore, the country has the potential to improve its performance by developing its capabilities. But this potential is still limited, given that the country's commitment is 'good' only in climate and 'satisfactory' in all other areas except defence, where it is 'failing'.

Hungary

Notorious for its disregard for the rule of law, Hungary is the worst performer in its overall contribution to European sovereignty. It is the only country that is 'failing' in more than three areas, with just 'poor' scores in migration and health. Hungary ranks in the bottom three members on almost all terrains, except for health – where it is in 20th place. The country not only has weak capabilities (like many central and eastern European countries) but also – due to its government – has little commitment to European sovereignty.

Poland

With the lowest overall scores of the EU's five largest members, Poland performs especially poorly in technology, climate, migration, and health. It ranks among the bottom five in these areas. Despite Poland's huge effort to help Ukrainian refugees, its capabilities in this area are still 'poor', while its commitment to EU-level migration management is relatively weak. The country makes a better contribution to European sovereignty in economy and defence. However, in neither of these domains does Poland receive a 'good' overall score. This is chiefly due to its limited capabilities – which contrast with its relatively strong commitment.

RANKING

● Excellent ● Good ● Satisfactory ● Poor ● Failing

Country	Overall	Climate	Defence	Economy	Health	Migration	Technology
1 Germany	6.9	5.9	6.8	7.1	8.6	6.2	5.3
2 Netherlands	6.8	5.8	6.4	8.0	8.1	5.8	6.3
3 France	6.6	5.5	8.7	6.9	7.2	4.9	5.4
4 Sweden	6.5	7.8	3.7	7.3	7.6	6.3	6.8
5 Denmark	6.5	7.5	4.4	7.6	7.9	5.2	6.1
6 Belgium	6.2	5.5	6.3	6.9	7.3	5.0	5.5
7 Luxembourg	6.0	6.0	3.7	6.9	7.7	5.6	7.1
EU	5.9	5.4	5.9	6.2	6.7	5.2	4.8
8 Finland	5.8	6.6	4.2	5.9	6.5	5.7	7.4
9 Spain	5.8	5.9	5.3	6.3	6.7	4.7	4.8
10 Italy	5.8	5.2	6.5	6.0	6.4	4.8	4.3
11 Portugal	5.7	6.5	4.7	5.5	6.0	5.7	4.6
12 Slovenia	5.5	5.8	4.5	5.5	6.3	5.4	5.6
13 Estonia	5.5	5.8	4.9	5.4	5.2	6.0	5.9
14 Ireland	5.4	5.5	2.1	7.2	6.6	5.6	6.6
15 Greece	5.2	5.1	5.7	4.3	5.7	5.3	4.1
16 Lithuania	5.2	5.2	4.3	5.9	5.0	5.6	4.2
17 Austria	5.2	6.2	3.4	5.4	6.1	4.7	5.0
18 Malta	4.9	5.1	2.1	5.8	5.2	6.2	4.8
19 Czech Republic	4.7	4.4	4.2	5.2	5.3	4.5	3.6
20 Poland	4.7	4.2	4.9	5.6	4.4	4.3	3.6
21 Croatia	4.7	5.2	3.2	4.3	5.3	5.3	3.6
22 Latvia	4.7	5.3	3.4	4.9	4.6	5.0	4.3
23 Cyprus	4.6	4.8	3.5	4.0	5.5	5.4	5.3
24 Slovakia	4.4	4.7	3.1	4.4	4.9	4.8	3.4
25 Romania	4.4	3.5	4.0	4.8	4.0	5.5	3.2
26 Hungary	3.9	3.9	2.9	3.5	5.0	4.4	3.3
27 Bulgaria	3.9	4.0	3.2	3.4	4.1	4.8	3.5

BY TERRAIN

Climate

Nordic countries could spearhead the EU's efforts to achieve the Paris climate goals and to make Europe a technology and regulatory leader in the global green transition

Rafael Loss

Europe needs to strengthen its climate sovereignty. Member states receive an average score of 5.4 out of 10, when weighted by population. They perform better in climate than in technology and migration, but poorer than in health, economy, and defence.

