

# Strategic Horizons

# Preface

Given the complexities of the current strategic situation, France must increase its ability to anticipate crises to ensure that its military capabilities are in readiness and in keeping with its role in the international arena. Within this context, the ability of the nation's armed forces to adapt to foreseeable future engagements is determined by how its force systems are prepared as of today.

The 30-year forecast plan - or PP30 as it is known in France - is intended as a guide in the preparation of weapons programmes. In particular, it identifies key factors and risks arising from operational and technological step changes. This technical-operational approach should be backed up by a forward-looking analysis of the international strategic environment.

More broadly, the Ministry as a whole should also have access to a joint analysis of changes in the strategic situation to help it in a wide range of activities calling for long-term forecasts.

That is precisely what this third edition of *Strategic Horizons* sets out to do, its ultimate goal being to serve as a decision-making aid in matters of national defence policy.

Starting with an analysis of changing trends in the world strategic situation, global geopolitical balances or step changes and the type and intensity of risks and threats, this work sets out to determine how all these changes affect France's position in the international system over the next three decades.

This document is the result of an open, interdisciplinary working method which makes no claim to being exhaustive. Supervised by the Delegation for Strategic Affairs (DAS), it has benefited from input not only from all the ministry organisations involved in planning for the future (Defence Staff, Defence Procurement Agency, General Secretariat for Administration and the staffs of the different armed forces, etc.), but also from many prominent institutional and private players.

This new edition reflects a particular focus on prospective methodology drawing on new collaborative tools. Intended to supplement the work of France's allies and to fuel discussions with its main partners, *Strategic Horizons* seeks to provide a coherent view of the future environment. The report illustrates the efforts made by the Ministry of Defence regarding defence planning and sets out to provide those concerned with a clearer understanding of the situation. This will allow them to consider, imagine and gauge more effectively and, above all, properly address the central question of what national defence challenges lie ahead.

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# Keys to Understanding

This report analyses changes in the strategic situation and shifts in geopolitical and geoeconomic balances, which are major challenges that governments around the world will have to face. It places a particular focus on risks and threats in terms of type and intensity. The tasks of the Ministry of Defence and its future planning requirements imply the need to concentrate on identifying and anticipating situations that are potential sources of instability in order to respond to them more effectively. Although some may feel that the report is excessively pessimistic in this respect, our armed forces must be ready to deal with such situations.

One of the salient features of our era is undoubtedly its lack of any single key that provides insight into the complexities of the international situation as a whole: the days of the ‘concert of nations’ or ‘bipolar confrontation’ are behind us. No single concept – be it globalisation, the ‘war on terrorism’, unipolarity, multipolarity, the rule of international law, the ‘clash of civilisations’ or the ‘end of history’ – provides an exhaustive explanation of how the international system works.



For the pace of change in the world is on the increase. New dynamics are emerging and new issues arising, even if they have not completely wiped out previous state- and power-based logic. This complex situation challenges our understanding and action and forces us to open up and consider many different viewpoints.

Anticipation is made all the more necessary – and difficult – by the increased pace of world events. Anticipation is a hazardous affair, as demonstrated by most of the major step changes in recent times, such as the fall of the Berlin Wall, the 9/11 terrorist attacks, and the revolutions and revolts that are currently reshuffling the cards in the Arab world. The fact that these events all came as a surprise means that those attempting to anticipate future events should do so with modesty.

That is why the purpose of this report is certainly not to foretell the future, but rather to help grasp and shed light on major developments that could or should take place in the world over the coming twenty to thirty years. Previous versions of the report adopted a single timescale. This is not the case in this report, where the timescale varies with the topic addressed, ranging from twenty years (for strategic areas, international situation) to thirty years (for demographics, social issues).

Based on the analysis of the current world situation and the major trends<sup>□</sup> that are currently emerging, this report sets out to identify the roles of various international players, changes and factors of uncertainty<sup>□</sup>, in an attempt to outline tomorrow's world, detect the appearance of new phenomena and possible step changes<sup>□</sup> and contemplate possible scenarios<sup>□</sup>.

Meanings of certain terms used in this report:

- major trend: direction taken by a changing phenomenon over a long period of time (e.g. urbanisation, population growth, technological changes, etc.);
- step change: any strategic change resulting from major trends or occurring unexpectedly. A step change draws a clear line between the situation 'before' and 'after', although it does not necessarily imply short time spans. Step changes are indicated by the symbol: 
- scenarios: coherent sets of assumptions leading from a situation in the past or present to a future situation. There are two main types of scenario: exploratory scenarios, which start out from past and present trends and lead to probable futures, and anticipatory or normative scenarios, which are based on alternative visions of the future, representing reasonable objectives, and are therefore built 'retrospectively' based on the strategies to be implemented to meet the said objectives;
- uncertainties: a situation whose outcome – positive or negative – is unknown or a situation where the outcome may be certain but the impact cannot be assessed, or where an expected event may have one of two opposite effects. Uncertainties are indicated by the symbol: 

Coordinated by the Delegation for Strategic Affairs (DAS), this report is the result of a collective effort involving a large number of Ministry of Defence organisations and experts from outside the Ministry.

Building on the experience acquired in previous years, it focuses particularly on methodology, the development and use of specific tools, conclusions that the Ministry of Defence can use directly in preparing the future and, lastly, the construction of an extensive expert network.

Participative working methods have been developed. For example, half a dozen meetings were organised for each chapter at the Technical-Operational Laboratory (LTO) set up by the French Defence Procurement Agency (DGA). Each meeting brought together experts from many fields, resulting in a collective approach to the different issues.

This report is divided into seven chapters addressing different topics: 'international relations', 'threats, conflict and military operations', 'economics', 'demographics and international migration', 'resources and environment', 'health' and 'technological and societal changes', followed by a section on regional analyses. It is based on an interdisciplinary, cross-cutting, participative approach.

It draws not only on the Ministry's own resources but also on those of a number of other government bodies, in particular the Ministry of Foreign and European Affairs and its Planning Directorate (Direction de la Prospective). In addition, a broad network of nearly 70 experts (political leaders, senior civil servants, demographers, economists, researchers, academics, journalists, sociologists, doctors, etc.) was also consulted. A list of the persons concerned can be found at the end of the report. We would like to express our sincere thanks to them, to the map department of the Institut d'études politiques in Paris and to LEPAC for their work on the maps and illustrations in the report.

For the sake of clarity and effectiveness, each chapter begins with a focus on key messages and ends with a section on the consequences of the major changes outlined for defence. Some topics or countries are given a special 'focus'. Terms marked by a triangle are defined in the glossary at the end of the report, as are all acronyms and abbreviations.

This report primarily seeks to open up new avenues of research and raise questions to contribute to collective discussions and debates and to drive the Ministry's strategic foresight effort. Readers are requested to take up the analyses in this document, to challenge them and consider the consequences of the possible futures outlined in these pages.

