

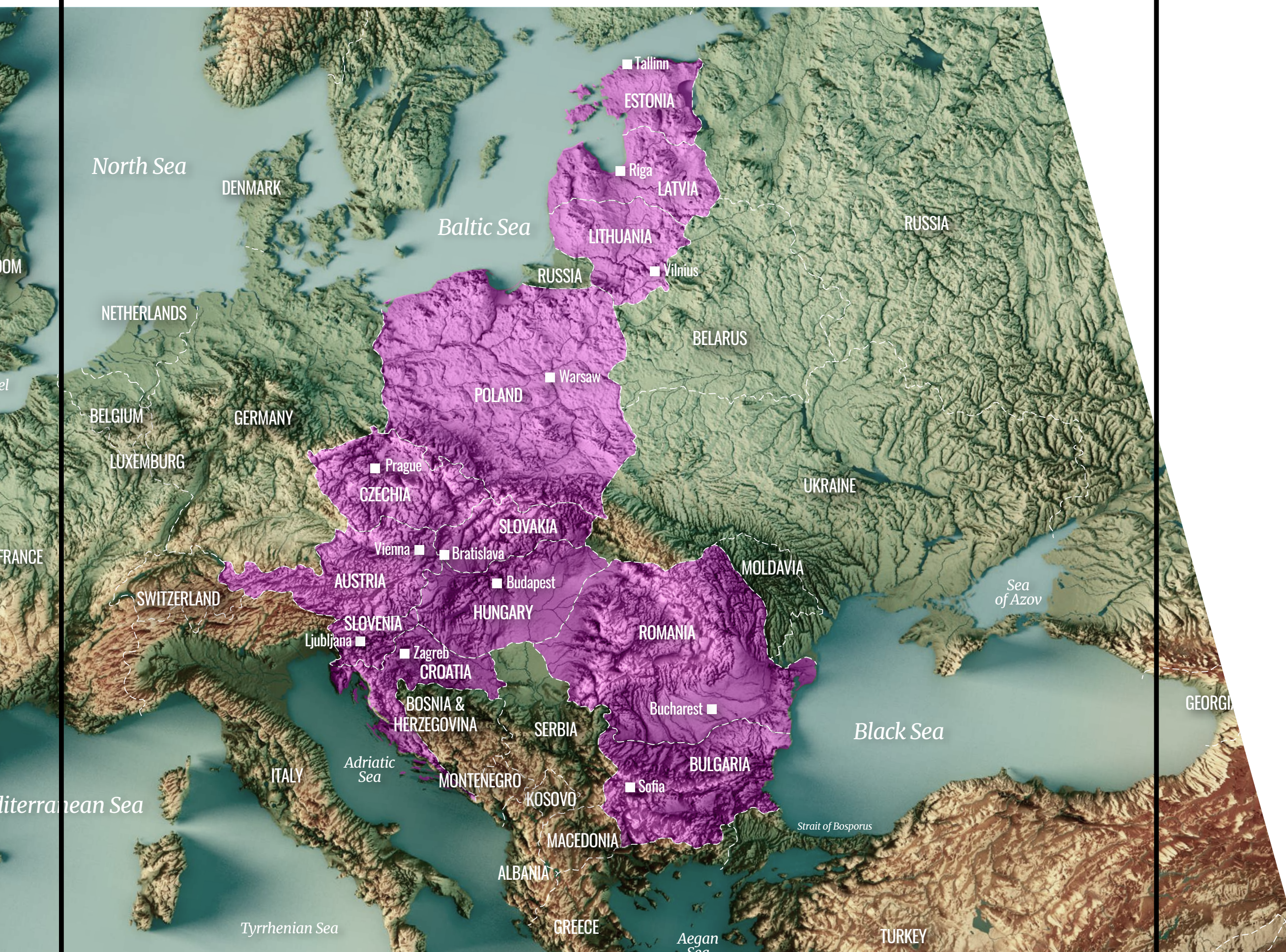
MILITARY POTENTIAL OF THE 3 SEAS COUNTRIES AGAINST THE BACKDROP OF THE REST OF EU-27.

BASED ON GLOBALFIREPOWER AND NATO DATA



3SEAS EUROPE

NEWS FROM CENTRAL EUROPE AND THE 3SEAS INITIATIVE



HIGH-LEVEL SNAPSHOT

The Three Seas Initiative comprises of 12 EU countries: Austria, Bulgaria, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia.

Together, the Three Seas countries make up:

25% of the EU's population

14% of the EU's GDP

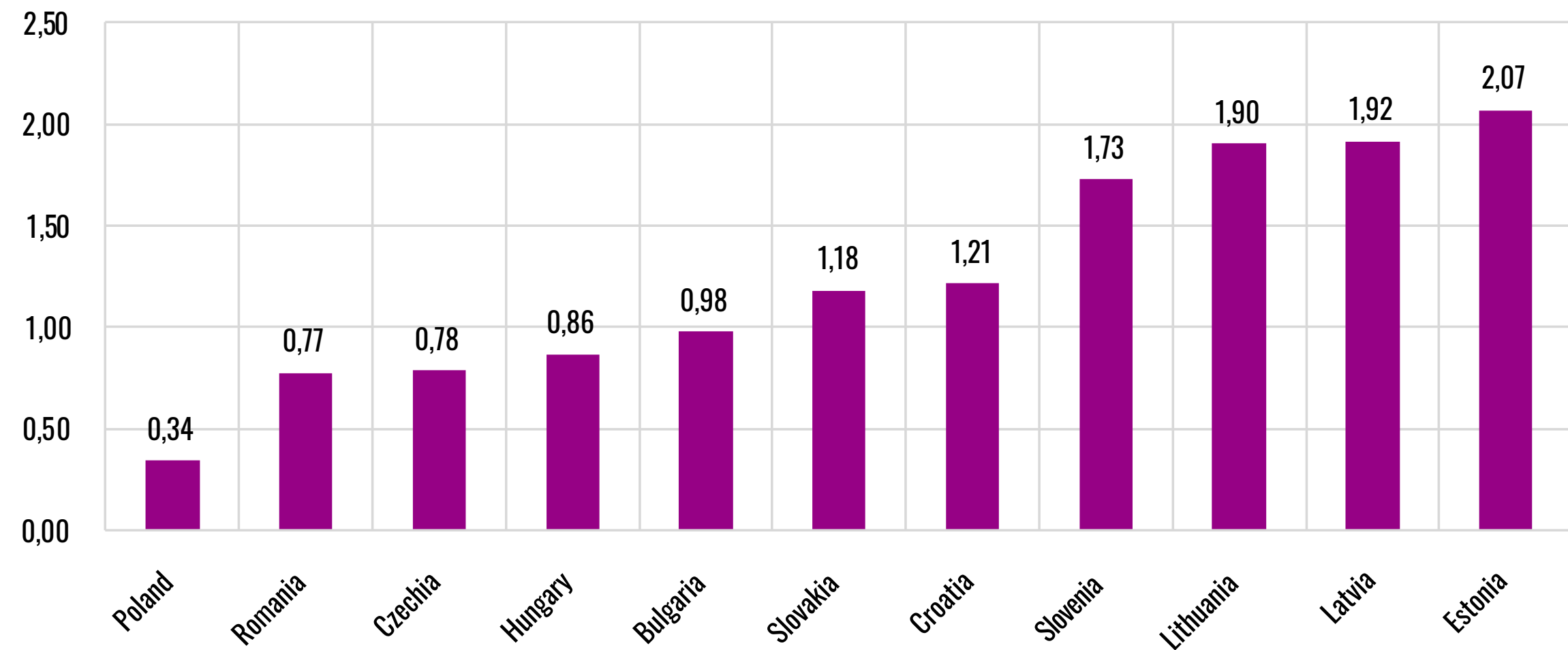
23% of the EU's energy consumption

THE POWER INDEX OF THE 3 SEAS AND REST OF EU-27 ARMIES

Note: according to GlobalFirePower 2023 ranking, the lower the Power Index value, the more powerful a military.

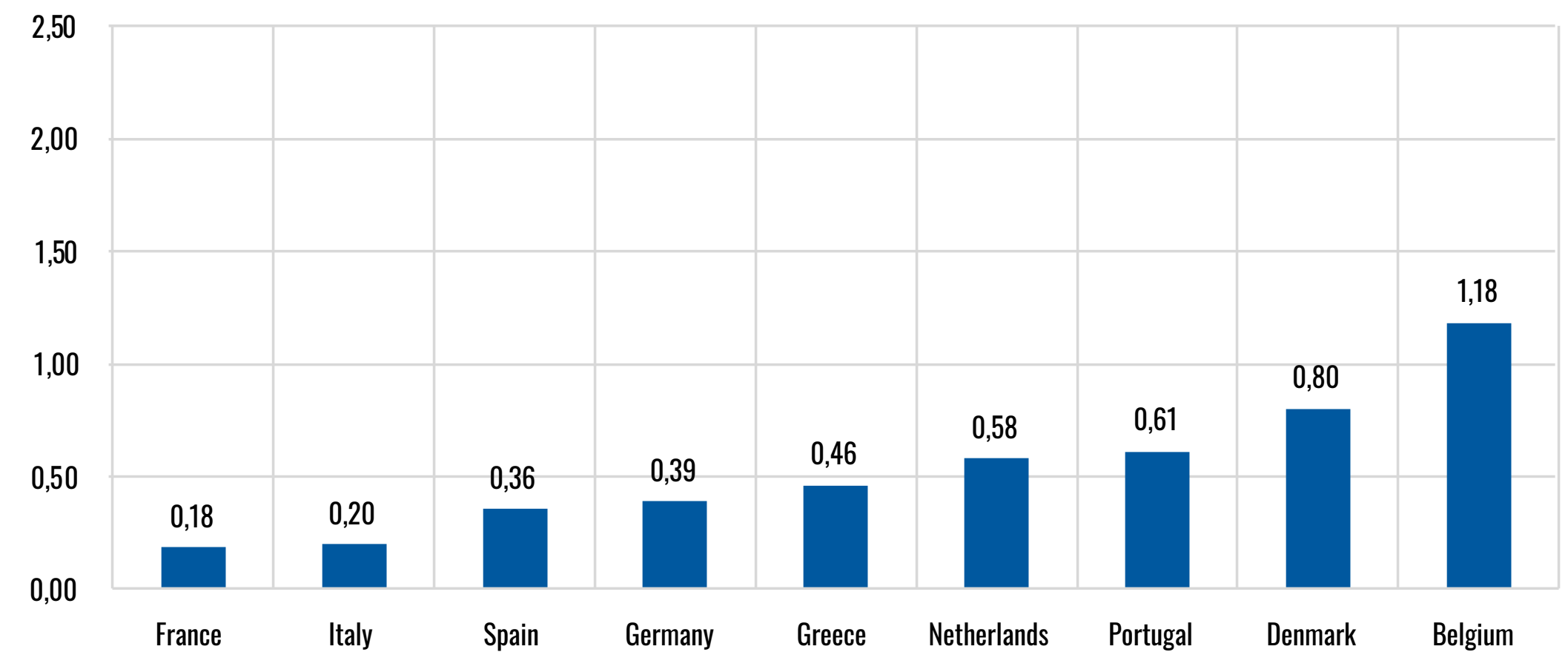
Power Index

■ 3 Seas



Power Index

■ Rest of EU-27

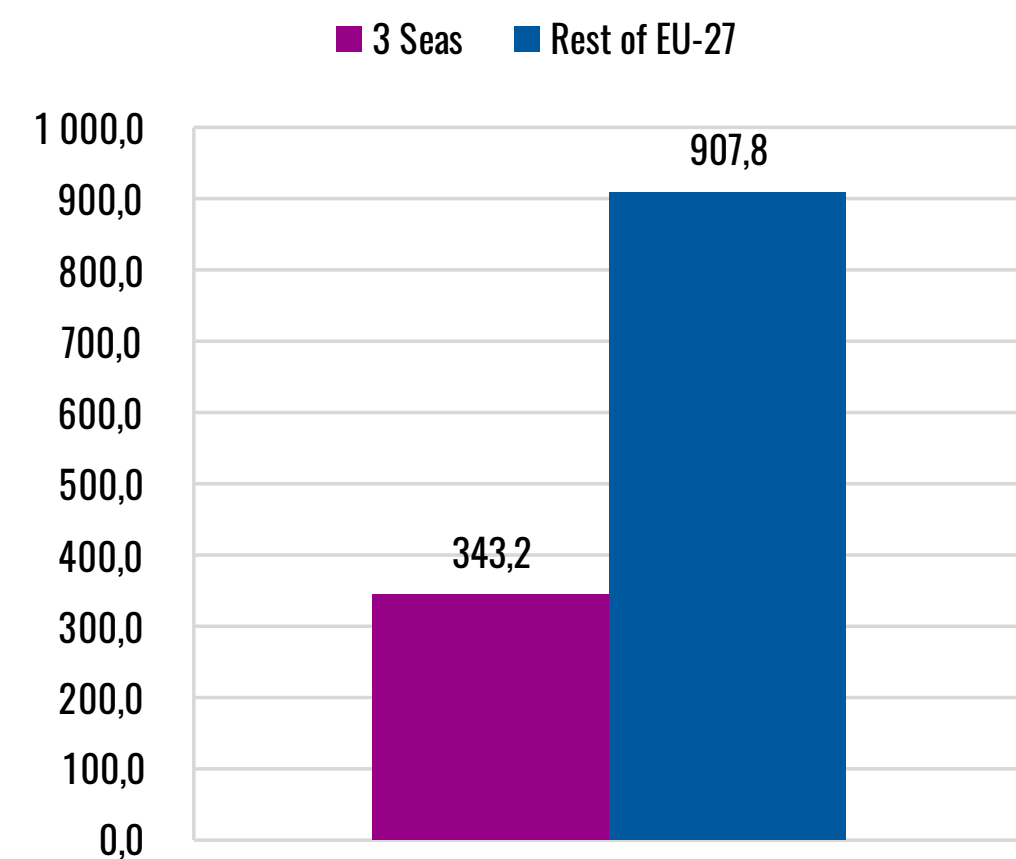


In the 3 Seas bloc, Poland's army is ranked as the strongest in 2022. Romania and Czechia followed, with Latvia and Estonia ranked as the least strong.