Climate sovereignty is the capacity to achieve climate neutrality by 2050 and to help all nations achieve the goal of the Paris Agreement – to prevent the global average temperature from rising by more than 1.5°C above its pre-industrial level – while minimising Europe's vulnerability to weaponised interdependence. This requires the European Union to pursue mitigation efforts such as the green transition while accounting for critical interdependencies in areas such as green technology and renewable energy. Europe should use the opportunity presented by the green transition to mitigate its pre-existing weaknesses and vulnerabilities. Moreover, as there would be growing climate risks even in a world that achieved the Paris Agreement goals, the EU will need to adapt to these risks – and support others' adaptation efforts – with a focus on people most at risk from climate change.

Indicators

This assessment of member states' performance in the area focuses on two areas: how far countries have progressed in their green transition, especially on energy supply; and how much they contribute to EU leadership in the global green transition. The first area centres on indicators such as the share of renewables in national energy mixes, government subsidies for fossil fuels and renewables, stranded fossil-fuel assets, and relative independence from energy imports. The second centres on indicators such as member states' national green innovation ecosystems, investment in research and development, and support for ambitious and joint EU climate action globally.

Results

The three top-performing countries are the EU's Nordic members, with Sweden and Denmark each scoring more than 7.5 points, ahead of Finland's 6.6. They are followed by Portugal, Austria, and Luxembourg, which still exceed a 'good' 6 points. Structural and political factors ensure that Romania, Hungary, and Bulgaria occupy the lowest spots in the ranking, with fewer than four points each – showing that they are 'failing'. The EU's five

biggest economies are relatively strong in climate: Germany, Spain, the Netherlands, and France score above the EU average of 5.4 points – making them ‘satisfactory’ – while Italy is slightly below this. Among the countries that have joined the EU since 2004, only Slovenia and Estonia do better than average – each scoring 5.8 points – but for different reasons: while Slovenia is strong on commitment and weak on capabilities, the reverse is true of Estonia. Poland, the most powerful country in central and eastern Europe, receives the fourth-lowest score, with a ‘poor’ 4.2 points. The variation in member states’ scores is considerable, ranging from Sweden’s ‘good’ 7.8 to Romania’s ‘failing’ 3.5. This reflects marked differences in their attitudes towards EU climate goals and their respective ability to contribute. The data also suggest that, while Europeans – particularly the public – are strongly committed to climate sovereignty, member states generally lack capabilities in this area.

The data from the two climate case studies for this index – on the EU’s energy supplies and Europeans’ potential to shape the global green transition – show that a high score in one area does not necessarily correlate with a high score in the other. While the top performers do almost equally well in both areas, the others perform more unevenly.

Most countries receive higher scores for energy supply than for the global transition; on average, this gap grows as countries’ overall scores decline. The only countries to score better on the global green transition than on energy supply are Denmark, Finland, Luxembourg, the Netherlands, Belgium, and Cyprus (in order of their overall scores). Countries tend to be in a position to promote the global green transition more effectively when they have a high share of renewables in their energy mixes, few stranded fossil-fuel assets, and have relatively little reliance on energy imports – as well as when they have political and public support for renewables, energy efficiency, and European energy sovereignty. But these are not strict requirements. Denmark only achieves middling scores on energy supply, due to its national fossil-fuel industry, but it leads the EU in green and ecological innovation, research, and development. And the country is a dedicated supporter of the EU’s global climate ambitions, outperforming even Sweden – which is in first place in climate sovereignty overall – in this area.

EU institutions make a greater contribution to European sovereignty in climate than in other areas. The European Parliament is a constant source of pressure on national governments to adopt ever more ambitious climate targets, as well as the common resources and instruments to create a socially just green transition. The EU is also a collective actor in international climate negotiations, giving member states additional weight on the global stage and often helping individual governments strike side deals or gain other compensation through EU mechanisms. Moreover, the EU’s four freedoms and funding for innovation have created an ecosystem where research institutions, industry, and regulators can collaborate more seamlessly across national borders and make the EU a responsible global leader in green

technology. This role will become increasingly important in the next few decades, as the world embarks upon an unprecedented transition away from fossil fuels and towards climate neutrality.

🛡️ Defence

European states' average scores for commitment to security and defence sovereignty are twice as high as those for capabilities. This may be because it costs far less to make commitments than to invest in capabilities.

