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STRATEGIC UPDATE

2021

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FOREWORD BY THE FRENCH MINISTER OF THE ARMED FORCES

Since the publication of the 2017 Defence and National Security Strategic Review — the framework that laid the foundations for the Military Planning Law (MPL of 13th July 2018) for 2019-2025 — our strategic environment has been in a constant state of flux, as the President of the French Republic noted on 7th February 2020 in his speech on defence and deterrence strategy at the École Militaire. Certain trends that were already in play have been confirmed, while others have accelerated and a number of disruptive events have made their mark. The Covid-19 pandemic, in particular, has provoked major social and economic upheavals, magnifying divisions and power relationships, creating new tensions over resources and, above all, catalysing threats. The time has therefore come to take stock of the changes that have occurred over the past four years

For this reason, I wanted to update the French Ministry for the Armed Forces' analysis of the status and evolution of the strategic context. This work, which is the subject of this publication, has involved numerous consultations, both within the administrations involved in our defence and security policy and with parliamentarians and experts from civil society. Exchanges have also taken place with our main partners and allies.

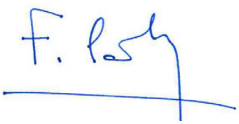
Now that this analysis has been completed, I note the extent to which certain trends identified in 2017 have intensified since then. This is true of the competition between major powers as well as the increasingly widespread use of hybrid strategies, the emboldening of regional powers and the disruptive effects of new technologies, particularly in the digital and space domains.

The 2021 Strategic Update also contributes to an initial assessment of the results of the Ministry's action and the implementation of the military planning law as requested by the President of the Republic, in order to prepare the armed forces to protect France and the French people more effectively against the threats of tomorrow. Faced with an unstable and degraded environment, we have adapted our responses to our competitors and developed our international partnerships, particularly in Europe, and the indispensable effort to rebuild our armed forces is now well under way.

As well as contributing to the adaptation of our defence effort at the national level, this document will also enable us to share our analysis of the international security environment at a key moment, when the North Atlantic Treaty Organisation (NATO), the European Union and a large number of countries are embarking on similar reviews.

The accelerated transformation of the international order confirms that "Ambition 2030", following on from regeneration and modernisation under the current MPL, is an opportune and imperative goal enabling France to achieve a coherent, agile and innovative armed forces model. It is my conviction that only a comprehensive armed forces model, in which conventional and nuclear forces support each other at all times, will be effective across the full spectrum of possible conflicts and equal to the challenges ahead. This is how the Ministry for the Armed Forces will be able to achieve the objectives set by the President of the Republic: to guarantee security, autonomy of decision-making and action, and the capability that France, and the European Union, will need in order to act as a driving force in tomorrow's world.

Florence Parly



1. The proven degradation of the strategic context

1.1. Confirmation of the assessments in the 2017 Defence and National Security Strategic Review

In his **speech on defence and deterrence strategy**[1], the President of the French Republic underlined the three-fold strategic, politico-legal and technological shift in the international environment. A few months after the emergence of the **Covid-19 pandemic**, the socio-economic context and the international environment have never looked as uncertain as they do today. These uncertainties confirm and amplify the negative trends identified in this speech and in the 2017 Defence and National Security Strategic Review (DNSSR). **The deterioration of the strategic context is accelerating**, jeopardising existing balances, the international security architecture, and multilateralism, while crises persist and threats are spreading in all conflict domains, even on national soil.

1.1.1. Entrenched crises and structural fragility

France's level of international commitment has not wavered since 2017, in the face of multiple crises differing in nature and intensity.

The eastern and northern flanks of Europe have remained under pressure, with conflicts in Ukraine and the Caucasus (Nagorno-Karabakh), an open crisis in Belarus, persistent challenges in the Balkans, and recurring tensions along the borders between NATO members and Russia, as the latter has pursued its military modernisation and disinformation campaigns.

Africa remains a hotbed of open crises compounded by rivalries imported by countries seeking influence. The active interference of external powers is thus exacerbating pre-existing antagonisms in Libya, transforming the crisis into a conflict and undermining cohesion within major multilateral organisations. In West Africa, and particularly in the **Sahel-Sahara region**, there is a growing number of potential crisis factors. Demographic pressure and the consequences of climate change are increasing urban pressure and heightening tensions between nomadic and sedentary populations. Wherever State governance is absent or ineffective, Islamist preachers and radical movements are recruiting from the ranks of unemployed youth.

1 Speech on defence and deterrence strategy, Ecole de guerre, 7 February 2020.

This breeding ground for mistrust, which is conducive to contestation and to the extension of the **terrorist threat**, is advancing southwards to the point of threatening the stability of the coastal States of the **Gulf of Guinea**. Stabilisation and development efforts in the Sahel are beginning to bear fruit, thanks in particular to the support of a broader coalition of international organisations and partners who have committed themselves alongside France, including via military support. However, the disintegration of States or the fragility of their institutions is nurturing the persistence of armed groups of all types, whether religious, ideological or criminal, from West Africa to the Gulf of Guinea and as far as the Central African Republic, the Democratic Republic of Congo, Somalia, and Mozambique.

Likewise, **the crises in the Near and Middle East are changing but not subsiding**. Although they reflect real progress towards normalisation between Israel and the Arab countries, the Abraham agreements signed on 15 September 2020 have not reduced instability in the region. In Syria, the recapture by the regime and its supporters of a large portion of the country has in no way led to a lasting resolution of the crisis which would alleviate the suffering of the population and allow the return of refugees. In Iraq, political progress must not eclipse the situation of a country suffering from strong popular dissatisfaction, an unprecedented economic crisis, and tensions fuelled by Iran.

In **Afghanistan**, after four decades of war, the level of violence remains extremely high, despite the agreement signed between the United States and the Taliban on 29 February 2020 in Doha. The peace process and the political future of the country (Taliban takeover of the Afghan State or power-sharing) remain fraught with uncertainty and could affect our interests, through international terrorism, drug trafficking, or illegal immigration.

Crises and structural fragility feed off each other. For example, the potentially destabilising nature of global population growth[2] exacerbates existing political and socio-economic tensions in already fragile regions and is reflected in the **influx of migrants and refugees** into Europe.

2 The world population is expected to grow from 7.7 billion in 2019 to 8.5 billion in 2030 (+10%) and 9.7 billion in 2050 (+26%), an increase concentrated in the States of sub-Saharan Africa (doubling of the population), according to the UN (*Department of Economic and Social Affairs, World Population Prospects 2019 : Ten Key Findings*).

The European periphery has been in a state of permanent instability for a decade. Continuing violence in the Sahel, Libya, Syria, Iraq and Afghanistan, and the lack of economic prospects are triggering **large population movements**. Beyond the significant drop in irregular entries at the external borders of the European Union, recorded during the second quarter of 2020 as a result of the measures taken by States to combat the Covid-19 pandemic, new focal points for migrants in transit have developed, either informally or under State control; these could fuel a rapid and massive resumption of migrant flows. Finally, the migration issue can be exploited, as shown by the pressure exerted on the European Union (EU) by Turkey, the leading host and transit country for Syrian refugees.

As a consequence of global population growth and corresponding economic development, we are seeing a long-term and **sustained increase in demand for water and energy**. For historical and cost-related reasons, the majority of needs are still covered by fossil fuels (oil, gas, coal), which could still account for nearly 80% of the world's energy mix in 2040. Although declining, global oil consumption continues to play a decisive role in trade and is slowing down the energy transition made necessary by climate change. Thus, growing demand for gas, increasingly inaccessible conventional oil reserves and the development of non-conventional hydrocarbons are redrawing the map of production and transit zones, sometimes at the cost of growing geopolitical tensions. In future, France and Europe will be increasingly dependent for their gas supplies on countries outside the European area, whether historic producers (Russia), revived energy players (United States) or transit countries (Turkey). Finally, the Persian Gulf remains a critical source of crude oil for France and the EU — Middle East suppliers (Saudi Arabia, Iraq, Iran, UAE, Kuwait) account for one-third of world oil production and have a decisive impact on its price.

Among the other vulnerabilities identified by DNSSR 2017, and since confirmed by the **Covid-19 pandemic**, **flows** in a globalised world are **denser and more numerous**, which favours the spread of viruses, complicates the response to health crises and spares no region of the world. **The current pandemic has illustrated in spectacular manner the risks induced by the globalisation of production and value chains, the resulting effects of dependency** — particularly with regard to China, in health issues but also in many everyday matters — and the need for stronger international cooperation mechanisms.

1.1.2. Persistent threats

In addition to these crises and fragilities, the **three main types of threats identified in DNSSR 2017** are terrorism, proliferation, and the return of strategic competition between great powers, the latter characterised in particular by a more systematic use of hybrid strategies.

Over the next decade, the **jihadist phenomenon** will continue to pose a global security challenge. Whether religious or ideological, as well as social, political and economic, the structural factors that favour the rise of jihadist groups in theatres of operations are multiple and have not disappeared. Jihadists have always been able to exploit them and take advantage of the opportunities available to them. The presence of several thousand supporters and fighters, often held in refugee camps **in Syria and Iraq**, but also scattered in neighbouring countries and as far away as Afghanistan, is feeding a dynamic of revenge and violent engagement and preparing the next generation of jihadists. Among the many risks to be anticipated, apart from **the dispersion of foreign jihadists** from the Levant, the **continued marginalisation of Sunni populations** and Sunni-Shia tensions must be considered as the main lever for a jihadist resurgence in the Near and Middle East in the short to medium term. Indeed, it is on this fertile soil that jihadist organisations have recently succeeded in provoking full-fledged armed insurrections.

