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Russian and Chinese Perceptions of Strategic Competition in the Euro-Atlantic Region

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Introduction

In the coming decade, the United States and its allies and partners are poised to lean in to deterrence and strategic competition in a way not seen since the Cold War. In June 2025, UK Prime Minister Keir Starmer revealed plans for the United Kingdom to join NATO's dual-capable aircraft mission with the purchase of a dozen F-35A aircraft, describing the move as "the biggest strengthening of our deterrence posture in a generation."[1] Then, in March 2026, French President Emmanuel Macron announced the first expansion of the French nuclear force since 1992 and declared that France would use its arsenal for "forward deterrence" in support of European partners.[2] The United States continues to modernize its nuclear triad and has the option to increase its number of deployed strategic warheads following the expiration of New START in February 2026.[3]

These changes are not happening in a vacuum, but rather are in response to Russia's aggression in Ukraine, backed by its expanding nuclear arsenal, along with changes in the transatlantic alliance. But this new era of strategic competition comes with potential risks for the United States and its allies, which will depend in part on how Moscow and Beijing perceive and respond to enhanced allied deterrence. Would Russia view new U.S. investments in missile defense as more destabilizing than forward-deployed nuclear forces in Europe? What drives Chinese strategic investments—Xi Jinping's personal political agenda or U.S. deployments in the Indo-Pacific? And would additional U.S., British, French, or other European investments in nuclear or strategic conventional capabilities incentivize Russia and China to continue their qualitative and quantitative nuclear buildups, or might they settle into a new strategic balance?[4]

The project found that Russian and Chinese threat perceptions are relatively inelastic to changes in U.S. or UK force posture due to long-standing distrust, and that both adversaries are likely to continue expanding their strategic arsenals regardless of what additional capabilities the United States or United Kingdom do (or do not) deploy.

To address these and other questions, this project developed four potential U.S. and UK force postures for 2030, including a mix of new dual-capable theater-based capabilities and offensive and defensive systems. The study team convened workshops with regional experts to anticipate how Russian and Chinese leadership might respond to strategic competition and to identify which scenarios were more likely to increase risks to strategic stability, including misperception, escalation, and arms racing. This report defines strategic stability as the absence of incentives to use nuclear weapons first (crisis stability) or build up nuclear forces in an action-reaction cycle (arms race stability), while recognizing that the concept is perspective-dependent and capabilities that one state views as stabilizing may appear destabilizing to another.[5]

The project found that Russian and Chinese threat perceptions are relatively inelastic to changes in U.S. or UK force posture due to long-standing distrust, and that both adversaries are likely to continue expanding their strategic arsenals regardless of what additional capabilities the United States or United Kingdom do (or do not) deploy. Russia and China may further modify their forces depending on domestic factors and, potentially, based on when, where, and how the United States and its allies adjust their force postures. For example, any new deployments during a crisis may be perceived as more escalatory than during peacetime; additionally, any deployments closer to the NATO-Russia border may be seen as particularly provocative in Moscow. Both China and Russia, however, would likely be sensitive to developments in U.S. homeland missile defense given shared anxiety about second-strike survivability. While Russia's projected responses to the four scenarios used in this project tended to focus on building in redundancy and asymmetric responses, including in the space and bio domains, China's projected responses focused on new capabilities that Beijing may choose not to immediately reveal or deploy.

This report proceeds in three parts. The first section identifies the policy challenge facing U.S. and UK policymakers about how to compete and enhance deterrence without increasing risks of arms racing or escalation due to misperception. The second section identifies Russian and Chinese threat perceptions and decisionmaking drivers and identifies how these drivers might shape responses to the four scenarios for U.S. and UK strategic buildups. The final section concludes that in any of the four scenarios, Russia and China are likely to continue on their own qualitative and quantitative nuclear expansion pathways, but they will perceive certain capabilities and packages as more escalatory than others. The report concludes by offering options for future strategic risk reduction

initiatives, including geographic and time-bound limits, dialogues in the P5 process (involving the five permanent members of the UN Security Council—China, France, Russia, the United Kingdom, and the United States), and opportunities for European allies to balance their pursuit of enhanced deterrence with new arms control initiatives.

