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# FRENCH NATIONAL STRATEGIC REVIEW 2025: WHAT EUROPEAN PERSPECTIVES?

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September 2025



## AUTHOR'S PRESENTATION



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The Defence and High Technology Industry Programme, directed by **Maxime Cordet**, Senior Research Fellow at IRIS, aims to inform French and European public and private stakeholders about policies conducted in the field of armaments and defence technologies and to provide recommendations on the key future directions of defence industrial policies. It notably relies on the network of European researchers from The Armament Industry European Research Group (Ares Group).

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The new French National Strategic Review (RNS)<sup>1</sup> was published on 14 July 2025. This type of document is intended to guide all state action in the field of national security. At around a hundred pages, longer than the two previous editions<sup>2</sup>, it first sets out the threats facing France, then the strategic objectives to be achieved, and finally the means and methods for doing so. National security here covers a very broad spectrum of threats but also of risks. The security-defence continuum is strongly reflected, as are (albeit briefly) climate change and health risks, though national defence still retains a predominant place.

Many issues are addressed, so we take here a specific perspective to analyse this new French strategy, which calls for a “European revolution”: what European prospects does the 2025 RNS offer? How are the European Union (EU) and the North Atlantic Treaty Organisation (NATO) treated? What new ambitions does France have in the field of defence cooperation? How does France see itself on the European continent? More broadly: does the 2025 RNS mark a “turning point towards Europe”<sup>3</sup> for France?

The language on Russia certainly represents a shift, as do certain objectives on European capability and industrial cooperation. Continuities are also restated, notably the strengthening of NATO’s European pillar and the pursuit of European strategic autonomy. Yet some of these shifts and continuities might raise doubts among those in Europe who expect France to be more cooperative in building the European Defence Technological and Industrial Base (EDTIB). They raise questions about the nature of the “bold choices” France is calling for.

## THE THREAT LANDSCAPE: RUSSIA AS THE PRIMARY THREAT TO FRANCE

With 50 mentions of “Russia” and 29 of “Russian”, the RNS explicitly acknowledges that Russia is today the main threat to national security. As the President of the Republic states in the foreword: “[...] the ongoing Russian threat at Europe's borders, a lasting threat that is being organised and prepared, and which we must be able to face in the future. For Europeans, ultimately, everything stems from this”<sup>4</sup>. In the introduction, paragraph 3 is unambiguous:

<sup>1</sup> Secrétariat général de la défense et de la sécurité nationale, *Revue nationale stratégique 2025* (Paris: 2025). [https://www.sgdsn.gouv.fr/files/files/Publications/20250713\\_NP\\_SGDSN\\_RNS2025\\_EN\\_0.pdf](https://www.sgdsn.gouv.fr/files/files/Publications/20250713_NP_SGDSN_RNS2025_EN_0.pdf)

<sup>2</sup> Ministère des Armées, *Revue stratégique de défense et de sécurité nationale* (Paris: 2017); Ministère des Armées, *Actualisation stratégique* (Paris: 2021); Secrétariat général de la défense et de la sécurité nationale, *Revue nationale stratégique* (Paris: 2022).

<sup>3</sup> Renaud Bellais and Axel Nicolas, « Stratégie de défense de la France : acter le pivot vers l’Europe », Fondation Jean Jaurès (2025). <https://www.jean-jaures.org/publication/strategie-de-defense-de-la-france-acter-le-pivot-vers-leurope/>

<sup>4</sup> All quotes come from the official English translation. Secrétariat général de la défense et de la sécurité nationale, *National Strategic Review* (Paris: 2025). [https://www.sgdsn.gouv.fr/files/files/Publications/20250713\\_NP\\_SGDSN\\_RNS2025\\_EN\\_0.pdf](https://www.sgdsn.gouv.fr/files/files/Publications/20250713_NP_SGDSN_RNS2025_EN_0.pdf)

“Russia in particular poses the most direct threat today and for years to come to the interests of France [...]”. Paragraph 4 adds: “Russia organises or serves as a sanctuary for cyber attacks, for example against our hospitals and some of our energy facilities, targets and assassinates opponents in exile, manipulates or attempts to manipulate certain elections, and attempts to influence opinions in order to destabilise our societies”. The political attribution of such hostile actions had previously been sensitive, but France now describes Russian operations in its most important strategic document, in line with the President’s address on 5 March 2025<sup>5</sup> and the formal attribution of Russian cyberattacks on 29 April<sup>6</sup>. The adaptation of France’s security apparatus to this reality runs throughout the 2025 RNS.

