



France

NATO Country Assessment —TIER TWO—

DEFENSE INDUSTRY • TAKING THREATS SERIOUSLY • UNDERMINING SECURITY



JULY 2026



TIER 2

Average Ally



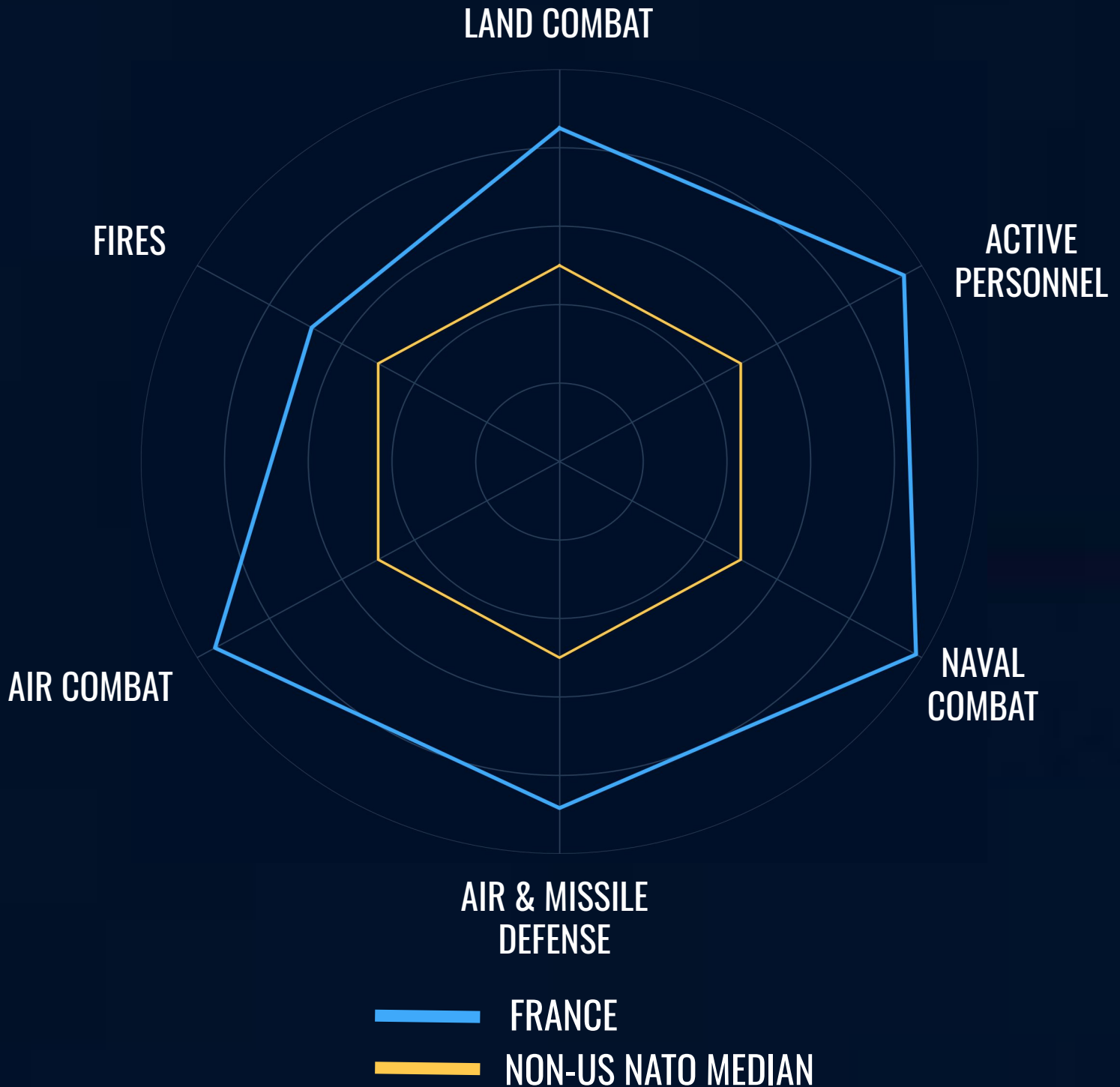
AT A GLANCE

Toplines

- **A Defense Industrial Force Multiplier:** France independently manufactures a complete fighter, nuclear submarine, ballistic missile, nuclear warhead, and naval cruise missile, and recently overtook Russia as the world's second-largest arms exporter.
- **Taking the Threat Seriously:** France's 2025 National Strategic Review represents its sharpest doctrinal shift on Russia since the Cold War, explicitly naming Russia as the most direct threat and warning of open warfare risk by 2030.
- **Undermining European Security:** France blocked US military aircraft overflights during Operation Epic Fury—undercutting the Trump Administration's efforts to secure lasting peace in the region.