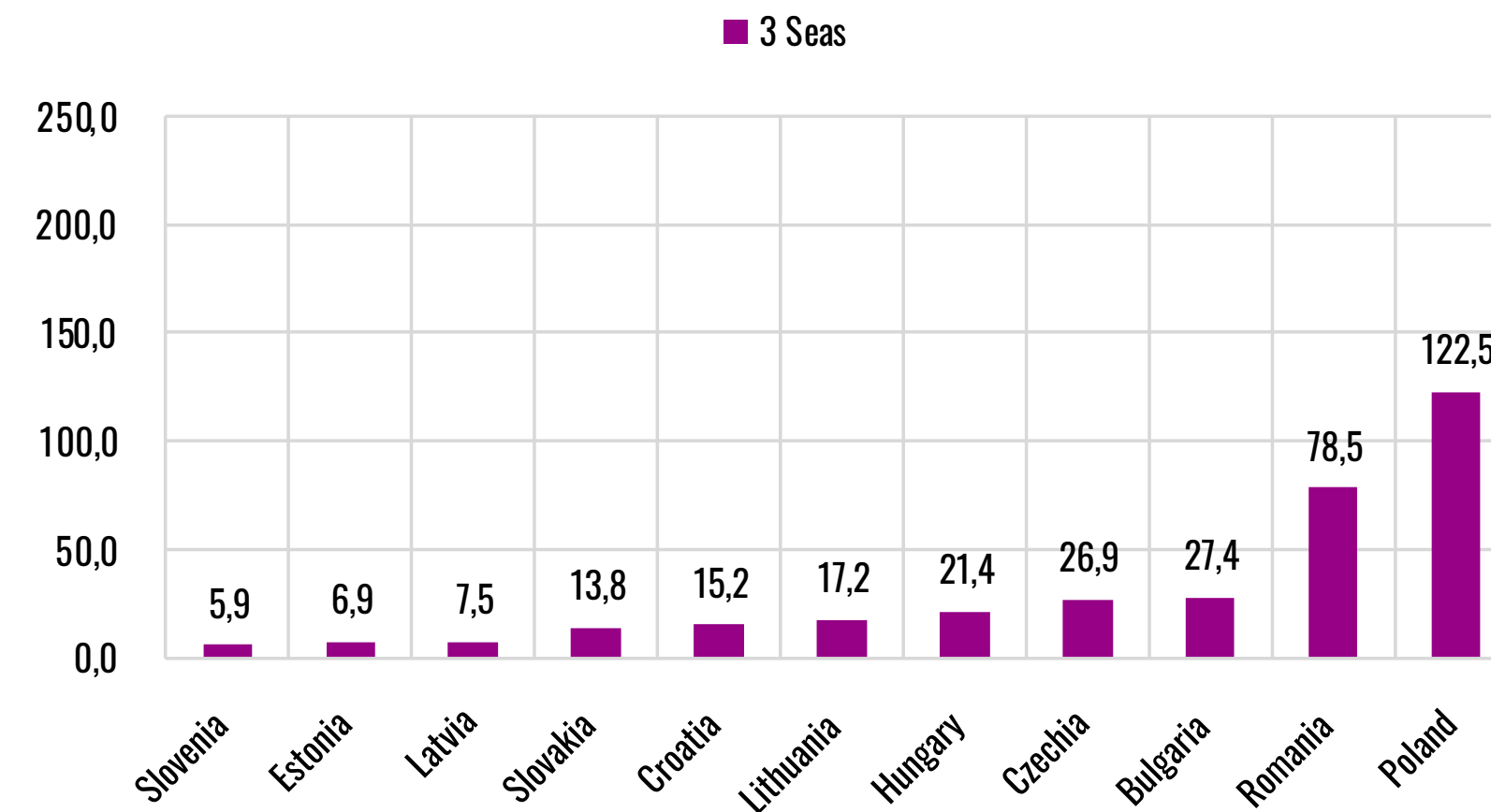
Within the Rest of EU-27 countries, the French army is ranked as the most powerful, followed by the Italian and Spanish armies. Portugal, Denmark and Belgium are ranked as the least strong.

MILITARY PERSONNEL (THOUSAND PERSONS), 2022 EST.

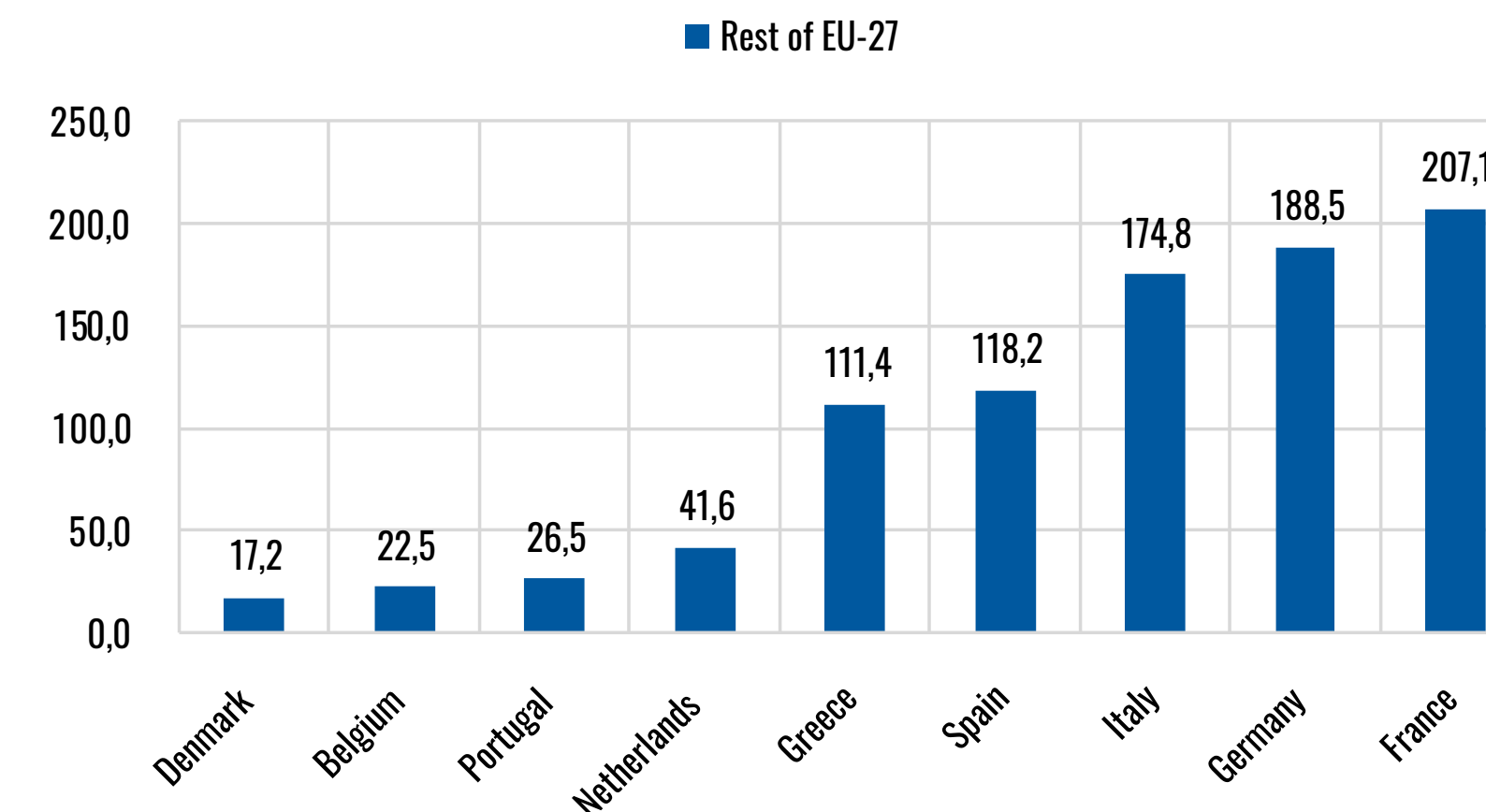
Military personnel (thousand persons), 2022 est.



Military personnel (thousand persons), 2022 est.



Military personnel (thousand persons), 2022 est.



The combined manpower of the 3 Seas countries' armies makes up around 38% of the size of the Rest of EU-27 militaries. This proportion roughly aligns with total populations, where 3 Seas account for 32% of the Rest of EU-27 inhabitants.

Poland has the largest army in the 3 Seas bloc, followed by Romania and Bulgaria.

The Polish army is the fourth largest in the entire EU-27.

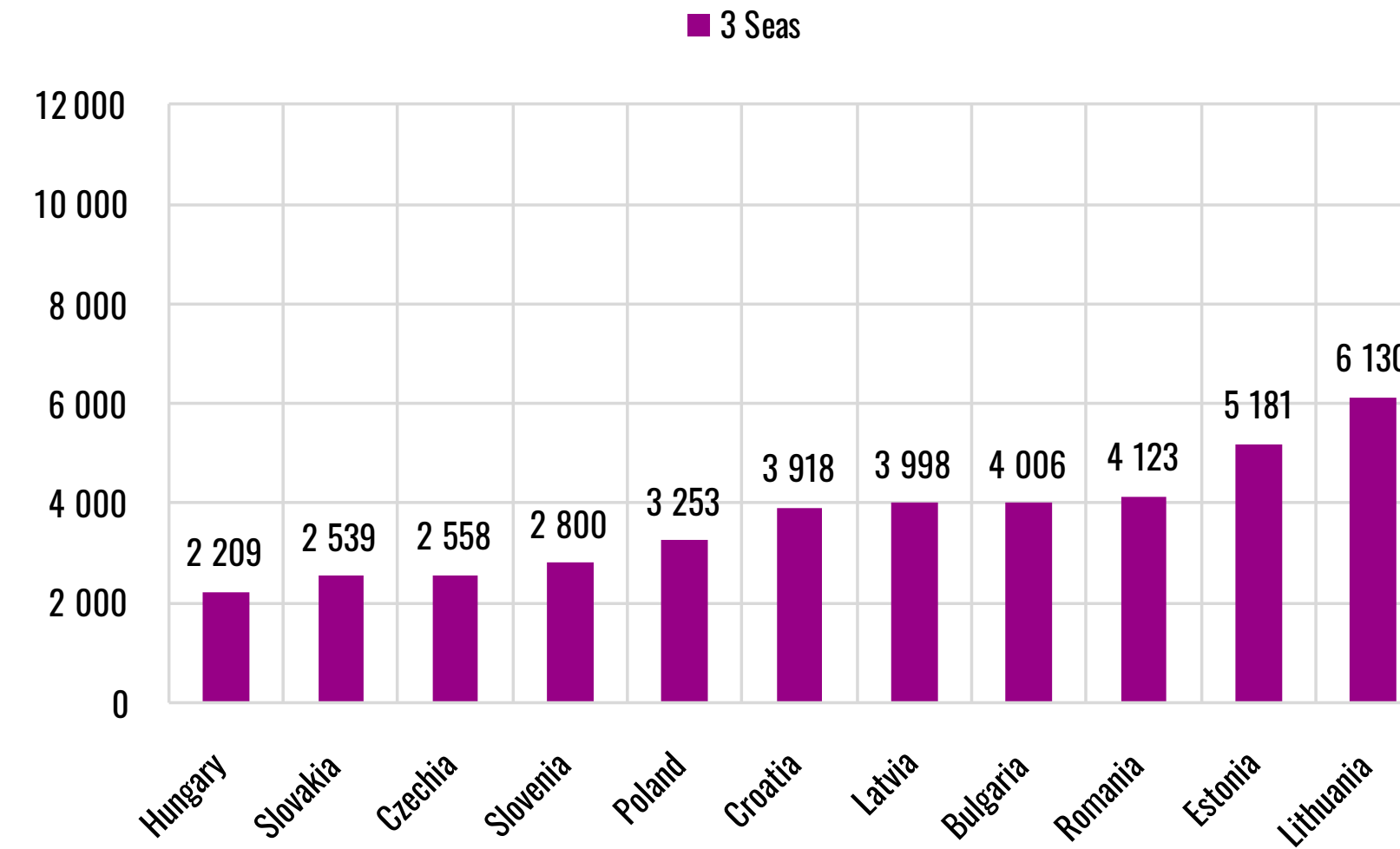
Within the Rest of EU-27 countries, only France, Germany and Italy have bigger armies than the 3 Seas leader, Poland.

MILITARY PERSONNEL PER MILLION INHABITANTS, 2022 EST.

