

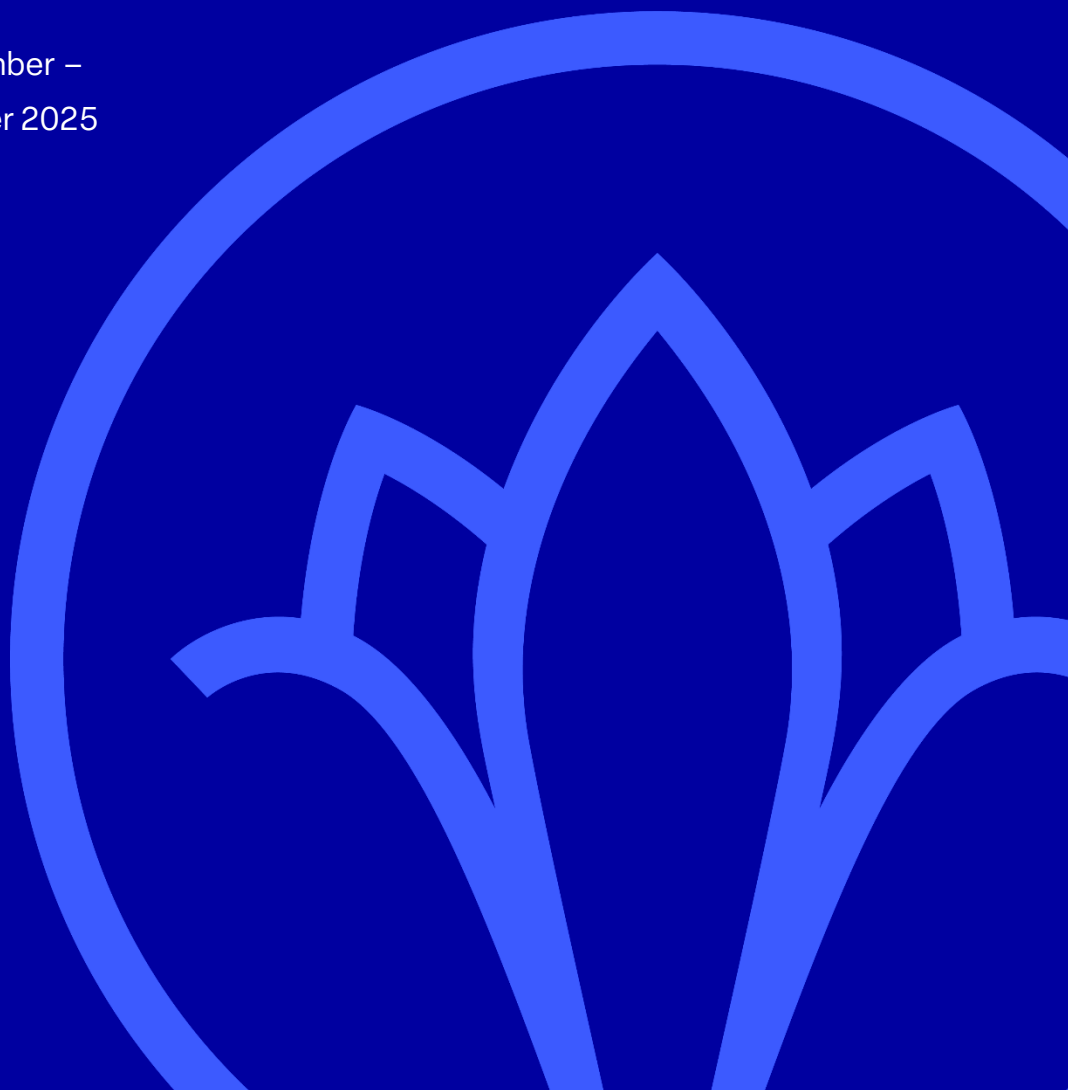


**Wilton
Park**

Report: Europe's nuclear future: 16th annual conference on extended nuclear deterrence and assurance

Wednesday 10 September –
Saturday 13 September 2025

In association with
Lawrence Livermore
National Laboratory
(LLNL), Sandia
National Laboratories,
Ministry of Defence,
and Swedish Defence
Research Agency
(FOI)



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Executive Summary

This conference examined three key questions:

- What impact have recent developments in U.S. and Russian policy had on extended deterrence and assurance in the transatlantic context?
- What alternative futures should be considered?
- What European deterrence architecture best serves the interests of the United States and its NATO allies? What steps are needed?