*The facts and figures mentioned in this report were valid as of 1 March 2012.*

# Main Elements



# Main Elements

At present, we can only identify the premises of how our strategic environment will look in 2040. Consequently, this new edition of the geostrategic and geopolitical prospective report aims to explore the main trends likely to structure the international system towards the middle of the century and to outline any implications for France and its defence system.

Three main trends can be identified:

- > the end of western domination,
- > the acceleration of globalisation,
- > ever-increasing instability and volatility.

# 1 The end of western domination

**The next two or three decades are likely to be a time of geopolitical transition, heralding the end of the era of western domination that began in the 16th century. The relative decline of the USA, which should nonetheless remain the dominant military power, the risk of Europe's status being downgraded and the affirmation of new major powers with regional or global influence will amplify the shift in the world's strategic centre of gravity.**

### A post-American world

The next thirty years should see the advent, sooner or later, of a post-American world. By 2040, the age of *pax americana*, or the 'unipolar' world, which began with the collapse of the Soviet Bloc, should have come to an end.

Any erosion of American leadership, however, will not consist of an abrupt and violent decline, but simply a readjustment bringing its power into perspective.

Although the USA will probably no longer be the world's largest economy by that time, it should still be the world's leading power and maintain a prominent role in most areas of smart power<sup>1</sup>.

This smart power, however, and the strategic prominence of the USA all over the world, will be challenged by the growing strength of new major powers, starting with China. What's more, relations between the two countries will be decisive at the international level and have global consequences in the event of tension.

The global imprint of American power, including military power, on the world scene will gradually decline. This change should manifest itself by a significant withdrawal in certain areas – particularly in Europe – and will be accompanied by a continuing shift of military deployment towards the Asia-Pacific region, the development of which is key to the definition of America's global strategy.

### Risk of downgrading of Europe's status

Faced with demographic stagnation, difficult economic outlook (low investment, weak growth, insufficient progress in productivity, debt burden), the risk of its Member States seeking refuge in more inward-looking policies, and a substantial decline in military resources, Europe is at a turning point in its history.

As the world's leading economic and scientific power and a centre of political stability, there is no doubt as to Europe's strengths. Europe could, however, see its influence decline, including in regions of growing strategic importance for Europeans, unless it experiences a sudden economic upturn and gains new momentum in terms of its political development. As the emerging nations assert their position,

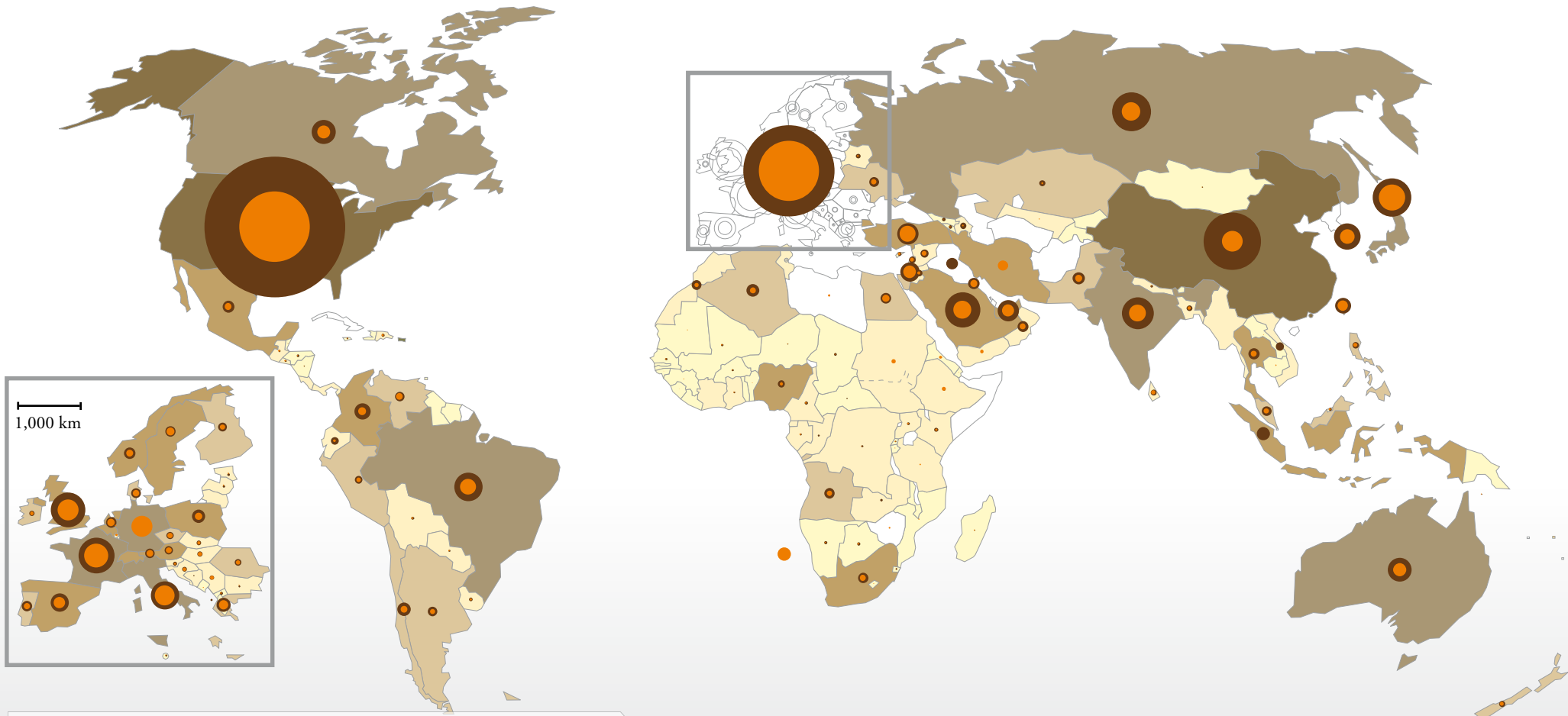
Europe will remain a first-rate power only if its members manage to define common goals and unite their efforts, while continuing to consolidate political, economic, and military integration.

### The emergence of new powers, whose future paths, however, remain uncertain

The arrival of new major 'emerged' powers, known as BRICS (Brazil, Russia, India, and China, with the recent addition of South Africa), and high-potential countries with a dynamic economy and a newly-acquired capacity to transform the global geopolitical landscape, will continue to cause upheaval in balances of power on an international scale. The catch-up effect concerns a growing number of countries. By 2040, the emerging countries should account for almost 60% of world GDP; their share of world trade should increase to 45% (compared to 34% today), and they should supply 65% of the manufactured goods imported by the developed countries (40% in 2010).