After the disappearance of the pseudo-caliphate in 2019, **the Islamic State organisation (IS)** reverted to a clandestine configuration and continued to expand its franchises in Africa and Asia. Still firmly rooted in the Levant, despite the military setbacks suffered from 2017 to 2019, it retains a strong disruptive potential by maintaining an insurgent terrorist capacity, as well as by its ability to influence minds via social networks. Faced with the current crises and different regional contexts (Sahel, Yemen, North Africa, Syria, Afghanistan, Somalia...), **the Al-Qaeda (AQ) movement** is also experiencing a revival. In Yemen, for example, although divided and weakened by the loss of key personnel, Al-Qaeda in the Arabian Peninsula (AQAP) continues to pose a threat. In the Sahel, the Support Group for Islam and Muslims (SGIM) has also been weakened by the elimination of important leaders and its fight against Islamic State in the Greater Sahara (ISGS), but it has not given up its ambition to extend its attacks beyond Mali.

Islamic State and Al-Qaeda, therefore, still have significant operational competences (bomb makers, military trainers, specialists in clandestinity, financiers...) and could have access to more sophisticated weapons in the future.

We cannot exclude the hypothesis of a re-emergence of territorialised proto-States, following the collapse of governance as well as difficulties in establishing post-conflict stability. The reappearance of jihadist sanctuaries, possibly linked to emerging insurgencies, would once again raise the spectre of a militarised and belligerent jihadist threat.

The recent jihadist attacks in France and Austria confirm the fact that **Western countries remain targets of choice** for jihadist organisations. Moreover, the **endogenous threat** has never been so high and is likely to increase further in the near future.

Finally, the situation in the countries around the Mediterranean should be closely monitored.

The **proliferation of** weapons of mass destruction and their delivery systems is a growing threat, as illustrated by the worsening North Korean and Iranian nuclear proliferation crises, as well as the continuous upgrading of certain ballistic missiles and the use of chemical weapons in the Syrian theatre[3]. The CBRN threat has also diversified and is no longer limited to theatres of operations. The repeated use[4] of chemical agents to spread terror or to poison has reinforced the sense that a taboo has been broken. The threat is therefore real, including on national soil, and it could be amplified by expected developments in synthetic biology.

While a major health crisis and not a chemical or biological threat, the **Covid-19 pandemic** has exposed real fragilities in Western States, from warning mechanisms to health systems, which could foster opportunistic exploitation.

In the nuclear field, the adoption by some States of opaque, or even use-oriented, nuclear postures seems increasingly at odds with the classic codes of deterrence, as it forms part of a strategy of intimidation or even

3 Since 2013, more than 30 chemical attacks have been carried out by the Syrian regime.
4 Since the Litvinenko case in November 2006, there has been a series of incidents — the assassination of Kim Jong-nam in Malaysia (February 2017), the Skripal case, the attempted assassination of a former GRU spy with a *Novichok-type* chemical agent in the UK (March 2018), and the Navalny case in August 2020.

blackmail that could provoke escalation. At the conventional level as well, we note the dissemination of effective anti-access / area denial (A2/AD) capabilities, modern combat aircraft or missiles of all types which, in becoming accessible, help to embolden regional powers.

Thus, **Iran is pursuing its nuclear programme** in violation of its commitments under the JCPoA, particularly with regard to its stockpiles of low enriched uranium and heavy water, authorised enrichment levels, R&D and the installation of centrifuges. In addition, Iran is failing to cooperate fully with the IAEA in verifying its nuclear obligations. Tehran is also pursuing the development of its ballistic and space programmes, conducting numerous operational launches and tests aimed at improving the range, accuracy and penetration of its delivery systems — in violation of UN Security Council Resolution 2231. Iran also continues to transfer ballistic systems and technologies to regional non-state actors, both in Lebanon and Yemen.

Similarly, the **strategic challenge posed by North Korea**, which is disrupting regional and ultimately global strategic balances, has only increased since 2017: the United States failed to obtain concrete guarantees on the country's denuclearisation at the 2018 and 2019 summits, while Pyongyang has shown its determination to develop an operational nuclear arsenal of intercontinental range and has made continuous, significant progress. Since May 2019, North Korea has resumed conventional and short-range tests and, at the end of December 2019, openly raised the possibility of resuming its long-range nuclear and ballistic tests, on which a moratorium had been agreed in 2018. Beijing and Pyongyang also appear to have realigned their regional ambitions. While China is still promoting the "denuclearisation of the peninsula", it seems that neither the definition of the terms nor the purpose of the process satisfies the expectations of the international community.

Contestation of the international order is leading to multi-dimensional competition between the international powers extending to **all domains of confrontation**. The resumption of **strategic and military competition, whether by Russia or China,** is now acknowledged.

Relying first and foremost on a range of non-military resources (instruments of disinformation and propaganda, capacity for clandestine action,

etc.), the **strategic intimidation posture** developed by **Russia** is also based on the political priority given to the development and modernisation of sophisticated military capabilities, whether conventional (A2/AD), non-conventional (private military contractors or proxies) or nuclear. The **resurgence of Russia's military power**, in contrast to the country's economic and demographic decline, is based on upgrading nuclear components, developing new weapon systems, some of which are destabilising[5], and modernising conventional forces. For example, by establishing anti-access and area denial (A2/AD) capabilities along its borders, designed to force any attacker into a major escalation, Moscow could pursue both defensive and coercive aims ("aggressive sanctuarisation"), depending on the circumstances. Moscow can now project forces (occupation of the Crimea and the Donbass, intervention in Syria), deploy a strategy of intimidation throughout neighbouring States and beyond (Arctic, Caucasus, Balkans, Mediterranean), **degrade the Western powers' freedom of action** and make itself a key player in the management of regional crises. As has been demonstrated, particularly in the Levant, Russia has become an **opportunistic and agile power**, with a rapid projection capability.

The **People's Republic of China**, meanwhile, has doubled its defence budget since 2012, making it the second largest in the world, while expanding its nuclear arsenal and developing new systems[6]. The deployment of a carrier battle group beyond the South China Sea illustrated these new ambitions in terms of power projection. In response, the United States, whose military budget had stabilised[7] below $700 billion between 2012 and 2017, has since increased expenditures to $720 billion and has made competition between the major powers the main determinant of its defence policy[8].

1.1.3. Increasingly widespread use of hybrid and multifaceted strategies

Globalisation of competition also leads to extended fields of confrontation, particularly in areas that lend themselves to ambiguous aggression. Cyber and space now constitute acknowledged domains of permanent strategic rivalry, or even conflict. This is illustrated by the operations

5 So-called 'exotic' new weapons announced in Vladimir Putin's speech on 1 March 2018: four new missiles (ICBM, ALCM), but also an intercontinental nuclear torpedo and a nuclear-powered cruise missile.
6 ICBM, SLBM, anti-ship missiles and hypersonic MRBMs, as well as a supersonic UCAV.
7 After nearly doubling from 2000 ($452bn) to 2008 ($823bn) under the *Global War On Terrorism*.
8 Cf. the official U.S. *National Defense Strategy* of 19 January 2018.

conducted by States in outer space, materialised in irresponsible or even dangerous behaviour, "unfriendly" activities or demonstrations of power (ASAT launches, proximity manoeuvres, jamming of positioning systems, etc.). The seabed is also increasingly becoming the setting for power struggles (seabed warfare), with the key issue of submarine cables in particular.

In these areas of confrontation without borders, identified in DNSSR 2017, China and Russia are the most active, but regional powers are also antagonistic and taking advantage of the unprecedented accessibility of space as well as the low cost of certain courses of action in cyberspace, often using affiliated non-state intermediaries. Attribution is a challenge of its own.

Some of our competitors, state and non-state, use "**hybrid strategies**", i.e. combining military and non-military, direct and indirect, legal and illegal, but always ambiguous, courses of action designed to remain below the estimated threshold of retaliation or open conflict. At the top end of the "hybrid spectrum", **non-state armed groups** can be used for covert, or at least unacknowledged, armed aggression.

At the lower end of this spectrum, the increasing digitisation of developed societies and the resulting interconnection of data increase their vulnerability to **information manipulation, which is contrary to democratic values**. More or less discreet, disinformation efforts, magnified by hyper-connectivity and artificial intelligence, are today leading to a form of surreptitious subversion, which aims to increase internal tensions in the targeted society, to influence it and to foster political paralysis by sowing confusion. The fast-changing nature of these informational manoeuvres, and their refinement, make the phenomenon difficult to characterise and attribute. The information sphere, flooded with digital resources, has become a key part of conflicts, impacting forces, institutions and populations.

Finally, the **use of lawfare**, through the unilateral promotion of standards, the reinterpretation of existing standards or the extensive use of extra-territorial sanctions, is also one of the many power levers available to achieve strategic and economic objectives..

All along the "peace-crisis-war continuum", the new hierarchy of powers thus translates into unfettered strategic competition, comprising intimidation and even coercion, leading to **serious risks of uncontrolled escalation**.

1.2. Accelerating trends and overlapping crises

The multidimensional crisis caused by the **pandemic is acting as a catalyst** for the major threats and trends previously identified, while at the same time degrading the response capacities of States. Widespread health protection measures have had unprecedented consequences on the global economy, leading to the **most severe economic recession since 1929**. The remedial measures announced by States (relocation of activities, repatriation of strategic production, etc.) foreshadow an at least partial decline in the internationalisation of the economy. The crisis is also focusing almost all the attention of the international community, at the risk of neglecting other issues that are just as worrying but long-term.

1.2.1. United States: disengagement versus rivalry with China

American security policy is undergoing a long-term refocus, already initiated under the Obama administration ("nation building at home") and now formalised in several official documents. Washington intends to reduce its engagement in theatres perceived as secondary, in order to concentrate on strategic competition with the major powers. In particular, the emergence of China as a strategic rival — its considerable military and technological investments, its expansionism in all directions and the resulting tensions in Asia — as well as Russia's military modernisation efforts and the posture of intimidation adopted by Moscow, pose a challenge to the pre-eminence of the United States. In return, the firmer stance towards China in particular is the subject of bipartisan consensus in Washington. This focus on strategic competition is accompanied by a more or less gradual military disengagement from theatres of operations in which U.S. forces have long been engaged, such as Afghanistan and Iraq. Washington also expects its allies and partners, in particular those hosting U.S. forces on their territory, to take on a greater share of the "burden", thus allowing resources to be redirected towards American priorities (innovation, multi-dimensional force model refocused on high-intensity operations).