Recent developments in U.S. and Russian policy have significantly affected the credibility and perception of extended deterrence in Europe. On the U.S. side, deterrence strategy has shifted from a single-theatre focus to recognition of a “two-peer competitor” environment, where the U.S. and its allies might need to deter Russia and China concurrently. Nuclear modernisation programmes, though well underway, began before this shift and may no longer match today’s requirements. Washington has also emphasised the need for greater burden-sharing, both in NATO and in Asia, while advances in cyber and space capabilities could complicate allied integration. Russia, meanwhile, has used nuclear coercion as a central tool in its war against Ukraine, relying on deterrence to limit direct NATO involvement. Moscow continues to frame any confrontation as potentially escalating to nuclear war, while reconstituting its forces for a long war of attrition. These dynamics have reinforced the centrality of U.S. nuclear assurances while underscoring vulnerabilities in Europe’s conventional and industrial bases.

Conference participants identified several possible futures for transatlantic deterrence. One option is to maintain robust conventional and nuclear forces to deter both Russia and China simultaneously, though this is costly and politically demanding. Another path could see greater reliance on nuclear weapons to compensate for conventional shortfalls, especially if China draws the U.S. into a major conflict. A third scenario envisions sustaining alliance commitments but reprioritising risk acceptance, with uneven coverage across regions. The most concerning future, however, is a full U.S. pivot to Asia, leaving Europe to assume far greater responsibility. This outcome would likely unsettle NATO cohesion, potentially encourage “friendly proliferation” in Europe, and embolden Russia to exploit perceived gaps. The uncertain impact of new missile defence concepts, such as a prospective “Golden Dome,” further complicates these futures, as such systems could deter adversaries or provoke destabilising pre-emptive actions.

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Action points

The most viable European deterrence architecture is likely to be one that strengthens transatlantic integration while deepening European contributions. This means:

- Modernising NATO's nuclear sharing arrangements
- Raising the "nuclear IQ" of political leaders
- Ensuring flexible planning across both nuclear and conventional domains. The Northwood Declaration (signalling unprecedented Franco-British coordination) is an important step, but one that cannot fully replace U.S. extended deterrence.

To achieve these goals, Europe must therefore pursue:

- Scalable conventional forces
- Modest enhancements in non-strategic nuclear capabilities
- Greater contributions from non-nuclear allies in intelligence, hosting, and resilience

At the strategic level, NATO must:

- Sustain unity in facing Russia.
- Adapt planning to the U.S.'s two-peer problem.
- Invest in capabilities that provide credible deterrence across multiple scenarios.

Only by combining U.S. leadership with a stronger European backbone can extended deterrence and assurance remain credible in a more unstable world.

Contextualising the regional nuclear order within global disorder

The global nuclear order, traditionally anchored in treaties such as the Nuclear Non-Proliferation Treaty (NPT) and Comprehensive Nuclear-Test-Ban Treaty (CTBT) alongside norms like the nuclear taboo, is weakening. The NPT once functioned as the historic foundation, credited with major achievements such as reducing nuclear arsenals by 90% and enabling international verification regimes. Today, it shows significant decline. Participation is thinning, deliverables like the P5 process have stalled, and proliferation pressures are rising. The possibility of withdrawals (whether by Ukraine, Iran, or others) threatens to hollow the treaty into a “zombie” framework, existing in name but no longer constraining states. In this environment, European security cannot assume the NPT will provide the same level of stability it once did.

Against this backdrop, the European nuclear order stands out for its reliance on collective security and extended deterrence. These features are now under strain. The erosion of the principle of territorial integrity (challenged most visibly by Russia’s war against Ukraine) strikes at the foundation of the European security order established since Westphalia. International politics are becoming more competitive and transactional, and this is filtering down into nuclear politics. For Europe, this means deterrence and reassurance are once again central, while disarmament and arms control have lost traction. Nuclear deterrence, once viewed sceptically in some European publics, is now seen as unavoidable, even as debates about risk reduction and responsibility continue.