Some doubt nevertheless remains concerning the growth potential of these economies and its sustainability, as some of them are likely to experience a significant slowdown (particularly China and Russia, which are likely to see their growth potential halved over the next twenty years).

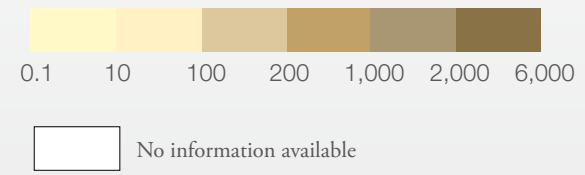
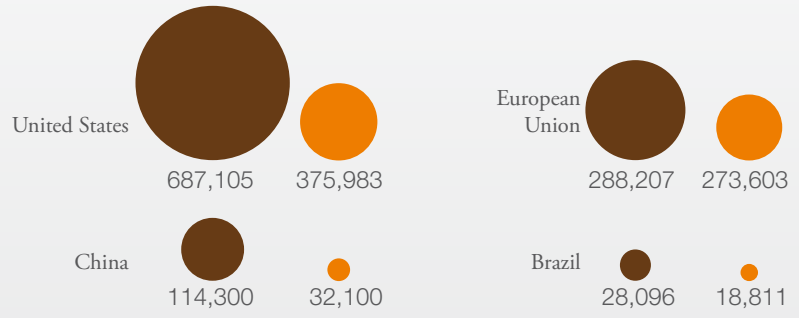
<sup>1</sup>- Combination of the hard power of military strength and the soft power of diplomacy, economics, law, and culture.



### Gross domestic product and military expenditure

Military expenditure by country, in millions of US dollars, in 2000 (orange) and 2011 (dark brown)

GDP growth 2000-2011 (in billions of US dollars)



Source: SIPRI/IMF

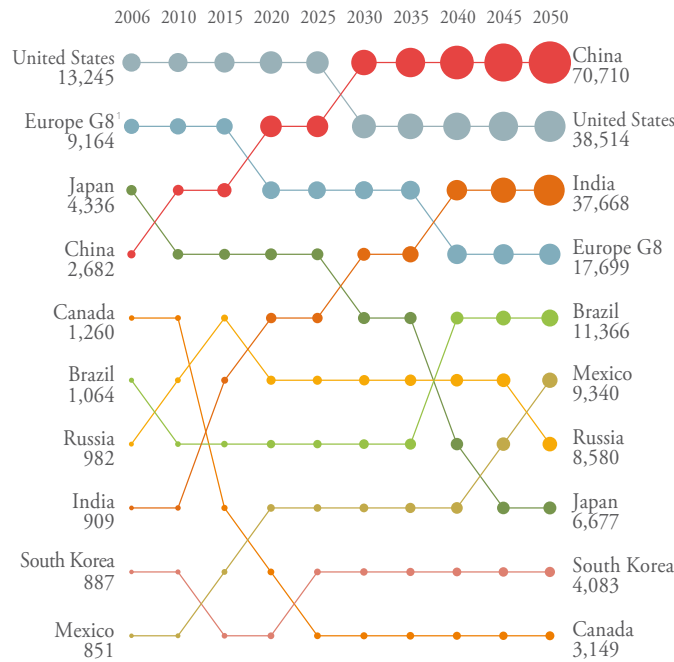
# Main Elements

Moreover, the catch-up effect depends on certain external and internal conditions being met (opening up of international markets, access to natural resources, effects that redistribute growth for the population, absence of major conflicts, political stability, appropriate governance and institutions, etc.). 'Emerging' countries will no longer automatically graduate to the status of an established 'emerged' power that is established and with the long-term capacity to take part in laying down rules in a certain number of key areas. The transition will largely depend on the ability of these countries to leverage the power they have in one field to increase their power in other fields, and their ability to manage their internal (demographic, economic, and social) problems.

This uncertainty also applies to the first of these new major powers: China, whose rise in the economic, financial, commercial, technological, and military fields has already caused an upheaval in the international strategic arena. After becoming the second economy in the world in 2010, it could become number one during the 2030s. Its military power, bolstered by very fast growing financial resources, could surpass the armed forces of all its immediate neighbours, and by 2040 the country might be in a position to replace the USA as the 'strategic policeman' of East Asia.

How it chooses to direct this power – whether to take on a more responsible role in international governance and security or to mount an aggressive challenge to the status quo – will be a major factor in determining the future strategic situation.

## On the road to a new economic order



2033, *Atlas des futurs du monde*, by Virginie Raisson (Published by Robert Laffont) © www.lepac.org

## The eastward and southward shift of the main geostrategic balances

The shifting of the world centre of gravity towards the East and, to a lesser extent, the South, which the 2008-2009 economic and financial crisis caused both in reality and in people's minds, is the most decisive strategic and political change of the decades to come.

Driven by China and India, the first and third economic powers respectively in 2040, more than two thirds of the countries with the highest rate of economic growth will be in Asia<sup>1</sup>.

As the new point of convergence for the flow of population, goods and capital, the region will be the most dynamic centre in demographic and economic terms as well as for innovation.

While nearly 80% of the world's population will be concentrated in Asia and Africa, and the economies of the seven main emerging countries<sup>2</sup> will be more than double those of the G7 countries at the turn of the century, the relative demographic and economic weight of the OECD countries will continue to decline (14% of the population in 2040, 43% of world GDP by 2030).

These changes could lead to the emergence of a multipolar system or, more probably, an 'oligopolar' system, structured around regional centres or based on pragmatic alliances that shift according to the interests at stake. Above and beyond the traditional economic and military alliances, new centres or coalitions of players might form based on cultural, religious, ideological, or linguistic identity and on common interests.

1- Fifteen countries, including South Korea, Indonesia, Iran, Malaysia, Thailand, the Philippines, Vietnam, Bangladesh, Turkey, Mexico, Argentina, Egypt and Nigeria.

2- China, India, Brazil, Russia, Mexico, Turkey and Indonesia.



## Defence in changing South-South relations in 2010-2011

- States which signed defence cooperation agreements between 2010 and 2011
- Cooperation agreement

Source: Osiris database/Military Balance 2011

# Main Elements

## Dewesternisation of the world?

The consolidation of these new powers will be accompanied by a densification of South-South relations, in both commercial and diplomatic terms, through the formation of increasingly strong coalitions and loyalties, particularly within multilateral structures, that are likely to modify certain international rules of the game, inspired by the northern countries, on a growing number of subjects.

With the decline of the main defining ideologies of the twentieth century, struggles for influence between powers could make a significant move into the arena of soft power and smart power, with governments pursuing the aim of organising the world according to their own principles, standards and values, as well as way of life and consumption habits. On the social level, the individualist model based on economic growth and the consumer and information society should continue to extend across the world in the next three decades, but will be accompanied by cultural isolationism and radicalisation.