Analyses on the return of strategic competition, at the heart of this refocus, are shared by many of the United States' allies, starting with France. However, the conclusions that have been drawn by Washington since 2017 are problematic in several respects. The weakening of the international order should give rise to renewed efforts in support of multilateralism and

arms control, rather than a move away from them. Similarly, it would be dangerous to overlook the continuing threat of jihadist terrorism or to leave regions plagued by instability to fend for themselves, as they provide opportunities for the ambitions of emboldened global and regional powers. Finally, the overly exclusive focus on competition with Beijing, and the resulting temptation to restore a form of bipolarity based on the alignment of allies, could be inconsistent with a complex, resolutely multipolar world.

Between a general aspiration to disengage, demands to allies, and occasional military re-engagement, the global orientation of U.S. policy is unclear and makes transatlantic consultation indispensable. Since 2017, the Trump administration had multiplied signs of mistrust towards multilateral organisations, whilst also giving the impression of mixing commercial and security interests according to a transactional approach. On all these issues, the new American administration could opt for international cooperation, in contrast to the unilateralism pursued since 2017; it would then be up to the Europeans to firmly seize any such overtures.

1.2.2. Development of Russian and Chinese power politics

Russia and China have actively developed their **power strategy**, exploiting available opportunities and neglected areas, as illustrated during the Covid-19 pandemic.

Although its economic leverage is constrained, Moscow today remains determined to deploy its strategic ambitions, particularly in the Middle East and Africa, and even in South-East Asia and Latin America. Its renewed military capabilities, its private military contractors, its immaterial capabilities and its diplomatic influence **allow it to project itself** more easily into **more distant theatres**. Faced with Moscow's strategic opportunism, and given the central role played by Russia on issues that directly affect national security interests, France has opted for a balanced response that combines firmness and engagement, which has made it possible to **initiate a candid dialogue with Russia**.

As far as the People's Republic of China is concerned, the Covid-19 pandemic has exposed some of the **strategic ambitions and modes of action of the Chinese regime**. Openly acknowledging its strategic rivalry with

Washington and exploiting all the opportunities that have presented themselves, over the last three years, Beijing has developed a diplomacy that is both active and aggressive; raised its actions of influence to a global level; bolstered efforts relating to espionage, technological appropriation and wielding its new economic and industrial weight; and, finally, demonstrated its military resolve. Reinforced by Xi Jinping since 2012, this basic trend marks a turning point in the development of Chinese power: now endowed with unprecedented capabilities, Beijing intends to weigh more directly on global issues and to assert its strategic aspirations.

As an international plea from a rising great power, the Belt and Road Initiative (BRI) testifies at another level to China's intent to exert a greater influence on its environments, to reshape certain configurations (even beyond the South China Sea) and to become the central hub for the trade flows of globalisation. In this perspective, the development of a **first-rate military capability** is as much a quest for status as an operational ambition. The extension of its interests beyond its regional periphery requires China to invest in operational armed forces with an expeditionary capability. Visible in the construction of its naval base in Djibouti or the development of its naval aviation capacities, this desire to project itself aims to give Beijing the capacity to reduce vulnerabilities along maritime corridors, but also to protect its interests, as well as its nationals abroad, more directly. Moreover, while its public nuclear doctrine remains centred on "no first use", **the rapid development of China's deterrent capabilities** raises questions.

Capable of promoting diplomatic alignments, weighing more directly on international organisations such as the WHO or the WFP, taking long-term action in the field of information or exerting influence on major political groupings such as the European Union (use of the "17+1"), China has become a **"systemic rival" for the EU,** while remaining an economic competitor and sometimes an important diplomatic partner.

1.2.3. Emboldened regional powers in the Middle East and the Mediterranean

The American refocus on rivalry with China is also **bolstering the confidence** of countries such as Iran and Turkey, which are seeking to **assert themselves as regional powers** and are tempted to seize strategic opportunities to consolidate their status or advance their interests, at the price of growing

adventurism. In so doing, these countries are participating in the contestation of the world order in the same way as Russia and China, or even in concert with them. Indeed, while these powers are often competitors, they have at the same time shown that they can overcome their divergences in order to squeeze out Western powers. This trend, of which the Astana format (Russia, Turkey, Iran) on Syria is the most significant illustration, can be seen in a large number of crises: Libya, Venezuela, Afghanistan, etc. It further weakens international and regional organisations by developing transactional models for resolving crises.

In spite of the economic loss caused by the restoration of U.S. sanctions and serious internal setbacks (impact of the Covid crisis, destruction of a Ukrainian Boeing aircraft, regular demonstrations), **Iran** is seeking to maintain its status as a regional power through its involvement in the Syrian and Iraqi conflicts. Its support for the regime of Bashar al Assad has enabled it to strengthen its strategic corridor towards Lebanon and its regional economic interests. Iran is also striving to turn Iraq into their own "strategic backyard" and to provoke an American withdrawal. Tehran relies on political and military proxies, in particular certain Popular Mobilisation militias, and gives them support, including transfers of military equipment. These same militias are today jeopardising the establishment of a truly representative Iraqi military and thus the stabilisation of the country, while at the same time being an instrument of the struggle led by Iran against the United States on Iraqi soil. In Lebanon, Tehran can also count on Hezbollah which, while increasing its political role, has reinforced its regional stature thanks to its intervention in Syria and its role as advisor to other Iranian proxies.

Moreover, Iran intends to strengthen its influence by linking the theatres of crisis together. By supporting the Houthi rebellion or by capitalising on the frustrations felt by the Shia communities of the Arabian Peninsula, as well as by the Palestinians, to promote the "axis of resistance" concept, Tehran is trying to influence or force the hand of its Gulf neighbours.

A NATO member since 1952, **Turkey** occupies a key position in the defence and security posture of the Alliance (control of the straits, military bases). In spite of its domestic difficulties, R. T. Erdogan wants to make Turkey an indispensable player in Central Asia and the Middle East but also in Europe. Ankara has thus developed an offensive foreign policy aimed at establishing Turkey as an international power that does not hesitate to

impose itself using strong arm tactics, in the Mediterranean, Libya or the Caucasus, using all the levers at its disposal, sometimes regardless of its Alliance membership or international law.

Since January 2020, Turkey has positioned itself as a major player in the Libyan conflict, providing military support to the Government of National Accord, including violations of the arms embargo. Through its military intervention, it has succeeded in changing the local balance of power but has also reduced the possibility of a diplomatic settlement of the crisis by provoking an increased Russian presence.

The ongoing reconfigurations are in turn leading to changes in the posture of the other regional players: the United Arab Emirates (UAE), Saudi Arabia, Israel or Egypt, which are seeing their strategic environment deteriorate, while the U.S. seems hesitant over its regional involvement.

The **Mediterranean is emblematic of all these developments**. The Arab uprisings of 2011 and the conflicts that broke out in Syria and Libya have encouraged an exponential increase in illegal migration flows to Europe. The collapse of some States (Libya, Syria), but also the political and socio-economic fragility in the Levant, the Maghreb or in sub-Saharan and Eastern Africa, are all factors that amplify and entangle migration, environmental, and criminal issues. In the Mediterranean, criminal activity is constantly on the rise: trafficking in drugs, arms and human beings, money laundering, hidden investments, oil smuggling, particularly with Libya. **This trafficking is now combined with the instability caused by energy issues** and the **projection of regional powers, particularly Turkey**, in the Mediterranean periphery. Furthermore, the stronger **Russian and Chinese influences** and the **Western military drawdown** potentially open up **the southern flank of Europe** for conflicts of all kinds.

1.3. Implications for the international order and for Europe

The evolution of the geostrategic environment since 2017 thus testifies to an accelerated degradation of the international order, leading to an even more dangerous and uncertain world. In the absence of an appropriate

European response, this context of instability brings new risks to Europe's doorstep and raises the spectre of a strategic downgrade.

1.3.1. The international order and security architecture are increasingly contested

While global challenges should entail more cooperation between States, the **erosion of the international order and the weakening of its institutions** are being confirmed. Attacks on multilateralism, noted in DNSSR 2017, have continued since then. The international order is being undermined by the effects of strategic competition and the behaviour of global and regional actors that favour bilateral arrangements and power games to ensure that their national interests prevail or to modify the hierarchy of powers to their advantage. Developments in the Levant and Libya, as well as tensions in the Middle East and Asia, are concrete illustrations of this challenge to the international order and the associated risks of escalation, particularly in regions lacking collective crisis resolution mechanisms.

In parallel with the contestation of an international system and standards described as "Western", first and foremost by China and Russia, the United States has taken several decisions since 2017 that call into question multilateral institutions and agreements. These national shifts are accelerating the **deconstruction of the international order**.

This serious turn of events is evident in Europe, with the **continuous weakening of the security architecture** inherited from the Cold War. In addition to Russia's suspension of its participation in the Treaty on Conventional Forces in Europe (CFE) in 2007 and its violation of the Budapest Memorandum and the Helsinki Final Act in 2014, the American withdrawal from the Open Skies Treaty in 2020 and the current stalemate over revisions to the Vienna Document, confirm the gradual disintegration of the existing regulatory frameworks. The termination of the Intermediate-Range Nuclear Forces (INF) Treaty in August 2019, due to its violation by Russia, marked the disappearance of the only bilateral arms control instrument eliminating a category of missiles, increasing the risk of a new arms race in Europe, while uncertainties remain over the extension of New START beyond February 2021. The partial obsolescence of the arms control instruments defined according to the strategic equation of the Cold War, coupled with the emergence of **new domains for the expression of power** (cyber,

space) and now proven nuclear multipolarity, are producing cumulative effects that significantly increase instability on the European continent. Europeans are hoping to engage in a constructive dialogue with the new U.S. administration on the future of strategic stability in Europe in accordance with their own interests.