The Policy Challenge

How to Manage the Risks of Competition

In recent years, the United States and its European allies have realized that they may need to take additional steps to strengthen deterrence in the Euro-Atlantic region. For the United States, this is driven by the expansion of China's nuclear arsenal, which has presented the need to deter two nuclear adversaries simultaneously. For Europe, this is largely due to Russia's invasion of Ukraine and concerns about the enduring credibility of U.S. security guarantees. While France has been relatively consistent in investing in its nuclear enterprise, the United States and United Kingdom exercised nuclear restraint in the aftermath of the Cold War and allowed their nuclear enterprises to atrophy. There are signs this is starting to change: U.S. experts increasingly recommend modifications and expansions to the U.S. nuclear force in response to Russia's and China's modernization and expansion. The 2023 bipartisan Congressional Strategic Posture Commission, for example, concluded that "the current modernization program should be supplemented to ensure U.S. nuclear strategy remains effective in a two-nuclear-peer environment."[6] The United Kingdom has also indicated that it may bolster its nuclear force, with the 2025 Strategic Defence Review calling for "sustained investment across the Defense Nuclear Enterprise" and the acquisition of 12 F-35As for participation in NATO's dual-capable aircraft (DCA) mission.[7]

A renewed emphasis on enhancing strategic deterrence, however, comes with both new and familiar challenges: How can the United States and United Kingdom invest in new strategic capabilities without prompting an arms race? What do historical Russian and Chinese threat perceptions indicate about how they will perceive future modifications to U.S. and UK nuclear force posture? Can leaders in Washington, London, and other European capitals pursue strategic risk reduction while simultaneously enhancing deterrence? Balancing the risks of competition while also pursuing

risk reduction will be familiar from the Cold War, but there are some new twists. Washington, in particular, must balance its deterrence signaling vis-à-vis two adversaries, rather than just one; similarly, it must balance assurance signaling to two sets of increasingly anxious allies. For Europe, the Russian threat is more acute than at any time since the end of the Cold War, with gray zone activities already targeting NATO members. And while concerns about U.S. credibility (could Boston be "traded" for Berlin?) are familiar, the U.S. shift to the Indo-Pacific and domestic political swings have created concerns that U.S. support for Europe is in decline.

The United States' European allies will have an essential role to play in this new strategic balance. As Washington realigns its strategic focus with a greater emphasis on the Indo-Pacific, there is a new division of labor emerging in the Euro-Atlantic theater. European allies are increasingly stepping up to invest more in strategic conventional systems, such as long-range precision strike missiles; however, the United States continues to be the essential provider of extended nuclear deterrence. Under Secretary of War for Policy Elbridge Colby reiterated the United States' commitment to "continue to provide the U.S. extended nuclear deterrent" in February 2026 at the NATO Defense Ministerial.[8] Macron's vision for a "European dimension" of the French nuclear deterrent notwithstanding, Europe cannot replace the credibility and capability Washington can provide.

The objective for the United States and its allies should be to balance the risks of an arms race with realistic deterrence requirements that account for Russia's and China's military buildups and geopolitical ambitions.

Enhancing deterrence through additional nuclear or conventional capabilities, however, could have destabilizing geopolitical and economic effects. Hans Kristensen, Matt Korda, Eliana Johns, and Mackenzie Knight-Boyle, for example, warn that the Strategic Posture Commission's "embrace of a U.S. nuclear buildup ignores the consequences of a likely arms race with Russia and China." They assess that "if the United States responds to the Chinese buildup by increasing *its* own deployed warheads and launchers, Russia would most likely respond by increasing its deployed warheads and launchers."[9] But policymakers should weigh these risks against the alternative risks of *not* competing and allowing U.S. and UK strategic arsenals to remain at the status quo in an increasingly tense security environment.

Indeed, China's historic nuclear buildup—and Russia's continued modernization and expansion of its strategic and nonstrategic nuclear forces—may limit the ability of the United States and its allies to deter simultaneous adversary aggression and to sufficiently assure allies. This risk is especially acute considering Russia's and China's increasingly aggressive behavior toward its neighbors that are part of U.S. alliances. The objective for the United States and its allies should be to balance the risks of an arms race with realistic deterrence requirements that account for Russia's and China's military buildups and geopolitical ambitions.