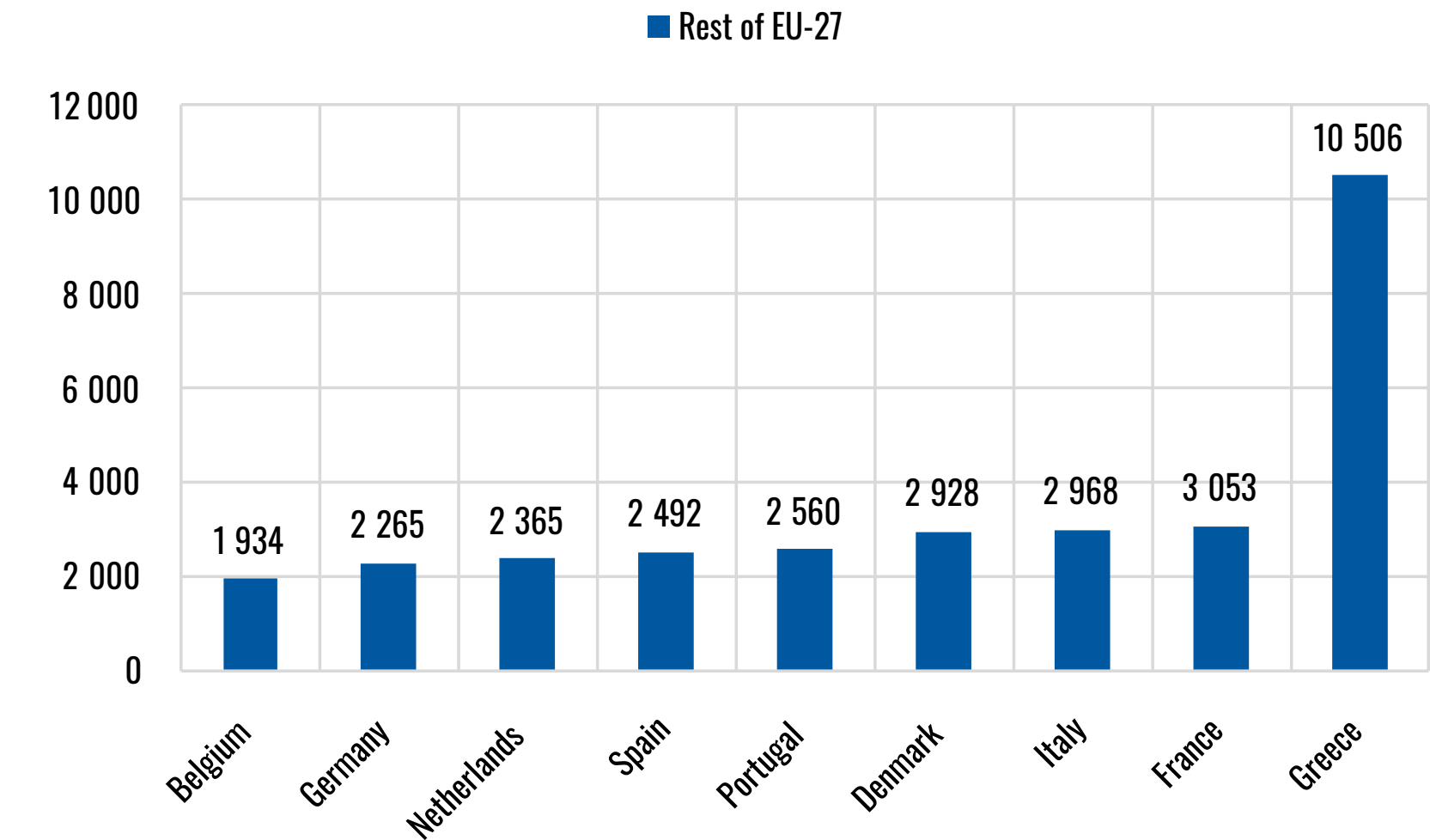
Military personnel per million inhabitants, 2022 est.



Military personnel per million inhabitants, 2022 est.



Military personnel per million inhabitants, 2022 est.



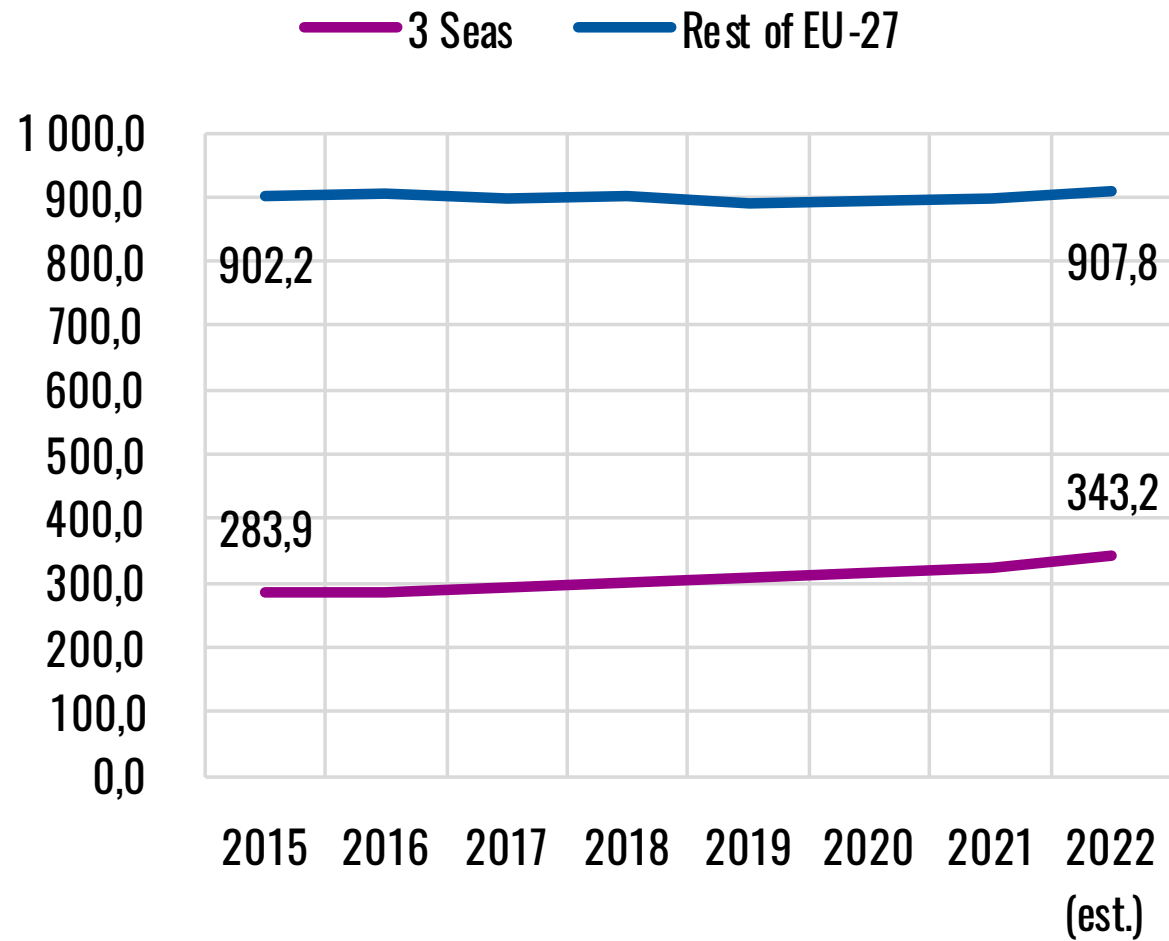
In the case of the 3 Seas countries, one million inhabitants is protected by nearly 3,400 military personnel. The number for the Rest of EU-27 countries is smaller, at roughly 2,900 military personnel per one million inhabitants.

In the 3 Seas bloc, Lithuania has the most military personnel per one million inhabitants, followed by Estonia and Romania.

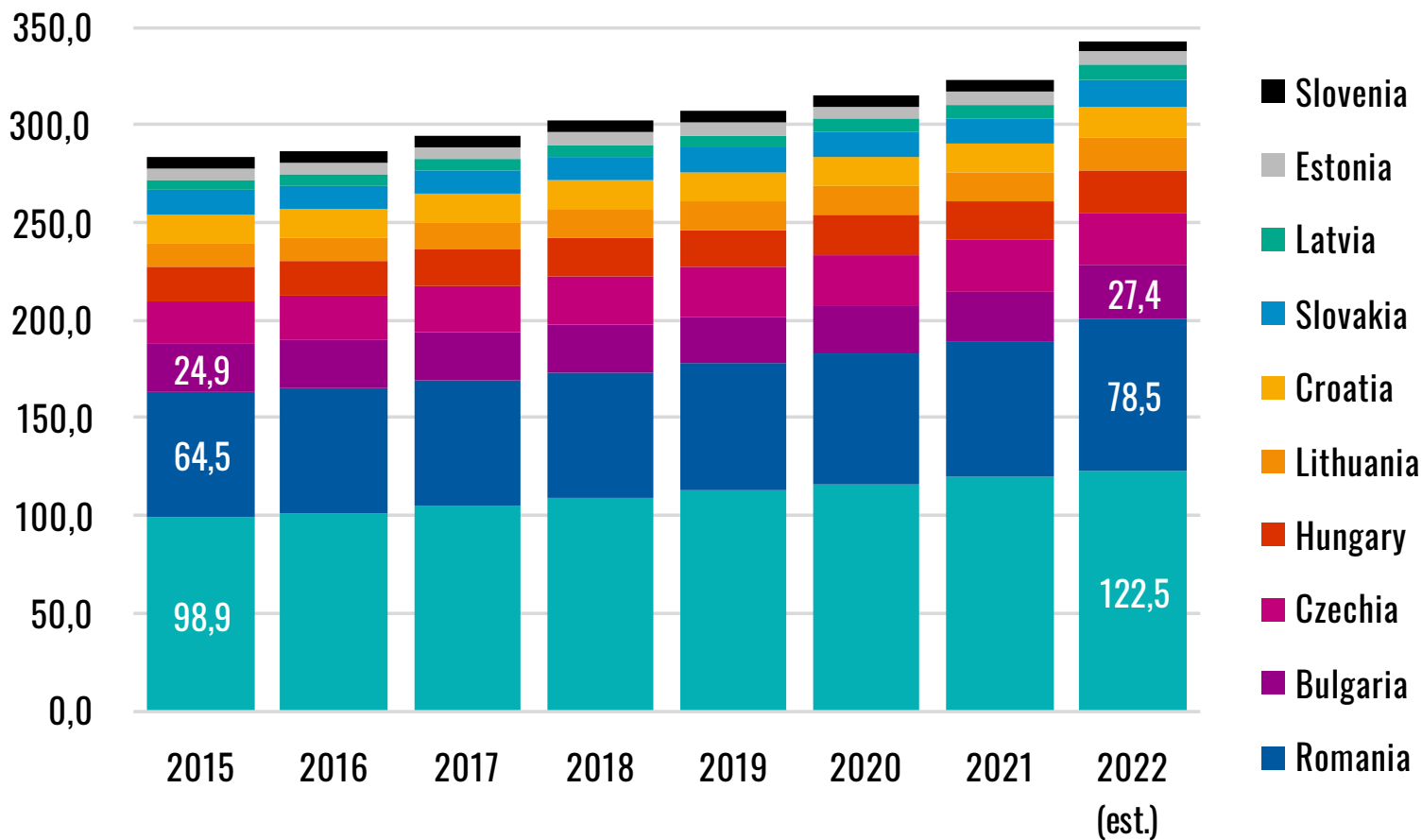
Within the Rest of EU-27 countries, Greece stands out with 10,500 military personnel per million inhabitants.