As western influence experiences a relative decline, western-inspired legal and political standards could be challenged and, whatever the case, will be affected by different ways of thinking, particularly those from Asia.

The economic and financial crisis has led to a re-examination of the dominant, neoliberal growth regime and the economic order sustained by the western countries which, although not radically challenged, have seen some of their principles questioned ('faith' in market regulation shaken, governments' role in the economy re-assessed). This return to greater state interventionism could be confirmed in the medium- and short term, with the increasing power of emerging countries, particularly those in Asia, whose stronger resistance to the crisis may have consolidated the alternative economic model of 'state capitalism'. This model could become more attractive for the developing countries and spread, at the expense of the 'western' model.

However, even though the new powers might propose alternative models in their search for a redistribution of power on an international scale, they do not radically challenge the basic philosophies and inter-state and free market structures on which the international system is based, as they did in the past. During this transitional period, a 'reformist' spirit should continue to predominate in most emerging countries.

The universality of human rights will continue to conflict with resistance from many governments or transnational players in the name of identity-based, and particularly religious, principles. This should not, however, prevent the demand for human rights from being heard loud and clear all over the world, encouraged by the rise of a better-off, more educated social class that wishes to be protected from the excesses and arbitrary nature of the state, and by the spread of information technology.

Raised to the status of 'universal value', the democratic principle will continue to assert itself in spite of any possible relapses. Although this principle is not adhered to by all governments, it is now shared by a large majority of people all over the world, which does not necessarily mean that it will be built solely on the model of liberal democracy. Thirty years from now, most democracies will adopt a concept of the state, human rights, democracy and the place of religion and minorities according to their own models. Moreover, in the short term, the progression of the democratisation process will not necessarily be synonymous with greater stability, nor will it automatically facilitate multilateralism and agreement on major international issues.



# 2 The acceleration of globalisation

**The globalisation process, which has been the greatest upheaval on the strategic front since the end of the Cold War, should intensify and accelerate in the next thirty years. The explosion of transnational flows, increased interdependencies, global challenges, the competition generated by non-state players (international firms, NGOs, civil society, media, diaspora, criminal groups, etc.) will compel governments to adapt. The stability of the international system will require international cooperation and regulation to be reinforced.**

### A trade explosion

Driven by the catch-up effect in emerging economies, growth in world trade in goods and services, in both absolute and relative terms, the faster spread of technological progress and the removal of trade barriers, the 'second globalisation' seems to be underway as part of a sustainable process. The volume of world GDP should almost treble, growing from 35 trillion dollars in 2005 to 90 trillion in 2030. The expansion of international finance, which represents more than ten times the world GDP, while the volume of foreign exchange transactions represents 50 times that of real trade in goods and services, will continue, although its excesses could be increasingly challenged.

Migration, which is already occurring on an unprecedented scale in terms of volume and geographical spread, is being stimulated by the opening up of borders, the development of communication networks and transportation, labour requirements, and by inequalities and conflicts, will intensify. The number of transcontinental migrants could reach 450 million in 2050 (compared to 240 today), while the number of climate refugees could reach 220 million in 2040.

The explosion of intangible flows (real-time distribution of data, information, images, and ideas) could see a renewed increase in pace with the ongoing revolution in information and communication technologies, of which multimedia and the Internet provide only a first glimpse. The globalisation process is reinforced by the constantly growing number of interconnections. As a powerful accelerator of social and political transformations (as demonstrated by the role played by the Internet and social networks in the revolts and revolutions in the Arab world in 2011), growth in intangible flows could even contribute to the establishment of a new order in world society.

Whatever the case, the acceleration and diversity of exchanges of people, goods, services, and ideas will create increasing problems for governments.

### Technological revolutions

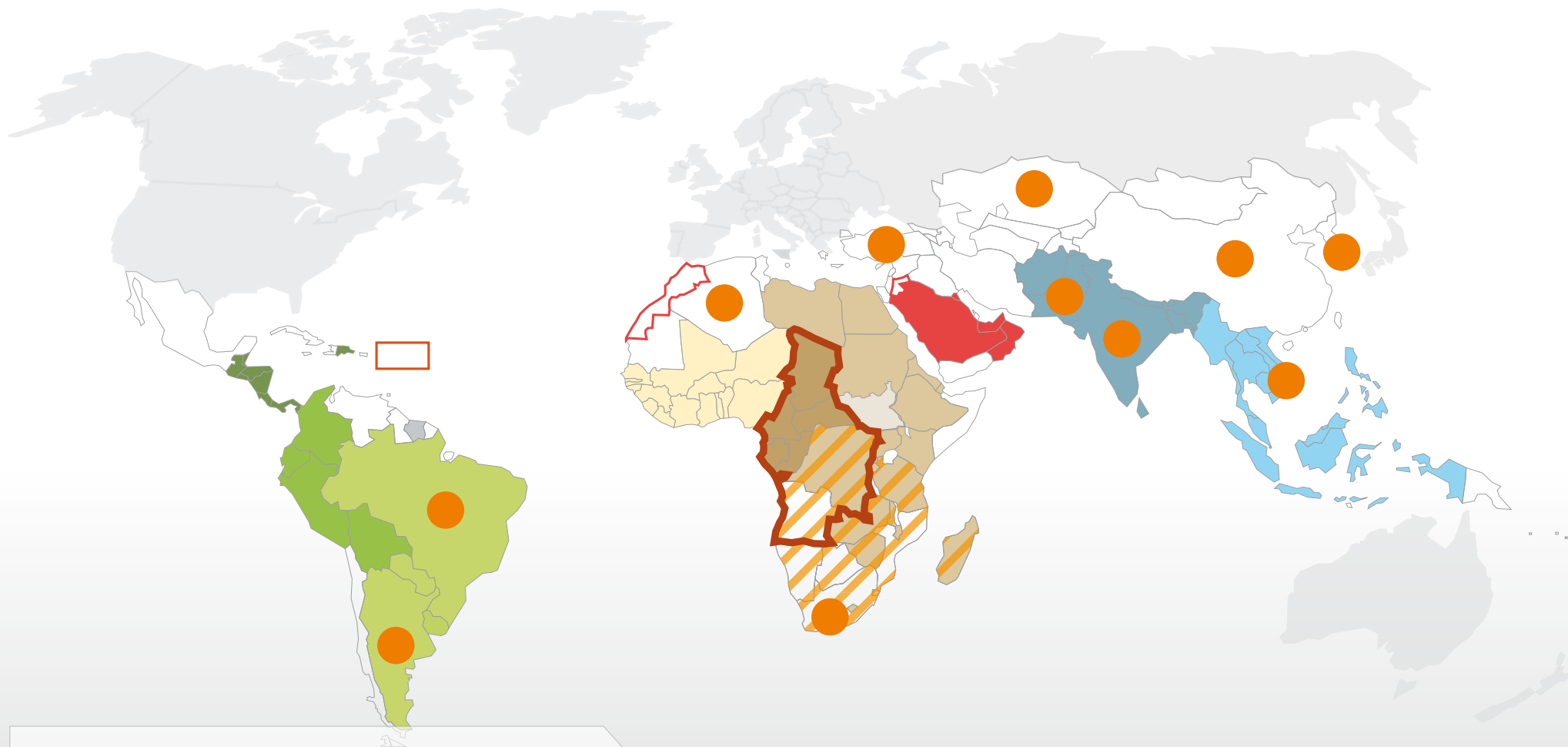
The acceleration of technological and scientific innovation is a driver of globalisation, and should continue. The next thirty years should bring new revolutions similar in scale and scope to those seen in recent years.