Russian and Chinese Reactions to Four Force Posture Scenarios

The likelihood of a new arms race or misperception depends not only on force posture decisions in Washington and London but also on the reactions of Moscow and Beijing, which will be shaped by both internal and external dynamics. Russia and China will interpret any U.S. or UK policy changes through the lens of existing and long-standing threat perceptions. These might include fears about second-strike survivability and broader concerns about U.S. hegemony, along with the role of U.S. allies in both regions. But Russia and China will also interpret force posture changes through the lens of domestic political dynamics, such as leadership preferences and influence from internal actors like the military or defense industrial base. The recent purges of Chinese military leadership, for example, suggest that authoritarian dynamics and internal power balances may be more fluid than Washington realizes.

Russia and China will also interpret force posture changes through the lens of domestic political dynamics, such as leadership preferences and influence from internal actors like the military or defense industrial base.

To assess how Russia and China would respond to increased competition and enhancing deterrence, this project identified four alternative 2030 U.S. and UK force postures. The scenarios cover a range of potential options, including new strategic nuclear, theater nuclear, and

conventional capabilities, both offensive and defensive. To design the scenarios, the study team compiled a list of two dozen supplemental capabilities that experts have recommended in open sources. The study team then hosted workshops with leading analysts on Russian and Chinese strategic thinking to anticipate how Moscow and Beijing would react to each scenario.

Russian Perceptions and Drivers

The Soviet experience and the immediate post–Cold War era still largely shape Russia's worldview. The Kremlin continues to see the West as a major threat and has a "sense of loss," according to one workshop participant, that drives Russia's desire to reclaim former Soviet states, including Ukraine and Georgia, as part of reclaiming great power status. This great power status is particularly important for Moscow because Putin and those close to him believe great powers have unique roles and rights, and they want Russia to reassert those rights rather than acquiesce to others. Nuclear weapons are a visible and foundational element of Russia's claim to great power status both as symbols of state power and tools for coercion.

Under New START, the Kremlin continued to modernize and diversify its arsenal with a range of new delivery systems. These included replacements for existing capabilities, like the Bulava submarine-launched ballistic missile (SLBM), silo-based and road-mobile Yars intercontinental ballistic missile (ICBM), Sarmat heavy ICBM, Borei-class nuclear-powered ballistic missile submarine (SSBN), Tu-160M2 strategic bomber, and Kh-102 air-launched cruise missile. Russia has also fielded or is in the process of developing a variety of new nuclear capabilities, including the Kinzhal air-launched ballistic missile, 9M729 ground-launched cruise missile (GLCM), Tsirkon hypersonic cruise missile, and Oreshnik intermediate-range ballistic missile (IRBM), some of which were used in their conventional capacities in Ukraine. Russia maintains an arsenal of between 1,000 and 2,000 nuclear warheads for use on nonstrategic delivery systems that are embedded throughout Russian air, naval, and ground forces.[10] In addition to its deployed force, Russia holds an additional 2,500 warheads in reserve, which it could quickly upload on existing platforms, should it choose to do so.

Russia's modernization effort aims to overcome U.S. ballistic missile defenses with a range of novel delivery systems, including the Avangard hypersonic boost glide vehicle, Burevestnik nuclear-powered cruise missile, and Poseidon intercontinental range submersible drone. Kremlin officials consistently frame these systems as a response to the U.S. withdrawal from the Anti-Ballistic Missile (ABM) Treaty in 2002 and subsequent efforts to build homeland missile defenses, along with advanced conventional weapons.[11]

Russia's official nuclear doctrine since the end of the Cold War has gradually expanded the role of nuclear weapons. In the early 1990s, Russia abandoned the no-first-use policy it inherited from the Soviet Union to compensate for weakened conventional forces. In more recent years, the Kremlin has further lowered its nuclear threshold: Russia's 2024 nuclear doctrine threatens nuclear use in response to conventional attacks that create a "critical threat" to Russian sovereignty or territorial integrity.[12] Russia's concerns about second-strike survivability persist to this day. The Kremlin has long worried about the counterforce threat posed by a combination of U.S. nuclear forces, missile defenses, and conventional precision strike systems.[13] In 2000, for example, then–Russian Defense