Charline Runge, Rafael Loss, Jana Puglierin

Europe's security and defence sovereignty is defined by Europeans' ability to ensure peace and security within their own borders, and to promote it further afield. A sovereign Europe would be able to respond to crises and conflicts in its neighbourhood even when the United States was unable or unwilling to engage with these issues. Within the framework of the transatlantic alliance, Europeans would be the backbone of conventional defence in Europe.

Europeans would be able to set their own political priorities and goals, and to make their own decisions in accordance with European rules, principles, and values. They would have the means, capabilities, and readiness to implement these decisions – autonomously, if necessary – in areas such as the credible use of military force. A sovereign Europe in security and defence would have a strong, innovative, and competitive defence industry whose expertise in future strategic technologies was on a par with that of other major powers.

Indicators

While in other policy areas this index focuses on contributions that strengthen EU institutions and initiatives, Europe cannot sufficiently strengthen its security and defence sovereignty solely within the framework of the Common Security and Defence Policy. This index analyses member states' overall engagement with NATO, the European Union, and other groupings, such as coalitions of the willing or other multilateral formats. To evaluate the state of European sovereignty, the index looks at territorial defence and crisis management, as well as countries' capabilities and commitments in both areas.

To evaluate countries' capabilities, the index assesses defence spending; troops deployed in joint missions and operations; membership in and contributions to military alliances and multinational standing forces; industrial cooperation; and military equipment. To evaluate commitment, the index assesses public opinion, member states' official statements, and participation in joint research and development efforts.

Results

Overall, the state of European security and defence sovereignty leaves much to be desired. Security and defence are areas in which member states have a mediocre overall performance – averaging 5.9, when weighted by population (although this is still a better result than for climate, migration, and technology). There is a considerable variation between member states' scores in the area, ranging from Malta and Ireland's 2.1 to France's 8.7. This is the largest gap between the top and bottom performers on any of the six terrains.

Eleven member states receive a 'poor' score in the area – more than on any other terrain

Smaller or neutral member states such as Ireland, Hungary, and Malta score less than 3 in security and defence sovereignty. Eleven member states receive a 'poor' score in the area – more than on any other terrain. But because large member states such as France, Germany, and Italy perform well (all three scoring 6.5 or more), European security and defence sovereignty looks relatively strong when weighted by population.

On average, the scores Europeans receive for commitment to security and defence sovereignty are twice as high as those for capabilities. This is not a surprising result considering that it costs far less to achieve a good score in commitment than in capabilities. Making a political statement, declaring EU security and defence as an important topic, and boosting the domestic defence industry by joining research projects is much easier than buying and maintaining military equipment or participating in military operations (which put soldiers and political capital at risk). Accordingly, Denmark and Spain are the only member states whose scores for capabilities are as high as those for commitment.

There is still a clear divide within the EU between member states that see US security guarantees as their main form of life insurance and those that also consider the EU to be an important player in security and defence, or would like it to become one. The countries that focus on the US are mainly those that have joined the EU since 2004. However, there are also exceptions here: Cyprus, Malta, and Slovenia also have a markedly pro-EU stance on this issue.

The EU's five biggest economies all receive a score higher than the EU average of 4.5. France is the only one with an 'excellent' score, while Germany and Italy receive 'good' scores (more than 6), Spain receives a mediocre score (5.3), and Poland receives a 'poor' score (4.9).

The biggest surprise is Estonia, which receives the same score as Poland. While it scores only 2.9 on capabilities, this is offset by a score of 7.0 on commitments. Estonia makes a relatively strong contribution to NATO operations and other non-EU military missions – within coalitions of the willing – but a much weaker one to EU operations. Its commitment to European security and defence sovereignty is reflected in excellent scores in public surveys and the country's participation in defence research projects.

It is no surprise that France is a leader in this area. Yet the fact that its score is almost two points higher than second-placed Italy suggests that President Emmanuel Macron has so far failed to convince other Europeans to follow his vision of security and defence sovereignty (or strategic autonomy).

Russia's war of aggression on Ukraine is likely to change the status quo significantly in the coming months and years. Countries such as Germany, Estonia, Denmark, Belgium, Austria, Lithuania, the Netherlands, Poland, Romania, and Portugal have already announced plans to increase their defence spending. Denmark has voted to end its opt-out from EU defence projects, while both Sweden and Finland are on their way to joining NATO. Estonia and France appear to be open to supporting the issuance of joint EU debt to fund higher collective defence expenditure.