France had been criticised for its discourse and stance towards Russia since 2017, and a new approach had been taking shape since the start of the full-scale war in Ukraine — and even more so since the Bratislava speech of 31 May 2023<sup>7</sup>. The RNS has the merit of seeking to clarify France’s view of Russia. The speech by the Chief of Defence Staff (CHOD) two days before the publication, on 11 July, was also particularly telling<sup>8</sup>. Moreover, this threat assessment, reinforced by the CEMA’s remarks, has the potential to drive a much-needed shift in mindset within the armed forces and the defence ministry, which in the past may have viewed the Russian threat as more distant.

In terms of consequences for France, the RNS goes further, aligning France more closely with other European states — especially northern and eastern ones — and even providing a timeframe: “The reality of the Russian threat is now unprecedented for the interests of France and Europe. The Kremlin regularly and consistently refers to France and Europeans as enemies in its official statements. The prioritisation of this threat, which is likely to be generational, places Europe in a long-term confrontation imposed by Russia, beyond the aggression against Ukraine. The possibility of a new Russian attack against Europe within the next three to five years is central to the defence and security interests of the European continent” (paragraph 113).

<sup>5</sup> Présidence de la République, *Adresse aux Français* (Paris: 5 March 2025). <https://www.elysee.fr/emmanuel-macron/2025/03/05/adresse-aux-francais-6>

<sup>6</sup> Ministère de l’Europe et des Affaires étrangères, *Communiqué* (Paris: 29 April 2025). <https://www.vie-publique.fr/discours/298386-ministere-de-leurope-et-des-affaires-etrangees-29042025-cyberattaques>

<sup>7</sup> Dimitri Minic, « La politique russe d’Emmanuel Macron : étapes et racines d’une nouvelle approche, 2017-2024 », Institut français des relations internationales (2024). <https://www.ifri.org/fr/notes/la-politique-russe-demmanuel-macron-etapes-et-racines-dune-nouvelle-approche-2017-2024>

<sup>8</sup> The CEMA held a press conference on the threats facing France, emphasising the singular position of Russia. Déclaration du chef d’état-major des armées, chaîne YouTube de l’État-major des Armées, 11 July 2025. <https://www.youtube.com/watch?v=v1A-Hvj5uTg>

## ‘EUROPE’S STRATEGIC AWAKENING’ AND AMERICAN DISENGAGEMENT

The RNS conveys a relatively neutral message on the new paradigm of transatlantic solidarity, and partly avoids the “I told you so” tone by focusing mainly on a shift in US priorities. Although it notes that US foreign policy now has “potentially major consequences for alliances (particularly NATO), transatlantic relations, the resolution of the conflict in Ukraine and, more broadly, security in Europe”, and that “the United States is asserting differences in views and values with the Europeans” (paragraph 76), it also emphasises the continuity of the American pivot towards Asia — which had already been a hallmark of earlier French strategic documents. The economic implications are also highlighted.

In this context, Europeans face a risk of “strategic isolation”, making it all the more necessary to strengthen the efforts undertaken since 2022 to build a more autonomous European defence. Yet despite frequent references to European instruments (which we will return to later), the RNS’s assertive language on NATO stands out — something relatively new in French discourse: “NATO remains the only organisation with the credibility, structures, mechanisms and legitimacy necessary to collectively address a major conflict on the European continent” (paragraph 121). Developing NATO’s European pillar appears to be the priority, especially in capability terms — which is not new — but more specifically regarding the main areas of dependence on the United States, which are explicitly named (paragraph 299). A footnote even defines it<sup>9</sup>: “The European pillar of NATO refers to the set of common (or jointly defined) capabilities and approaches that enable European NATO Member States to fulfil their obligations as allies while also acting together independently for their own defence”. This depiction of NATO is far removed from the “brain-dead” characterisation once made by the French President a few years ago.