Finally, the prohibitionist dynamic, marked by the signing of the Treaty on the Prohibition of Nuclear Weapons (TPNW) in 2017 — which is due to enter into force shortly, despite the fact that it fails to fully represent the international community — is part of this contestation of the international order and of the balances enshrined in existing treaties, first and foremost the Non-Proliferation Treaty (NPT).

1.3.2. The risk of a strategic downgrade for Europe and France

Faced with these observable realities, and even if the effort remains uneven, European nations have begun to **adjust their defence budgets**, which are still lower than those of some regional powers. However, the **looming economic crisis could severely affect this upswing**. With €7 billion for the European Defence Fund and €1.5 billion for military mobility[9], the result achieved within the new EU multiannual financial framework is significant but below the level of our initial ambition — and could bode badly for some national defence budgets. **The crisis years between 2008 and 2012 already resulted in major cutbacks** in budgets and capabilities, and the latter have only just returned to 2008 spending levels[10]. **Were Europeans to make further major cutbacks in their budgets, they would deal a fatal blow to the most fragile militaries and to Europe's capacity for collective action**. In this respect, the willingness shown by a large majority of our Allies within NATO to maintain the growth of defence expenditures, despite the economic crisis, is a positive sign that needs to be confirmed in the long term. However, our allies and partners still have different sensitivities regarding the prioritisation of threats, some being tempted by unilateral solutions or bilateral arrangements that weaken our unity.

France's efforts to give more political meaning to NATO and more substance to "European Defence" (combining cooperation in ad hoc arrangements and stronger European Union action) are aimed precisely at enabling Europeans

9 Reductions of 40% and 75%, respectively, compared to the Commission's proposal.
10 See the graph in the appendix.

to respond to the challenges they face. **Europe is indeed at a crossroads** and it must get its acts together to deal with **the worsening security environment on all fronts. Our country regularly reaffirms its common destiny with the Europeans**, but it cannot face on its own all the perils weighing on the continent, despite its strategic assets (deterrent, full-spectrum armed forces model, support points in overseas territories, DTIB).

2. Adaptations underway and challenges to take up

In the face of growing disorders and persistent threats, the adaptation of our defence system has been initiated by an ambitious review of our posture and resources, as well as by the mobilisation of our partners and allies. Building a real capability for action through a full-spectrum, modern, and coherent defence capabilities will allow Europeans to be credible allies within NATO and consolidate their own national sovereignty. For France, this means maintaining armed forces that are resilient and capable of action across the entire spectrum, from hybrid operations to high-intensity conflict, thus pursuing this path between national autonomy, cooperation and acknowledged dependencies in the context of shared interests.

2.1. Adaptations to our defence have been initiated

Following on from the 2017 analyses, three lines of adaptation have been pursued: the consolidation of our defence strategy, the permanent mobilisation of our partners and allies and the modernisation of our military establishment thanks to a Military Planning Law (MPL) that combines regeneration and innovation.

2.1.1. Enhancing and adapting our defence strategy

In his speech on **defence and deterrence strategy**, the President of the Republic recalled why nuclear deterrence remains the "keystone of our security and the guarantee of our vital interests". In an environment marked by the return of nuclear reality and strategic competition between powers, our armed forces are being deployed close to nuclear powers, in Europe but also in distant theatres. The function of nuclear forces — in their two complementary components, airborne and submarine-based — is to ensure deterrence and in particular to prevent a "major war", i.e. direct confrontation between great powers. They also guarantee the freedom of action of our conventional forces, in particular by preventing

them from being circumvented "from above" through escalation. Robust conventional forces also force an aggressor to reveal his intentions quickly and prevent a possible bypass "from below", especially in the event that an aggressor seeks to quickly establish a *"fait accompli"*. In this way they contribute to the exercise of deterrence. Thus, **nuclear and conventional forces "support each other at all times"**.

After recalling France's commitment to the principle of strict sufficiency and to arms control, as well as to the need to reconcile ethics and strategy, the President of the Republic also stressed the **European dimension of our deterrence** – *"France's vital interests now have a European dimension"* – and proposed to interested European partners **a strategic dialogue** on deterrence. This approach is complementary to our efforts to **promote a nuclear culture within the Alliance**[11].

Always seeking to reconcile strategic lucidity, readiness, respect for the law and a spirit of responsibility, the adaptation of our defence strategy has focused on new fields (cyber, space, AI) and has been implemented by successive enhancements. Investing in these domains is essential for our freedom of action, in view of the widespread use of hybrid strategies.

After creating the Cyber Defence Command in May 2017, conducting a **cyber defence strategic review** and publishing elements of **cyber offensive doctrine** in January 2019, France has shown that it is capable of conducting offensive cyber operations for military purposes, in compliance with the law. In this regard, France has carried out a clarification and transparency exercise that has been acknowledged internationally, to define its vision of the applicability of **international law to cyber operations.**

In the same spirit, the Ministry for the Armed Forces has created the Space Command, attached to the Air and Space Force, and, in consultation with our European and American allies, has drawn up a new **space defence strategy**. This strategy has a threefold objective: to guarantee the peaceful and responsible use of space, to adapt to the opportunities and risks associated with routine access to space (***"New Space"***), and to respond to the increased strategic competition between space actors, which is leading to a form of weaponisation of this domain.

11 Outside NATO's Nuclear Planning Group.

Finally, the ministerial strategy for "effective, robust and controlled" artificial intelligence[12] has given birth to both the Artemis programme, which will provide sovereign decision-making tools, and an **ethics committee to advise the Minister of the Armed Forces on issues relating to new technologies**. These efforts are also in line with NATO's acknowledgement of space and cyberspace as "operational domains", and with the European Union's increased efforts to take better account of security issues in these new areas of competition.

2.1.2. 2019-25 MPL: a concrete effort to rebuild our forces

The 2019-25 Military Planning Law (MPL) marks the determination to rebuild our forces, through an **unprecedented financial effort** that breaks with the last 30 years of almost continuous stagnation or decline. It aims to give the armed forces the resources to carry out their missions over the long term, while pursuing the modernisation that is essential to meet the challenges of the future, which herald a tougher operating environment. The first two annual instalments of the MPL have reflected this desire for **recovery, which must be pursued in view of the intensification of threats and their increasing proximity to national soil. Within the framework of the 2030 operational ambition**, this effort will trickle down to many areas, from general management of the ministry[13] to high value-added capabilities in a coalition, particularly in the new areas of confrontation.

With regard to **human resources**, this MPL "on a human scale"[14] includes various measures to improve personnel conditions (Family plan) and the exercise of the military profession. It puts an end to a long period of staff deflation and even initiates a recovery, with an increase of 6,000 positions, including 1,500 between 2019 and 2022. An effective and dynamic human resources policy also requires appropriate management levers and tools, in particular to meet the challenges of attracting and retaining staff.

The operational preparation of the forces has been consolidated overall. This effort, however, must be stepped up, due to the negative impact of the Covid-19 crisis on personnel training, but above all to meet the challenge

12 "Revue stratégique de Cyberdéfense", January 2018; "Stratégie spatiale de défense", 2019; "L'intelligence artificielle au service de la défense", September 2019.
13 Digitisation of processes and secure teleworking, accelerated by the aftermath of the Covid-19 pandemic, review of projects, new information systems for human resources and command, modernisation of the purchasing function and real estate policy.
14 Compte rendu du Conseil des ministres du 8 février 2018, " Programmation militaire pour les années 2019 à 2025 et dispositions intéressant la défense ".

posed by new trends in conflicts. This is an indispensable condition for preserving our military edge, at a time when all competitors are improving their capabilities, both technologically and operationally.

With regard to equipment, the first years of implementation of the MPL have set in motion both the **regeneration** of the fleets in service, weakened by intense operational engagements, (with a particular effort in terms of maintenance, from organisational reforms to investments), and the **modernisation** of weapon systems. These efforts, covering all strategic functions, constitute one of the main thrusts of the MPL.

A significant effort is devoted to renewing the **two components of the nuclear deterrent**. At the same time, the land, sea and air domains[15] will benefit from the modernisation of conventional capabilities, accompanied by sustained investment in intelligence and cyber capabilities as well as in the space domain[16].

Finally, key long-term programmes have been launched. Some are being pursued in a national framework[17], while others are part of international cooperation, in a NATO[18] and above all a European[19] framework.

Budgetary resources in 2019 and 2020 reflect the President's ambitions and priorities: modernisation and transformation of the armed forces to achieve a sustainable model, based on **long-term operational superiority**, but also on the strategic functions of "prevention" and "knowledge and anticipation", in order to guarantee our **autonomy of assessment, decision, and action**.

2.1.3. Mobilisation of our partners and allies

In the emerging world of unfettered strategic competition, Europe must make the necessary political effort and allocate the resources to define and defend its interests and assume greater responsibility for its security. The President of the Republic has placed the revival of European defence

15 Land: focused on the medium land segment, with commissioning of the first *Griffon*, *Jaguar* and *Serval* vehicles, and collaborative combat with *Scorpion*; sea: delivery of the first *Barracuda* class SSN; air: operational employment of the first *Phénix* MRTTs, arming of the MALE Reaper UAVs.
16 CUGE, ALSR, IRIS, CELESTE systems.
17 New space ambitions, new-generation aircraft carriers, improved resilience of positioning and navigation information thanks to the Operation to Modernise the Armed Forces' GNSS Equipment.
18 Air Command and Control System (ACCS) and Alliance Future Surveillance and Control (AFSC) initiative to replace the AWACS fleet.
19 Future combat air system (NGWS for its cooperative portion), future battle tank (MGCS), EUROMALE UAV, MAWS maritime patrol aircraft.

at the core of France's international action[20]. Notwithstanding its possible knock-on effect on our European partners, both in terms of strategic culture and effective capabilities, our national effort will not be enough to cope with the acceleration of destabilising strategic trends: the **search for convergence and increased cooperation with our partners** is therefore indispensable and requires a **credible linkage between the EU, NATO and *ad hoc* cooperation arrangements between multiple partners, in particular the European Intervention Initiative** (EI2).

