



European armaments cooperation 1/4

an important issue, choices to be made

Cour des comptes

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Relations internationales

At a time when military spending is increasing everywhere in the world except in Western Europe, the October 2017 Strategic Review on Defence and National Security promotes European armaments cooperation as a key to strategic autonomy. Three effects of international cooperation can contribute to this:

- . the interoperability of national armies ;**
- . the sharing of the costs of expensive and innovative equipment;**
- . support for the European defence industry.**

Budgetary context France spends nearly €10 billion a year on defence equipment, including €7-8 billion on conventional armaments. ¹ . Most of the investment is used to develop, refine and acquire equipment. new projects, which may be carried out by France alone or in partnership with other States. Each year, France invests around €2 billion in conventional programmes carried out in cooperation with European partners.

The draft Military Planning Law (LPM) for the period 2019-2025 adopted by the Council of Ministers on 8 February 2017 announces, compared to the trajectory planned for 2016, a strong growth in the creation of new military programmes. The most significant change will come after the updating of the LPM, scheduled for 2021 .

The industrial imperative The world armaments market is dominated by American industrial groups, which rely on a domestic market representing more than 40% of world spending. In addition, in recent years, new players from emerging countries have increasingly competed with European groups on export markets. Out of the ten largest defence industrial groups (measured by their turnover, which also covers civil activities),

the only Europeans are Airbus Group and BAe Systems (United Kingdom); they compete with mainly American and Asian companies.

The viability of the European defence industries - and consequently the survival of industrial jobs - depends on the orders obtained; it can no longer be guaranteed at the level of a single European country. Thus, the sale of many items of equipment, either in the context of export markets or in the context of intra-European cooperation to share costs and benefit from the series effect, conditions the equilibrium of their economic model.

Choices for the future

The implementation of the LPM 2019-2025 will lead the public authorities to take decisions on future equipment, some of which will be structuring for defence in the medium and long term. The sum total of the needs of the French forces to satisfy the model of a complete and balanced army, capable of acting in the face of all threats and in all areas, exceeds national means; Increasing the share of investment in cooperative programmes could help France to equip itself with state-of-the-art equipment that each European state would find it difficult to finance on its own.

1 and 2 to 3 Bn€ per year for nuclear deterrence

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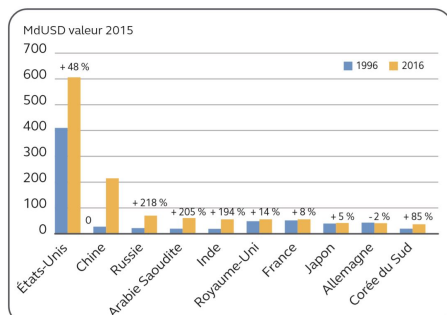
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Pensées mili-terre

Centre de doctrine et d'enseignement du commandement

Évolution des dépenses militaires entre 1996 et 2016



Source : Stockholm International Peace Research Institute (SIPRI)

Crédits de paiement pour l'équipement des forces²

En millions d'euros	2015	2016
Total programme 146	10 210	9 833
Dont dissuasion nucléaire	2 429	2 830
Total programme 146 hors dissuasion	7 781	7 003
Dont principaux programmes en coopération		
Observation spatiale MUSIS/CSO	115	74
Avion de transport A400M	543	228
Hélicoptère NH90	119	471
Hélicoptère TIGRE	182	344
Frégate FREMM	506	530
Missile FSAF	44	83
Sous-total des principaux programmes en coopération	1 509	1 731

Source : Rapport annuel de performance 2016 du programme budgétaire 146