Minister Igor Sergeyev asserted that prospective U.S. homeland missile defenses would undermine Russia's deterrent, saying, "We do not see any [real] motives for the deployment of this national ABM [anti-ballistic missile] system other than the striving of the USA to acquire strategic domination in the world."[14] Similarly, then-Director of Security and Disarmament at Russia's Ministry of Foreign Affairs (MFA) Anatoly Antonov declared in 2007 that the U.S. prompt conventional strike concept, "when combined with global missile defense, becomes a means of seeking to dominate the world politically and strategically."[15]

Russia's view of the U.S. threat, however, is a point of debate. One workshop participant indicated that Russia perceives its nuclear forces to be superior to those of the United States and that Russian political leadership is unconcerned about Golden Dome and second-strike survivability.[16] This view contrasts with reactions from other Russian experts and officials, as well as the Kremlin's tendency to inflate the threat from U.S. buildups. In the 1980s, for example, the Kremlin interpreted U.S. missile deployments to Europe, the Strategic Defense Initiative (SDI), nuclear modernization, and President Ronald Reagan's rhetoric as evidence that the United States was preparing to launch a first strike.[17] In the current environment, the Kremlin's rhetoric suggests that it views Golden Dome as an escalation of the counterforce threat posed by U.S. homeland missile defenses. A joint Russian-Chinese statement on strategic stability, for example, asserted that Golden Dome "can be employed for the purposes of delivering . . . a first strike."[18]

The Kremlin's view of Europe is also a matter of debate. One workshop participant disputed the notion that Russia views itself as conventionally inferior to NATO and asserted that the war in Ukraine has highlighted the vulnerabilities of Western military technology.[19] Another participant noted that Russia has traditionally viewed Europe as a "parking lot" for U.S. forces, but the war in Ukraine may shift the Kremlin's perceptions of Europe's power in NATO.[20] While the Kremlin strongly criticized recent shifts in French nuclear doctrine and posture, Russia typically describes the U.S., UK, and French nuclear forces as a unified threat, often referring to the UK and French nuclear forces as components of NATO's "combined strike potential."[21] The Kremlin is also highly critical of NATO's nuclear sharing mission and has repeatedly warned that it will respond to the deployment of U.S. weapons to countries on its borders, including Poland and Finland.[22]

But domestic factors—including the desire for prestige and industry influence—will also influence Russian reactions to any changes in U.S. or UK nuclear force postures. Given Russia's ongoing economic struggles, the prioritization of the immediate demands of the war in Ukraine, a shrinking population, and an underperforming conventional military, nuclear weapons are one of the few realms where Russia remains a global leader. Maintaining rough strategic parity with the United States as a sign of status has thus been a long-standing priority for the Kremlin.[23] A broader nationalist narrative, in which nuclear weapons symbolize Russian patriotism and statehood, reinforces this status concern.[24] As a result, the Kremlin may react to U.S. and allied force posture shifts not only as military threats but as challenges to Russia's status and identity.

Russia's defense industry has significant influence in defense acquisition decisions. As of 2025, the defense industry employed more than 4.5 million people—a population that depends on the Kremlin for employment and therefore generally supports the regime.[25] Due to inefficiency,

however, many of Russia's largest defense companies operate at a loss.[26] As a result, the Kremlin will often award contracts to bail out struggling factories rather than to fill capability gaps.[27] This dynamic may have impacted the Kremlin's decision to develop the Sarmat ICBM. In the early 2000s, the Moscow Institute of Thermal Technology and the Votkinsk Machine Building Plant—which design and produce solid-fueled missiles like the Yars ICBM, Topol-M ICBM, and Bulava SLBM—dominated Russia's modernization efforts.[28] As a result, Makeyev—the only design bureau in Russia that produces liquid-fueled missiles—likely had little other business. A desire to support Makeyev's workforce and maintain its production capability may have influenced the decision to develop Sarmat as a liquid-fueled missile.[29]