MILITARY PERSONNEL (THOUSAND PERSONS) BETWEEN 2015 AND 2022

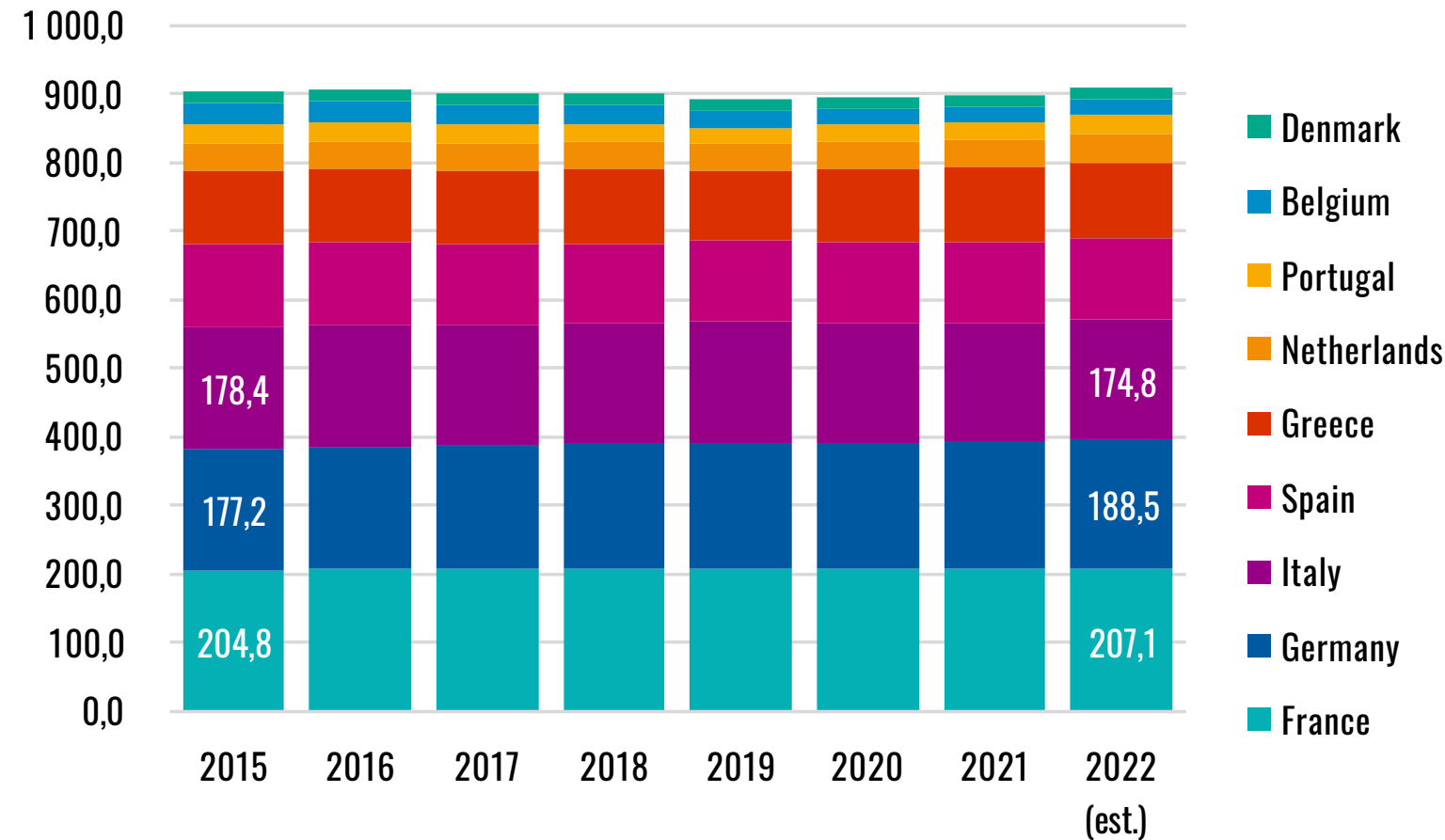
Military personnel (thousand persons) between 2015 and 2022



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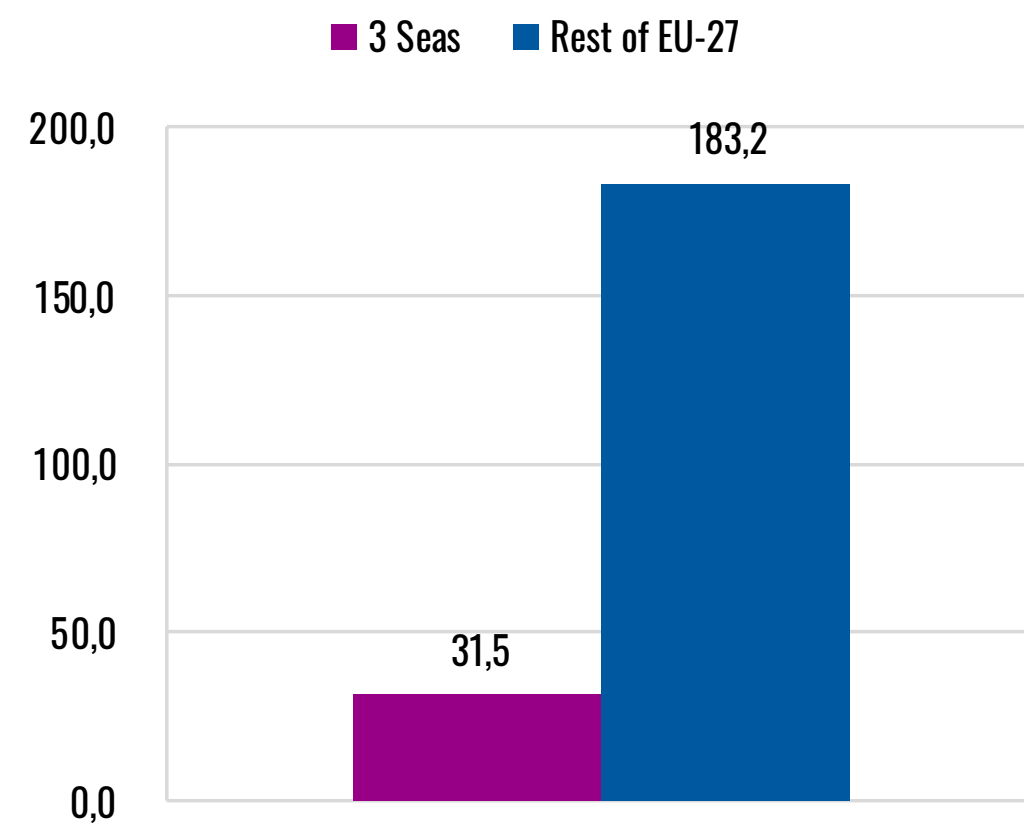
Over the last decade, the 3 Seas countries military manpower was growing steadily, whereas the Rest of EU-27 manpower remained largely unchanged.

In the 3 Seas bloc, the annual average manpower growth rate across all militaries was 21% between 2022 and 2015.

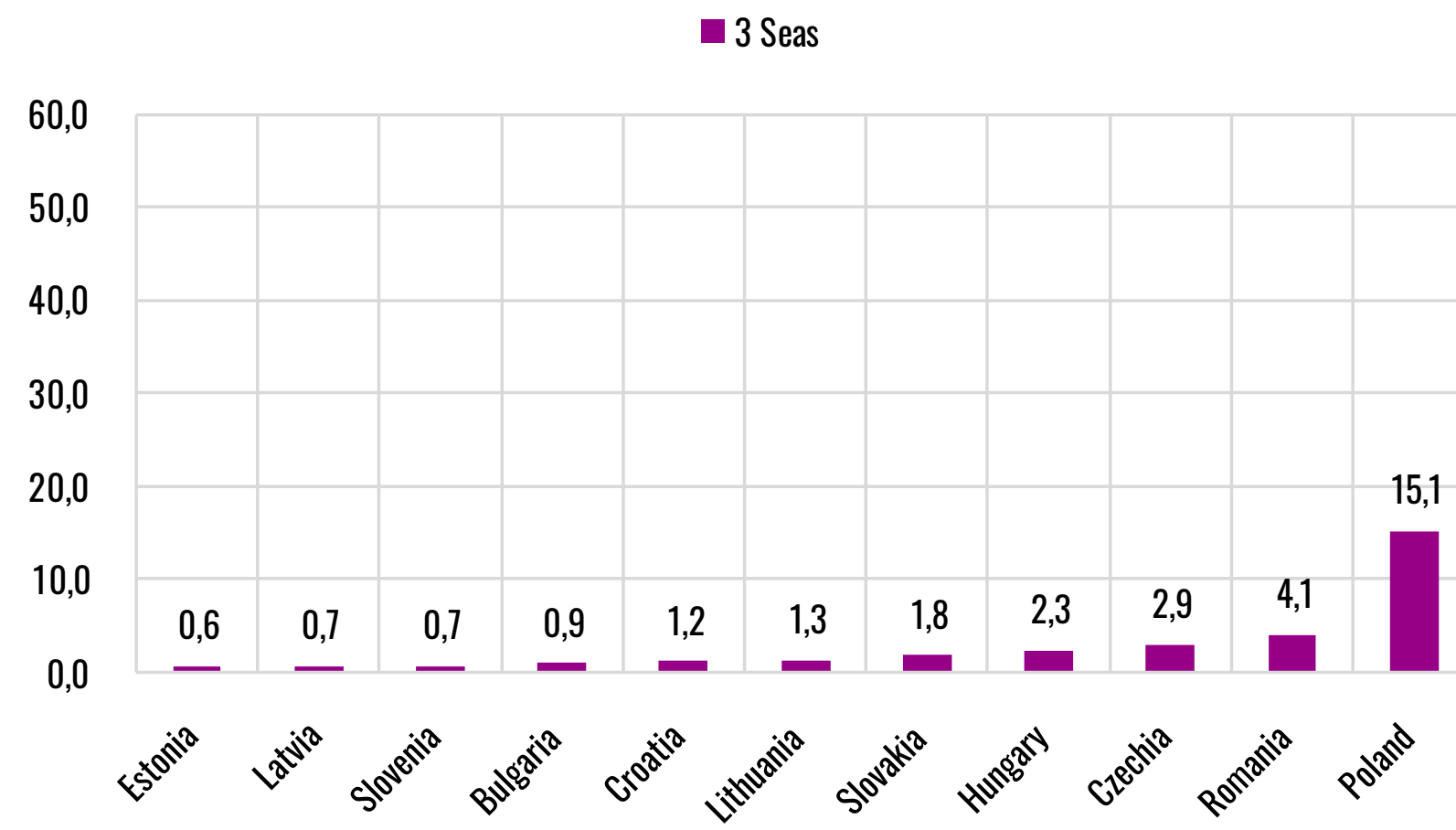
Within the Rest of EU-27 countries, the annual average manpower growth rate across all militaries was 1% between 2022 and 2015.

DEFENCE EXPENDITURE (USD BN, CONSTANT 2015), 2022 EST.

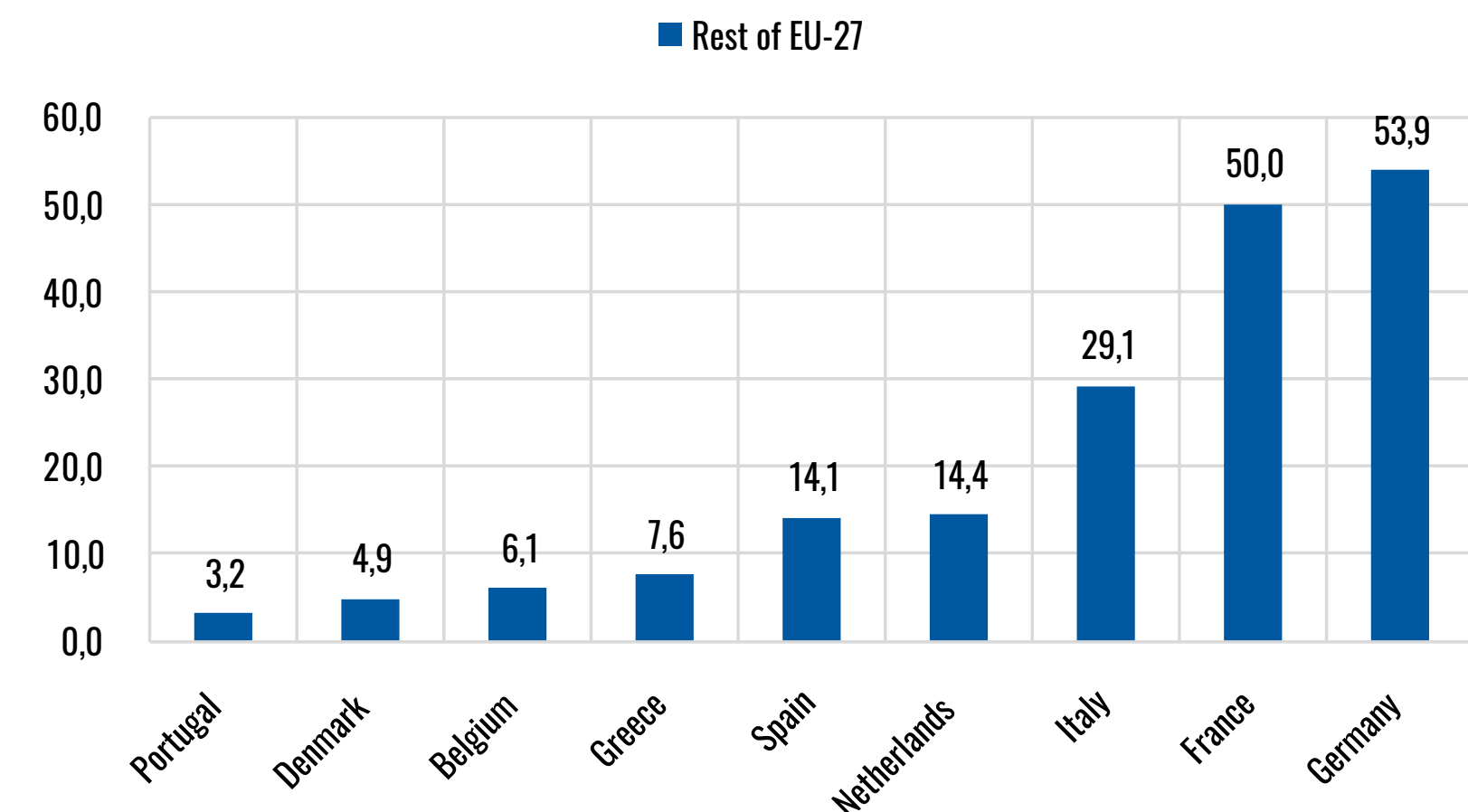
Defence expenditure (USD bn, constant 2015), 2022 est.



Defence expenditure (USD bn, constant 2015), 2022 est.



Defence expenditure (USD bn, constant 2015), 2022 est.



