



防衛産業政策の充実・強化に向けて Toward Enhancing and Strengthening Defense Industrial Policy

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1 今後の国家安全保障の課題

Future National Security Challenges

(1) 権威主義国家の挑戦

Challenges of authoritarian states

- 中国の挑戦 China's challenge
- ロシアの暴挙 Russian violence

(2) 国家安全保障戦略の方向性

Direction of National Security Strategy

- 防衛力強化の加速化 Accelerate defense capabilities
- 技術覇権争いへの対応 Battle for technological hegemony

(3) 国主導の防衛産業政策の強化

Strengthen state-led defense industrial policy



Photo, Russian Military Exercise, Kuril Islands (TASS)

2 我が国防衛産業を取り巻く環境と現状 Environment and Current Status of Japan's Defense Industry

(1) 我が国防衛産業の特色

Characteristics of Japan's defense industry

- 防衛産業の市場規模 Market size of defense industry
- 企業構造 Corporate Structure

(2) 我が国の防衛予算 Japan's Defense Budget

- 長期的な削減傾向 Long-term trend of reduction
- 輸入 / FMSの割合の拡大 Imports and FMS increase
- 装備品の高度化による単価上昇と維持整備費の高騰
Rising unit prices and maintenance costs
- 国防研究開発の低迷 Sluggish defense R&D

(3) 危機的状況を迎つつある現状 Situation is critical

- 防衛部門からの企業の撤退、技術者の散逸

Withdrawal of companies and engineers from the defense sector



3 防衛産業再生の方策

Measures to Revive the Defense Industry

(1) 政府の積極的な関与＝「防衛産業は防衛力の一部」

Active government involvement = defense industry is part of the defense force

(2) 具体的手順 Specific steps

- 年末の政策三文書への強いメッセージの盛り込み... Inclusion of a strong message in the three year-end policy documents...
- 防衛予算の拡大と研究開発費・産業基盤強化策の増額 Expand the defense budget and increase R&D expenditures and measures to strengthen the industrial base
- 所要の制度の創設 Establishment of necessary institutions

(3) 再生の方向性 Direction of Revitalization

- 防衛産業・技術基盤の強化 Strengthen defense industry and technology base
- 技術の育成(Promote)と保全(Protect) Promote and protect technology
- 防衛装備移転の促進 Promotion of defense equipment transfer





Thank you for your attention

Photo, Courtesy of US Navy