While Russia has accelerated its production of conventional and dual-capable systems for the war in Ukraine, it has not boosted the production of strategic systems and has few resources to spare for a strategic arms race.[30] As a result, while Russia can quickly expand its deployed force by uploading warheads onto ICBMs and SLBMs, it likely has only limited capacity to produce additional delivery systems. Further, several of Russia's modernization programs are lagging behind schedule. Russia originally scheduled the Sarmat ICBM, for example, to enter service in 2018, but the program has faced repeated delays and test failures, and as of June 2026 Russia still has not deployed it.[31] Nonetheless, the continued development of systems like Burevestnik, Oreshnik, and Poseidon during the war in Ukraine illustrates the priority that the Kremlin places on nuclear modernization.

Chinese Perceptions and Drivers

Like Russia, China perceives the United States as the principal threat that could both hinder its regional ambitions and undermine strategic stability. China sees a significant continuity in U.S. nuclear policy, driven by a pursuit of "absolute security" and nuclear hegemony. U.S. counterforce and damage limitation capabilities have long been a focus of Chinese strategic thinking. Chinese analysts have consistently expressed concern about China's retaliatory capability in the face of U.S. modernization. Chinese threat perceptions are most acute over Taiwan, and Beijing will likely assess any adversary's modernization based on its impact on a Taiwan contingency, regardless of the program's actual intentions. China sees the United States as the main threat and the only country capable of blocking reunification. The threat goes beyond the military realm and includes U.S. efforts to suppress China's growth through sanctions and export controls. One workshop participant summarized China's strategy as "resist or confront the U.S., hug Russia, and divide Europe."

While Chinese analysts are worried about how planned U.S. modernization might affect the military balance, they are just as, if not more, concerned about the political message the United States may be attempting to send. One workshop participant, for instance, noted that Chinese analysts understand U.S. deterrence less through the lens of specific capabilities and more through political signaling, including U.S. rhetoric about extended deterrence in the Indo-Pacific.[32] Chinese analysts are additionally concerned that damage limitation capabilities, especially space-based ones, can erode China's secure second-strike capability. Combined with developments in AI, analysts worry that the United States could achieve real-time tracking of China's nuclear assets and have a high

probability of intercepting a strike against the United States.[33] Against this backdrop, China views U.S. attempts to open arms control talks as merely a way to preserve its advantage over China.[34]

China has rapidly expanded its ballistic missile force, deploying over 400 new ICBMs, while also continually modernizing its Jin-class SSBN and fielding new, longer-range JL-3 SLBMs.[35] China has similarly modernized its bomber force, deploying a nuclear-capable variant of its H-6 strategic bomber, along with a new air-launched ballistic missile (ALBM).[36] China's modernization of strategic and nonstrategic forces has also included a significant increase in IRBMs, from 34 to 250 missiles between 2020 and 2025.[37] In that same time period, China approximately doubled its warhead stockpile from 300 to 600. In 2024, the then-Department of Defense projected that China would reach over 1,000 warheads by 2030.[38] At the 2026 Non-Proliferation Treaty Review (NPT) Conference, China described its modernization program as an effort to "deter other countries from using or threatening to use nuclear weapons against China . . . in a changing security environment."[39]

China's nuclear posture has largely been defined by opacity, resulting in a diversity of views and speculation about its doctrine. One scholarly view is that China maintains a policy of first-strike uncertainty whereby it seeks to create doubt about an adversary's ability to conduct a disarming first strike.[40] China's recent nuclear buildup has undermined this interpretation, however, and scholars increasingly interpret China's strategy as one of assured retaliation.[41] More recently, investments in early-warning systems and on-alert missile launch systems indicate that China may be moving toward a launch on warning (LOW) posture.[42] Nonetheless, the prevailing scholarly view is that China currently maintains an assured retaliation strategy and has not yet adopted a LOW posture.