In Strategic Objective 5 (“France as a reliable ally in the Euro-Atlantic area”), paragraph 296 neatly sums up the historic stance: “France will continue to promote a balanced sharing of the burden for Europe’s security, based on genuine European strategic autonomy and a strong European defence industrial base”. This sentence also reaffirms that, for France, no “transatlantic” defence industrial base exists — contrary to the view of some Europeans.

Furthermore, paragraph 300 states: “[...] the efforts undertaken by the Member States and the EU (dedicated funding in support of Ukraine, defence, EDIP, Common Security and Defence Policy – CSDP – operations and missions, White Paper on the future of European

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<sup>9</sup> Note 42, p. 53.

defence, flagship CDP projects) and in ad hoc formats (ELSA) should be recognised and encouraged. They contribute to the sustainable strengthening of the Alliance's deterrence and defence posture". The RNS thus draws a link between the EU's cooperation frameworks and instruments (as well as ad hoc formats) and NATO's collective defence.

Another notable element is the repeated insistence on France's need to demonstrate reliability as a "host nation". This reflects the momentum generated notably by Exercise Orion 2023 — a major-conflict scenario on national territory — which sought to ensure that France is adapted to hosting and enabling increased movements of both French and allied troops, thereby proving capable of acting as a host and transit nation during a large-scale military operation in Europe. The role of the Interministerial National Defence Commission (CIDN)<sup>10</sup> is repeatedly highlighted (paragraph 208, for example). Interministerial workstreams thus appear to have been well identified (transport, health, energy, etc.).

However, within Strategic Objective 5, it remains unclear what will actually change in France's posture compared to recent years, and how this European pillar would materialise — beyond ad hoc coalitions and capability development (which, traditionally, France has not viewed as something to be pursued within NATO).

## EUROPEAN STRATEGIC AUTONOMY TO BE STRENGTHENED...

The 2025 RNS follows a thread set out in previous documents: national and European strategic autonomy<sup>11</sup>. Within the EU, the notion of European preference remains the French ideological compass, continuing to call on Europeans to be "free to design, modify and produce without restriction" (paragraph 332). It also reaffirms France's preference for the intergovernmental format (between states) for certain functions (paragraph 334: "export controls, intelligence, capability development, etc".) as well as for the European Defence Agency (EDA, paragraph 335). However, it adds several significant elements which, for the more optimistic at least, could be seen as signs of the beginnings of a shift in France's approach to European defence policy.

### *Nuclear deterrence*

First, the European dimension of nuclear deterrence is highlighted (pages 35–38): the language is particularly educational and seems aimed at both Europeans and the French. It fits

<sup>10</sup> A commission under the authority of the Secrétariat général de la défense et de la sécurité nationale (SGDSN), set up to oversee the governance of defence-related issues on national territory and requiring the coordination of multiple actors, notably from the civilian sector.

<sup>11</sup> In particular since the 2017 Strategic Review, for instance from paragraph 160 onwards.

within the recent dynamic of openness, based on bilateral dialogues launched to define how French nuclear deterrence could contribute more to the defence of Europeans — at least in terms of perception.

*Capabilities and industry: Between European champions and geographical return as a way to scale up the EDTIB*

Aside from the singular point of deterrence, industrial and capability issues occupy an important place in the document, especially in their European dimension. From the introduction (paragraph 14): “[...] choosing to support European champions in critical industries. This will strengthen Europe’s strategic depth, industrial scale, and competitiveness, but it demands bold decisions and a willingness to accept shared, carefully managed dependencies with our partners, where the quality of French industries will be a decisive advantage”. The French philosophy of the European champion is not new, although it has never been clearly defined: it refers to the perceived need to see dominant players emerge in different segments of the European Defence Technological and Industrial Base (EDTIB) in order to reduce intra-European competition. The language here is more direct, though it still leaves some doubt as to France’s intended strategy: “choosing” champions implies making “bold choices” and accepting “shared dependencies” (also in paragraph 317: “[...] based on the principle of mutually agreed dependence [...]”). Should the state select which companies must merge into joint groups? Or conversely, should it allow certain industrial actors to be sidelined (to put it mildly)?

