EUROPEAN ORGANISATION FOR STRATEGIC POLICY

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Open Strategic Autonomy: Reducing Critical Dependencies Without Closing Europe

A risk-based economic security doctrine for materials, technologies and infrastructure.

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A risk-based economic security doctrine for materials, technologies and infrastructure.

EXECUTIVE JUDGEMENT

> *European economic security should protect a limited set of essential functions with exceptional seriousness while preserving openness, competition and trusted international exchange everywhere else.*

KEY FINDINGS

- Concentration becomes strategic risk when disruption can disable an essential function or deny public authorities time to respond.
- Indiscriminate self-sufficiency would weaken European competitiveness and the alliances on which resilience depends.
- A common dependency register and timed stress tests are prerequisites for proportionate intervention.
- Diversification partnerships should create durable value in supplier countries rather than reproduce extractive dependence.

From vulnerability to function

The policy debate often begins with a list of foreign dependencies. It should begin with the European function at risk. A concentrated supply relationship is strategically significant when its interruption could disable energy, defence, health, communications, transport or public administration; when substitution would take longer than the political decision window; or when a supplier could exploit the dependency coercively. This functional test prevents economic security from becoming an unlimited protectionist licence.

A three-tier doctrine

Tier one covers essential functions and requires minimum stocks, tested substitutes, repair capacity and trusted supply agreements. Tier two covers costly but manageable disruption and should rely on supplier diversity, transparent ownership and contingency contracts. Tier three encompasses normal commercial exchange and should remain governed by predictable rules. Measures in every tier require review and sunset clauses so that emergency controls do not become permanent barriers without evidence.

Data, stress tests and responsibility

A shared dependency register should connect customs data, corporate supply maps, beneficial ownership, infrastructure exposure and recovery time. Selected chains should be tested against 30-, 90- and 180-day interruption scenarios. The exercise must identify the lead authority and the point at which private contingency becomes a public responsibility. Confidential corporate information can be protected while aggregate vulnerabilities and remedial milestones are published.

Partnerships as resilience

Diversification cannot be reduced to buying the same inputs from a different external supplier. Europe needs agreements that support processing, skills, standards, infrastructure and transparent revenue in partner countries. Such arrangements widen political support, reduce concentration and create relationships that are more durable under pressure. The strategic aim is not isolation but a larger number of credible options.

POLICY RECOMMENDATIONS

01 Adopt a common EU test for strategic concentration based on essential functions and recovery time.

02 Create a protected European dependency register with public aggregate reporting.

03 Run cross-border stress tests for selected materials, digital services and infrastructure.

04 Use joint purchasing where fragmented demand weakens security or bargaining power.

05 Attach review, proportionality and sunset clauses to exceptional economic-security measures.

DECISION AND MONITORING MATRIX

Priority	Decision horizon	Evidence of progress
Adopt a common EU test for strategic concentration based on essential functions and recovery time.	0-90 days	Single-supplier exposure above agreed thresholds
Create a protected European dependency register with public aggregate reporting.	3-12 months	Substitution time beyond 180 days
Run cross-border stress tests for selected materials, digital services and infrastructure.	12-36 months	Foreign control of repair or software access
Use joint purchasing where fragmented demand weakens security or bargaining power.	Continuous	Retaliatory escalation against open trade
Attach review, proportionality and sunset clauses to exceptional economic-security measures.	Annual review	Single-supplier exposure above agreed thresholds

INDICATORS TO WATCH

- Single-supplier exposure above agreed thresholds
- Substitution time beyond 180 days
- Foreign control of repair or software access
- Retaliatory escalation against open trade

SOURCES AND METHOD

This publication distinguishes verified institutional evidence from CERAX interpretation and forward-looking judgement. Principal public sources are listed below; all recommendations are the institutional judgement of CERAX.

- European Commission, European Critical Raw Materials Act
- European Commission, Economic security measures

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Independent analysis. Diplomatic judgement. European perspective.