There is also a debate over the drivers of China's nuclear buildup, with four groups of explanations that are not mutually exclusive.[43] First, China may be motivated by concerns about second-strike capability.[44] Second and relatedly, China may be seeking to expand its freedom of action by building a "nuclear shield" to enable more aggressive behavior toward U.S. allies. Third, China's buildup could be motivated by status concerns. As a rising power that has historically been concerned with bolstering its global image, China may be using nuclear weapons to symbolize its global power status and to force the United States to recognize it as a peer competitor.[45] Fourth and finally, domestic politics, including interservice rivalry and political infighting, may shape modernization efforts.

Consistent with the second explanation, workshop participants observed that China is "asking more" of its nuclear arsenal, hoping not only to deter nuclear coercion, but also to enable more aggressive behavior and deter U.S. intervention in Taiwan.[46] China's expanding investment in nonstrategic systems, including two IRBMs and an ALBM, aligns with this objective. China may be seeking an in-theater nuclear advantage in the Indo-Pacific, while the United States has largely focused on strategic capabilities in recent decades. In evaluating the closing gap in capabilities, analysts have particularly focused on China's improved capabilities in hypersonic glide vehicles.

Of course, China's nuclear posture and its potential drivers are also shaped by what Chinese analysts identify as drivers of U.S. nuclear modernization. Chinese analysts see a large degree of continuity in U.S. nuclear policy, arguing that the United States was never willing to accept mutual vulnerability with China and seeks to pursue "absolute security"—a security advantage without regard to the concerns of others, of which, they suggest, Golden Dome is just the latest symptom.[47] They attribute the United States' continued pursuit of absolute security to its declining structural position, in which the closing power gap between China and the United States—and the former's improving missile capabilities—exerts structural pressure spurring U.S. modernization.[48] From this Chinese perspective, there is a large degree of continuity in U.S. policy across administrations—for instance, analysts observe that the Trump and Biden administrations continued nuclear programs that the Obama administration funded, such as the Columbia-class SSBN, Sentinel ICBM, B-21, F-35, modernized B-52, and Long-Range Standoff Weapon (LRSO).[49]

Notably, Chinese analysts observe that China's improved capabilities in hypersonic glide vehicles—an area where it might have a "slight advantage"—could be driving the United States to pursue more advanced damage limitation capabilities.[50] Additionally, they perceive U.S. modernization as helping to revitalize the U.S. industrial base, and lobbying from defense contractors, to include both the traditional "primes" and newer entrants such as Starlink and SpaceX, as another key influence.[51] Finally, China views U.S. modernization, particularly missile defense, as a tool for U.S. alliance management and maintaining the credibility of U.S. extended deterrence.[52]

In addition to long-standing threat perceptions of the United States, China will also interpret force posture changes through the lens of domestic factors, particularly concerns about regime security and an internal distrust of foreign influence. Chinese analysts widely share these perspectives, suggesting they will likely persist beyond the current Chinese leadership. A mixture of status concerns and technological drive also means that China could pursue new technologies in response to U.S. developments without deploying them, as China did in response to SDI. Interservice rivalries and corruption opportunities could have motivated China's choice to procure silo-based missiles. For example, silo construction aligns with domestic priorities such as civil-military fusion, which could be helpful in interservice debates over who "owns" the buildup. In addition to bureaucratic bargaining, elite politics can shape which groups have input into China's nuclear posture. Workshop participants noted that while authority for nuclear use will remain highly centralized under the Central Military Commission (CMC) (if not solely with Xi), decisions on force structure and posture involve a variety of groups, including the national labs and the broader, nonnuclear defense community.

Russian and Chinese Responses to Four Scenarios of U.S. and UK Force Postures in an Era of Strategic Competition

The following section outlines the four alternative future scenarios for U.S. and UK force posture, describes Russian and Chinese perceptions of each scenario, and assesses how they might respond.