Significant progress has been made since the publication of the EU's Global Strategy in June 2016. At the **political** level, Permanent Structured Cooperation (PESCO), as provided for in the Treaties, was activated in 2017. On the capability side, the European Defence Fund will support capability projects in cooperation from 2021 onwards. With the introduction of the PESCO projects, most of which are capability-based, and the Coordinated Annual Review on Defence (CARD), the European capability cycle is being structured to foster cooperation and ensure continuity between priority setting, funding and equipment fielding in the armed forces. Finally, at the **operational** level, the Military Planning and Conduct Capability (MPCC) is getting up to speed, with the aim of enabling an "executive operation" involving up to 2,500 troops. The European Peace Facility (EPF) is being set up to support military missions. French efforts to **develop the EU's intervention capability to include more demanding military engagements** have borne fruit, with a strengthening of the mandate of EUTM Mali from 2018, which will make it possible to assist the Malian armed forces up to pre-deployment, and also the setting up in a few weeks of Operation *Irini*[21]. France's action in the Mediterranean is aimed at bringing together European efforts to block coercive actions against our partners and restore stability in the Mediterranean area, which is located at the gateway to Europe and is essential to its security.

At the same time, **NATO remains the bedrock of collective defence of the European continent** and of the transatlantic link, as well as of Europe's nuclear culture. The Atlantic Alliance stays committed to crisis management operations and missions in Afghanistan, the Balkans, the Middle East

20 Speech for a sovereign, united, democratic Europe; 26 September 2017.
21 Operation EUNAVFOR MED *Irini* was launched on 31 March 2020 to strengthen oversight of the arms embargo on Libya. It also extends the former tasks of Operation *Sophia*, namely training the Libyan Coast Guard and monitoring human trafficking and illicit oil export networks.

and the Mediterranean. It also faces multiple challenges, with increasing threats in its immediate environment, tensions between its members and a more distant approach from the United States. France is playing its full part in collective defence, actively participating in air policing in the Baltic States and, since 2017, in the Enhanced Forward Presence (eFP), alternately in Estonia and Lithuania, and is even the leading contributor to the NATO Readiness Initiative (NRI). It is also supporting the Alliance's adaptation efforts and its deterrence and defence posture and knows that NATO is irreplaceable in achieving lasting interoperability among Allies.

However, the insistence on the Alliance's political and military credibility which France signifies through its engagement presupposes an **updated political contract**. This work on cohesion is at the centre of the strategic reflection initiated by the Heads of State and Government in London in 2019. The parameters of this new contract should make it possible to **redefine the contours of both allied solidarity and the transatlantic relationship**, counting on a **growing role for Europeans** to contribute to the common defence effort and assert their security concerns in a 360° perspective. This presupposes both that **Europeans continue their budgetary efforts** and the modernisation of their forces and that they become active stakeholders in **building a new security architecture capable of guaranteeing strategic stability** on the European continent.

The European Air Transport Command (EATC) also contributes to the interoperability and sharing of its members' projection capabilities. In this respect, it represents one of the most successful European operational cooperation efforts.

In addition to our engagements in the EU and NATO, in 2017 France proposed to a group of "able and willing" European States to work more closely together. **EI2** is thus contributing to the establishment of a common strategic culture through concrete cooperative projects. The initiative now has 13 members[22] and serves as an incubator for projects that improve collective readiness or encourage our partners to invest in regions or subjects that are key to Europe's security.

22 In addition to France: Belgium, Denmark, Estonia, Finland, Germany, Italy, Netherlands, Norway, Portugal, Spain, Sweden, United Kingdom.

In the Sahel, France has also mobilised several European countries to deploy Special Forces in support of African forces in Mali and Niger, within the framework of the ***Takuba***[23] ***Task Force***. At the same time, the EMASoH-Agénor maritime surveillance operation in the Persian Gulf has rallied several European partners willing to contribute to regional de-escalation.

Europe's defence is also being enhanced through bilateral cooperation. France is thus continuing to develop its key partnerships in Europe: with the Treaty of Aachen, the **Franco-German relationship** has reached a new level, in particular thanks to the establishment of a privileged relationship in land systems[24] and unprecedented cooperation in terms of operations and capabilities[25], the latter also including **Spain**. An unprecedented major partnership has also been established with **Belgium** in the field of land mobility[26], in connection with the Scorpion programme, and with **Italy** in the field of naval cooperation (creation of the NAVIRIS Joint Venture in 2019). As far as the **UK** is concerned, and despite Brexit, the 10th anniversary of the Lancaster House Treaties provides an opportunity to measure the progress made, in particular on the Combined Joint Expeditionary Force (CJEF) and the two key capability programmes FC/ASW and MMCM, and to open up shared perspectives for the coming decade. In addition, France has in recent years strengthened its already close ties with Spain, but also with many other European countries, including Finland, Denmark, the Netherlands, Portugal, Sweden, Norway, the Baltic States, Switzerland, and Greece

Because Africa and the Middle East are areas of **major interest** affecting the interests and security of French citizens, both abroad and at home, the French armed forces are developing the concept of **operational military partnership** (PMO)[27] for crisis prevention purposes. French forces support partner forces, from training to combat, including equipment, so that they can eventually acquire the capability to ensure the security of their countries autonomously. Thus, **in the Sahel**, France is resolutely committed

23 Sweden, Estonia, the Netherlands, Portugal, Denmark, Belgium, Italy and the Czech Republic (ongoing process).
24 Nexter and KMW merged to form KNDS.
25 Future Combat Air System (FCAS) and Main Ground Combat System (MGCS) projects; Franco-German air transport squadron.
26 *Capacité Motorisée* (CaMo) programme.
27 PMO : *Partenariat militaire opérationnel.*

to mobilising its international partners and the **G5 Sahel** countries in a comprehensive approach: combating armed terrorist groups; strengthening the military and security forces of the States in the region; supporting reinstallation of governance and administrative structures in the region; and providing development aid.

The **Indo-Pacific is today the theatre of profound strategic changes**, from the intensification of Sino-American competition to Sino-Indian and Pakistani-Indian tensions, not to mention transnational threats and the implications of climate change. **These changes have direct consequences** on all populations and infrastructures in the region, **including French overseas territories**.

In this region, which is home to seven of the 10 largest defence budgets in the world, heightened strategic and military imbalances constitute a threat with global consequences – 30% of trade between Asia and Europe passes through the South China Sea. Unlike most European countries, the majority of Indo-Pacific States have invested in modern, yet large militaries for more than a decade. Combined with technological progress, this trend results in tougher operational environments and a potential disruption of regional and global balances.

As a European nuclear power with global interests, **France cannot define its interests solely in terms of geographical proximity** to the homeland: it must imperatively maintain a geostrategic reach in line with current developments and its ambitions, which are first and foremost to protect its citizens and territories, but also to preserve its influence and freedom of action. France's defence strategy in the Indo-Pacific was presented by the Minister of the Armed Forces at the Shangri-La Dialogue 2019 in Singapore.

France's action in the Indo-Pacific also aims to contribute to multilateral security efforts and to preserve the freedom of maritime and air navigation. This implies intensifying our cooperation efforts, by encouraging our European partners to become more involved in the Indo-Pacific, and by developing major strategic partnerships beyond Europe, in particular with India, Australia and Japan, as well as by supporting regional cooperation formats (ASEAN, IONS, IORA, SPDMM, etc.).

Present in Europe as well as in the Indo-Pacific, active in the Middle East and as far away as Africa, the **United States** is both a global and an indispensable

ally. Beyond recurring political differences, France intends to preserve the excellence of its bilateral defence relationship with the United States, our historical ally, based on shared values and interests.

2.2. What challenges do we face in order to play our role as a stabilising power?

2.2.1. Uniting around European sovereignty and shared interests

As tensions and sources of instability accrue at Europe's borders, uncertainty as to the political will of the United States to become engaged in regional crises is leaving European States to face their responsibilities. While significant progress has been made since June 2016 and the recognition of the need for "shared strategic autonomy", it is **necessary to go beyond what has already been done in order to build a genuine European pillar of security and defence, consistent with developments in NATO**. This implies progress in three directions: consolidating European defence, reducing our dependencies, and developing common responses to hybrid aggression.

Europe's convergence around common defence and security interests will be one of the issues in efforts to define a "strategic compass", launched by Germany and due to continue until the French Presidency of the EU in the first half of 2022. The operationalisation of Article 42.7 of the Treaty on European Union should also make it possible to strengthen the effectiveness of solidarity mechanisms between Europeans.

The level of ambition of the EU's operational engagements, particularly in the Mediterranean, the Sahel and more generally in Africa, remains insufficient considering the interests to be defended and should therefore be augmented. The continued operationalisation of the European command structures (EUMS/MPCC), the strengthening of EU action in the maritime and air domains, the increased sharing of operational assets and support bases in strategic areas, the improvement of European situation assessment tools and the establishment of the European Peace Facility (EPF) are all priority areas for efforts to contain terrorist threats and the push of expansionist powers.

Harmonising the capability instruments (PESCO, CARD and EDF) and consolidating an innovative and competitive European defence industrial

base are major challenges, which must be taken up to open the possibility of real European strategic autonomy. Provided that it is sustainable and funded over the long term, the EDF will benefit all industries, both large groups and SMEs, will promote processes capable of bringing the different industrial bases closer together on a long-term basis, and will give Member States access to new-generation technologies and key equipment meeting the capability objectives of the Member States of both the European Union and NATO. France intends to play a leading role in this respect[28] and supports the new DG DEFIS in its increasing involvement in defence issues, which should be supported, while consolidating the respective roles of the EEAS and the EDA.