Economy

The EU's economic sovereignty is dependent on member states' capacity to reach a consensus on key policy issues. Yet eight of them are doing poorly or worse in this area.

Pawel Zerka

The European Union will be economically sovereign when its member states, companies, and individuals are free to engage in economic activity as they wish – and when its member states and institutions can implement their preferred economic policies – without fear of interference by outside powers. This is particularly challenging in a world in which powers such as China, Russia, the United States, and Turkey are increasingly weaponising the EU's global economic interdependencies.

This index assesses member states' contribution to European economic sovereignty by focusing on trade and investment. It explores the extent to which member states are vulnerable or resilient to other actors' weaponisation of economic interdependencies.

Indicators

The index accounts for the complexity of trade and investment relations in their capacity to create both vulnerabilities and leverage. Therefore, rather than simply focus on the size of bilateral exchanges, the index also addresses the issue of the balance of power in member states' economic relationships with Russia and China.

The index also tries to tread the fine line between protections and protectionism. Reducing interdependencies with the rest of the world should not be the main way to make Europe more economically sovereign. But, equally, a laissez-faire approach to international trade and

investment is no longer sufficient. Europe needs a mixture of openness, diversification, and some protections – such as foreign direct investment (FDI) screening, measures to counter corruption, and an anti-coercion instrument at the EU level. This is reflected in the indicators the index uses to evaluate member states’ contribution to Europe’s economic sovereignty.

Therefore, in trade, the index assesses the asymmetries in member states’ trade with China and Russia, particularly their reliance on imports of Russian energy, and their economic leverage over the rest of the world through exports. These indicators all contribute to its assessment of member states’ capabilities.

In analysing member states’ commitments, the index focuses on public support for EU trade policies, as well as governments’ approach to implementing non-tariff trade barriers and openness to the EU’s anti-coercion instrument and 2022 economic sanctions on Russia.

To assess investment capabilities, the index focuses on member states’ need for investment (such as their gross financing needs and bond spreads), their FDI screening frameworks, and their interdependence with China and Russia – while also comparing their use of FDI to gain leverage over non-EU countries. On commitments, the index explores the level of political consensus between member states on Chinese and Russian investment, and the power of their domestic pro-China and pro-Russia lobbies – as well as their performance on corruption and FDI screening in practice.

Results

There is a significant variation between member states’ contribution to economic sovereignty but, when weighted by population, they receive a ‘good’ score (6.2) on average. Only the Netherlands receives an ‘excellent’ score (8 points). This reflects the fact that the country is not only strongly engaged with international trade and investment but is also prudent in avoiding excessive and disadvantageous asymmetries in this – and is supportive of initiatives that boost the EU’s protections (such as the anti-coercion instrument, FDI screening, and economic sanctions on Russia).

Eight countries receive a ‘good’ score, making economy the second-strongest area of European sovereignty, after health. These eight countries include not only the northern economic liberals such as Denmark, Sweden, and Ireland and the Benelux countries, but also the EU’s two biggest economic powers, Germany and France, and the most globalised southern European economy, Spain. In contrast, Austria and Finland – two of the EU’s wealthiest members – have lower scores, largely because of their asymmetric dependencies on Russia and China.

Bulgaria, Hungary, and Cyprus all receive ‘failing’ scores. This reflects their excessive dependence on Russia or China, their complacency about foreign lobbying, a lack of necessary protections (such as FDI screening and anticorruption measures), and the

resulting weaknesses in their potential economic leverage over non-EU countries. Croatia, Greece, Slovakia, Romania, and Latvia also receive worryingly poor scores in this area (less than 5 points each).

Italy and Poland – which are among the EU’s five biggest economic powers – receive only satisfactory scores, albeit for different reasons. Performing similarly on capabilities and commitments, Italy is close to receiving a ‘good’ overall score. Meanwhile, Poland is one of four countries – alongside the three Baltic states – that score much better on commitments than on capabilities. This means that, while both the government and the public in these countries strongly support European economic sovereignty, they are not capable of making a significant economic contribution to it.