Within Strategic Objective 3 (“An economy prepared for war”), the so-called “war economy” objectives are developed. Notably, this expression is not used; instead, terms like “preparing” for war are preferred, which is arguably more rational and coherent with the resources mobilised. Paragraph 236 is worth noting: “In line with this strategy of industrial sovereignty, whenever possible, the best European manufacturers in the sector should be used, with a view to performance, efficiency and cost reduction. European preference, and in particular its financial benefits, must therefore benefit all EU Member States, contribute to structuring its ecosystem and, more broadly, support Europe’s dual-use industries”.

This marks an explicit reference to scaling up at the European level. France reiterates its intention to rely on the “best athlete” approach for cooperation projects. France is often criticised for this view, as the ‘best European industrial player’ often turns out to be French when one looks at public contract awards. Yet stating here that European funding must benefit the industries of all states fairly is noteworthy. France has long criticised geographical return — whereby European funds are distributed relatively evenly between member states (a

political logic) rather than primarily according to capability needs or industrial efficiency. In practice, this could herald a new way of viewing European funds and cooperation projects — though this remains to be clarified. Moreover, the “best athlete” logic can appear contradictory to geographical return, and the RNS does not explain how these two could be reconciled.

Paragraph 333 continues on European champions, specifying that joint developments must be pursued — through new cooperation projects intended to contribute to the emergence of new champions. This will again require “bold decisions”. While questions remain over this paragraph, the noteworthy part is the following: “controlled and accepted forms of mutual dependence in favour of genuine overall European sovereignty”. A managed loss of national sovereignties would be offset by a gain in overall European sovereignty, and countries would have to accept not producing everything themselves in order to strengthen European-level sovereignty.

The statement is clearer than before, though its meaning is not new. It was already present in the 2017 Strategic Review, which even included a diagram (page 67 of the 2017 document):