Several elements of the nuclear order are particularly consequential for Europe’s security:

- **The credibility of extended deterrence and alliance commitments.** Russia’s regular nuclear threats, combined with its growing investment in unconventional and hybrid capabilities, underscore the importance of keeping deterrence credible in practice and visible in signalling.
- **Non-proliferation challenges.** A more proliferated world, especially if the NPT collapses, would make Europe less safe and could trigger destabilising cascades across WMD domains.
- **The preservation of knowledge and expertise.** The risk of generational knowledge loss in arms control, verification, and deterrence practices, could weaken Europe’s ability to manage crises or negotiate future frameworks.

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In terms of safeguarding the regional nuclear order, allies need to adopt a posture of adaptation rather than conservation. The goal should not be to preserve the old order at all costs, but to prepare for a possible transformation. Deterrence needs safeguarding, with nuclear alliances at the core. Non-nuclear allies can contribute by countering Russian and Chinese disinformation, strengthening public awareness about adversaries' nuclear activities, and engaging actively in strategic communications. The UK and France also have a role to play in the P5 Process, where it can push ambitious risk-reduction agendas and call out the obstructionism of Russia and China. Finally, cooperation across the non-proliferation, disarmament, and deterrence communities will be essential, ensuring a shared understanding of challenges rather than siloed debates.

Europe cannot afford passivity. The nuclear order is dynamic, not static, and at a possible inflection point. If the NPT weakens further and U.S. leadership recedes, Europe will face a harder security environment where deterrence, non-proliferation, and public reassurance become indispensable pillars of stability.

Russia's campaign against European security

President Putin's overarching objectives have remained steady over the years. His ambitions are rooted in resurrecting Russia as a premier power and ensuring Moscow is a decisive player in shaping European and Eurasian security. Central to this vision is the establishment of a distinct Russian sphere of influence, embedded within a polycentric worldview where great powers dominate their regions, and smaller states have limited sovereignty. Since 1999, removing U.S. influence from Europe has been a consistent priority for Russian foreign policy, and that this goal remains a cornerstone of Putin's agenda.

In terms of next steps, Russia's longstanding influence campaign is likely to persist. This includes not only propaganda and cyber operations but also intimidation, especially targeting post-Soviet states. Cognitive warfare, indoctrination, and political pressure campaigns complement these methods. At the centre of the campaign is Russia's large-scale conventional war in Ukraine, which remains crucial for Moscow's claim to ultimate sovereignty and regional dominance. Putin's ambitions may not stop at Ukraine, pointing to evidence of incursions and attacks on critical infrastructure in the Baltics and beyond. Another area of concern is the regeneration of Russia's covert military capabilities, which could strengthen hybrid threats across Europe. Putin continues to cultivate the narrative that any direct conflict with Russia would escalate

to nuclear war, thereby deterring stronger Western responses. The Arctic will likely remain an arena for strategic signalling, but despite recent developments, it is not expected to become a daily hotspot.

Regarding Putin's assessment of his own prospects for success, he has likely concluded that nuclear deterrence works, as Russia (by virtue of being a nuclear power) invaded a large neighbour without provoking direct international military intervention. However, frustrations have emerged: Ukraine's resilience and the scope of indirect Western military support have undermined Russian expectations of a swift victory. Even so, Putin likely continues to view Western countries as hesitant to engage in direct conflict, reinforcing his belief that time favours Russia. Moscow's capacity to expand military production, strengthen its conventional forces, and maintain a functioning economy, despite sanctions, supports this assessment. The view in Moscow is that Russia can sustain a long war of attrition. Meanwhile, the West has not reached a definitive verdict on Ukraine's outcome, leaving room for Putin to claim success through endurance. Russia would regard any reduction in U.S. involvement in Europe as a strategic victory, although it is still too soon to determine whether such a shift will materialise.