FORCE STRUCTURE AT A GLANCE



This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

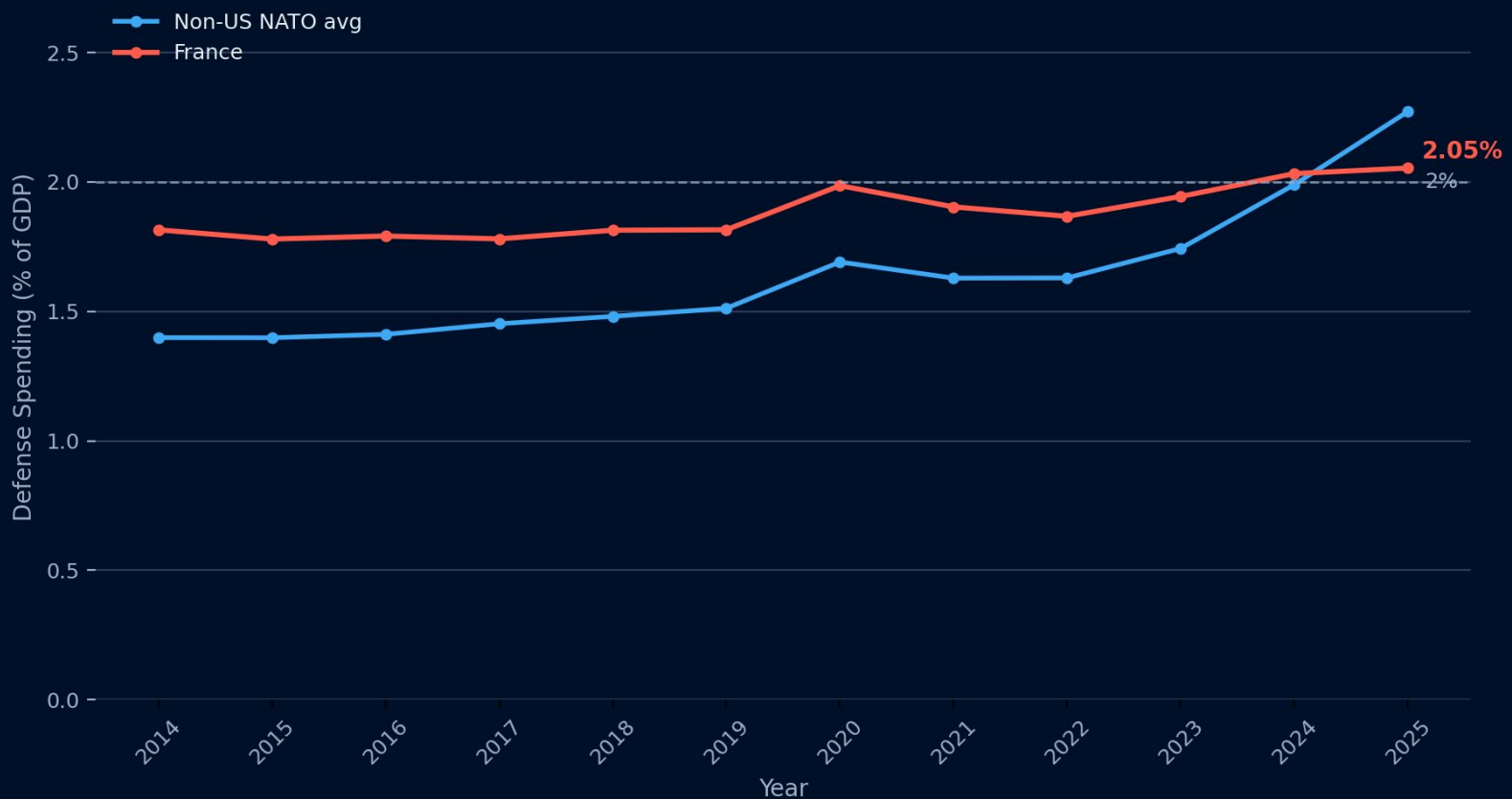


MILITARY CONTRIBUTIONS

Defense Spending Level

France's [defense spending](#) has been largely consistent over the years. France has consistently spent above the non-US NATO average but right below the 2% threshold. But as the non-US NATO average surged post-2022, France has been overtaken, sitting at 2.05% in 2025 while the alliance average hit 2.5%. France is now below the NATO average for the first time. At \$70B in 2025, France is Europe's third-largest absolute defense spender, with [Macron targeting](#) €63.3 billion (\$74 billion) in defense spending by 2027 and €76.3 billion (\$89.1 billion) by the end of the decade—roughly 2.6% of GDP. France's budget is large enough to sustain a nuclear deterrent, carrier strike group, global deployments, and Rafale production simultaneously, but the spending trajectory falls short of new alliance norms.

