



**MINISTÈRE
DES ARMÉES**

*Liberté
Égalité
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STRATEGIC UPDATE 2021



SYNTHESIS

The President of the French Republic underlined in February 2020 the shifts in the international environment, confirming the trends identified in the 2017 *Defence and National Security Strategic Review (DNSSR)* (DNSSR). A few months after the outbreak of the Covid-19 pandemic, the socio-economic context and the international environment have never looked as uncertain as they do today.

1. Persistent threats to French interests

France's level of international commitment has not wavered since 2017, in the face of multiple crises amplified by both structural and cyclical factors: global demographic pressure, influx of migrants, effects of climate change, but also economic and political consequences of the Covid-19 pandemic. In addition to these crises and vulnerabilities, the three persistent threats identified in DNSSR 2017 are jihadist terrorism, which, although weakened by the loss of numerous key personnel, pursues its strategy of local footholds and global dissemination; proliferation of weapons of mass destruction and their delivery systems, illustrated by the worsening North-Korean and Iranian nuclear proliferation crises; and, finally, the return of strategic competition between great powers.

2. Tougher competition between great powers

The resurgence of strategic and military competition, whether by Russia or China, is now acknowledged. The strategic intimidation posture developed by Russia is based both on a range of non-military resources and on the development of sophisticated military capabilities. The People's Republic of China, for its part, has doubled its defence budget since 2012, making it the second largest in the world, while expanding its nuclear arsenal and showing new ambitions in terms of power projection. In response, the United States has since increased its defence expenditures to \$720 billion and has made competition between the major powers the main determinant of its defence policy.

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

The U.S. 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 seize all opportunities to advance their interests, at the price of growing military adventurism. These 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. The Mediterranean is emblematic of all these developments: criminal activity is constantly on the rise and is now combined with the instability caused by energy issues and the projection of regional powers, particularly Turkey, the stronger Russian and Chinese influences and the Western military drawdown.

4. Hybrid and multifaceted strategies

Globalisation of competition also leads to extended fields of confrontation, particularly in areas that lend themselves to ambiguous aggression. Some of our competitors, state or non-state, use “hybrid strategies”. Combining military and non-military, direct and indirect, legal and illegal courses of action, these strategies are careful to remain below the estimated threshold of retaliation or open conflict. The use of armed groups, cyber, space, information manipulation or “lawfare”, through the extensive use of extra-territorial sanctions or the unilateral promotion of standards, are the many power levers available to support military intimidation manoeuvres and achieve strategic objectives.

5. Consequences: a contested international order and security architecture

While global challenges should entail more cooperation between States, the erosion of the international order is being confirmed, undermined by the effects of strategic competition and the behaviour of actors that favour bilateral arrangements and power games. The associated risks of uncontrolled escalation are high, particularly in regions lacking crisis resolution mechanisms. In Europe, the weakening of the security architecture inherited from the Cold War continues inexorably, with the contestation of institutions and multilateral agreements. On all these issues, the new U.S. administration could opt for international cooperation; it will then be up to the Europeans to firmly seize any such overtures to recreate strategic stability on their continent.

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

This context of instability brings new risks to Europe's doorstep and in the Mediterranean. In the absence of an appropriate response, Europeans may undergo a genuine strategic downgrade. The willingness shown by a large majority of our partners to maintain the growth of defence expenditures, despite the economic crisis, is a positive sign that will have to be confirmed in the long term. France's efforts to give more political meaning to NATO and more substance to European Defence, within the EU or ad hoc frameworks such as the E12, are aimed precisely at enabling Europeans to respond to the challenges they face.

7. MPL, cyber, space, AI, energy: our defence is adapting

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. The adaptation of our defence strategy has focused on new fields (cyber, space, AI, energy). Investing in these domains is essential for our freedom of action, in view of the widespread use of hybrid strategies. The 2019-25 Military Planning Law (MPL), which combines regeneration and innovation, marks the determination to rebuild our forces, through a financial effort that is unprecedented since the end of the Cold War. 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.

8. Challenges to be met: uniting around European sovereignty and shared interests

While significant progress has been made since June 2016 and the recognition of the need for «shared strategic autonomy», a genuine European pillar of security and defence, consistent with developments in NATO, still needs to be built. This implies progress in three directions: consolidating European defence, reducing our technological and industrial dependencies, and developing common responses to hybrid aggression. Harmonising the capability instruments 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. The defence industry is an essential component of this autonomy and a key sector for the economy, both nationally (200,000 direct and indirect jobs, 20% of research) and on a European level.

9. Contributing to the Nation's resilience

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 Operation Resilience. However, the armed forces' capabilities need to be strengthened to deal with large-scale crises in mainland France or the French overseas territories. In this respect, the implementation of a strategic "protection-resilience" function and the reconstitution of a certain organic "backbone" (stocks, logistical means and so forth) are now clearly necessary.

10. Prepare for the future by stepping up current efforts towards Ambition 2030

The geopolitical disruptions, tougher operating environments and the multiplication of fields of confrontation now make the hypothesis of a direct confrontation between major powers credible. France must continue the build-up initiated in 2017 in order to be able to counter A2/AD postures in all domains, ensure the projection and reinforcement of its forces overseas, or guarantee its intervention capability. Beyond the substantial modernisation already undertaken within the framework of the MPL, major programmes (FCAS, MGCS) have been launched, at national level or in cooperation with our closest partners, to renew the capabilities needed beyond 2030 and prepare for the war of tomorrow. Ambition 2030 combined with the MPL should be seen as an intermediate but indispensable step towards a full-spectrum, agile, 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.