In contrast, four countries – Austria, Hungary, Malta, and Germany – score significantly worse on commitments than on capabilities. This is why Germany only receives a ‘good’ rather than ‘excellent’ overall score on this terrain. A vulnerability to Russian and Chinese lobbying seems to be a particularly big problem for Germany, as it is for Hungary and Austria.

It is concerning that Germany, which has the EU’s most powerful economy, is not the biggest contributor to European economic sovereignty.

Meanwhile, the Czech Republic, Ireland, Lithuania, the Netherlands, and Poland all perform better in economy than in any other area of European sovereignty.

The EU’s economic sovereignty is dependent on member states’ capacity to reach a consensus on key policy issues, such as economic sanctions on Russia and trade with China. Therefore, it is particularly worrying that eight of them are doing poorly or worse in this area.

♥ Health

Health is the area in which European sovereignty is strongest, thanks to Europe’s health systems, pharmaceuticals industry, and commitment to global health. But the EU is held back by disparities between member states.

Anthony Dworkin, Gosia Piaskowska

The covid-19 pandemic transformed European citizens’ awareness of the importance of sovereignty in public health. This index shows that Europe has been broadly successful in maintaining its freedom of action in its response to covid-19, and that it is comparatively well placed to address future health threats. With the most critical phase of the pandemic seemingly coming to an end, the index shows that Europe is doing better at safeguarding its sovereignty in health than in any of the other areas we studied, with an overall score of 6.7.

The index defines health sovereignty as the capacity to protect Europeans' health independently of other international actors. Ideally, member states would be able collectively to provide a high quality of healthcare to their citizens, mount a whole-of-society response to health emergencies, and obtain the medical products they need to protect themselves against familiar and emerging diseases. However, due to countries' deep interdependence on these issues, sovereignty on this terrain also has a collaborative element. A sovereign EU would be able to use its influence to support global health by ensuring that medical goods were shared beyond Europe's borders and that adequate resources were directed towards improving health systems across the world. This is the ideal form of the global health system for a Europe that seeks to protect its citizens.

Indicators

To assess European health sovereignty, the index focuses on two case studies. The first concerns member states' contributions to the strength and resilience of health systems in Europe; the second concerns efforts to coordinate the global response to covid-19 and other major diseases.

In the first case study, the index covers capabilities including spending on health, production of pharmaceuticals, and number of medical patents registered, as well as trust in scientists – which has been shown to correlate with countries' success in confronting covid-19. The index also looks at indicators of commitment such as countries' resilience and flexibility in responding to the pandemic, the success of their vaccination programmes, and their support for efforts to improve EU coordination on health, including through the creation of the recently established European Health Emergency Preparedness and Response Authority.

In the second case study, the index accounts for member states' donations of vaccine doses to third countries, the share of those donations that went to vaccine-sharing platform COVAX, and the funding they provide to the World Health Organization (WHO) and other international health bodies. The index also covers member states' positions on proposals for export restrictions on vaccines. Although this could be seen as a measure that enhances sovereignty, the index awards a slightly higher score to countries that opposed such restrictions, on the basis that maintaining an open market in vaccine components and finished doses is important to global cooperation against diseases.

Results

Europe's relative strength in health sovereignty results from several factors: many member states have made relatively large investments in their health systems, have advanced pharmaceutical industries, conducted broadly successful vaccine rollouts (albeit after a slow start), adapted effectively to covid-19, and have a major role in supporting global health institutions. Nevertheless, the index shows a marked disparity in scores across Europe. In

particular, a group of central and eastern European countries receive comparatively low scores – for some of the same reasons why many of them have high covid-19 death rates.

With health now firmly established as a core component of sovereignty, Europe is comparatively well placed to build its defences against future health emergencies

Germany is the clear leader of health sovereignty in Europe and the only one to receive an ‘excellent’ score (8.6). It scored highly on many indicators, including spending on healthcare, the availability of hospital beds, trust in scientists, displays of solidarity in the early part of the pandemic, vaccine doses provided to COVAX and third powers (weighted by population), and voluntary contributions to the WHO and other health organisations.

The Netherlands (8.1), Denmark (7.9), Luxembourg (7.7), and Sweden (7.6) also scored highly. Denmark and Luxembourg proved to be the most resilient member states in addressing the threat from covid-19, while Denmark and the Netherlands scored highly on vaccine donations, and Sweden excelled in its support for global health organisations, including the WHO.