France — Defense Spending as % of GDP, 2014-2025

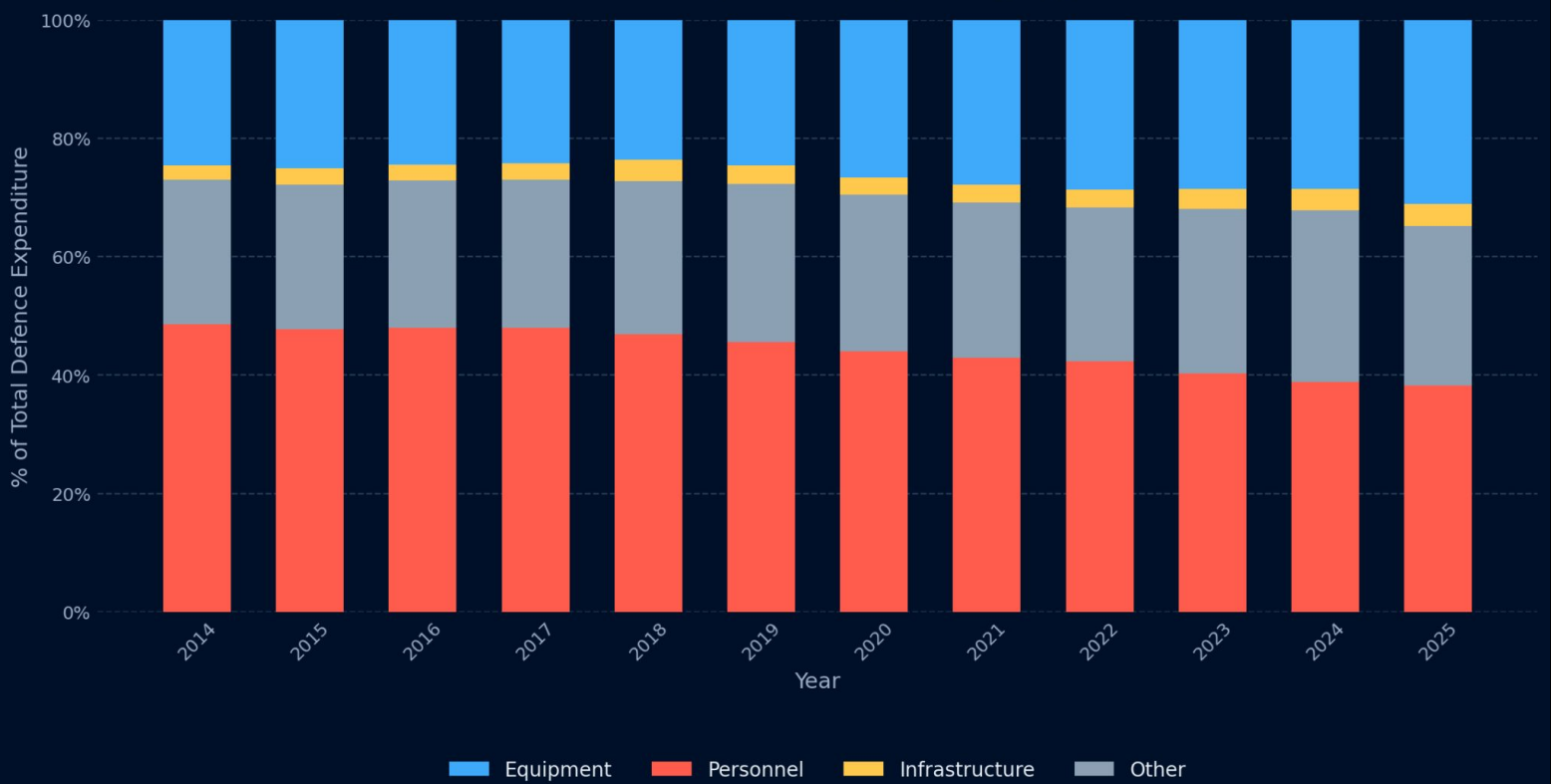


MILITARY CONTRIBUTIONS

Equipment Share

France's [equipment investment](#) is one of the strongest in NATO. It has held at roughly 25-30% of the defense budget throughout 2014-2025—well above NATO's 20% benchmark. France never went through the equipment-share collapse that afflicted countries like Belgium, the UK, or Germany. No other European ally sustains France's breadth of sovereign platform production simultaneously. The constraint is that France's equipment budget is largely consumed sustaining existing high-end capability across nuclear, carrier, fighter, and ground systems simultaneously. This leaves limited fiscal space to expand capacity or accelerate modernization at the pace the current threat environment demands.

France — Defence Expenditure by Category, 2014-2025



MILITARY CONTRIBUTIONS

Manpower & Recruitment

France's [personnel numbers](#) show a force that has been slowly shrinking. Active military personnel peaked at roughly 208,000 in 2016-2018 before modestly declining steadily to approximately 205,000 by 2025. Personnel cost share has fallen from roughly 49% in 2014 to approximately 39% in 2025, partly reflecting the declining headcount and partly the growing equipment budget. France maintains a professional all-volunteer force without conscription, and at roughly 205,000 active personnel it is large in absolute terms but increasingly thin relative to its global commitments across nuclear operations, carrier strike, Africa deployments, domestic counter-terrorism, and Eastern Front contributions simultaneously. The chart's gradual personnel decline is the quiet story behind France's capability-mass tension: a force that is qualitatively exceptional but structurally stretched.

France — Personnel Cost Share & Active Personnel, 2014-2024



MILITARY CONTRIBUTIONS

Capability Modernization

France's [modernization](#) is concentrated on nuclear, air power, and naval precision strike. On nuclear, the M51.3 SLBM entered service in October 2025 with improved range and penetration, the ASMPA-R nuclear cruise missile entered service in 2023, and the ASN4G hypersonic nuclear missile is in development for 2035. On combat aircraft, France is transitioning to an [all-Rafale fleet](#) by 2035 with 109 currently in service and aiming for 225 by 2035. On air defense, 60 SAMP/T launchers make France Europe's most significant non-US air defense operator outside Germany. On naval strike, France is the only European NATO ally besides the UK capable of launching long-range naval precision strikes through the MdCN cruise missile on frigates and Suffren-class submarines. France also operates Europe's first dedicated signals intelligence satellite constellation. Still, ground force depth and air-defense missile stockpiles lag behind what the current threat environment demands.