To **strengthen their sovereignty** and assume their shared responsibilities, **Europeans will have to increase their technological and industrial independence**. Dependencies can be mutual and consensual — particularly between European partners, whether they involve industrial consolidation or major programmes in progress — or they can be unilateral and imposed, in which case remedial solutions are called for. Europeans will therefore have to clarify what constitutes their national critical infrastructures in transport, energy, space and digital[29] technologies — infrastructures that must be protected from predatory actions and external influences. EU Member States are only beginning to converge on these key sovereignty issues. The new Commission illustrates the increasing importance of issues relating to defence and the protection of Europe's technological perimeter.

The need for greater independence can be seen in all key sectors: 5G, AI and data storage, quantum computing, energy — and their mostly imported regulatory standards — or critical supplies of raw material. In terms of **artificial intelligence** (AI), upscaling requires a global data architecture, allowing for massive data processing tools and artificial intelligence applications to reach their full potential. Similarly, the **energy transition** required by climate change is transforming the global energy mix.

28 French participation in 36 of the 46 of the Permanent Structured Cooperation projects, participation of French companies in 14 of the 16 industrial consortia selected following the 2019 call for projects of the EDIDP (European Defence Industrial Development Programme).

29 Cf. act no. 2019-810, known as "5G", which aims to preserve the security, integrity and resilience of networks, and which entails obligations for operators; at the same time, in January 2020, the Commission adopted a common "toolbox" on network security.

European countries should therefore start to diversify their sources of supply now in order to reduce their strategic dependencies[30]; concerning gas, the EU intends to encourage a process of diversification of suppliers, routes, and means of supply. In addition, electrification and digitisation are creating **new, structural dependencies** on certain technologies (digital systems) and energy sources (renewables, electricity, batteries), as well as on the raw materials underlying their production. Whether in terms of access to critical materials, control of industrial value chains, definition of standards or data processing, the digital and "low-carbon" technology sectors constitute new areas of economic, technological, and normative competition.

The dual advances made possible by certain technologies **thus extend economic confrontation to new areas of competition** (digital, automation, financial or scientific computation, commercial artificial intelligence, high-speed telecommunications), in which European States are not sufficiently coordinated, with cumulative R&D budgets that are undersized, particularly in comparison with Chinese and American efforts. These inadequacies are likely to deprive Europe of its residual advance and influence in these fields, and to complicate or even subordinate to others its capacity for action and ultimately its sovereignty.

The **risk of an irreversible downgrade**, or even the withdrawal of **the European continent** from world affairs can no longer be ruled out today.

Faced with such challenges, we must both take into account our most critical dependencies and draw up an inventory of those that could be reduced, in order to limit risks and identify solutions to reduce our common dependencies and secure our supplies. While preserving technological interoperability between Allies over the long term, we must complement and develop further the tools already available at a national and European level[31].

Moving towards greater European sovereignty also means reducing our shared vulnerabilities. Some of our competitors are resorting to **"comprehensive" or**

30 The EU imported 74% of its gas by pipeline in 2019, from Russia (31%), Norway (28%) and Algeria (5%). In the same year, LNG accounted for around 25% of EU gas imports, from Qatar (28%), Russia (20%), the U.S. (16%) and Nigeria (12%) - see BP Statistical Review of World Energy 2020.

31 PACTE Act (expanding the list of critical technologies, lowering the threshold of voting rights held that triggers the control procedure) and framework for the screening of foreign direct investments into the EU (EU Regulation 2019/452 of 19th March 2019).

"hybrid" strategies aimed at making gains by orchestrating the effects of their diplomatic, military, economic, informational and legal actions according to an overall dynamic that is ambiguous and often difficult to detect or denounce.

The increasingly widespread use of these "**grey area**" strategies and actions[32] requires, in return, the ability to anticipate, detect, understand and, if necessary, attribute the adversary's actions, which will make it possible to discourage them or at least to limit their effects and regain the initiative. Credibility requires organisation to be able to respond. While the response to hybrid threats must first of all be national and integrated, the contribution of external resources (partners, allies, NATO and particularly the EU, which brings significant added value to civil-military interaction) can enhance its effectiveness[33]. Greater European strategic autonomy would thus contribute directly to the preservation of our national sovereignty, as well as that of other European countries.

Defining a posture and potentially an appropriate European response will require close coordination of our diplomatic, legal, economic, and informational resources, as well as certain national intelligence and action capacities, including cyber operations.

2.2.2. DTIB: consolidate through balanced cooperative ventures and stimulate through investment

The defence industry is an essential component of **national autonomy** and a key sector for the national economy. Capable of producing all types of equipment in all domains, it guarantees our security of access to the technologies needed to provide equipment essential to our sovereignty and critical weapon systems.

In addition to the major industrial contractors and their network of equipment manufacturers, subcontractors and suppliers, the **DTIB** is a **unique ecosystem** comprising the major public and parapublic research players[34]

32 Speech by the President of the Republic on 7 February 2020: *"the frontier between competition and confrontation, which used to distinguish times of peace (...) crisis (...) war, is today deeply diluted. It is replaced by many grey areas where, under the guise of asymmetry or hybridity, actions to influence, disturb or even intimidate are put in place, with a risk of degeneration".*

33 The creation of a Centre of Excellence for Countering Hybrid Threats in Helsinki is an example of this.

34 ONERA, CNES, CEA, ISL, etc.

with the scientific and technical expertise needed to meet defence requirements. It also includes entities of the Ministry for the Armed Forces responsible in particular for equipment maintenance[35] or procurement programmes, with strong interaction between State agencies and industrial stakeholders, reinforced by new methods for managing arms programmes.

The broad and constant quest for cooperation on a European scale must contribute to the emergence of true innovative European champions, both prime contractors and subcontractors, capable of meeting the needs and satisfying the sovereignty ambitions of the various nations. In this respect, the four degrees of independence/cooperation — sovereignty, cooperation with nationally preserved skills, cooperation with mutual dependency, "market-based" solution — introduced by DNSSR 2017 are even more relevant in light of the economic effects of the Covid-19 pandemic.

Whether intergovernmental or industrial, cooperation implies, through induced specialisation and the quest for efficiency, the creation of **mutual dependencies with our partners**. In order to be consensual and not imposed, these dependencies must be identified *a priori* so that the desired autonomy can be restored if necessary, and be accompanied by agreement between partners as to the desired degree of autonomy with respect to the other actors.

Like the European economies in general, the **defence sector** sometimes depends on monopoly manufacturers based abroad, particularly in China, for its day-to-day supplies. This is true for the support and day-to-day operation of the armed forces (IT equipment, medicines, masks) as well as for supplies to arms manufacturers. **Both national needs and the ambition of European sovereignty** must therefore fully integrate independent access, in a timely manner and with guaranteed quality, to certain transverse technologies that are essential for the production of our major systems. For example, expertise in high-performance steels, from their elaboration to the manufacture of the associated mechanical parts, is indispensable for the production of the most sensitive platforms, while expertise in the design of printed circuits and electronic components is necessary to maintain our electronic systems in the long term; finally, our needs for rare metals and critical minerals (rare earths, lithium, cobalt, tantalum, etc.) are increasing.

35 SSF, SIMMT, DMAé, SIAé.

First of all, it is necessary to better identify **supply chain risks**, even if it means developing our own supply chains if need be. Certain **strategic industrial sectors** also require particular attention, which could go as far as providing capital support. The same applies to **emerging technology** fields (AI, hyper-velocity, stealth, cyber including networks, control of the electromagnetic environment, combat cloud, nanotechnology, etc.): in the absence of national or European suppliers and sufficient investment, **new, highly critical dependencies will develop to the point of becoming irreversible**.

A pivotal element in the economic health of the defence industry, **exports** must meet a threefold requirement: guarantee compliance with international commitments through strict oversight, satisfy the demands of our partners, who are increasingly demanding production and technology transfers and offsets, and preserve our industrial base by extending production runs. Transfers and exports must therefore be chosen so as not to disrupt our sovereign, long-term access to critical technologies, sometimes buried deep in the subcontracting chain.

Finally, innovation is at the heart of our DTIB. It is both long-term — in order to prepare critical investments, anticipate technological breakthroughs or ensure expertise in emerging technologies of a strategic nature — and short-term, in order to rapidly capture innovation from the civilian market and from the armed forces, directorates and departments through the actions of the Defence Innovation Agency (DIA) created in 2018.

Our DTIB not only contributes directly to the country's security and sovereignty, but also has a **remarkable economic impact**, in terms of jobs, trade balance, investment, and research. It is a key sector of the national economy, accounting for 10% of industry, more than 20% of R&D and about **11% of French exports of goods in 2019**. Because the DTIB has been preserved from the waves of offshoring of the last 30 years, it constitutes a real **local network; defence investment therefore has a direct knock-on effect** on the many regions where the defence industry remains firmly established, and more generally on the economy as a whole.

The activity of the DTIB's 4,000 companies of all sizes generates about **200,000 direct and indirect** (subcontractor) **jobs**, intrinsically industrial and qualified: engineers, blue-collar workers, technicians, researchers, etc. Exports of military equipment alone made a positive contribution to the

national trade balance of €6.9 billion in 2018 and €8.5 billion in 2019. In addition to the DTIB, there are 26,000 companies supplying the Ministry for the Armed Forces throughout the country. Since laboratories and production lines are located on national soil, public spending in this sector, which represents 80% of State investment, has a particular **macroeconomic multiplier effect** — equivalent to **a factor of two over 10 years**.