These changes will be major strategic issues with decisive repercussions on international relations (increasing capacity for action, redistributing power, transforming the environment, etc.), all the while hastening the upheaval of the individual's relationship with time, space, and the world, a process which began half a century ago.

It is highly probable that a wide redistribution of knowledge and skills on a planetary scale, particularly in the fields of biological sciences and technologies, will take place in the coming decades. Given the increasingly marked convergence of civil and military technologies, the emerging powers are – up to a certain point – destined to catch up with, and even overtake, western countries in fields where western superiority had hitherto been unchallenged.

The area of techniques and technologies considered to be strategic will therefore constitute a significant field of reinvestment and state intervention, starting in the military sector.





### Economic integration in the South, 2011

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|--|--|--|--|
| <span style="color: green;">■</span> Andean Community (AC)                                 | <span style="background-color: yellow;">■</span> Economic Community of West African States (ECOWAS)                            | <span style="color: red;">■</span> Cooperation Council for the Arab States of the Gulf (CCASG)     | <span style="color: orange;">●</span> Civil nuclear cooperation among other southern countries |
| <span style="color: darkgreen;">■</span> Central American Common Market (CACM)             | <span style="background-color: brown;">■</span> Economic Community of Central African States (ECCAS)                           | <span style="color: red;">—</span> Application to join the CCASG in 2011                           | South Africa/Algeria   |
| <span style="border: 1px solid orange;">□</span> Caribbean Community (CARICOM)             | <span style="background-color: tan;">■</span> Common Market for Eastern and Southern Africa (COMESA)                           | <span style="background-color: blue;">■</span> SAARC Preferential Trading Arrangement (SAPTA)      | Algeria/Argentina  |
| <span style="background-color: lightgreen;">■</span> Common Market of the South (MERCOSUR) | <span style="background-color: orange; border: 1px solid black;">■</span> Southern African Development Community (SADC)        | <span style="background-color: lightblue;">■</span> Association of Southeast Asian Nations (ASEAN) | Algeria/China  |
|  | <span style="background-color: orange; border: 1px solid black;">■</span> Economic Community of Central African States (ECCAS) |  | Brazil/Argentina   |
|  |  |  | China/Pakistan   |
|  |  |  | South Korea/Turkey   |
|  |  |  | South Korea/India  |
|  |  |  | South Korea/Vietnam  |
|  |  |  | India/Kazakhstan   |

Source: OECD/AFP

# Main Elements

## Global challenges exacerbated by globalisation, sources of tension

While globalisation can emerge as a source of growth on a world scale, it also brings with it new vulnerabilities. The increase in imbalances that it generates will be a source of increased tension and instability.

- While the world population should increase by 25%, reaching 8.8 billion in 2040 (followed by a drop in the natural rate of increase from then onwards), the demographic imbalance between developed countries, with slow natural growth, and the countries of the 'demographic growth diagonal' extending from sub-Saharan Africa to the Arabian Peninsula, Afghanistan, Pakistan, and northern India, will be amplified. Although the ageing of the population due to longer life expectancy and falling fertility rates should affect every continent, it should be faster in the developing countries. In those countries, which often have no social protection system, this phenomenon will be a major issue, particularly in terms of political and social stability.
- Urbanisation should continue to advance, although at a slower pace. In 2040, 65% of the world's population will be concentrated in cities. While 95% of demographic growth should be absorbed by cities in developing countries (where 80% of city-dwellers will live), uncontrolled urbanisation will multiply the risks of instability (urban disasters, rising tensions, environmental problems, etc.).

- Climate change seems inevitable in the time frame under consideration, although experts do not agree as to its scope and speed. It should lead to more serious and more frequent extreme climate-related events, with repercussions on environmental, economic, health and strategic issues (increased risk of conflicts, population displacement, militarisation of certain strategic areas). Its impact will not be the same the world over and semi-arid or arid zones will be the worst affected. The adaptation of ways of life and consumption habits will become a crucial challenge that societies will have to face.
- Access to natural resources such as fresh water, arable land, foodstuffs, raw materials, especially energy and mineral resources, will be one of the main challenges facing humanity. Secure access to energy resource production areas, especially in the Middle East and Africa, and the securing of transport (maritime routes, straits and oil pipeline paths, particularly in Central Asia, Russia, and Iran) will become increasingly crucial issues for the dependent countries.
- Despite an overall reduction in poverty<sup>1</sup>, increasing inequalities in the distribution of wealth, on both a national and international scale, will worsen social and political instability and fuel radicalisation.

- The main economic imbalances in the world (massive surpluses for some, particularly in Asia, and excessive deficits for others, particularly in the USA and Europe), amplified by financial globalisation, will increase the risk of systemic crises.
- Under the perverse effects of globalisation and the growing rivalry of states in the field of soft power, identity-based and religious demands could be exacerbated and radicalisation phenomena amplified. Conflicts that play the religious card and exploit community identity will continue to increase, against the background of the disintegration of certain weak states, social and economic destructuring and lack of a feeling of citizenship.
- The risk of controversial or dangerous applications of technological innovations (nanotechnologies, biotechnologies, robotics), which are increasingly beyond government control, will raise ethical questions (cloning, eugenics, artificial intelligence, etc.) and could represent a growing threat to the security of persons, populations, and States. Increasingly advanced interconnections thanks to the new information and communication technologies will also be a source of increased vulnerability, and could be used for the purposes of propaganda, disinformation, repression and surveillance, and as a vehicle for racial or religious hatred, an instrument of war and for recruitment by criminal groups, computer piracy, etc.

<sup>1</sup> The number of persons living in extreme poverty could be halved by 2040, dropping from more than one billion today to 500 million persons.