Asia's potential impact on Europe's nuclear future

China's recent military parade signalled that domestic manufacturing capabilities are strong enough to allow China to resist political and economic reliance on others for a sustained nuclear weapons programme, including any need for GCAP or AUKUS-style arrangements. As such, it also does not have a need for a necessity-based security arrangement mirroring Russia and North Korea's 2024 Strategic Comprehensive Partnership, seemingly indicating that the three countries may collectively be friends, but China should not be viewed as equal to the other two.

China's nuclear modernisation has three primary impacts on European security issues. First, it indicates China's increasing ability to operate as growing nuclear power with a complete nuclear triad, which could make future decisionmakers more uncomfortable with the heightened risk of any instance of potential conflict with China. Beyond the security implications of the ability of Chinese nuclear weapons to be capable of reaching Europe in the hypothetical event of a conflict, Europe should also consider the implications of Chinese nuclear doctrine and strategy from a political perspective. At present, for example, there is a danger of Europe not fully appreciating the political

value and legitimacy China generates among non-nuclear weapons states with its No First Use policy.

Second, it finally gives Europe's traditionally stalwart ally, the U.S., sufficient incentive to pivot fully to Asia (and subsequently draw resources away from Europe), as Washington seeks to address its strongest competitor. However, by Europe borrowing the U.S.'s framing of China's rise as a "two-peer problem," Europe is encouraging itself to only consider what might be lost by any US withdrawal, when it might instead be more useful to consider what Europe might gain from a more focused U.S. presence in Asia.

Third, nuclear and defence industries writ large may become more interesting to China as it continues to seek modernisation. China could become more reliant on Russian fissile material even as it continues to expand domestic capacity for production. Equally, China may become more interested in the European defence industry, either as an example or as a potential opportunity for collaboration or competition.

Further east, Europe should still consider North Korea as a security issue within a nuclear context, as Kim Jung Un is considered by some as the likeliest leader of a nuclear-capable country to break the nuclear taboo. A nuclear incident, even isolated to the Korean Peninsula, would have knock-on effects for Europe. North Korea's future relationship with China bears monitoring, especially considering that Pyongyang views the Taiwan and Korean Peninsula issues as analogous.

Relatedly, Europe should consider the impact of security assurances, and the potential absence thereof, in Northeast Asia. From a broader geographic perspective, Asian states seem disinterested in establishing a NATO-style security architecture, including anything resembling a Defensive Counter Air (DCA) mission. China realises this and seems increasingly poised to capitalise on the absence of this kind of structure by establishing its own influence—or, at least, mitigating the ability of the U.S. to do similarly—through coercion. Europe should watch how the future of the security assurances the U.S. does have in the region evolve, given the potential for "friendly proliferation."

Assessing NATO's Russia strategy

NATO lacks a clear, comprehensive theory of victory against Russia. While the Alliance is unlikely to lose a war, it does not currently have a framework for achieving success. What exists instead is a collection of reactive measures shaped by the war in Ukraine,

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broader threat assessments, and shifting U.S. priorities. Since 2022, NATO has relied on bolstering deterrence, reassuring allies, and supporting Ukraine, but without articulating a clear long-term objective for relations with Moscow. An actual strategy would not only prepare for the challenge of Russia's hybrid, high-intensity, and nuclear threats but also serve as a powerful signal of determination to Moscow.

Two major drivers are shaping NATO's approach. The first is Russia's own trajectory. Despite decades of reassurance and unilateral restraint on NATO's part, Moscow has escalated its ambitions. Russia has pursued revisionist policies since at least 2007, invaded neighbours, and invested heavily in its defence industry. Today, it mobilises vast resources for a protracted conflict, combining low-cost drone production, hybrid warfare, and nuclear coercion.

Far from moderating its behaviour, NATO's restraint has reinforced Moscow's belief that the Alliance lacks resolve. Russia now uses nuclear weapons not only as deterrents but as tools of coercion, successfully limiting NATO's involvement in Ukraine.

The second driver is the shift in U.S. priorities. With Washington increasingly focused on China and potentially reducing its conventional presence in Europe, NATO must consider how to deter Russia with fewer American assets. This raises difficult questions about whether European allies can fill the gap and how sustainable the current balance of contributions will be in the long term.