Belgium (7.3) and France (7.2) were close to joining this group of leaders. France performed well on healthcare spending, support for an EU response to health emergencies, assistance for COVAX, and health spending as development aid, while Belgium scored highly on several indicators of European health resilience, including pharmaceutical production and support for dealing with health at the EU level. A few countries scored highly in specific areas: Finland on medical patents, Austria on intra-European solidarity, Ireland on pharmaceutical production, Spain on trust in scientists, and Malta, Portugal, and Spain on the rollout of vaccines.

The member states that scored lowest overall were Romania (4.0), Bulgaria (4.1), Poland (4.4), and Latvia (4.6). Bulgaria and Romania scored particularly badly on the efficiency of their vaccine rollouts, having been held back by widespread public scepticism of vaccines. All four countries scored poorly on trust in scientists, as did Cyprus, Greece, and Lithuania. Bulgaria, the Czech Republic, Romania, Slovakia, and Belgium were the least-resilient countries in the pandemic. Several countries performed poorly on the collaborative dimension of sovereignty: Bulgaria, Hungary, Latvia, Malta, Poland, and Romania received low scores in this area, including on sharing vaccine doses internationally and on funding various global health initiatives.

With health now firmly established as a core component of sovereignty, Europe is comparatively well placed to build its defences against future health emergencies. Some member states could benefit from greater investment in medical facilities, but Europe’s greatest weakness on this terrain is the widespread distrust of scientists and hesitance about vaccination that are evident in several countries. Even more importantly, a significant

number of member states have not accepted the idea that Europe's health security depends on a sustained effort to establish more effective global health systems.

4 Migration

EU member states' migration policies are shaped more by domestic politics than demographic, labour-market, and humanitarian imperatives. As a result, the EU is highly vulnerable to the weaponisation of migration.

Susi Dennison, Gosia Piaskowska

The European Union is struggling to establish its sovereignty on migration more than most other areas covered by this index. The union's average score in this area, weighted by population, is a mediocre 5.2 points – lower than for any area except technology.

This index defines migration sovereignty as the capacity to implement a migration policy that meets the EU's demographic and labour-market needs (given its ageing population), thereby improving the competitiveness of European companies. In this ideal situation, freedom of movement within the EU would be secure, as immigration into the EU would complement migration between EU states, compensating for brain drain and skills shortages wherever they occurred. A key humanitarian component of the EU's migration policy – the capacity to host refugees, in line with member states' legal obligations under the 1951 Refugee Convention – would also be preserved, reflecting the EU's values. Crucially, third countries would be unable to weaponise migration against the EU, as it would have systems in place to calmly deal with fluctuations in the number of arrivals in Europe.

To explore how close the EU is to this ideal and how member states are trying to realise it, the index focuses on collective management of the EU's external borders and deals with third countries that externalise migration management, particularly that with Turkey.

Indicators

To evaluate member states' capabilities in migration sovereignty, the index accounts for factors such as their participation in the Dublin framework, capacity to host refugees, use of resettlement schemes, and management of the public debate on migration. It also looks at their capacity to fulfil their responsibilities under the New Pact on Migration and Asylum.

The index assesses member states' commitments based on factors such as their voluntary contribution of resources to Frontex and their use of the 'sovereignty clause' in the Dublin framework. In this, the index also accounts for public support for a common EU migration policy.

Results

Governments in the EU continue to be collectively and individually vulnerable to the weaponisation of migration. One example of this is Turkey's threats in 2021 to send refugees to Europe unless the EU met its demands in negotiations over a support package for Syrian refugees. Another is Belarus's decision the same year to encourage Middle Eastern migrants to cross into Poland – and Warsaw's refusal to cooperate with the European Commission in handling the situation. Turkey and Belarus acted as they did because they believed the EU would bow to such coercion. So did Morocco when it used African migrants to pressure Spain in summer 2021. And it was right: hoping to address public concerns about migration, the Spanish government decided in March 2022 to end its long-standing rejection of Morocco's position on Western Sahara – which infuriated Algeria (a country that could become an increasingly important supplier of energy to Europe).

Unlike the other terrains of sovereignty in this index, migration is an area in which there are only three leaders. It is characterised by mediocre capabilities and limited commitment to tackling migration at the EU level. Indeed, there is little difference between the best and worst performers on this terrain.