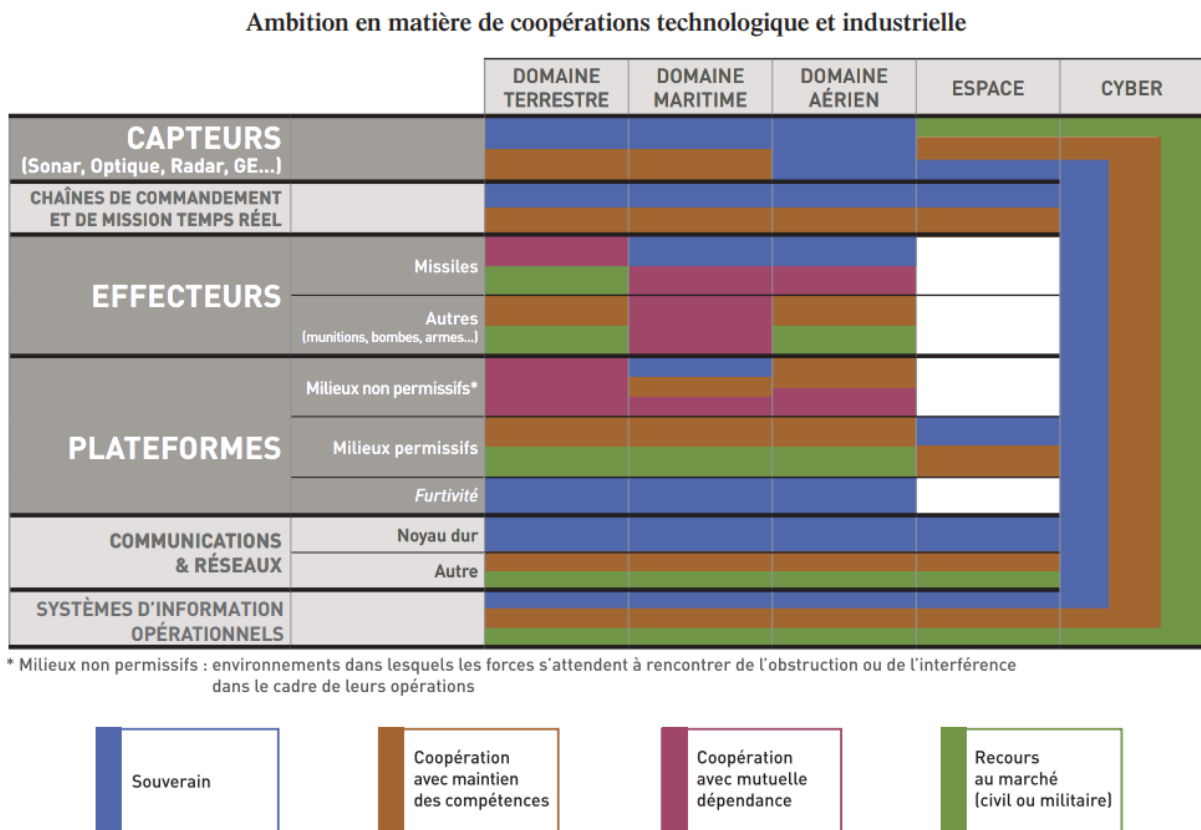


Figure 1: “Ambition in Technological and Industrial Cooperation”, National Defence and Security Strategic Review, 2017, p. 67.

The four 2017 categories are more or less carried over into 2025 (with the two cooperation categories merged), but without any new visual framework being provided — which is supposedly due “in 2026” (paragraph 526). This point will be revisited later.

### *Prioritising and developing capabilities at the European level*

Paragraph 330 partly outlines the approach sought, placing it within the EU framework: “The EU must continue developing an autonomous and sovereign European Defence Technological and Industrial Base (EDTIB) through a decisive step change, by prioritising key capability areas set out in the European Defence White Paper of 19 March 2025 [...]”. France thus aligns itself with the European White Paper’s capability priorities (air and missile defence, artillery, missiles and munitions, drones and counter-drone, military mobility, artificial intelligence, quantum, cyber, electronic warfare, strategic enablers and protection of critical infrastructure<sup>12</sup>). In the following paragraph (331), it also supports new funding instruments (notably those of Readiness 2030) and adds that France must adapt to seize the opportunities they offer. Does this adaptation include the Military Programming Law (LPM)? The President has already requested an update of the LPM in the autumn to accelerate investment (“over-steps” of €3 billion compared to the previous contracts of the same amount)<sup>13</sup>. Will more structural changes be made? France’s programming already faces structural difficulties in incorporating the European Defence Fund (EDF), which delivers EU funding that is by nature uncertain — awarded via competitive calls for projects while requiring state co-funding. Could we be heading towards a more flexible and transparent LPM that integrates cooperation more simply and effectively, perhaps with a dedicated fund to support it?

### *In the operational field*

Despite the strengthened language on NATO, the RNS also recalls France’s objective of operationalising the mutual assistance and solidarity clauses, under Article 42-7 of the EU Treaty and Article 222 of the Treaty on the Functioning of the EU (paragraph 341). The Russian invasion of Ukraine, and especially Sweden’s and Finland’s accession to NATO, had stalled operationalisation efforts, as the number of EU states not covered by Article 5 decreased and NATO’s clause became the more credible security guarantee to pursue<sup>14</sup>. France was

<sup>12</sup> European Commission and High Representative of the Union for Foreign Affairs and Security Policy, « Joint White Paper for European Defence Readiness 2030 » (Brussels : European Commission, 19 March 2025). [https://defence-industry-space.ec.europa.eu/document/download/30b50d2c-49aa-4250-9ca6-27a0347cf009\\_en?filename=White+Paper.pdf](https://defence-industry-space.ec.europa.eu/document/download/30b50d2c-49aa-4250-9ca6-27a0347cf009_en?filename=White+Paper.pdf)

<sup>13</sup> Présidence de la République, « Discours aux armées depuis l’Hôtel de Brienne » (Paris : 13 July 2025). <https://www.elysee.fr/emmanuel-macron/2025/07/13/discours-aux-armees-depuis-lhotel-de-brienne>

<sup>14</sup> The EU member states that remain outside NATO are Austria, Ireland and Cyprus. In Austria, however, this may be changing: Kevin Dupont, « L’Autriche ouvre le débat sur son adhésion à l’OTAN », *7sur7*, 27 July 2025. <https://www.7sur7.be/monde/lautriche-ouvre-le-debat-sur-son-adhesion-a-lotan~aea05b0c/>

particularly proactive on this issue, often supported by Greece, Cyprus and Finland. Reinvesting in this subject could be timely amid American disengagement from Europe, and links to the question of the EU's command and control (C2) function. The EU's Rapid Deployment Capacity (RDC) is also mentioned (paragraph 342), with France continuing to contribute to its operationalisation so that it can operate outside the EU, including in non-permissive environments.