Table 1: Alternative Futures for U.S. and UK Strategic Forces

Scenario 1: Program of Record	Scenario 2: Two-Theater Conventional Balancing
United States *Nuclear* • 100 B-21s • LRSO with initial operational capability (IOC) in 2030 • B-2 Life Extension Program • 12 Columbia-class SSBNs • SLCM-N with IOC in 2035 • Sentinel ICBM with IOC in 2033 *Conventional* • Precision Strike Missile (PrSM) • Long-Range Hypersonic Weapon (LRHW) • Intermediate-Range Conventional Prompt Strike (IRCPS) • Hypersonic Attack Cruise Missile (HACM) *Defensive* • Next Gen OPIR • Glide-phase interceptors • Next Generation Interceptor **United Kingdom** • 12 F-35As and DCA mission	**United States** *Nuclear* • SLCM-N with IOC in 2030 • Hypersonic-N (sea-launched) • Hypersonic-N (ground-launched) *Conventional* • Increased PrSM procurement • Hypersonic Attack Cruise Missile (HACM) • Long-Range Anti-Ship Missile (LRASM)/ Joint Air-to-Surface Standoff Missile-Extended Range (JASSM-ER) *Defensive* • Next Gen OPIR • Glide-phase interceptors • Space-based interceptors • Accelerated/expanded Next Generation Interceptors • Expanded Patriot/THAAD procurement • Additional Golden Dome layers (including nuclear-armed interceptors) **United Kingdom** • 12 F-35As and DCA mission • Conventional short-range ballistic missile (Nightfall) • SPEAR 3 F-35 integration

Scenario 3: Nuclear Double Down	Scenario 4: Full Scope Buildup
United States *Nuclear* • Long-Range Anti-Ship Missile – Nuclear (LRASM-N) • 145 B-21s • LRSO with IOC in 2028 • 16 Columbia-class SSBNs • SLCM-N with IOC in 2030 • Hypersonic-N (sea-launched) • Prompt HDBT • Hypersonic-N (ground-launched) • GLCM • 100 Road-mobile ICBM with IOC in 2032 *Conventional* • Long-Range Hypersonic Weapon (LRHW) • Intermediate-Range Conventional Prompt Strike (IRCPS) *Defensive* • Next Gen OPIR • Glide-phase interceptors • Next Generation Interceptor **United Kingdom** • 12 F-35As • Sovereign air-launched standoff weapon	**United States** *Nuclear* • 145 B-21s • LRSO with IOC in 2028 • 16 Columbia-class SSBNs • SLCM-N with IOC in 2030 • GLCM *Conventional* • Increased PrSM procurement • Long-Range Hypersonic Weapon (LRHW) • Intermediate-Range Conventional Prompt Strike (IRCPS) • Long-Range Anti-Ship Missile – Extended Range (LRASM-ER) *Defensive* • Next Gen OPIR • Next Generation Interceptor • Glide-phase interceptors **United Kingdom** • 12 F-35As • Sovereign air-launched standoff weapon • Procurement of fifth Dreadnought SSBN

Scenario 1: Program of Record

The first scenario centers on existing U.S. and UK modernization plans and serves as a baseline for the other three scenarios. In this scenario, the United States proceeds with plans to acquire 100 B-21 bombers, develop the LRSO with initial operational capability (IOC) in 2030, acquire the Columbia-class submarine, acquire a nuclear-armed sea-launched cruise missile (SLCM-N) with IOC in 2035, and acquire the Sentinel ICBM with IOC in 2033. On the conventional side, the United States deploys the Precision Strike Missile (PrSM) short-range ballistic missile; the ground-launched,

medium-range Long-Range Hypersonic Weapon (LRHW); the sea-launched Intermediate-Range Conventional Prompt Strike System (IRCPS), and the air-launched, medium-range Hypersonic Attack Cruise Missile (HACM). For missile defense, the United States fields the Next Generation Interceptor to replace its fleet of Ground-Based Interceptors, as well as glide-phase interceptors on Aegis destroyers. The United Kingdom proceeds with plans to acquire four Dreadnought-class SSBNs, expand its nuclear stockpile to 260 warheads, and acquire 12 F-35As for participation in NATO's DCA mission.

While Russia understands that the program of record does not entail an expansion of the U.S. strategic force, workshop participants concluded that Russia may nonetheless continue to invest in its nuclear forces. Although Russia does not perceive the current U.S. nuclear modernization effort as an immediate threat, deep-seated distrust within the Kremlin means that Russia still perceives the United States as the most significant threat to the country. The accession of Sweden and Finland to NATO amplifies Russia's threat perception given its long-held view that NATO represents an extension of U.S. hegemony. Given the Kremlin's strategic outlook and deep skepticism of U.S. intentions, participants suggested that Russia may continue its current nuclear strategy, including by developing the novel delivery systems that Putin announced in 2018 until they are operational.