On the question of transatlantic consensus, views diverge. On one hand, there has been notable progress in aligning threat perceptions since the full-scale invasion of Ukraine. Increases in defence spending, the integration of Finland and Sweden, and strengthened support for Kyiv all demonstrate a shared commitment. On the other hand, divisions remain. Different regions hold varying perspectives on Russia's threat, U.S. politics introduce uncertainty, and European business communities are not always aligned with security priorities. The absence of a consistent U.S. strategy toward Russia further complicates matters. Without clarity from Washington, NATO's collective strategy risks remaining fragmented and reactive, rather than proactive and long-term.

As Russia increasingly relies on nuclear coercion, NATO's nuclear posture has become critical to both deterrence and reassurance. Continued nuclear guarantees are essential, especially as conventional balances appear less favourable. Moving beyond the "three no's" could reinforce deterrence by signalling that NATO is no longer bound

by outdated commitments and could expand nuclear sharing or deploy new capabilities if necessary. Emphasising the importance of normalising nuclear messaging, modernising deterrence arrangements, and better integrating nuclear, conventional, and hybrid strategies could all also offer more effective components of a strategy. NATO's credibility in facing Russia depends on demonstrating unity, strengthening nuclear deterrence, and developing a proactive, long-term strategy that moves beyond reactivity.

The future of U.S. deterrence

Since the 2014 wake-up call in Crimea, U.S. deterrence thinking has shifted from single-theatre assumptions toward acknowledging a late-Biden-era “two-peer competitor” environment. Nuclear modernisation programmes began before that shift and may now be mismatched to the threat landscape. In parallel, there is an explicit recognition of the need for greater burden sharing (already visible in NATO discussions and budget increases), and this expectation extends to Asia. Strategy is trending toward tighter integration across domains and types of conflict, building on multidimensional planning while knitting efforts more deeply with allies, even as rapid U.S. advances in cyber and space could complicate seamless integration. The main drivers of change include the rise of the two-peer problem and the “pivot to Asia”; overlapping timelines for China's nuclear modernisation, a potential Taiwan contingency, and China's consolidation as the closest economic competitor; a Chinese buildup that makes U.S. coercion less certain while expanding Beijing's coercive options; and an increased likelihood of Russian nuclear use. Cooperative or opportunistic coordination among adversaries (Russia-China, Russia-DPRK, Iran, etc.) are of particular concern, and arms-control prospects are currently dim, reducing avenues to constrain opponents collectively.

The U.S. is likely to increasingly have to address the two-peer problem through its deterrence strategy. A central question is whether the U.S. and allies can realistically sustain conventional superiority given costs and political will; if not, nuclear forces sized and configured for alternative strategies may differ from those needed to manage simultaneous nuclear escalation from both Russia and China. If a U.S.-China conflict draws resources to the Indo-Pacific and Europe cannot sufficiently rearm conventionally to deter Russia, Washington could lean more on its nuclear posture in Europe to backstop alliance shortfalls. Capabilities that support allies will differ by theatre, but promptness of response will be universally important. Targeting approaches may also need to adapt; advocates of moving away from counterforce

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warn it is destabilising and, in a two-peer setting, could fuel arms racing by undermining the plausibility of damage limitation; others argue counterforce can still help prevent limited nuclear use from widening into existential exchange, even as regional counterforce becomes more dispersed and demands larger strikes.

The real debate, then, is how much counterforce capability is necessary, and whether to prioritise it against Russia, China, or both (simultaneously or sequentially), given extended-deterrence commitments and finite resources across the conventional-strategic spectrum. The credibility of extended deterrence during any U.S. conventional drawdown will hinge on the tone and nature of that drawdown.

Four broad options are in view:

- 1 Maintain robust conventional and nuclear forces to deter both peers simultaneously.
- 2 Increase reliance on nuclear forces to cover conventional gaps.
- 3 Keep alliance commitments while reprioritising where to accept risk.
- 4 Pivot fully to Asia and ask Europe to shoulder its own burden.

The fourth is potentially more likely, although it should not reassure European allies; it could spur “friendly” proliferation. Finally, a prospective “Golden Dome” of missile defence could shape allied and adversary behaviour: its effects are uncertain, it might provoke pre-emptive attacks intended to derail the system, and, if highly effective, it could increase the appeal of counterforce targeting against strategic threats.