MILITARY CONTRIBUTIONS

Force Posture

France maintains roughly 30,000 personnel deployed worldwide, a global posture no other European NATO ally approaches. Permanent deployments include Djibouti (1,500 troops, Bab-el-Mandeb access), UAE at Al Dhafra (750 troops), and Jordan (300 troops). France leads NATO's Enhanced Forward Presence battlegroup in Romania with 750 troops, tanks, artillery, and a SAMP/T battery, and contributes 350 troops to FLF Estonia. France is one of the only European NATO allies with a permanently deployed carrier strike group capable of simultaneous Atlantic, Mediterranean, and Indo-Pacific projection. The tension is that France's global posture has not been sufficiently reoriented toward European territorial defense as the Eastern Front threat has intensified.



MILITARY CONTRIBUTIONS

Industrial Base

France's [defense industrial base](#) is uniquely self-sufficient. It independently manufactures a complete fighter jet (Dassault Rafale), nuclear submarine (Naval Group), ballistic missile (ArianeGroup), nuclear warhead (CEA/DAM), and naval cruise missile (MBDA). France recently overtook Russia as the world's [second-largest arms exporter](#) by SIPRI ranking, with over 300 Rafales sold to eight countries financing domestic production. SAMP/T production is expanding following Danish and other export orders. On raw materials and supply chains, France holds meaningful reserves of rare earth processing capacity through ORANO, uranium mining interests across Africa and Kazakhstan, and is investing heavily in domestic battery and critical minerals processing through the [France 2030 industrial plan](#) to reduce Chinese supply chain dependence in defense-relevant sectors. French industrial capacity is high-end but limited. Caesar deliveries to Ukraine strained French stockpiles, SCALP-EG inventory has been drawn down, and MBDA missile production faces the same output problem as the broader European defense industry.



STRATEGIC ALIGNMENT

Declared Posture

France's 2025 [National Strategic Review](#) is France's sharpest doctrinal shift on Russia since the Cold War. The review explicitly names Russia as the most direct threat to France and Europe, warns of a risk of open warfare against the heart of Europe by 2030, and identifies Russian sabotage, cyber, and disinformation as present threats. [Macron's nuclear deterrence shift](#), opening structured consultations and exercises with European partners while preserving exclusive French decision-making, is a major European deterrence signal. On China, France voted yes on Chinese EV tariffs and the strategic review identifies Chinese rare-earth control and cyber operations as strategic vulnerabilities, but [Macron's three high-level China visits](#) since April 2023 and his [2023 Taiwan strategic-autonomy comments](#) create persistent ambiguity that allies find frustrating. On Iran, [France's blocking](#) of Operation Epic Fury overflights is the most consequential operational break with Washington in the current period. The [2025 RNS](#) represents genuine doctrinal convergence with NATO on Russia; the Iran posture represents the most significant divergence.