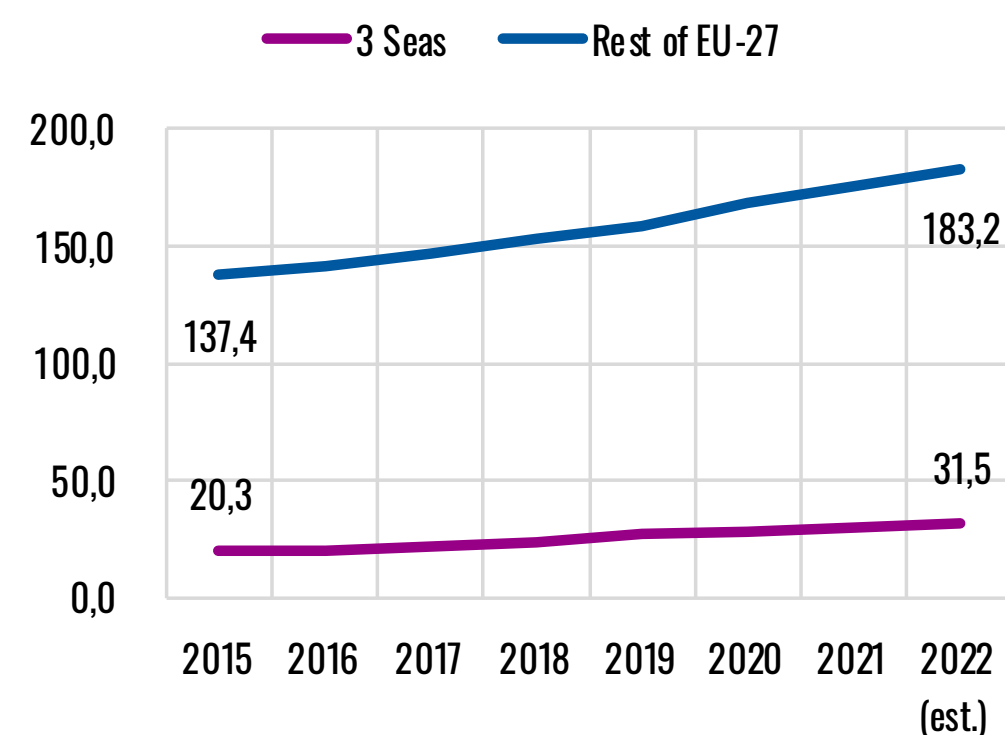
Estimated defence expenditure of the Rest of EU-27 countries was almost six times larger than that of the 3 Seas countries.

In the 3 Seas bloc, Poland led the pack with over USD 15 bn spent on the military in 2022 (2015 constant prices). The runner-up, Romania, spent USD 4 bn.

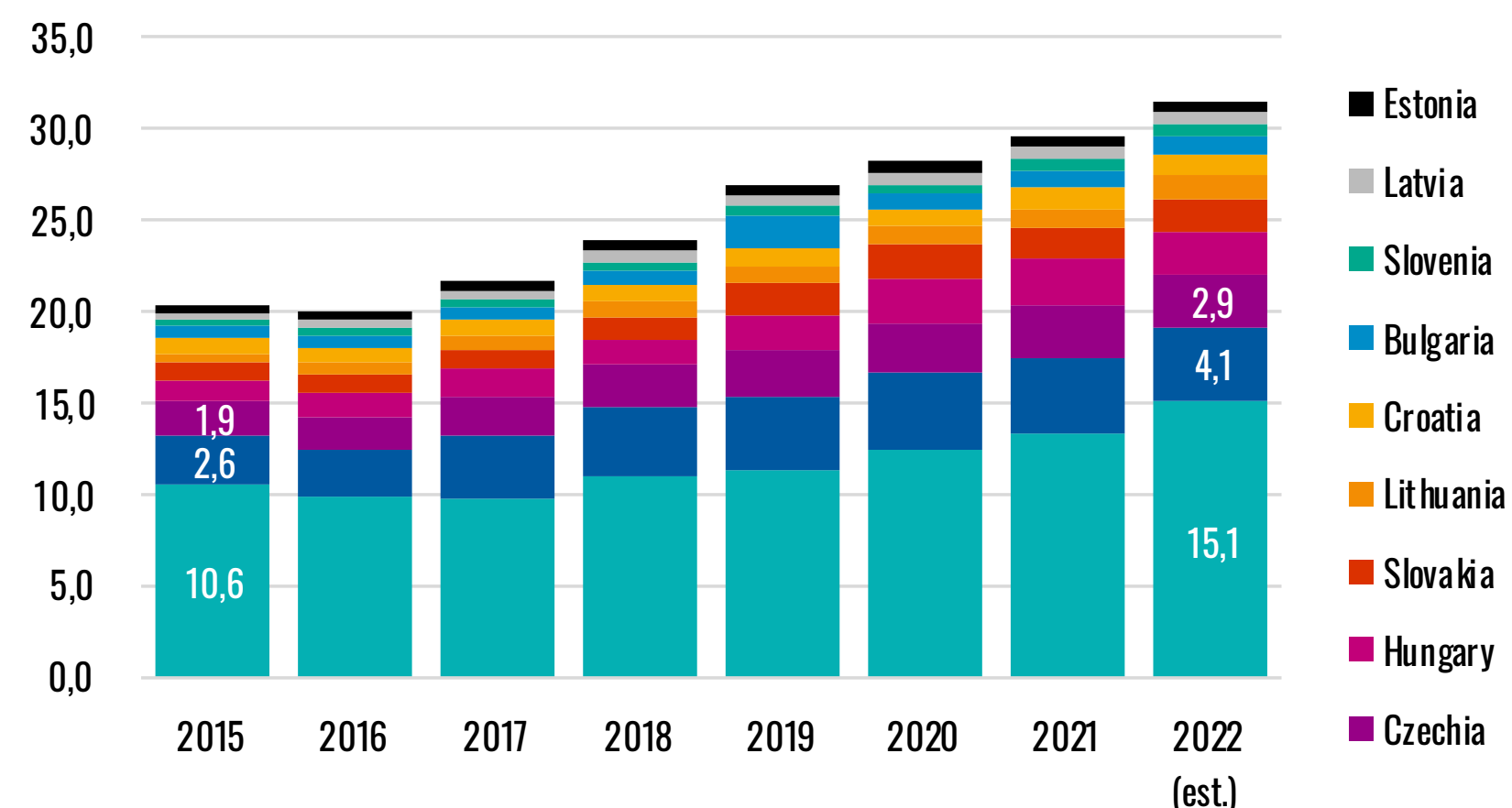
Within the Rest of EU-27 countries, German and French army expenditure was over USD 50 bn each, way ahead of Italy (USD 29 bn).

DEFENCE EXPENDITURE (USD BN, CONSTANT 2015), BETWEEN 2015 AND 2022

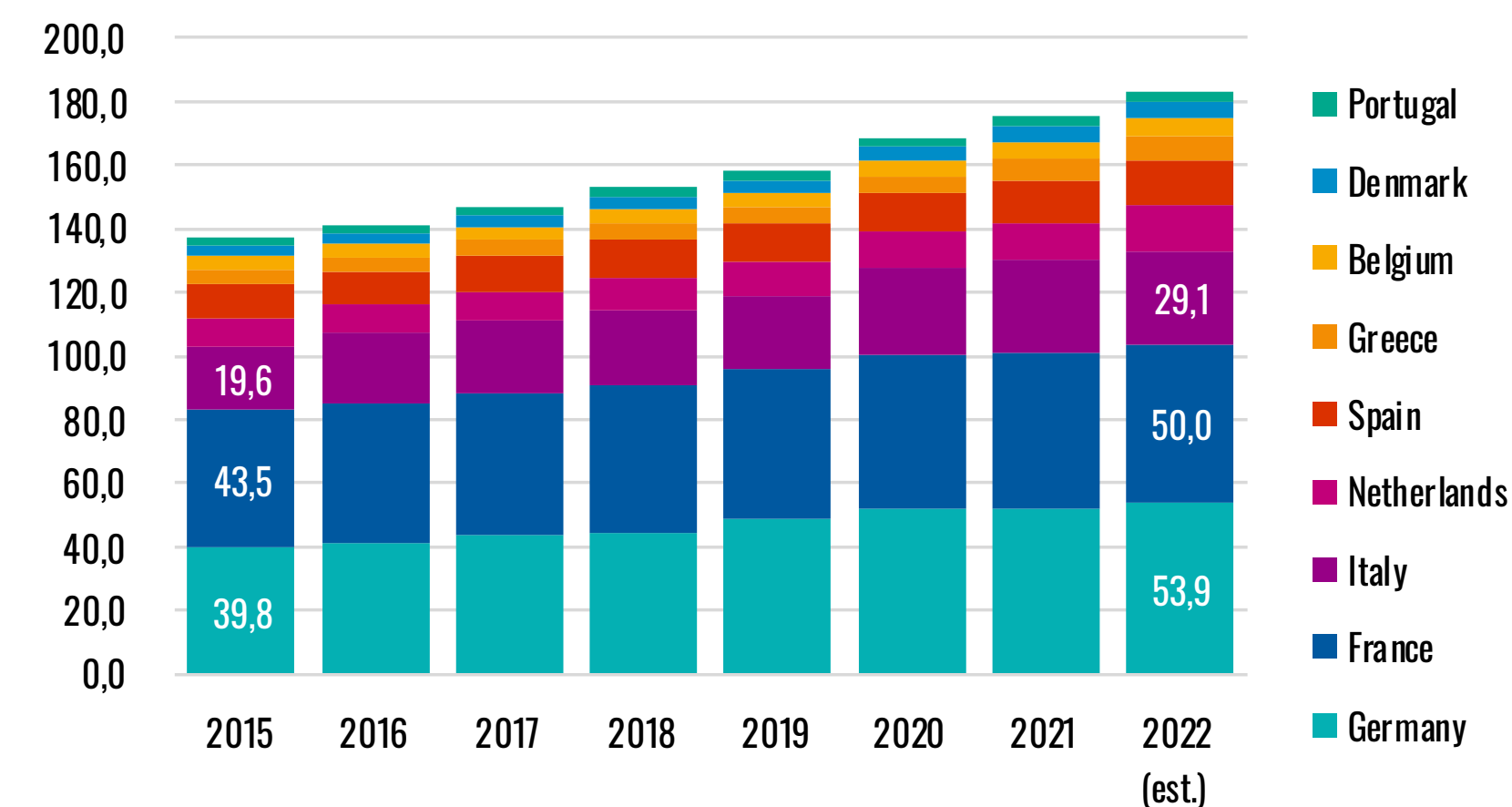
Defence expenditure (USD bn, constant 2015) between 2015 and 2022



Defence expenditure (USD bn, constant 2015) between 2015 and 2022



Defence expenditure (USD bn, constant 2015) between 2015 and 2022



Despite smaller scale, defence expenditure of the 3 Seas countries between 2015 and 2022 grew faster (7% per year) than in the case of the Rest of EU-27 countries (4% per year).

In the 3 Seas bloc, Polish military expenditure grew at an average 5% per year between 2015 and 2022.

For Romania, the rate was 7% per year.

Fastest growing countries were Lithuania (16% p.a.), Bulgaria (15% p.a.) and Latvia (14% p.a.).

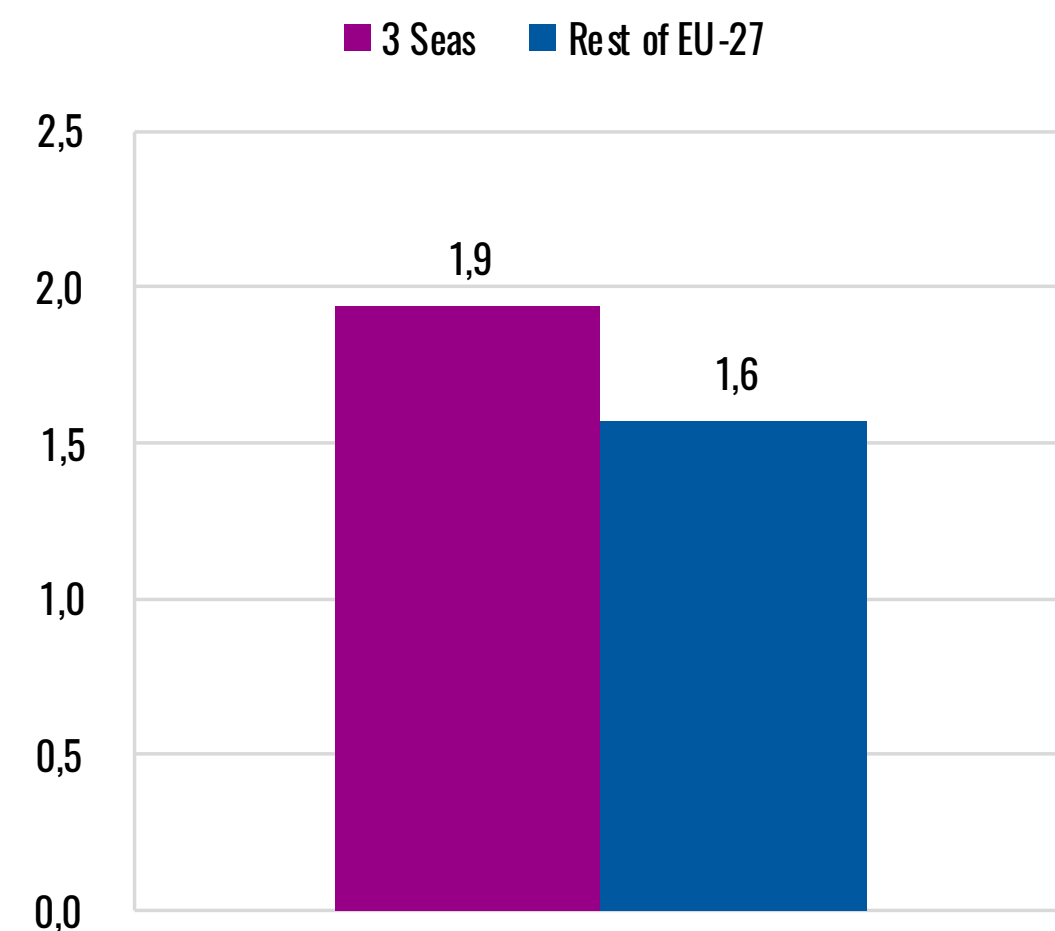
Within the Rest of EU-27 countries, German military expenditure grew at an average 4% per year between 2015 and 2022.