Potential futures for NATO’s deterrence

The most significant announcement from the 2025 Hague Summit was the collective agreement by all NATO allies to raise defence spending to 3.5 percent of GDP on core defence by 2035. This represents the largest sustained defence investment since the Cold War and marks a decisive step toward enhancing NATO’s capabilities. Equally important was the 1.5 percent commitment to deterrence by denial, directed not just at conventional capabilities but also at resilience in areas such as information security and critical infrastructure. Both measures combined send a powerful signal of NATO’s determination to deter adversaries. This journey began with the Madrid Summit in 2022, when NATO adopted a new strategic concept, now reinforced by renewed planning disciplines, updated capability targets, and new nuclear measures. This broader strategy also reaffirmed support for Ukraine, which underscored NATO’s strengthened deterrence posture.

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The UK's evolving role in NATO's deterrence pathway is apparent in its 2025 Strategic Defence Review (SDR). The SDR outlined five priorities, the most striking being the explicit focus on NATO first and European security second, a notable shift from earlier reviews. It also emphasised enhancing nuclear capabilities, updating conventional forces, fostering innovation in defence, applying lessons from the Russia-Ukraine conflict, and taking a whole-of-society approach to resilience. These measures underscore how the UK is building forces integrated into NATO's design, ensuring alignment across nuclear and conventional deterrence. Nuclear modernisation commitments could include a £15 billion investment in the warhead programme, building SSN/A-class submarines, acquiring twelve F-35A aircraft, or initiating early work on long-term deterrence. The UK also declared its intention to join NATO's nuclear sharing mission, signalling readiness to shape and participate in that mission with full political control.

Equally, the Northwood Declaration indicates France's growing commitment to shaping European resilience through Franco-British cooperation on nuclear deterrence. The declaration introduced stronger language about collective responses to extreme threats and marks France's first formalised nuclear weapons cooperation agreement with another state, seeming to build on (or emerge as an extension of) the Lancaster House 2.0 defence and security cooperation commitments made between the two countries.

The ongoing war in Ukraine clearly has broader implications for European security architecture. The critical question is not only what happens on the frontlines but how the conflict concludes and reshapes Europe's security environment. Russia's ability to reconstitute its forces, possibly with Chinese support, and how NATO should guard against divisions that Russia could exploit, are all questions that need resolving for effective forward movement. This leads to a consideration of collective burden-sharing, strengthening Europe's industrial base, and adjusting to the U.S. reorienting more heavily toward deterring China. The rise of China is another pressing issue for NATO, particularly in the context of its expanding nuclear arsenal and growing global assertiveness. At the upcoming NPT Review Conference, NATO will need unity to counter disinformation and pressure from both Russia and China.

Finally, NATO must modernise its nuclear sharing arrangements, strengthen its planning processes, and raise the "nuclear IQ" of decision-makers. Flexible, adaptive planning across multiple scenarios is essential for credible deterrence, as is the

integration of nuclear and conventional tools. Exercises, capability development, and strategic communication are particularly critical components of this effort.

Overall, while the Hague Summit was a positive milestone, the real test lies ahead: sustaining progress in doctrine, planning, and modernisation to ensure NATO can deter effectively in an increasingly unstable world.

Considering alternative European nuclear umbrellas

While the debate surrounding the promise and limits of alternative European nuclear umbrellas has recurred for decades whenever transatlantic tensions arise, the urgency has grown against the backdrop of Russia's war in Ukraine and uncertainty about U.S. political commitment. This is less about replacing the U.S. nuclear umbrella than about exploring complementary models, ranging from strengthening the UK-French deterrent partnership under the new Northwood Declaration to more speculative ideas like building a European nuclear submarine or creating collective control mechanisms. However, proliferation in Europe is unrealistic unless the NPT and NATO's Washington Treaty collapse, which remains an unlikely scenario. The Northwood Declaration marked a turning point because, for the first time, France indicated readiness to coordinate nuclear deterrence with another state, and the UK signalled willingness to do so beyond its U.S. relationship. Together, this creates the potential foundation of a European pivot in deterrence without directly mimicking U.S. force posture.