### *Additional methodological elements on industry*

Several significant points also appear in the RNS's third and final part on the "ways and means" to achieve the strategic objectives.

First, on European funding initiatives: "To give substance to the White Paper on European defence, the defence ministries of certain European countries will create new capability coalitions. France will play its full part in this initiative, which aims to synchronise the rearmament of European countries in order to benefit from existing industrial capabilities, achieve economies of scale, optimise production tools and jointly finance poolable strategic capabilities. Work to identify initial joint projects will be consolidated from 2026 onwards. In view of Europe's rearmament needs, France will propose innovative cooperation models aimed at more ambitious lead times based on strong and more effective governance" (paragraph 554). This suggests SAFE (Security Action for Europe), which will enable states to borrow from the EU to partly finance joint arms acquisitions. But the final remark raises questions: what exactly are these "new models of cooperation"? The "ways and means" part could have clarified this, as other Europeans are awaiting clear French commitments on how it intends to cooperate.

The benefits of the ASAP (Act in Support of Ammunition Production) regulation are also highlighted (paragraph 556). France seems to have appreciated the instrument and would like to go further: "It will propose establishing production lines for European manufacturers elsewhere in Europe and will seek to develop cross-border supply chains to enhance the resilience and autonomy of the EDTIB". This is noteworthy as it sets out a concrete way to develop the EDTIB — something relatively rare in the RNS.

The text then mentions capability projects that France will propose under the European interest projects of the White Paper, in paragraph 566: "[...] France will also seek to present high added-value projects in the capability areas identified by the conclusions of the extraordinary European Council meeting of 6 March 2025, such as secure space communications, surface-to-air defence and tactical and strategic air transport". The double "transport" component could relate to the Permanent Structured Cooperation (PESCO) FMTC

and SATOC projects<sup>15</sup>. In any case, France had not so far shown that the ‘strategic’ component (as opposed to tactical) matched its capability priorities. SATOC aims to explore the possibility for Europeans to acquire outsize transport aircraft, notably to replace the Ukrainian An-124s used under the Strategic Airlift International Solution (SALIS) contract, which are nearing the end of their service life in the coming decade.

Lastly, paragraphs 563 and 564 address military careers, which should be rethought to better value experience in multilateral institutions. This is indeed important for service members, who do not necessarily see their “time away” from Paris (outside operational deployments) as recognised. Yet this is also key to ensuring that European issues are better understood within the armed forces and therefore more strongly invested in.

### ... BUT A PIVOT TOWARDS EUROPE AND THE EU STILL TO BE PROVEN

Several paragraphs suggest that France is adapting to the continental scale and deepening its discourse on European strategic autonomy. Yet others cast doubt. It is possible that some parts of the text reflect more heavily the style of their initial administrative drafters — particularly the strategic objective dedicated to the defence industry.

#### *DTIB, EDTIB — but the link between them still seems unclear*

One striking point is the language used to describe the EU. It is generally mentioned positively, especially when the RNS recalls what has been achieved since 2022. Yet it is also described as merely an administrative and financial entity to strengthen Europeans, notably within NATO. It is certainly not depicted as the political institution that will guarantee peace in Europe. The ambitions of the 2017 Sorbonne speech seem distant. The EU’s role in defence itself is absent, replaced by ad hoc coalitions, coalitions of the willing, and bilateral partnerships — in Europe, yes, but not within the EU framework, which no longer seems as appealing as before for building Europe’s defence. Minilateralism seems to be regaining the upper hand over complex organisations with standardised decision-making, even if the two are not strictly incompatible (the example of ELSA<sup>16</sup> is telling: cited three times, it emerged outside the framework but was then the subject of intense discussions to bring it into the EU’s funding priorities).