The countries that lead the group only receive 'good' scores. The first of these is Sweden (6.3), which performs well mainly on preparedness for an EU migration management system and on its engagement with the implementation of the EU's migration pact. Sweden has one of the highest numbers of refugees per capita in the EU and one of the highest numbers of accepted resettlement applications per capita.

Another leader is Germany (6.2), which also accepts more resettlement requests than average and makes a significant contribution to EU systems for managing migration. Despite its backlog in processing such applications, Germany has the highest score of any member state for its ability to manage the public debate since 2015. While the country has since welcomed a significant number of refugees, public opposition to immigration from outside the EU is milder than in many other member states.

Malta (6.2) is the surprise leader in migration, making significant contributions to Frontex (as does Germany) and displaying public support for common EU policy on migration, the New Pact on Migration and Asylum, and a common EU asylum system and external borders. Malta has also performed well in its preparations for the mobility dimensions of crises.

With the exception of Germany, the EU's five biggest countries are not particularly committed to increasing Europe's migration sovereignty. In France (12th place), the debate on immigration is dominated by the far right. Italy (13th place) is dealing with high numbers of arrivals by sea. Spain (14th place) has, as discussed, failed to deal with the weaponisation of migration strategically rather than purely in the context of its relations with Morocco. And Poland (last place) remains highly sceptical about non-European migration.

Many member states lack not only the systems to work with one another to strengthen migration sovereignty but also the collective will to do so. Continuing to view the issue through the lens of national interests alone, they have reduced EU institutions' capacity to address challenges in the area. Nonetheless, member states have made some progress on migration issues since Russia launched its all-out invasion of Ukraine, particularly through their collective decision to activate the temporary protection directive.

Technology

The EU and its member states have much work to do to strengthen their technological sovereignty. They should continue to decisively regulate technologies and should greatly improve their capabilities in critical technologies.

Ulrike Franke, Julian Ringhof

This index defines technological sovereignty as the ability to shape critical technologies in accordance with the European Union's interests and values. The EU would be technologically sovereign if it developed globally competitive critical technologies, regulated their dissemination and use effectively, and avoided excessive dependence on other powers for technologies that are essential to its economic, political, and societal well-being.

Indicators

In evaluating member states' contribution to European tech sovereignty, the index focuses on artificial intelligence, big data, cloud computing, semiconductors, robotics, the internet of things, high-performance computing, advanced telecommunications, and cyber-security. This is because, in increasingly digitised economies and interconnected societies, these technologies play a fundamental role in economic and political development, have taken centre-stage in technological battles between great powers, and have generally been at the centre of European discussions on technological sovereignty.

The index measures member states' technological capabilities using indicators including their contributions to research, patents, and standards; number of technology firms and professionals; companies' market shares; venture capital investment in these technologies; and technology uptake. And it measures their commitment to technological sovereignty using indicators such as their positions on EU regulations and cooperation; engagement with international tech forums; participation in European research and development; contributions to the EU's international tech initiatives; and polling data on public support for technological development.

Results

Member states receive an average score of just 4.8, when weighted by population, in technological sovereignty. This is their lowest average score in any of the six domains in the index. But there are large differences between individual member states in the area.

Finland, Luxembourg, and Sweden lead Europe with overall scores of 7.4, 7.1, and 6.8 respectively, while Romania, Hungary, and Slovakia receive scores of less than 3.4. The scores of more than three-quarters of member states are mediocre or worse, while those of more than one-quarter of them are ‘poor’. There is a distinct geographical divide in technological sovereignty, with northern countries performing far better than southern and eastern ones – with the exceptions of Estonia and Slovenia, which rank in the top third.

Member states perform better in artificial intelligence, big data, and the internet of things than in other technologies

Importantly, member states generally score significantly higher in commitment than in capabilities, with an average of 6.8 and 3 respectively. This reflects the reality that the EU is not at the forefront of global technological development in many areas but that, in recent years, it has shown a willingness to decisively shape the European technology market. The union now aims to increase its competitiveness and protect its interests in the area – even if this will be a lengthy process at best.