On plausibility, opinions are more divided. One school argues that the UK and French nuclear arsenals, if better coordinated and perhaps modestly expanded, could provide reassurance and deterrence tailored to Europe's needs. In this model, burden-sharing might take the form of financial contributions, intelligence cooperation, or hosting arrangements from non-nuclear allies. Another school argues that European deterrence remains hampered by a "numbers problem": neither the UK nor France possess sufficient warheads, tactical systems, or escalation management tools to replicate the credibility of U.S. extended deterrence. Whereas the U.S. offers a wide ladder of escalation (from tactical to strategic options), Europe has a more constrained set of responses, raising doubts about its ability to deter Russia effectively. Credibility is both a deterrence issue, where Russia decides if it is deterred by NATO, and a reassurance issue, where European allies such as Poland or the Baltics judge whether they feel protected. This dual perspective complicates any purely European model.

There are also interesting questions that arise regarding the conception deterrence. On one hand, deterrence requires damage equivalent to the stakes at risk, implying that UK and French forces would need to grow significantly to be credible against Russia. On another, deterrence hinges on inflicting intrinsically unacceptable damage, regardless of numbers, and that adversary perceptions matter more than strict parity. Cold War-era U.S. frameworks, which stressed counterforce and damage limitation, should not dictate European strategies indefinitely. Instead, deterrence credibility today requires adaptable plans, flexible response options, and political resolve rather than mirroring U.S. nuclear doctrines.

New capabilities fall into three principal areas:

- 1 Europe requires more flexible and scalable conventional forces to strengthen escalation management and raise costs for Russia before reaching nuclear thresholds.
- 2 Modest increases in tactical nuclear capabilities and delivery systems could enhance credibility, though such steps would take time and face political hurdles.
- 3 Non-nuclear contributions (such as intelligence sharing, hosting arrangements, and permanent protection of nuclear assets) are critical areas where non-nuclear allies could bolster deterrence. Declaratory policy was another gap identified: unlike the U.S. Nuclear Posture Review, neither the UK nor France have comprehensive public doctrines, limiting transparency and reassurance.

The Northwood Declaration provides a meaningful step toward Franco-British coordination and demonstrates that complementary models are possible, but Europe still faces structural challenges: insufficient numbers, limited escalation management tools, and political uncertainties about future leadership. For now, the priority should be strengthening transatlantic deterrence, modernising conventional capabilities, and deepening UK-French cooperation, while leaving space for contingency planning should U.S. commitments weaken.

The future of transatlantic engagement

Ensuring continued constructive transatlantic engagement will require building structures and arrangements resilient to political pressures and changes within the U.S. There remains a need for greater robustness in responding to technological uncertainties, particularly with the rapid pace of advancements in artificial intelligence that could accelerate unexpected challenges. U.S. extended deterrent remains the

foundation of NATO security and must continue in a way that is credible in the eyes of Russia. This premise bears supporting via sustained dialogues through the High-Level Group and the Nuclear Planning Group. One manifestation of alliance support may need to include backing potential U.S. uploads after the expiration of New START, depending on how negotiations between Russia and the U.S. (should they materialise) might unfold. The Dual-Capable Aircraft mission equally remains vital, and it should remain open to broader participation and accompanied by collective communication across the alliance about its purpose and value.

The U.S. must continue to demonstrate a committed stake in Europe, balancing nuclear policy with conventional posture to reassure allies and deter adversaries. However, alliance leadership need not be Washington's responsibility alone. Independent centres of decision-making within Europe could strengthen signalling to Russia, while the provision of extended deterrence or similar arrangements from the UK and France should continue to be refined and assessed within alliance discussions.

In terms of demonstrating commitment and resolve beyond capabilities, response time improvements will generate more flexibility and optionality in deterrence strategies. Non-nuclear allies with strong industrial bases take on more visible leadership roles and responsibilities within alliance structures, thereby reinforcing NATO's collective strength. Finally, the alliance needs to continue addressing the challenge of emerging disruptive technologies, as these developments complicate second-strike considerations and will require the alliance to develop improved and adaptive responses to maintain credible deterrence in the future.

[Gina Sinclair and Jack Crawford](#)

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