Moreover, from the very start of Strategic Objective 3 (“An economy prepared for war”), the end-state set for 2030 (paragraph 222) makes no mention of European capabilities to prepare for war: “[...] the French economy and industrial capabilities will meet the needs of the armed

<sup>15</sup> Future Mid-Size Tactical Cargo for tactical transport, and Strategic Air Transport for Outsized Cargo for strategic transport.

<sup>16</sup> European Long-range Strike Approach, aimed at developing deep strike capabilities.

forces and internal security forces to cope with a major war outside France and its consequences on national territory. The industrial base is resilient and the supply of resources and energy is sufficiently diversified and robust [...]”. It is highly unlikely that national economic and industrial capacities alone will allow France to meet these objectives — something the outgoing French CHOD has also pointed out<sup>17</sup>.

Doubts also arise in paragraph 231: “[...] The resilience of subcontracting chains must be guaranteed, including through the use of European companies where possible [...]”. Here, European preference could have been stated explicitly to show that Europeanising the value chain is a key objective — even if it is implied elsewhere in the text and in another strategic objective. The use of ‘including’ here casts doubt on France’s view of other Europeans’ DTIBs: are they seen simply as subcontractors for the French DTIB? A phrase like “primarily through the use of European companies” would have been clearer for Europeans — especially since the French DTIB is theoretically part of the EDTIB.

### *Returning to the capability development diagram*

This doubt is reinforced in paragraph 233, which recalls the three levels of control sought in capability development: “Efforts in developing national skills and industrial capabilities must be adjusted according to the level of sovereignty expected for weapons systems (independence, partial dependence or reliance on foreign markets) [...]”. As noted earlier, this does not really change the 2017 text, which also mentioned mutual dependencies. One could note the merging of the two cooperation categories (in 2017: first “while maintaining competence”, then “with mutual dependence”), but that is not the crucial point.

Yet given today’s context — with the level of threats presented in the 2025 RNS and the state of Europeans’ ability to defend themselves — a slight adaptation could have shown that France is evolving with the context. In the 2017 diagram, a European (non-French) competence theoretically falls under the same ‘partial dependence’ category as an American one, and likewise for reliance on foreign markets. The new diagram announced in paragraph 526 would reaffirm this, going further than industrial competences: “[...] the Ministry of the Armed Forces will define a roadmap for 2026 identifying the desired level of sovereignty (national control, control through cooperation or recourse to the market) in terms of defence system design, production and maintenance capabilities”. Yet European cooperation and even procurement from a European company should logically be prioritised over non-European sources in this scheme, both in line with the President’s European discourse and with the logic

<sup>17</sup> Laura Kayali, « Thierry Burkhard : l’Europe doit s’endurcir ou risquer de devenir “un animal traqué” », *Politico*, 28 August 2025. <https://www.politico.eu/article/thierry-burkhard-leurope-doit-sendurcir-ou-risquer-de-devenir-un-animal-traque/>

of national industrial resilience and consolidation of the EDTIB. Especially since paragraphs 14, 317 and 333, as noted earlier, mention the need for mutual dependencies between Europeans, notably in selecting industrial champions. In short, Strategic Objective 3 seems to have been written somewhat in isolation from the rest of the document.

To be fair, one could argue that the diagram is the *method*, and European preference the *principle* — therefore applicable in all cases, as indeed it is repeatedly mentioned. Yet among the seven references to “European preference”, France never appears to apply it to itself (except perhaps the fourth instance, paragraph 236), leaving it to the EU, Europe and Europeans — and for itself only when negotiating EU industrial funding initiatives. It would seem that France still struggles to apply this principle to itself, even rhetorically, in such a strategic document.