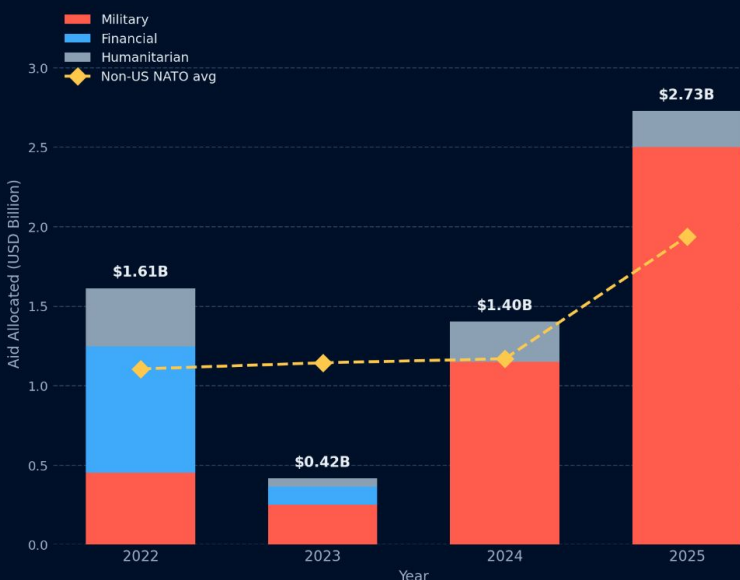
STRATEGIC ALIGNMENT

Ukraine Support

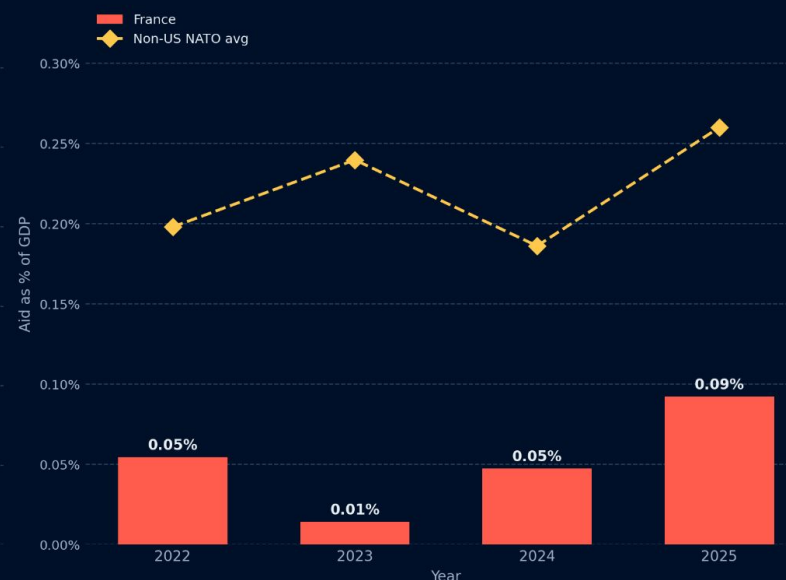
France's [Ukraine aid reveals](#) the gap between rhetoric and commitment. Absolute volumes are significant: \$1.61B in 2022, dropping to \$0.42B in 2023, recovering to \$1.40B in 2024, and surging to \$2.73B in 2025. But as a share of GDP, France has never exceeded 0.09% in any single year—consistently well below the non-US NATO average. Kiel tracks €7.907B allocated and €10.322B committed, 0.316% and 0.413% of GDP cumulatively. High-end transfers are real like Mirage 2000 fighters, SAMP/T air defense jointly with Italy, SCALP-EG cruise missiles, Caesar howitzers among the earliest Western artillery deliveries, and AASM Hammer guided bombs. France co-leads the [Coalition of the Willing](#) with the UK. The gap between France's self-image as a leading Ukraine supporter and its GDP-share contribution is one of the more striking disconnects in the alliance.