2.2.3. Contributing to the Nation's resilience

Five years after the terrorist attacks of 2015 and three years after the hurricanes that devastated part of the West Indies, the Covid-19 crisis has illustrated the need for a **versatile military, capable of strengthening the Nation's resilience** through its ability to take action in a wide variety of critical situations, from health or environmental disasters to terrorist or hybrid attacks in metropolitan France or the overseas territories.

Thus, in the spring of 2020, and despite the Covid-19 crisis, the armed forces continued to fulfil all their permanent missions and all their operational commitments (nuclear deterrence, homeland protection, internal and external operations), while visibly contributing to the national effort to combat the virus through the three components of Operation Resilience: health, logistics, and protection.

However, in the light of lessons learned from the pandemic, among other things, **the armed forces' capabilities** need to be strengthened to deal with large-scale crises. In this respect, the implementation of a **strategic "protection-resilience" function** is now clearly necessary. Indeed, the notions of protection and resilience complement each other, as resilience is an essential prerequisite for ensuring the protection of the French people and the national territory and guaranteeing the continuity of the nation's essential functions. The rationale behind this function could moreover be **extended to our European partners and our Allies**.

With the *Vigipirate* system and Operation *Sentinelle*, the armed forces have shown for several years now that they are able to provide homeland security forces with valuable assistance that can be adapted to the evolving terrorist threat. This increased role in domestic security has required specific resources and training. Similarly, in the face of the **CBRN threat**, particularly of a terrorist nature, it is clearly indispensable to reinforce

the equipment dedicated to this threat, as well as the acculturation of all personnel, and to pursue research programmes in the biological and chemical fields.

The armed forces, set to act in situations of sudden crisis, constitute — together with the entire ministry and within an inter-ministerial framework — an essential link in the Nation's resilience, particularly with regard to strategic or vitally important infrastructure. Because of their specific capabilities and know-how, for example in planning, they also play an important role in the inter-ministerial response to hybrid attacks, particularly in the face of repeated, low-intensity actions that require long-term follow-up in response.

At the same time, in the cyber domain, the emerging confrontations with regional and major powers confirm the need to continue strengthening the capabilities of the armed forces to operate in cyberspace and exploit technical intelligence.

In terms of resilience, the geographical location of our overseas territories is significant. The health crisis has shown the reality of the **strategic continuity between the homeland and our overseas territories** and the need for reassurance in the face of predatory actions and information manipulation. Our "presence and sovereignty" forces, currently sized as tightly as possible given our interests[36], could be reconfigured to be able to receive, at short notice and for extended periods, detachments deployed as reinforcements from mainland France. In addition to all the services and resources of the State, a credible global posture should also mobilise the cooperation of Western or regional partners, who have their own resources or support bases. Faced with the need for a global response, our **Basing Overseas and Outside France (OME) system** is a precious lever that from now on must integrate the entire conflict spectrum, including competition between great powers.

Reinforced resilience involves reconsidering certain **in-service support dependencies**. Faced with a crisis that affects delivery flows, supplies for the armed forces cannot be based solely on a logic of efficiency, inspired by a private sector model. It is essential to have strategic stocks and to accept the associated additional costs. Outsourcing of services must also take account of resilience issues. **What is true in the light of the Covid-19 crisis**

36 -25% of personnel since 2008, with temporary capacity reductions that the 2019-2025 MPL must compensate for.

would also be true in the event of a surprise of a completely different nature (digital or environmental), and a fortiori in the context of a high-intensity engagement possibly threatening the homeland.

Furthermore, the armed forces are increasingly subject to legal standards that sometimes ignore the special nature of the military profession. The indiscriminate application of regulatory constraints to ordinary activities as well as to operational or combat training activities risks in the long run reducing our ability to engage in operations. **Positive laws applied to the armed forces must therefore be adapted in a necessary and proportionate manner** to enable the forces to fulfil their missions in all circumstances. Respect for defence issues must therefore be given due consideration by all the national or European bodies that define the regulatory framework in a multitude of areas (labour legislation, environmental code, social rights, laws governing digital and data issues, etc.).

Finally, it is important to continue to ensure the full support of our fellow citizens for the defence effort, by demonstrating very concretely its contribution not only to their security, but also to the economy, employment and social cohesion. This requires continuing efforts to ensure that the armed forces reflect the diversity of society to an even greater degree.

2.2.4. Ambition 2030: stepping up current efforts

The geopolitical disruptions noted above are reflected at the military level by tougher operating environments and the multiplication of fields of confrontation. As a result of all these developments, the hypothesis of a **direct confrontation between major powers** can no longer be ignored. The engagement of the armed forces on home soil is also set to continue in the implementation of protection postures, for the benefit of civilian authorities and in all fields of confrontation. Between now and 2030 and beyond, current tensions and possible upheavals therefore require us to **prepare** ourselves for **scenarios of "engagement (...) in a major conflict"**[37] and to continue to build up our capabilities and adapt our general posture.

In critical areas such as deterrence, intelligence, access to space, power projection or first and forcible entry capability, the objective of **controlled sovereignty** remains a priority. Our freedom of action thus requires us to

37 As indicated by the President of the Republic in his speech of 7 February 2020.

ensure the credibility and renewal of our deterrent, and to guarantee our autonomy of assessment and decision-making, based on national intelligence and command capabilities with guaranteed resilience.

Wherever possible, we need to retain a **national intervention capability**, covering the widest possible spectrum of action, from counter-terrorism to high-intensity conflict to responding to hybrid attacks. Having a **full-spectrum armed forces model**, fully equipped and capable of acting in both physical and immaterial fields will also make it easier for us to rally our **European partners**.

However, the French armed forces cannot completely free themselves from dependence; they rely on their **closest partners**, the European and American armed forces in particular, for operations, intelligence, or the provision of certain specific capabilities.

In terms of capabilities and operations, the United States is thus the primary provider of support for the French armed forces, directly in a bilateral format, or more indirectly via NATO or within ad hoc coalitions. To this must be added the resources of our European partners, which carry out all kinds of missions for our benefit, as well as contributing financially to some of our efforts. The strategic and military alliance between Europe and the U.S. remains essential. While preserving transatlantic solidarity, burden-sharing needs to be rebalanced to enhance engagement capabilities.

At the same time, it will be necessary to strengthen force **protection**, both on bases and combat platforms. This will particularly apply to the areas of health, CBRN, air defence and missile defence, but also counter-UAV systems — the latter applies to French territory as well as to our deployed forces, given the intensive use of armed UAVs, as attested by recent examples (Libya, Syria, Nagorno-Karabakh). The same logic applies to the improvement of communication and information systems, with a special focus on interoperability with domestic security forces.

Our forces will also have to retain a capacity to operate in a technological environment that is both digitised and degraded, combining constant challenges to the electromagnetic spectrum, the risk of paralysing or deceptive cyber attacks, and the proliferation of missiles of all types to an increasing number of players. Our forces will operate in a digital and

informational environment presenting more and more risks and opportunities, where they will need to have the capacity to implement defensive as well as offensive postures.

Engaged in possible high-intensity combat against adversaries with multiple modern capabilities, they will also have to **strengthen their capability for joint collaborative combat**, and thus their capability for multi-domain integration alongside our Allies and partners. Even within multinational coalitions, conflicts could involve a maximum level of engagement, difficulties in accessing areas of confrontation, and direct, kinetic, electromagnetic and cyber attacks.

The French armed forces will also have to **gradually build up sufficient critical mass**, in terms of manpower and equipment, in order to simultaneously rebalance the odds in their favour, endure by compensating for potentially high attrition, and engage in several theatres.

Finally, they will have to **continue to** diversify their **offensive capabilities at the top end of the spectrum**, particularly for deep penetration of anti-access / area denial (A2/AD) postures. This implies **"scaling up"** our capability to conduct operations at divisional or even corps level (and their air and naval equivalents), thanks to interoperability with our partners and allies, and reinforced reserves.

Substantial modernisation is already under way: reception of FDI frigates and operational commissioning of the first four *Barracuda* class SSNs with enhanced combat capabilities, from 2021 to 2025; delivery by 2025 of a large number of medium armoured vehicles (*Griffon* and *Jaguar*), followed by the *Leclerc* battle tank upgrade; enhanced connectivity and collaborative air combat thanks to the deployment of the F4 standard on Rafale in 2024 and improvement of our air defence systems (SAMP/T-NG) in 2027, etc.

In addition, major programmes have been launched, in cooperation or open to cooperation, to prepare for the **renewal of the capabilities needed beyond 2030**. These include in particular the Franco-British FC/ASW missile system, the future Franco-German land combat system in 2035, the new-generation aircraft carrier in 2038 and the future combat air system, being developed with Germany and Spain — its initial operational capability is expected around 2040. These complex programmes and the

projects[38] that will follow will ensure the connectivity and credibility of our forces and incorporate the **requirements of collaborative combat in a joint and combined environment**, in order to guarantee their **operational superiority** in the face of future threats. Developed over the longer term and continuously modernised, these major capabilities will be designed to allow upgrades to ensure they can adapt to conditions of engagement that are still remote and uncertain, but which will constitute the challenge of future high-intensity combat.

It is **necessary to continue the build-up initiated in 2017**, whether it involves countering A2/AD postures in all domains, ensuring the projection and reinforcement of our forces, or guaranteeing our intervention capability.

The accelerated transformation of the international order thus confirms that **Ambition 2030 combined with the MPL** should be seen as an i**ntermediate but indispensable step towards a full-spectrum, coherent, agile and innovative, and therefore effective, armed forces model**, in which conventional and nuclear forces permanently complement each other. In this way we will be able to guarantee our security and self-sufficiency as well as our capacity to rally others in Europe and beyond.