In this regard, Germany’s Defence and Security Industry Strategy published in late 2024 is instructive: it included a circular diagram with three levels (although the strategy’s scope is more limited than the RNS): national, European, international<sup>18</sup>:

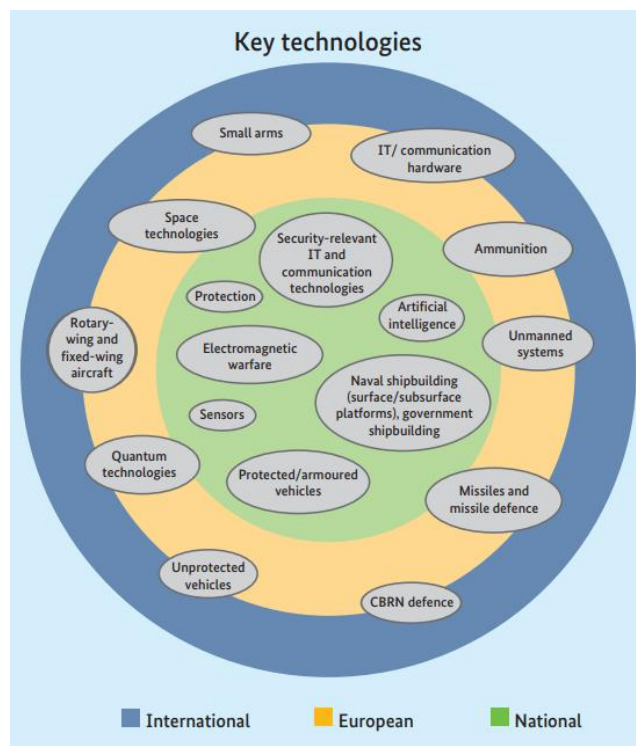


Figure 2 : National Security and Defence Industry Strategy, 2024, p 9.

<sup>18</sup> National Security And Defence Industry Strategy, english traduction of the german version : Bundesministerium der Verteidigung, *National Security and Defence Industry Strategy* (Berlin : 2024). <https://www.bmvg.de/resource/blob/5873628/138fddf8112609dfdc3ea44a52ba9195/dl-national-security-and-defence-industry-strategy-data.pdf>

It has the advantage of clarifying Germany's choices, including the fact that for many technologies there is little distinction between European and international (everything that is European is also international), which at least has the merit of clarity.

Further on, in Strategic Objective 11 ("Supporting French and European sovereignty through academic, scientific and technological excellence"), paragraph 454 states: "The following technologies must be mastered at national level, without excluding, in certain areas, the possibility of co-development or co-production with trusted partners, particularly in Europe : directed energy weapons, hyper velocity, artificial intelligence, quantum, new forms of energy, stealth, autonomous systems, new communication technologies, electronic components, stealth, critical materials, data management; freedom of action and access to space, electronic warfare".

The range of domains listed is very broad, and one may question whether French financial means correspond to this ambition. Many of these areas are precisely those that should be Europeanised, given the research and development challenges and the need for industrial critical mass. Finally, if these technologies are of prime importance for national security, why use such cautious wording — on the one hand "[...] without excluding, for certain areas, the possibility [...]", and on the other "notably" European? European cooperation should logically be the priority, even the sole option, in these fields.

## CONCLUSION: SEEMINGLY CONTRADICTIONARY SIGNALS

France's pivot towards Europe has yet to be substantiated. The 2025 RNS contains several elements that point towards greater French trust in its European partners (states and institutions) to achieve the goal of developing and consolidating the EDTIB. The discourse on Russia is now more aligned with that of most European states and with the reality of the threat, which marks a genuine shift. Yet at the same time, certain national industrial orientations cast doubt on France's willingness to work collectively and further Europeanise its defence. Some will see the glass as half full, others as half empty. This is likely the inevitable pitfall of drafting such an all-encompassing strategic document while still trying to make it operationalizable.

Perhaps the most glaring omission is a clear explanation of France's vision of the EDTIB and of European cooperation as tools to ensure national security. European champions and mutual dependencies are levers — but to what end? Why, in France's view, is it necessary to cooperate in Europe, and how? Moreover, in the document, military support to Ukraine and

the means for it to repel the common enemy are not directly linked to Europe's rearmament efforts. What is France's strategy for supporting Ukraine?

Clarifying these points would help the French better grasp the stakes and the value of European integration, help other Europeans identify the kind of ally they can expect France to be in the future, and help Ukraine understand what kind of European future France is willing to support.

# Strategic expertise in complete independance



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