France — Ukraine Aid, 2022-2025

France: Aid to Ukraine by Type



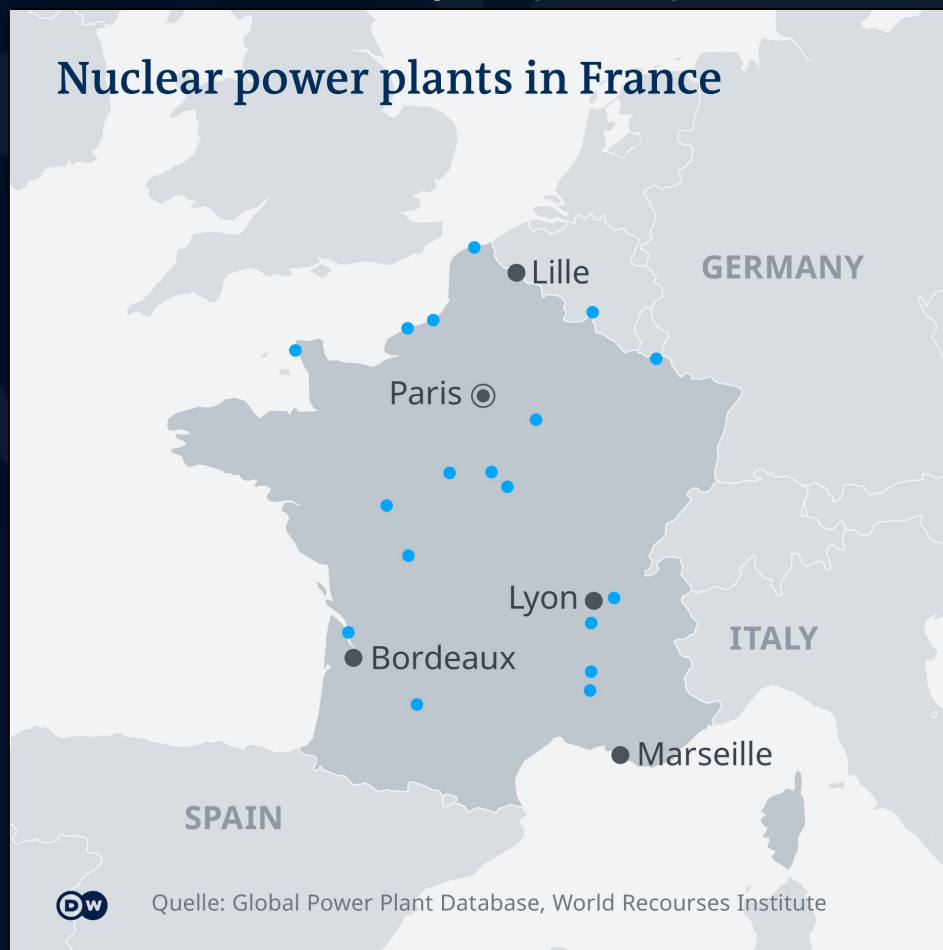
France: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

France's Russian energy decoupling is largely complete. Its nuclear-heavy electricity mix provided structural insulation from Russian gas dependence that Germany and Austria lacked, Russian crude was [substituted rapidly](#) after 2022, and France operates a fully independent nuclear cycle with no Rosatom dependence. The one significant gap is Russian LNG: Russian-origin LNG continued [arriving at French terminals](#) in 2024-2025, and TotalEnergies' continued stake in Russia's Yamal LNG project is the most important remaining corporate decoupling concern. LNG exports remain a critical financial channel that still benefits the Russian energy sector. The EU's LNG phase out timeline will close this gap progressively. France supported every EU Russia sanctions package through the 20th without obstruction.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