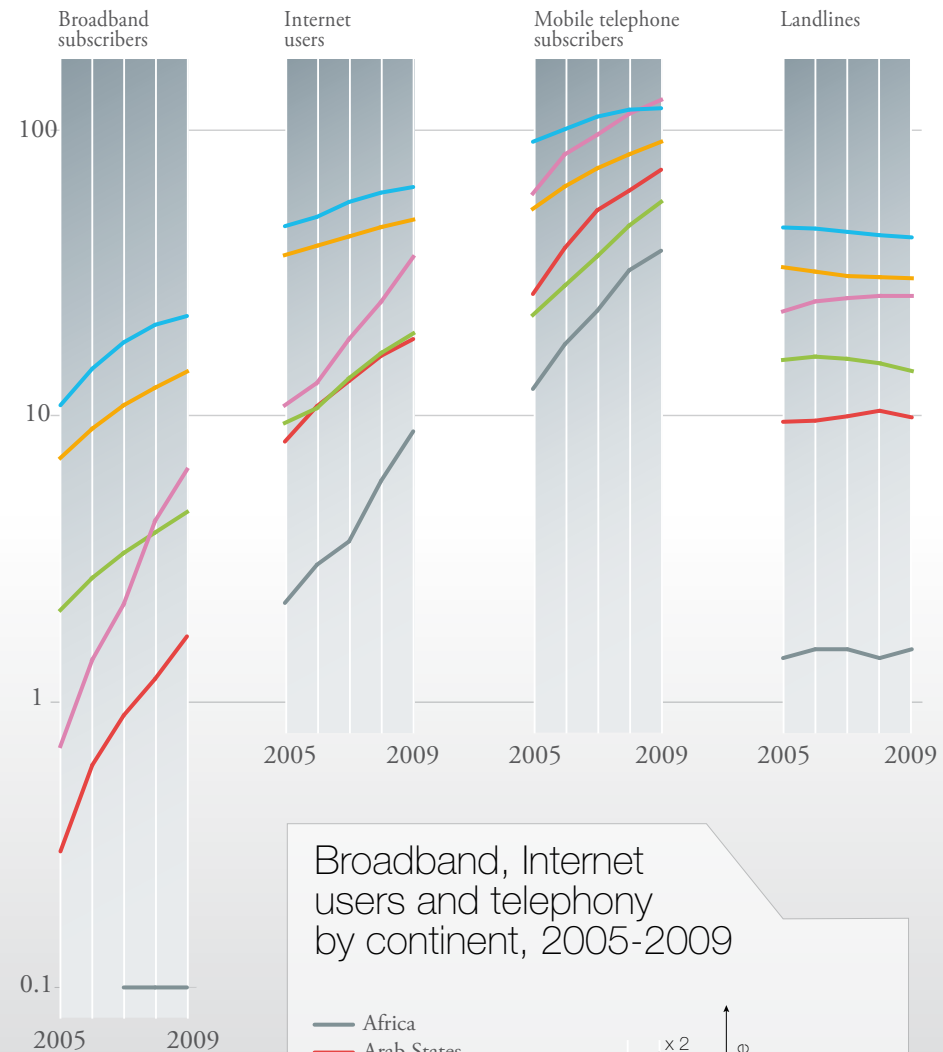
### A growing demand for international regulation

Although the emergence of a 'world government' by 2040 seems unlikely, growing interdependencies and global challenges should lead to an increased demand for multilateral cooperation, which will be increasingly complex and heterogeneous. The need to reduce systemic risks and control flows on a worldwide scale will become more and more essential in a growing number of areas, not only economic and financial, but also regarding migration, health, environment and new information and communication technology. It will call for the reinforcement of international instruments of regulation and coordination, and for the development of cooperation tools.

In an ever changing environment, the gradual erosion of American power and the emergence of an oligopolarity or loose multipolarity could weaken all regional and multilateral organisations, especially alliances, which will be forced to adapt their agendas, missions and practices, and could induce governments to adopt a form of strategic protectionism. Moreover, tensions relating to the legitimacy, representativeness and effectiveness of international organisations (UN, international financial institutions) should continue to characterise, and even hinder, world governance.

That being the case, the major structural risk could be a growing interdependency and a weakening of the players and instruments of regulation at the same time. The stability of the international system will thus depend on the capacity of States to renew or create appropriate governance and security tools at the bilateral, regional, and global levels.

All values are expressed for 100 inhabitants



Source: ITU, [www.itu.int/ITU-D/ict/statistics](http://www.itu.int/ITU-D/ict/statistics), June 2010 update

Map Department of Sciences Po, 2010

# 3 A period of geopolitical transition marked by growing instability and volatility

**In the absence of a robust regulatory mechanism, and in an increasingly globalised and interdependent space, geopolitical rearrangements could lead to a gradual rise in tensions and increase in conflictual situations, with the risk of international confrontations and the growth of asymmetric threats.**

### **A risk of 'strategic vacuum' and extending areas of fragility**

The erosion of American leadership and the simultaneous rise of various centres organised around emerging world powers (China and India), regional powers (Brazil, Turkey), or powers based on pragmatic alliances according to the interests at stake will not, however, automatically involve the creation of a new mechanism to regulate the international system.

On the contrary, reduced involvement of the western powers (USA and Europe) and the failure of any responsible emerging powers to take over their role, would create a power vacuum giving free rein to disruptive state and non-state international players.

### **A risk of extending areas of fragility**

The areas of fragility of the international system could primarily be established where the various spheres of influence meet, particularly when access to resources is at stake. Areas where the main trade flows are concentrated will remain potentially high conflict zones. In some cases, access to rare raw materials that are essential to the development of certain key technologies could spark off crises in areas that are currently preserved (Siberia, Arctic).

With the risk of multiplication of fragile or bankrupt states, mafia organisations and terrorists will see their clandestine business thrive in new 'grey areas'.

These threats will become decisive as soon as they affect strategic points, especially regarding the transport of energy resources.

### **Changes in the risk of conflict**

In spite of the large number of crises, the risk of conflict is often depicted today as being historically low. The trend could change in the coming decades, in a more volatile and complex international environment. The use of collective violence could become more unpredictable, moving into new – including immaterial – fields, as technological innovations appear and societies change.

Geopolitical changes could be marked by an increase in 'power rivalries', confrontation between centres, or even international conflicts ('shortage wars', territorial and extra-territorial claims). Asia in particular should continue to be exposed to the risk of major conventional conflicts, which are liable to have a significant impact on international stability.

Geostrategic changes could also generate a new form of conflict which, moving further and further away from war or crisis models as identified today, could combine different forms of struggles or disputes of varying intensity. The line between international and intra-national conflicts, between regular and irregular wars, and between low- and high-intensity conflicts, will be increasingly blurred. The interrelationship between state and non-state players, with increasingly diverse modes of action, will be more and more complex.

### **The growth of transnational and asymmetric threats**

Not only will 'disruptive' states probably maintain their ability to cause harm and generate threats, increasing threats can also be expected from non-state players as globalisation increases.