For France, the rate was 4% per year.

Fastest growing countries were Greece (8% p.a.), the Netherlands (8% p.a.) and Italy (6% p.a.).

DEFENCE EXPENDITURE AS % OF GDP (USD BN, CONSTANT 2015), 2022 EST.

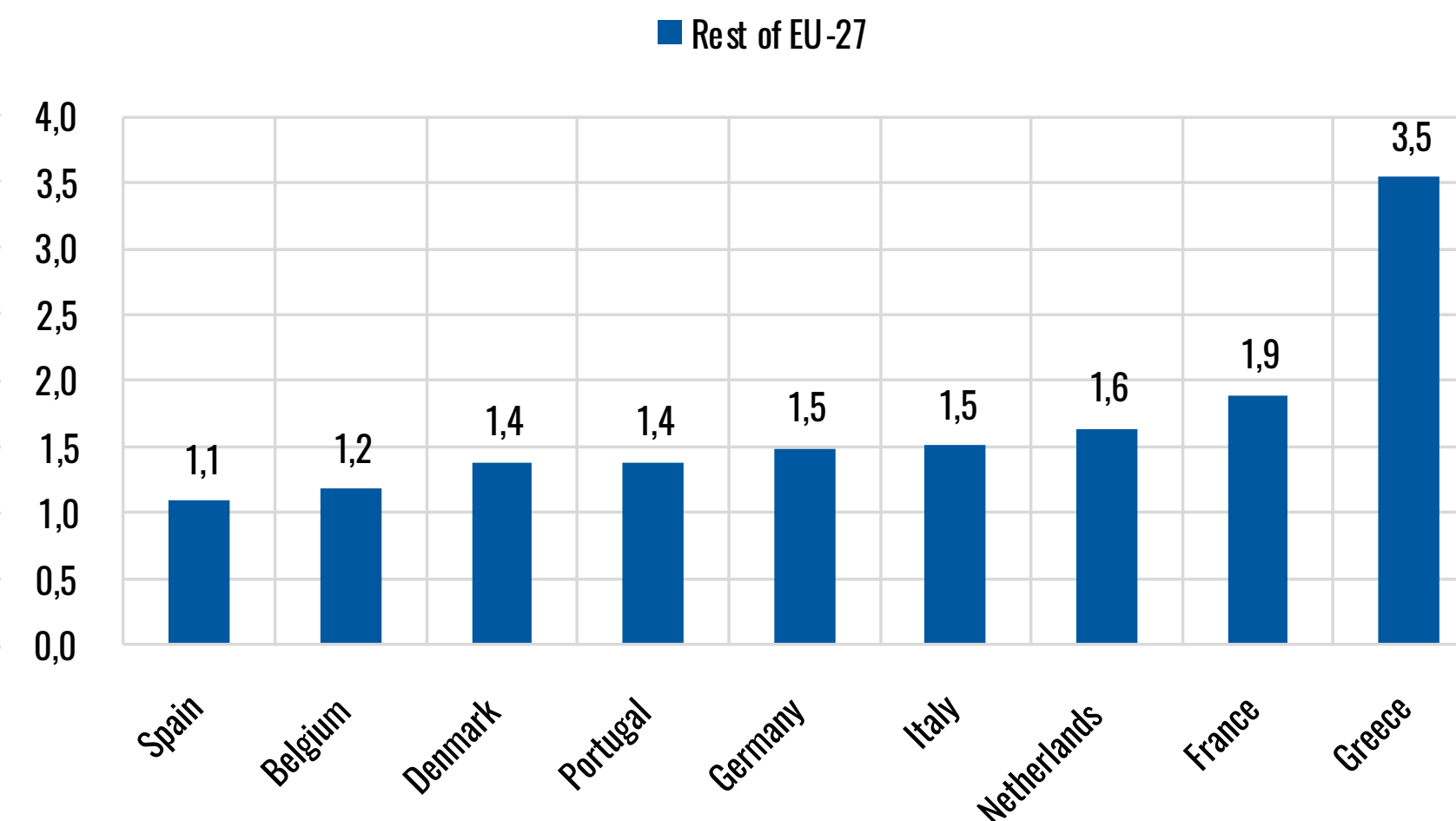
Defence expenditure as % of GDP (USD bn, constant 2015), 2022 est.



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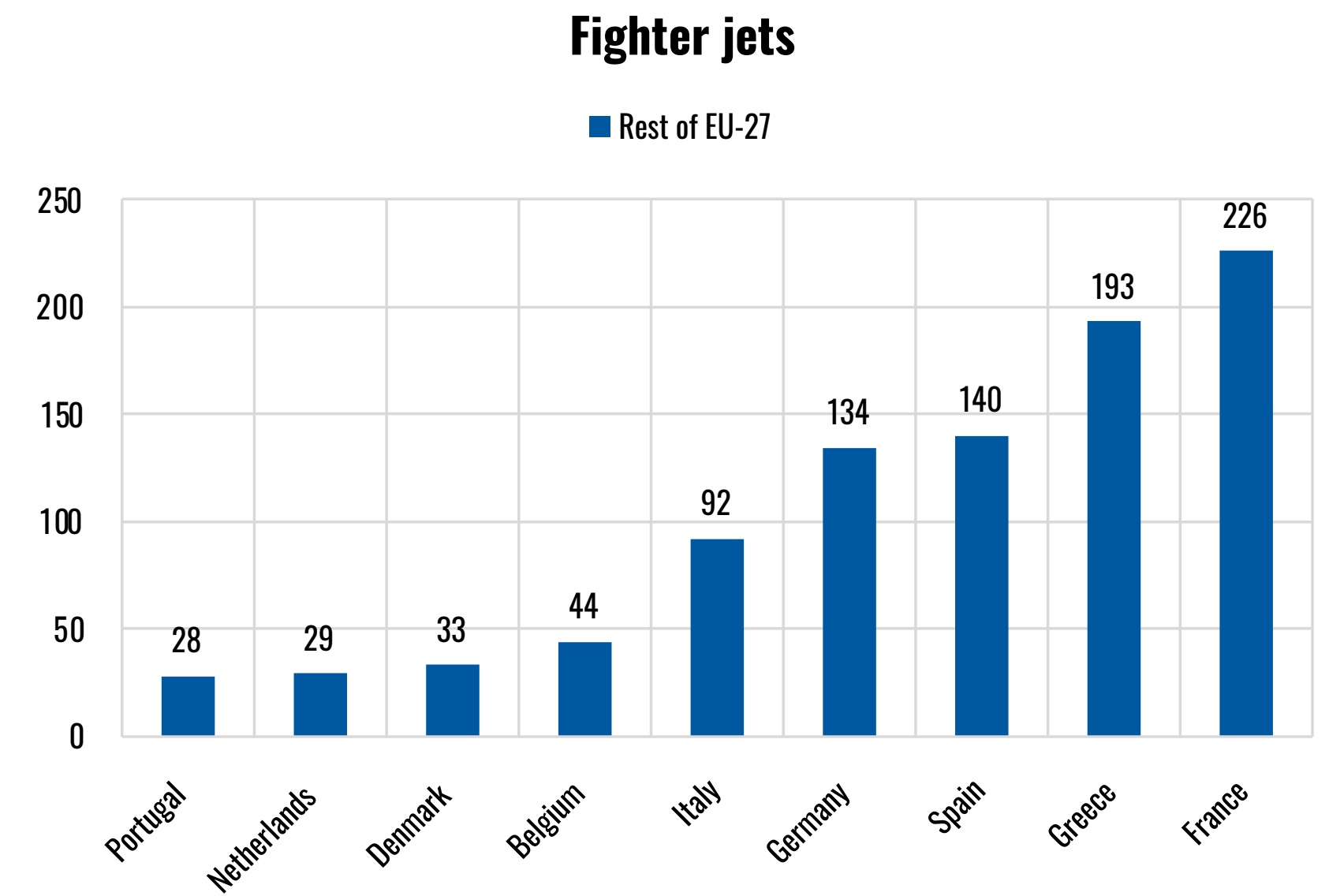
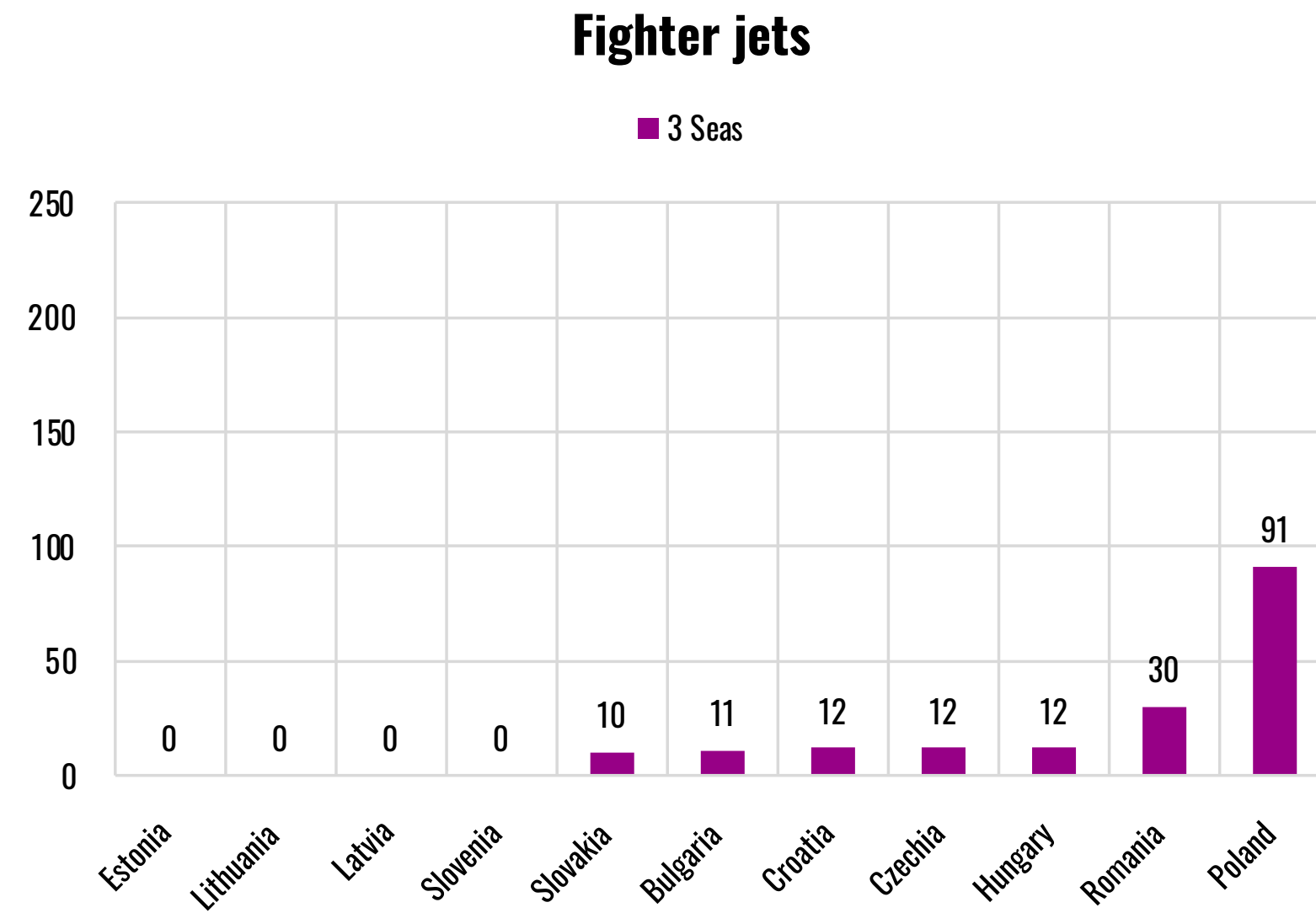
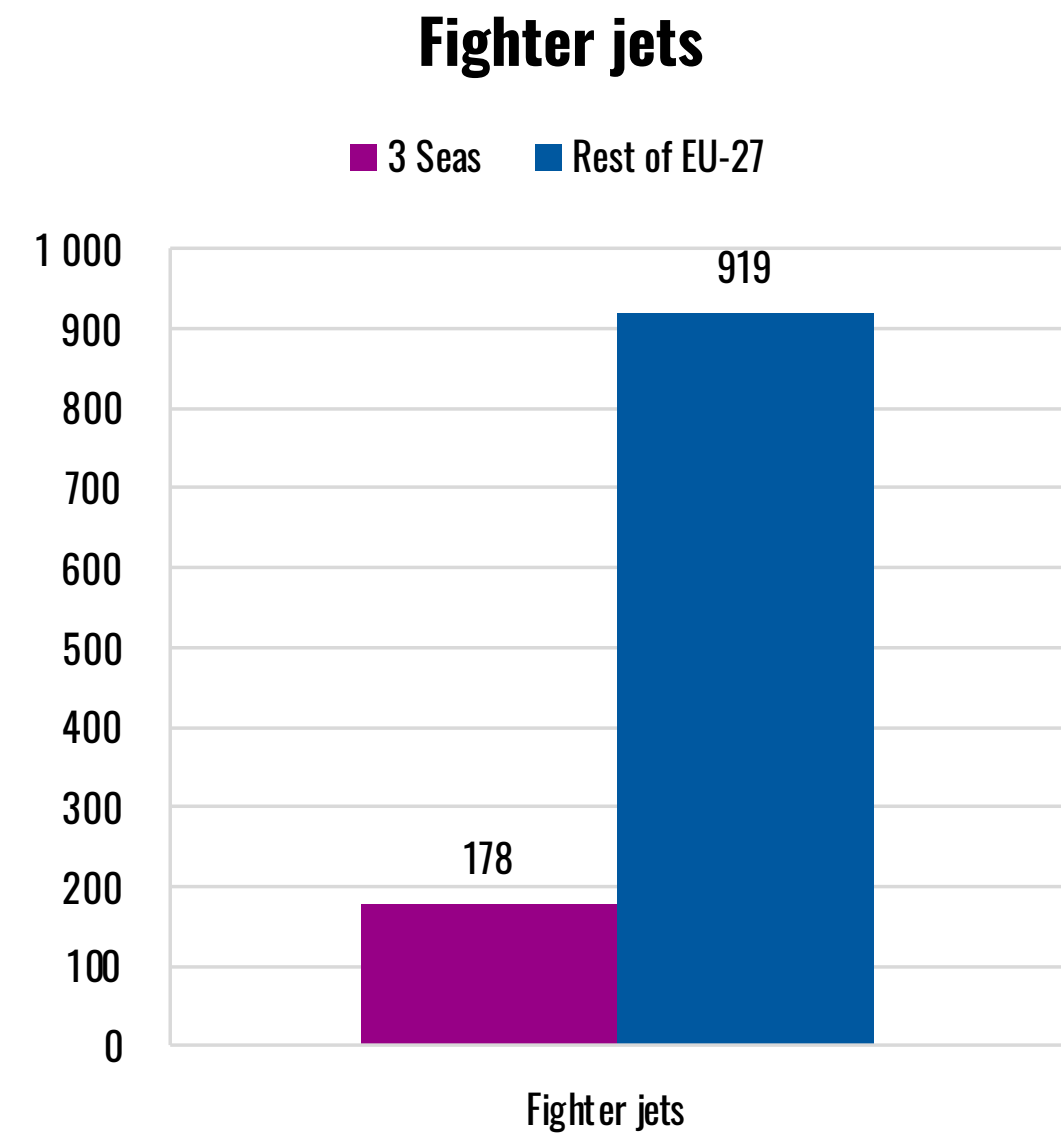
In 2022, the 3 Seas countries spent 1.9% of their GDP on military.