All EU countries receive higher scores on commitment than on capabilities, but this trend is especially marked in Slovenia, Cyprus, Greece, and Portugal. The difference between the two criteria is smallest for Sweden, Finland, and Ireland, which are all relatively technologically capable while also being deeply committed.

The most technologically capable EU countries are Finland, Sweden, and Luxembourg, which score 6.5, 6.2, and 5.7 respectively. Finland and Sweden both performed well in advanced telecommunications (4G and 5G) due to the fact that Nokia and Ericsson are global leaders in the field. Finland is also a strong performer in big data and the internet of things, and Sweden in cloud computing.

Estonia received particularly high scores in robotics and performs well in almost all technologies. Meanwhile, Slovenia is particularly strong in high-performance computing: it hosts two of Europe’s newest supercomputers as part of a pan-European high-performance computing project.

On average, member states perform better in artificial intelligence, big data, and the internet of things than in other technologies. They have significant weaknesses in semiconductors and cloud computing – which is why recent EU initiatives such as the Franco-German Gaia-X project and the EU Chips Act aim to improve European competitiveness in these technologies.

The countries that are most committed to EU technological sovereignty include Luxembourg (8.5), Finland (8.4), Slovenia (8.3), Cyprus (7.9), and Estonia (7.9). It is unsurprising that these smaller but relatively developed economies are committed to EU regulation and cooperation in technology, given that they particularly benefit from the union's market and regulatory strength to compete globally. Estonia has made a particular effort to support the EU's technological sovereignty agenda while also promoting its own international initiatives, such as Trusted Connectivity. Slovenia focused on digital sovereignty during its recent presidency of the Council of the EU. The least committed countries are Hungary (4.8), Romania (4.8), and the Czech Republic (5.2). Due to its openness to Chinese 5G technology, Hungary scores particularly poorly in its commitment to digital security.

None of the five biggest EU countries – Germany, France, Italy, Spain, and Poland – are in the top third in this area. France (10th place) has particularly high scores in supercomputing due to the large market share of French company Atos, which is the only globally competitive European firm in this industry. Germany (11th place) performs relatively well in semiconductors as the home of Zeiss and Trumpf, global leaders in highly specialised semiconductor manufacturing equipment, and of Bosch and Infineon, which produce chips that have automotive and industrial applications. Spain generally has average scores in all areas of technology. Italy performs particularly poorly in cloud computing capabilities. And Poland (18th place) shows little interest in EU research projects in digital technology.

In all, the EU has much work to do if it is to strengthen its technological sovereignty. The union and its member states should not only continue to decisively regulate technologies, an effort to which most of them are committed, but should also greatly improve their capabilities in critical technologies – especially through the commercialisation of their research in almost all areas.

METHODOLOGY

The European Sovereignty Index assesses each EU member state's contribution to European sovereignty on six terrains: climate, defence, economy, health, migration, and technology.

This involves the following steps:

1. On each terrain, the index identifies two cases that are the focus of analysis. For example, in economy, these are trade and investment.
2. For each case, the index identifies the indicators used for the evaluation, separating capabilities and commitments. To create these indicators, the index uses both primary sources (input from our 27 national associate researchers) and secondary sources (such as public opinion data, official statistics, and other rankings). The full list of sources used in this study is provided below.
3. The index normalises scores for each indicator so that they fit into its grading system: <0-4) = failing; <4-5) = poor; <5-6) = satisfactory; <6-8) = good; <8-10) = excellent. This often involves recalculating indicators based on each member state's population size, so that they better reflect the extent to which countries fulfil their potential in their contribution to European sovereignty.
4. For each case, the index applies a weighted average to produce a score for a country's capabilities, commitments, and overall performance.

The index combines the scores of the 27 member states to produce an overall score for the EU on the six terrains, weighting countries based on their population in a manner that follows the EU's approach to qualified majority voting.

The index also identifies four groups of countries based on their roles in the EU's efforts to build European sovereignty. The assignment of countries into different groups is based on the following criteria:

- 'Leaders' include countries that receive a score of at least 8.0 at least once, or at least 6.4 on average.
- 'Strivers' include countries that score relatively highly in all areas – and 6.0 or more at least three times.
- 'One-hit wonders' include countries with middling scores – and one or two areas in which they are doing particularly well (at least 6.0).
- 'Underperformers' include the poorest performers and those that are mediocre overall and do not excel in any area.

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