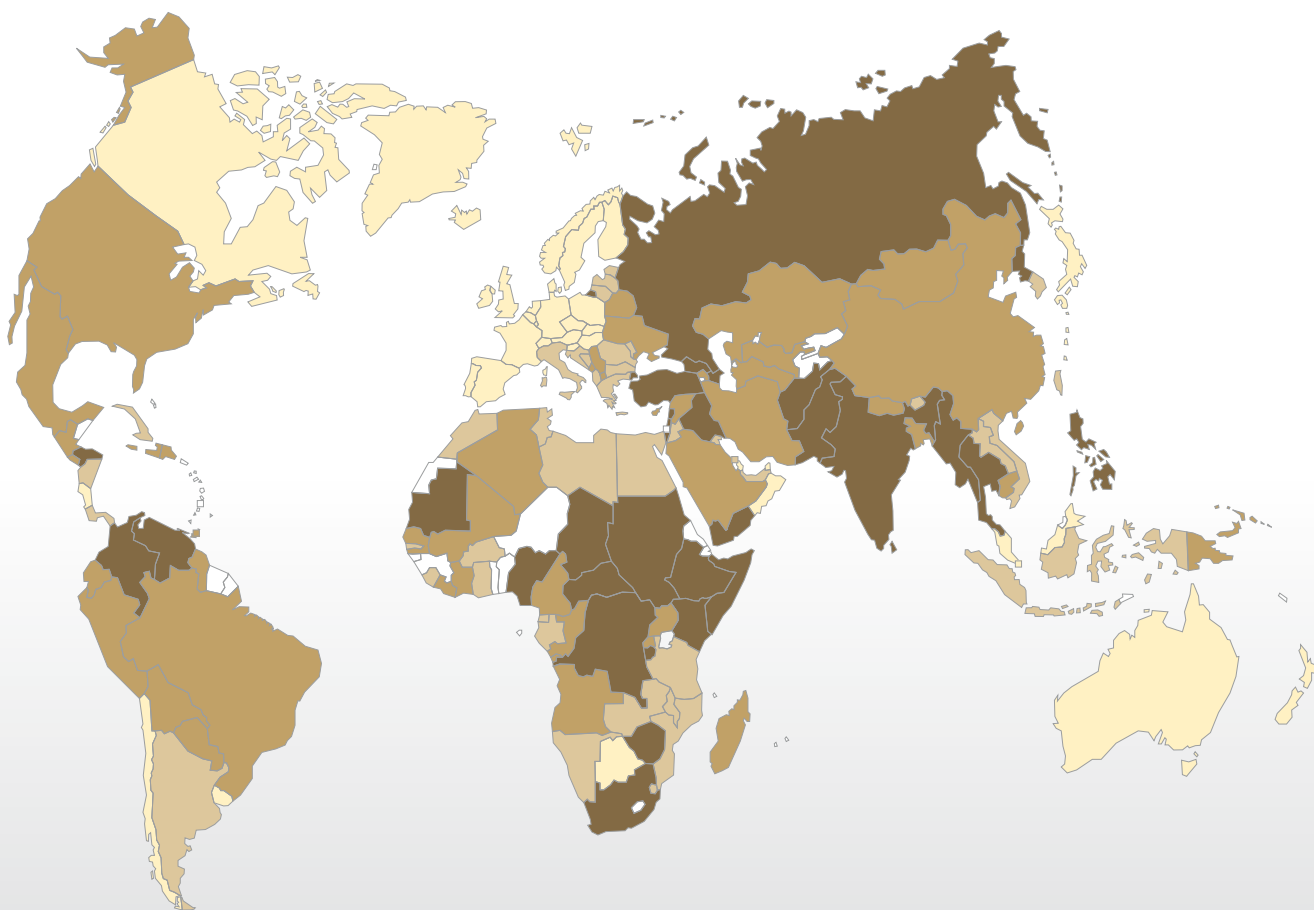
The proliferation of weapons of mass destruction (nuclear, bacteriological and chemical) and their means of delivery should represent one of the most serious risks in the years to come. It will be further facilitated as exchanges develop and knowledge and technology (often dual-use) spread. The risk of nuclear weapons or radiological devices being used could increase (escalation between two nuclear powers, acquisition of weapons or technologies by an increasing number of state players, including those with low capabilities, and/or by non-state players, particularly terrorist groups, etc.). In this context, the adaptation and reinforcement of non-proliferation regimes and bans will remain a central issue.

Although multipolarity is likely to absorb some of these ideological disputes, terrorism will remain an effective and profitable asymmetric strategy for the weakest and most relentless parties, and will continue to flourish in a context of poverty, economic and social inequality, failure and poor governance by states. Terrorist groups are likely to make increasing use of information technologies and could benefit from easier access to better and more sophisticated means of destruction.

After the death of its charismatic leader, and driven by democratic movements in the Arab world, Jihadism could lose some of its ideological foundations and increasingly be used as an 'umbrella' to lend legitimacy to activities related to organised crime. The Jihadist terrorist threat could lose the central strategic position that it suddenly gained after the attacks of 11 September 2001.

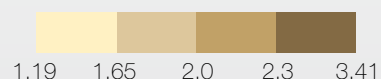
Transnational organised crime (trafficking in weapons, drugs and human beings, intellectual property theft, piracy at sea, money laundering, etc.) will continue to benefit from globalisation. As certain natural resources becoming increasingly scarce, the illicit economy could find new avenues of expansion.

Although partnerships between terrorist groups and groups associated with organised crime are only observed on an occasional basis at present, they could become a more regular occurrence, which would make them even more difficult to combat.



## Global Peace Index - 2010

Global Peace Index \*



 No information available

\* The GPI is an indicator of peacefulness on a scale of 1 to 5 (1 = peace, 5 = conflict). It is based on 24 socio-economic, military and security-related indicators.

Source: Institute for Economics and Peace, 2010 GPI results report, [www.visionofhumanity.org](http://www.visionofhumanity.org)

Map Department of Sciences Po, 2010

# 4 Implications for the French defence system

### Adapting defence to the new strategic context

Acknowledging the gradual decline of its relative power, the USA, which is likely to refocus its efforts on the Pacific region, will ask its European allies to deepen their involvement in their immediate strategic environment. Less involved in military operations that do not directly concern its own interests, it will encourage European countries to increase their defence effort, particularly through alliances over which it will seek to maintain control.

Alliances will see a significant change in how they traditionally function as a result of this redeployment. They should evolve into more flexible and more mobile structures, less subject to long-term objectives and more concerned with preserving the interests of each Member State through a more pragmatic approach. Although they will probably maintain a strong regulatory role in the operational field, with a growing number of variable-geometry coalitions, they will probably be less restrictive on a political level and will not necessarily involve all the allies.

In a context of growing budget restrictions for all European countries, just as new major strategic players are asserting themselves, the risk of being relegated in the strategic arena could incite Europe to move forward with its joint defence policy. This should combine various formats, from 'à la carte' partnerships to more structured alliances, with the gradual pooling of certain military capabilities and eventually be able to produce significant operational results.