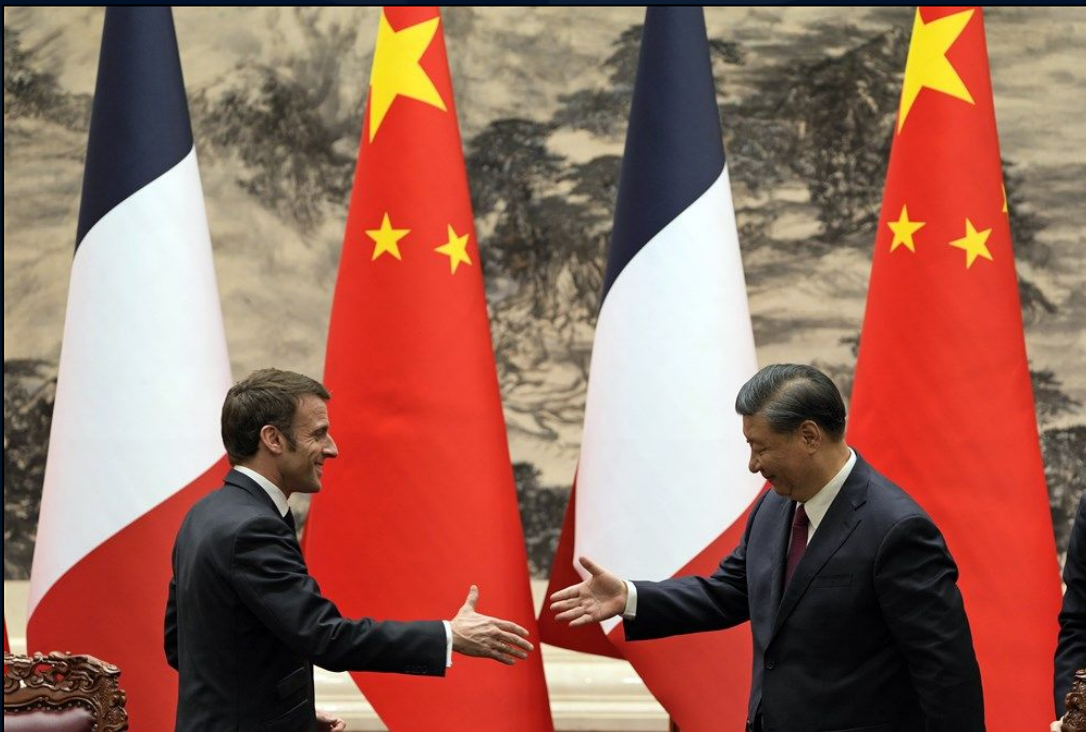
France recorded only 61% for staying in [NATO in 2024](#), one of the lowest figures in the alliance, and just 50% felt more safe due to NATO cooperation, tied for the lowest figure. Only 56% agreed France should defend another ally if attacked, and Ukraine support stood at roughly 56% combined, below most Western European partners. President Macron's coalition is formally pro-NATO but has complicated alliance messaging through calls for European strategic autonomy and ambiguous Russia diplomacy, while the Rassemblement National, at roughly 30 to 35% of voters, has moderated but retains historic ties to Moscow and has opposed arms shipments to Ukraine. La France Insoumise, with roughly 10 to 15% of voters, is openly anti-NATO and anti-Ukraine aid, meaning together the two main opposition forces encompass roughly half the electorate with varying degrees of NATO scepticism. France is the one large ally where public NATO support, governing coalition messaging, and the composition of the opposition all simultaneously create a drag on alliance reliability.



STRATEGIC ALIGNMENT

Hedging Behavior

Unfortunately, France's hedging behavior record is mixed. The positives: no BRI exposure, no adversary arms procurement, yes vote on Chinese EV tariffs, full EU Russia sanctions support, no obstruction of Finnish or Swedish accession. The concerns are also real. On China, Macron's [post-Beijing April 2023 comment](#) that Europe should not be a "vassal" of the US on Taiwan and should avoid being "caught up in crises that are not ours" drew sharp rebukes from frontline allies and Washington. France has held three high-level China summits since 2023 to reinforce a strategic-autonomy posture that NATO's eastern members find [genuinely frustrating](#). On Iran, the Operation Epic Fury overflight refusal is the most consequential mark: blocking US military aircraft is not rhetorical autonomy but concrete operational obstruction that affected allied military planning. France is not actively undermining the alliance, but the Iran and China postures are real frictions that distinguish it from unambiguously aligned major allies.



STRATEGIC ALIGNMENT

Operational Cooperation

France has an uneven track record of supporting US-led operations. It contributed forces to [Afghanistan under ISAF](#) and was a significant coalition [partner in Iraq](#), and has maintained one of the broadest global military footprints of any NATO ally across Africa, the Middle East, and the Indo-Pacific. In the Indo-Pacific, France is a genuine resident power with territories in the Pacific and Indian Ocean, contributing to freedom of navigation and regional security in ways no other European ally can match. On recent US operations, the record is mixed. France participated in [EU Operation Aspides](#) in the Red Sea and moved naval assets toward Cyprus during the 2026 Iran war. But France refused to allow US military aircraft to overfly French territory during Operation Epic Fury. This obstruction seriously affected US strike planning and placed France alongside Spain and Italy in undermining regional security. On Venezuela, France has been cautious about supporting US pressure. For Washington, the question is whether an ally that blocks overflights during an active US military operation can be relied upon when operational stakes are highest.