This was more than in the case of the Rest of EU-27 countries which spent 1.6%.

In the 3 Seas bloc, Lithuania, Poland, Estonia and Latvia each spent over 2% of their GDP on the military.

Within the Rest of EU-27 countries, Greece spent 3.5% of its GDP on the military, followed by France (1.9%) and the Netherlands (1.6%).

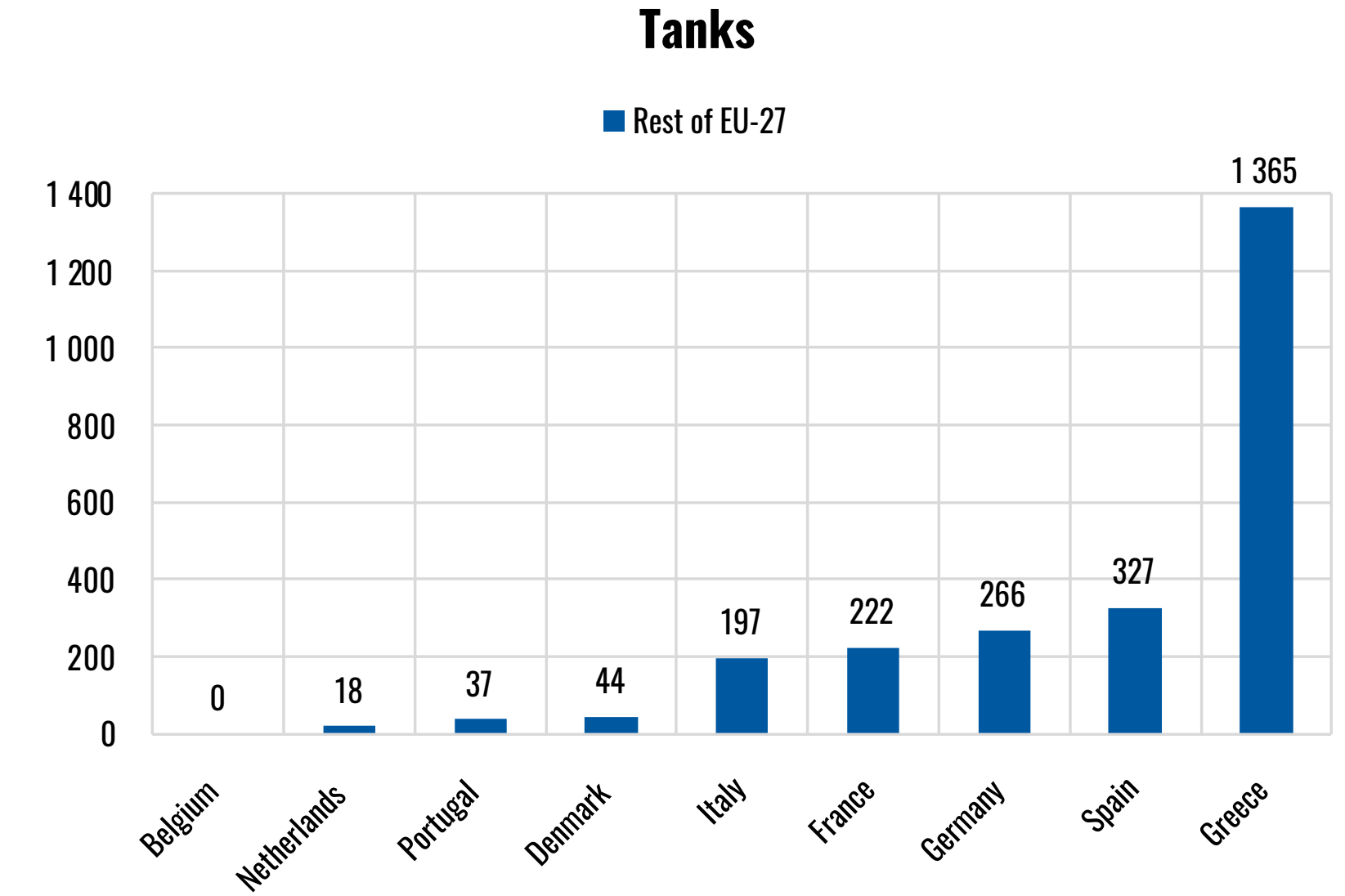
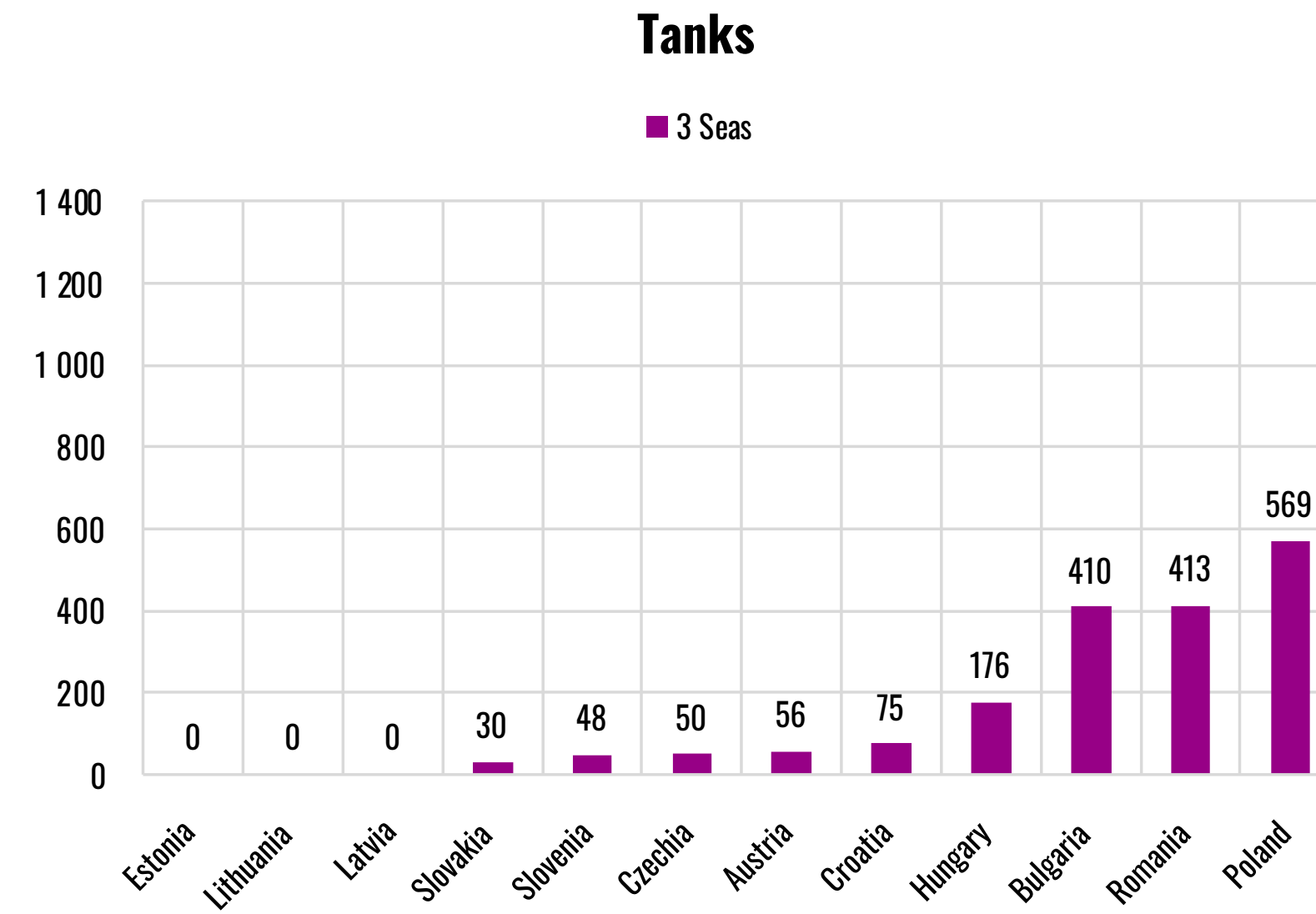
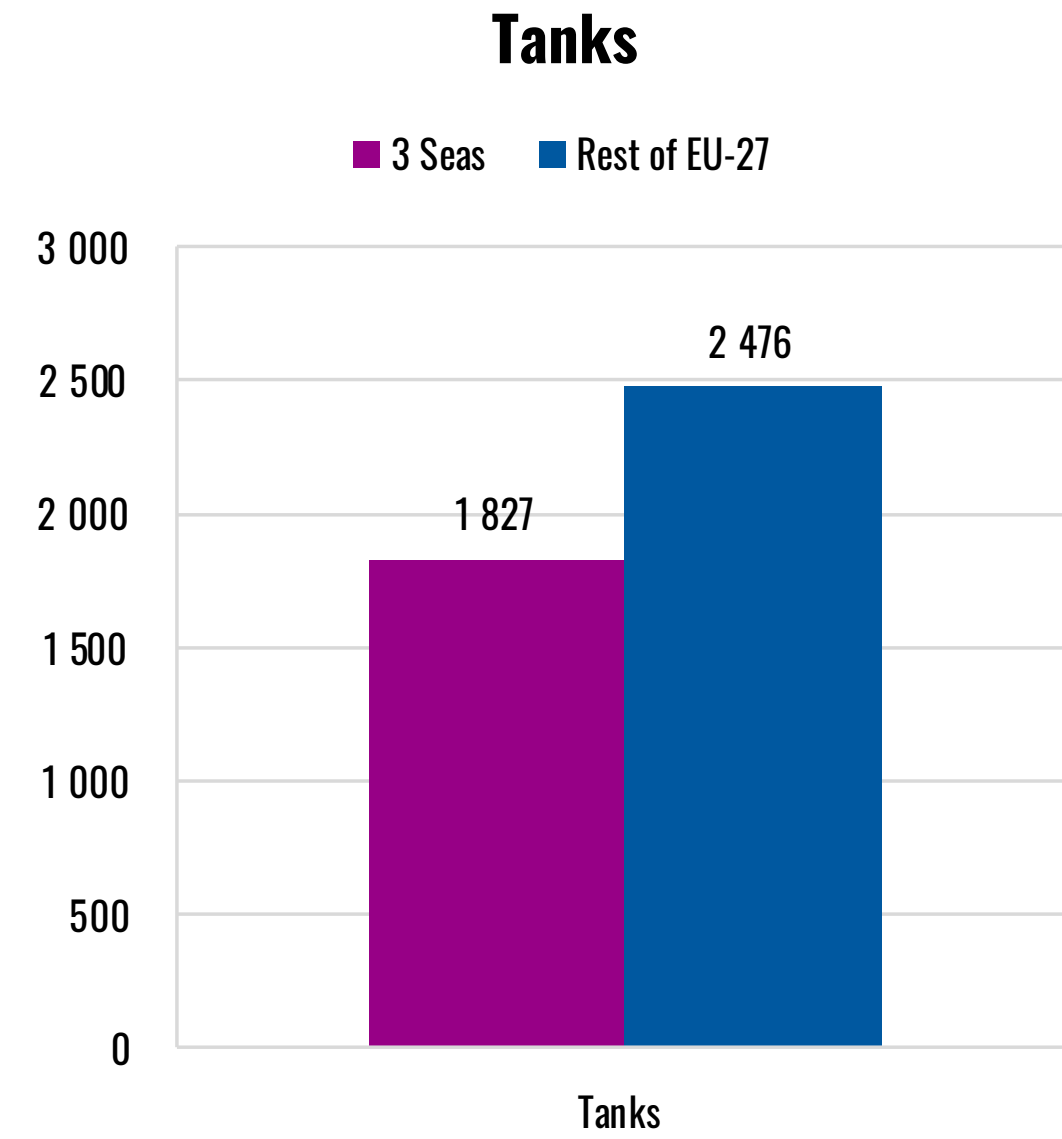
FIGHTER JETS



In 2022, the Rest of EU-27 countries outnumbered the 3 Seas countries in fighter jets inventory over fivefold.