At the same time, our status as a nuclear power, our international responsibilities, our defence pacts and French influence overseas will set our national interests apart from those of our main partners. Unless we significantly revise the level of our ambitions, this 'strategic identity' will require us to have a substantial margin for independent action, capable of covering specific fields of interest.

The long-term operational credibility of the French armed forces will be based on the preservation of a critical mass guaranteeing a level of autonomy that is compatible with national interests and status. In order to meet this requirement, the French defence architecture will have to be reviewed and organised around a robust military base and new partnership mechanisms.

The question of the formats and military capabilities of the European and French armed forces will be asked with increasing urgency. In terms of capability, a new balance must be struck between quality- and quantity-based approaches. The changing nature of conflict and the redistribution of power will oblige us to maintain, in all circumstances, a response threshold and level of vigilance high enough to counter any foreseeable threats, address emergencies and, in the worst case, deal with strategic step changes, which are always possible.

As military intervention will increasingly take place within a multinational framework, through ad hoc coalitions or alliances, the interoperability of forces will be crucial among European nations and necessary with America.

Coordination with the other partners (interministerial logic, work with local players, including private entities) will also be a significant operational lever.

### Preparing for future military engagements

In the context of a probable increase in the risk of conflict, the development of the scope of armed conflicts, incorporating various forms of confrontation, struggle, or disputes of varying intensity, should prove more restrictive for the use of military force.

Controlling this more volatile field of conflict will, in particular, involve reinforced efforts at prevention and wielding influence. These forms of 'upstream' and 'downstream' action, conceived according to a global approach and coordinated in an often multinational framework, could therefore play a growing role in the strategic arena.

Adapting to the new conditions of this operational environment will also entail designing and planning more indirect action by combining forces (expeditionary, local and private) more effectively in specific areas to contain and restrain a more heterogeneous opponent. This approach will necessarily have an impact on the footprint of French military operations

Lastly, all European countries will probably need to rethink the role of the armed forces in the domestic arena to meet the need to protect and ensure the security of their home territory and population.

Drawing on specific capabilities and a potential for high-level response, armed forces could find themselves more deeply involved in emergency operations and, more generally, protecting national territory and population.

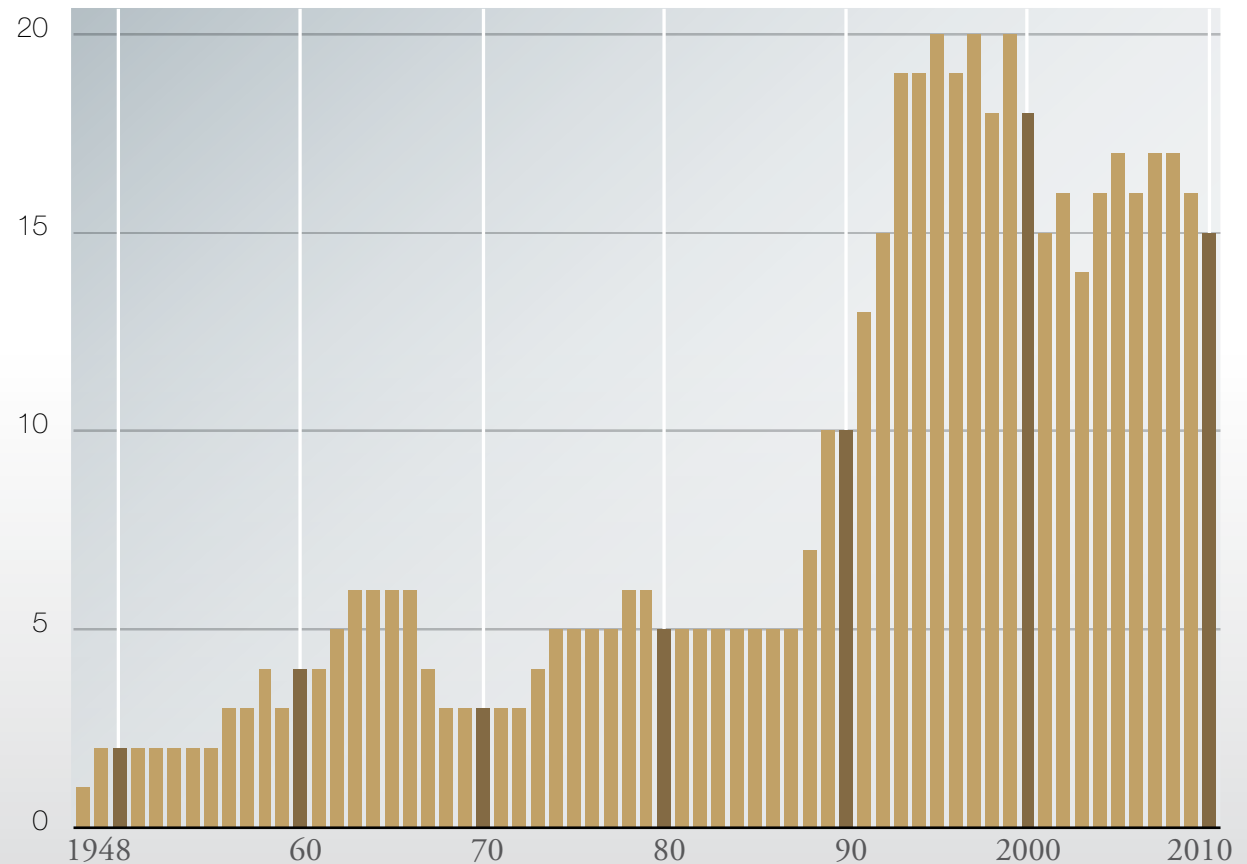
### Ensuring industrial and technological autonomy

As technical and scientific knowledge spreads, there should be a relative levelling-out of power among the major players on the international scene in the medium term. In some cases, certain emerging countries could even take the lead in the development of some weapons.

In this context of heightened competition, an ambitious industrial policy must respond to the growing constraints of globalisation (relocations, preserving a competitive edge). It should be based both on the development of partnerships with France's historic partners, and with other countries whose rise to power is supported by France, as well as on the deepening of the European market.

Finally, the growing involvement of the emerging countries in the financing of the French and European economy could lead states to reinforce their industrial 'regulator' function, in particular to protect certain sectors that are considered to be of top priority for the defence of national and European interests. The question of reinforcing special legislation to protect strategic interests should therefore be raised, particularly for France and the EU.

All these trends will affect France's defence system and, as such, call for a significant effort to adapt to the future challenges facing the nation.



## Peacekeeping operations

Total number of operations, 1948-2010

Source: UN, [www.un.org/en/peacekeeping/dpko.shtml](http://www.un.org/en/peacekeeping/dpko.shtml)

Map Department of Sciences Po, 2010