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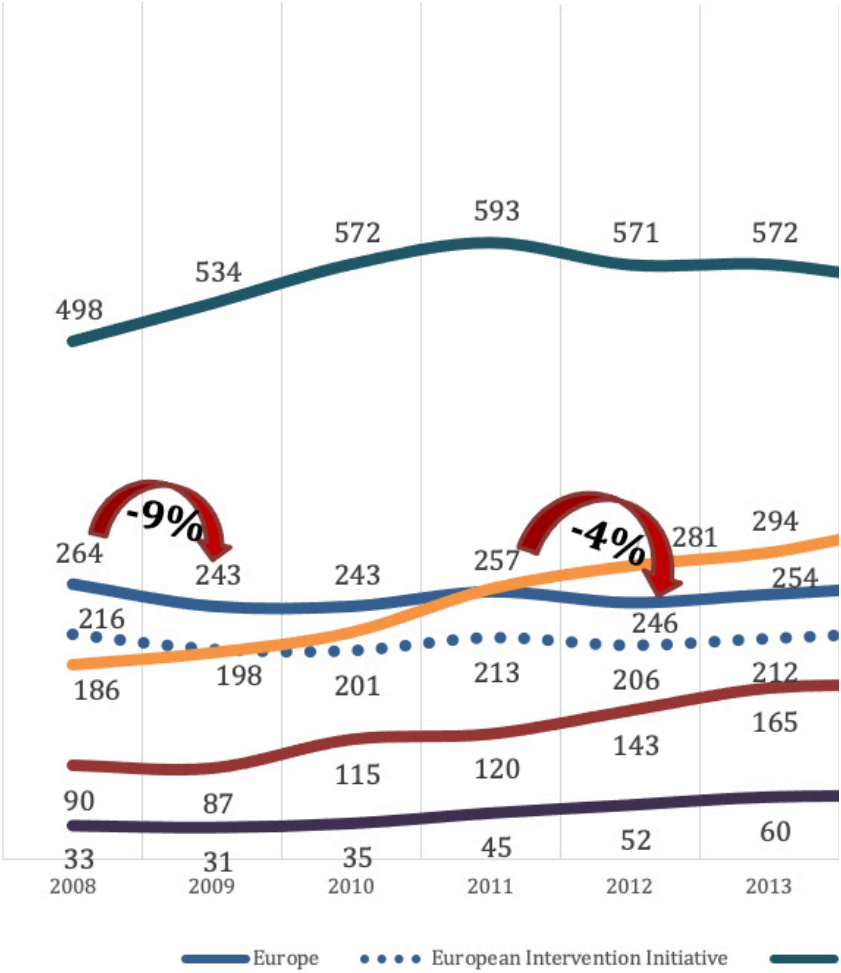
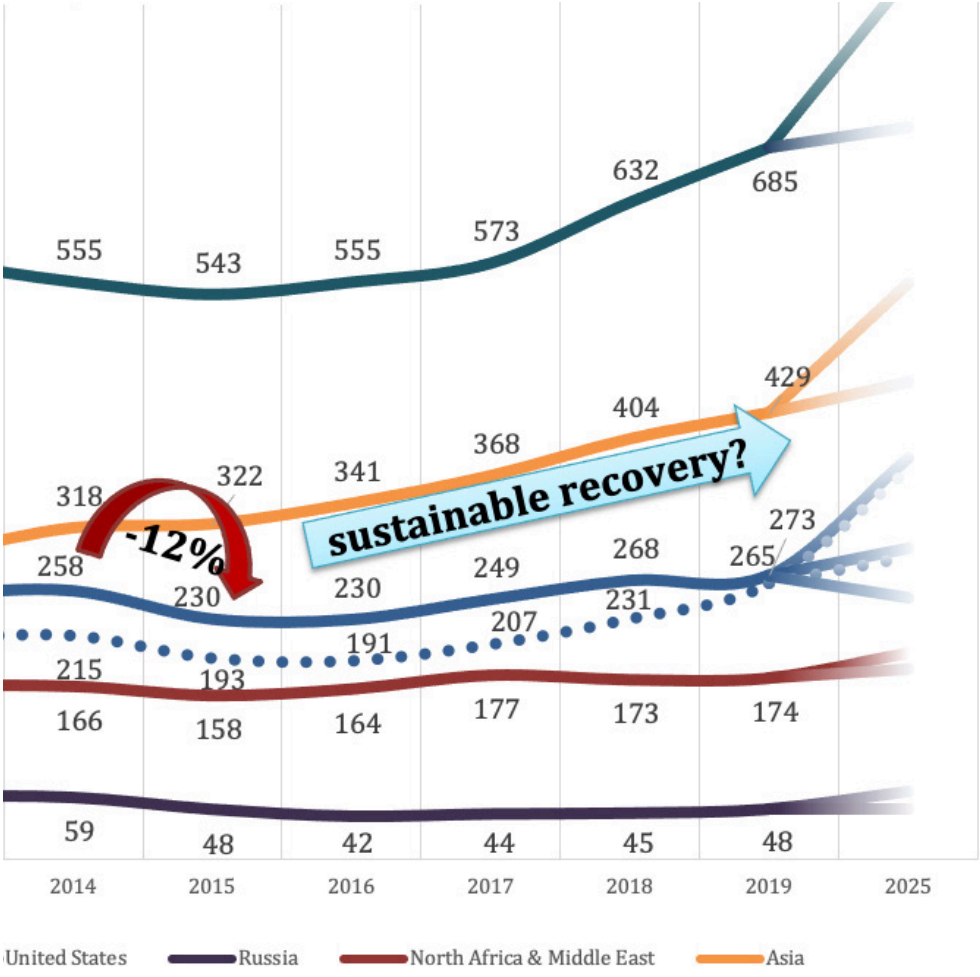
*As a **stabilising power** dedicated to peace and security, **France** promotes effective multilateralism that respects human rights, fundamental freedoms and democratic principles. In a world marked by heightened competition, **our political efforts must be backed by a strengthened, effective and agile defence apparatus**. It is by pursuing our national military modernisation efforts, but also by developing European and global partnerships based on trust, reciprocity and these common values, that we will be able to confront the deteriorating international environment and its multiple challenges.*

38 TITAN, Axon@v and Connect@éro, relating to the renewal of the land forces decision segment, the new-generation carrier battle group and the Future Combat Air System (FCAS), respectively.

APPENDIX

Impact of economic crises on European defence expenditure, 2009-2019 & international trends (billions of 2019 USD)





Sources : IISS, *Military Balance*. 2025 data are based on two **hypotheses**: a **high ceiling**, where defence expenditure trends over the period 2020-2025 are based on the last three years (2016-2019), and a **lower trajectory** based solely on the change from 2018 to 2019. For **European defence expenditures**, a third trend has been created by simply reproducing the impact of the 2008 crisis.

LIST DES ACRONYMS

A2/AD	Anti-Access/Area Denial
ALCM	Air-Launch Cruise Missile
ALSR	*Avion Léger de Surveillance et de Reconnaissance* (light surveillance and reconnaissance aircraft)
AQPA	Al-Qaeda in the Arabian Peninsula
ASAT	Anti-satellite
ASEAN	Association of Southeast Asian Nations
CARD	Coordinated Annual Review on Defence
CBRN	Chemical, Biological, Radiological and Nuclear
CEA	*Commissariat à l'Énergie Atomique et aux énergies alternatives* (French atomic energy and alternative energies commission)
CFE	Conventional Forces in Europe
CJEF	Combined Joint Expeditionary Force
CNES	*Centre National d'Études Spatiales* (the French space agency)
CUGE	*Capacité Universelle de Guerre Électronique* (universal electronic warfare capability)
DG DEFIS	Directorate General for Defence Industry and Space

DMAé	*Direction de la Maintenance Aéronautique* (Aeronautical Maintenance Directorate)
DNSSR	Defence and National Security Strategic Review
DTIB	Defence Technological and Industrial Base
EATC	European Air Transport Command
EDA	European Defence Agency
EEAS	European External Action Service
eFP	enhanced Forward Presence
IS-GS	Islamic State in the Greater Sahara
EMASOH	European-led Maritime Awareness in the Strait of Hormuz
EUMS	European Union Military Staff
EUROMALE/MALE RPAS	European Medium Altitude Long Endurance Remotely Piloted Aircraft System
EUTM Mali	European Training Mission in Mali
FAO	Food and Agriculture Organization
FCAS	Future Combat Air System
FC/ASW	Future Cruise and Anti-Ship Weapon

GNA	Government of National Accord (Libya)
ICBM	Intercontinental Ballistic Missile
INF	Intermediate-Range Nuclear Forces
IONS	Indian Ocean Naval Symposium
IORA	Indian Ocean Rim Association
ISL	*Institut franco-allemand de recherches de Saint-Louis* (Franco-German research institute for science and defence)
JCPoA	Joint Comprehensive Plan of Action
LNA	Libyan National Army
MEDOR	*Méditerranée Orientale* (Western Mediterranean)
MENA	Middle East and North Africa
MGCS	Main Ground Combat System
MMCM	Maritime Mine Counter Measures
MPCC	Military Planning and Conduct Capability
MPL	Military Planning Law
MRBM	Medium Range Ballistic Missile

New START	Strategic Arms Reduction Treaty
NGWS	Next Generation Weapon System, portion developed in cooperation
NRI	NATO Readiness Initiative
ONERA	*Office National d'Études et de Recherches Aérospatiales* (French aerospace research centre)
PESCO	Permanent Structured Cooperation
SGIM	Support Group for Islam and Muslims
SIAé	*Service Industriel de l'Aéronautique* (maintenance service of the French Air and Space Force)
SIMMT	*Structure Intégrée du Maintien en condition opérationnelle des Matériels Terrestres* (maintenance service of the French Army)
SIRH	*Système d'information de gestion des ressources humaines* (human resources information and management system)
SLBM	Submarine Launched Ballistic Missile
SPDMM	South Pacific Defence Ministers' Meeting
SSF	*Service de Soutien de la Flotte* (maintenance service of the French Navy)
WHO	World Health Organisation

Translation: AéroTraduction

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