In the 3 Seas bloc, Poland and Romania had the most fighter jets.

Within the Rest of EU-27 countries, France, Greece, Spain, Germany and Italy each had more fighter jets than the 3 Seas leader, Poland.



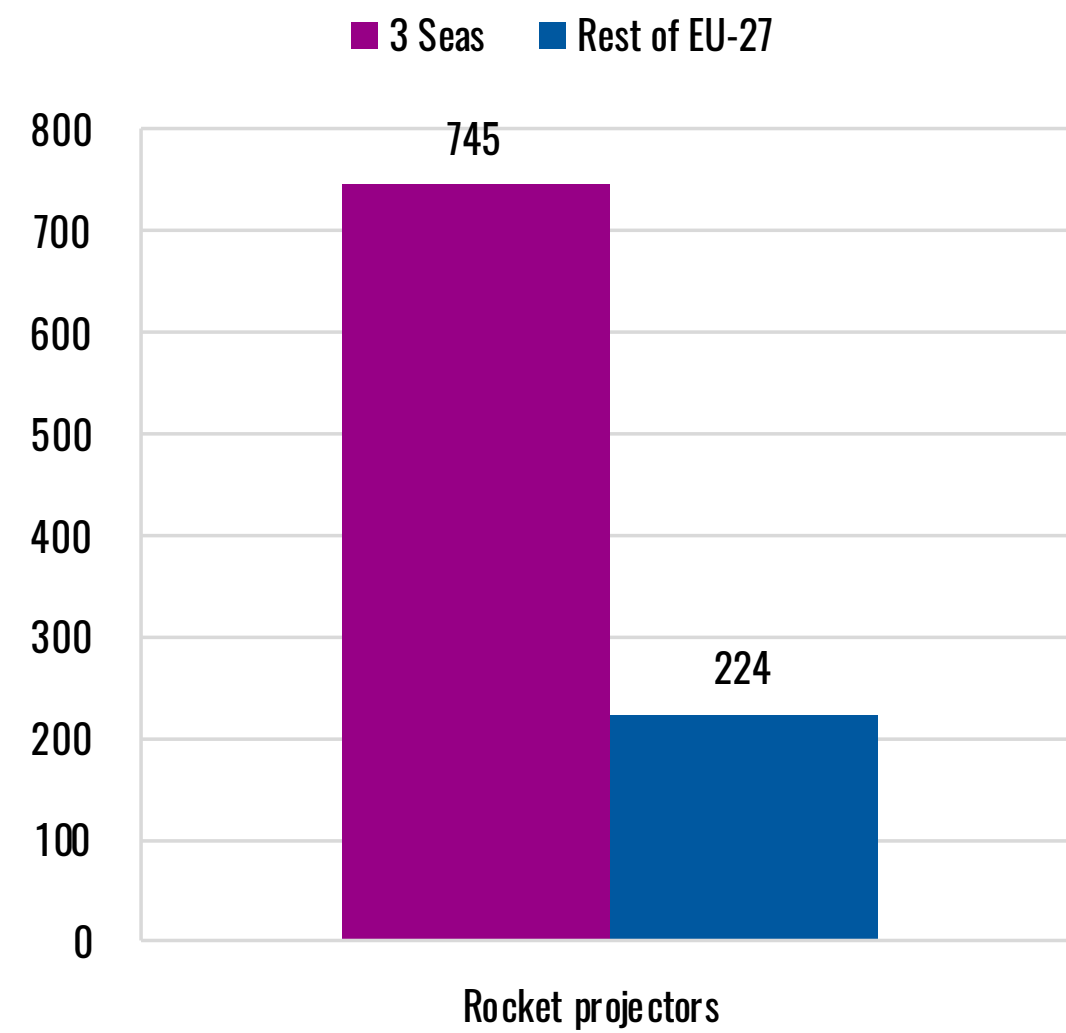
In 2022, the 3 Seas counties had over 1,800 tanks, compared to nearly 2,500 tanks in the Rest of EU-27 countries.

In the 3 Seas bloc, Poland was the only country with over 500 tanks, followed by Romania and Bulgaria each having over 400 tanks.

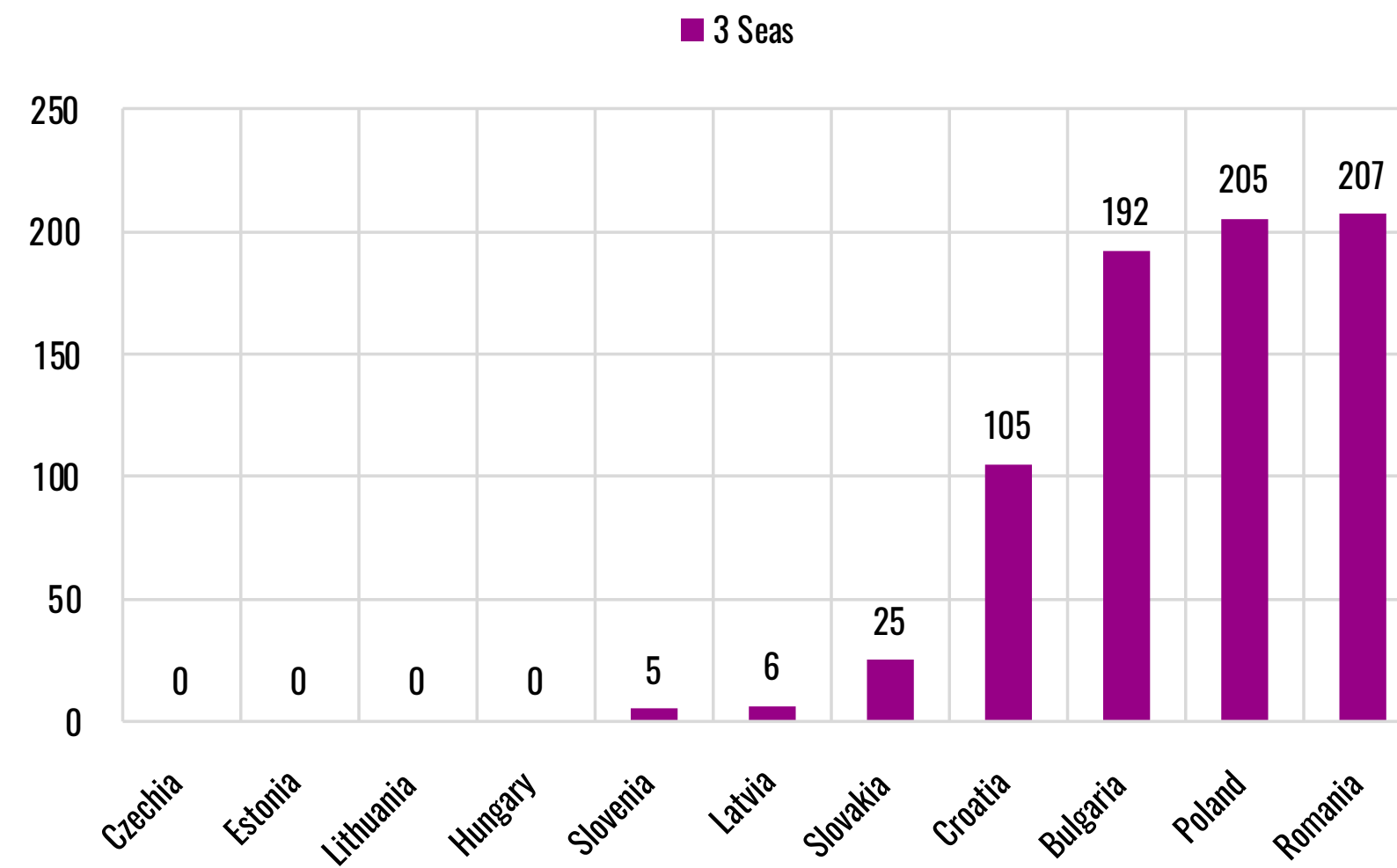
Within the Rest of EU-27 countries, Greece stood out in the number of tanks (1,365), over four times more than the second in line Spain.

ROCKET PROJECTORS

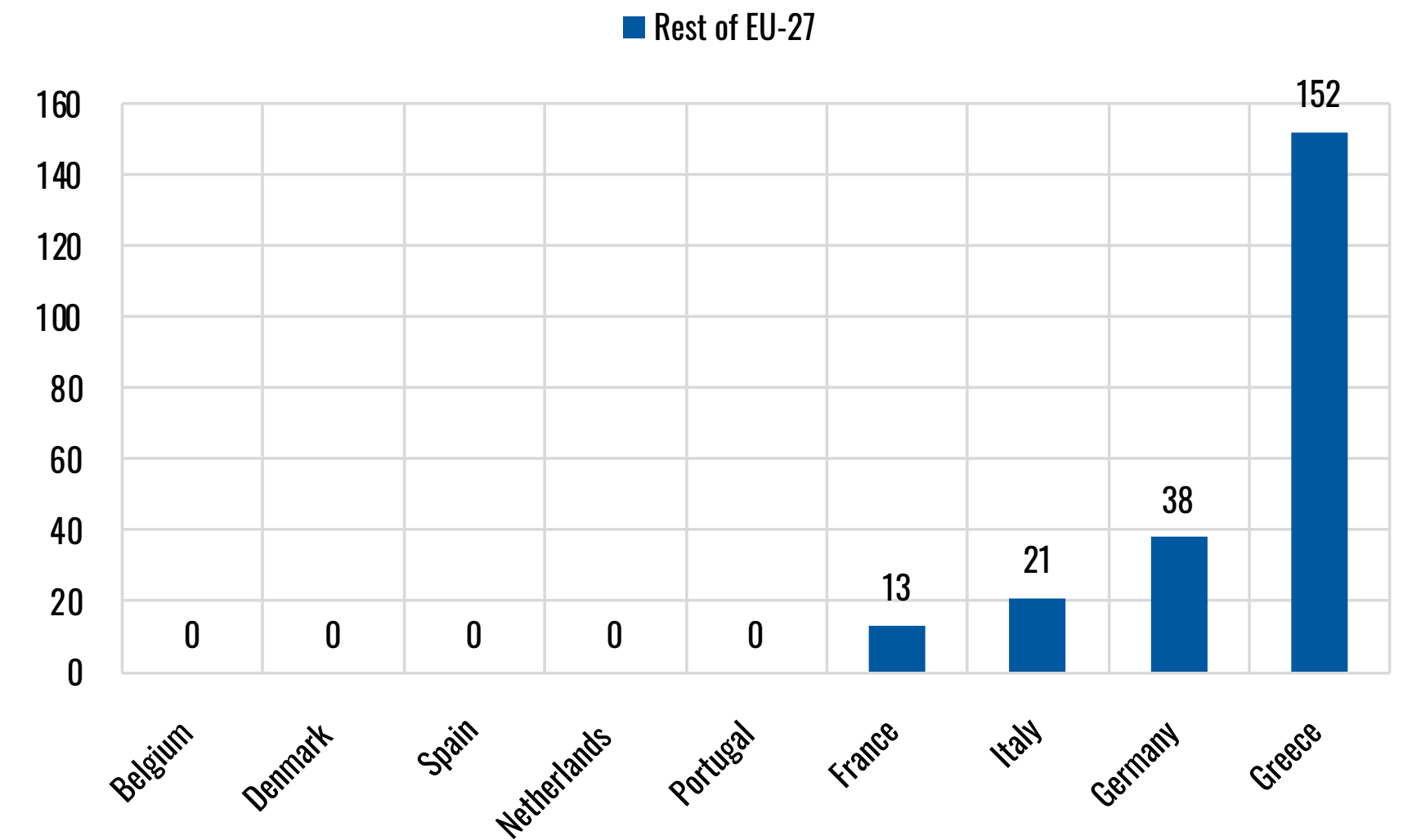
Rocket projectors



Rocket projectors



Rocket projectors



In 2022, the 3 Seas countries had almost 750 rocket projectors, which was over three Times as many as in the case of the Rest of EU-27 countries.

In the 3 Seas bloc, Poland, Romania and Bulgaria altogether had over 600 projectors.

Within the Rest of EU-27 countries, Greece had the most (150) projectors, followed by Germany (38) and Italy (21).

The report for 3SeasEurope was prepared by experts of the Jagiellonian Institute