Workshop participants indicated that like Russia, China will likely continue its nuclear buildup in the near term even if the United States does not expand its nuclear arsenal beyond the current program of record. China views U.S. modernization as the product of multiple factors, including the pursuit of absolute security, China's evolving missile capabilities, and U.S. defense industry interests. The program of record may have contributed to China's decision to expand its nuclear forces, but that decision dates to 2018 or 2019.[53] It is therefore unlikely that the program will trigger new Chinese reactions, or that U.S. restraint will impact China's trajectory in the near term. Like Putin, Xi harbors a deep skepticism about the United States and believes that leaders in Washington will continue to seek absolute security and refuse to acknowledge its waning status as a global power—potentially compensating with military capabilities and aggression. Accordingly, China will likely continue to invest in its nuclear arsenal as a hedge in this scenario.

Scenario 2: Two-Theater Conventional Balancing

The second scenario features a modest diversification of the U.S. nuclear force and a buildup of conventional capabilities for the Indo-Pacific beyond the current program of record, paired with an expansion of UK precision strike systems for the defense of Europe. The United States expedites the acquisition of SLCM-N in this scenario to achieve IOC by 2030 and begins to develop an intermediate-range, sea-launched, nuclear-armed hypersonic boost glide vehicle. On the conventional side, it expands production for the PrSM and develops an extended-range variant of the Long-Range Anti-Ship Missile (LRASM) and the Joint Air-to-Surface Standoff Missile (JASSM). Crucially, this scenario involves a significant expansion of U.S. missile defenses in the form of space-based interceptors, a greater number of Next Generation Interceptors, nuclear-armed interceptors, and expanded production of THAAD and Patriot systems by the early 2030s.

The United Kingdom develops a new conventionally armed short-range ballistic missile and a conventional air-launched cruise missile, to be carried on the F-35.

Workshop participants indicated that Russia would view this buildup as a significant threat, especially given the expansion of U.S. missile defenses. Participants agreed that Russia would likely respond to U.S. and UK nuclear and conventional enhancements by deploying additional dual-capable missiles and investing in space capabilities.[54] Further, the U.S. expansion of Golden Dome in this scenario would significantly amplify Russian threat perception. Since the Cold War, Russia has worried that U.S. missile defense would embolden the United States to pursue a disarming first strike. Trump's Golden Dome proposal has reignited these fears. Indeed, Putin framed Russia's 2018 novel capabilities as a "response to the unilateral withdrawal of the United States of America from the Anti-Ballistic Missile Treaty and the practical deployment of missile defense systems both in the US and beyond their national borders."[55] As such, further U.S. investments in missile defense would likely compel Russia to procure more of its nuclear-powered cruise missile, Burevestnik, and its underwater nuclear drone, Poseidon, both specifically intended to counter this threat. Another expert indicated that Russia could respond to U.S. homeland missile defense by uploading warheads onto ICBMs and SLBMs.[56]

Participants suggested that China's reaction to this scenario would also likely focus on U.S. missile defense capabilities. Given Chinese analysts' criticisms of Golden Dome as evidence of the United States' pursuit of absolute security, China would likely view the expansion of U.S. missile defenses as validating concerns that the United States is moving toward a first-strike capability. Chinese leaders could also interpret new U.S. nonstrategic capabilities as preparations for nuclear warfighting, reinforcing the view that the United States seeks more options to deny China the ability to prevail in a Taiwan contingency.[57] China's response would likely focus on complicating U.S. targeting and penetrating U.S. missile defenses. This could include accelerated investment in counterspace capabilities and novel delivery systems—including hypersonic and fractional orbital bombardment systems. China might also choose to further expand its ICBM or SSBN forces to enhance survivability and continue efforts to develop strategic missile defenses. Finally, workshop participants noted that China might develop new systems and technologies to counter missile defenses without deploying them.[58]

Scenario 3: Nuclear Double Down

The third scenario features significant expansions of U.S. and UK nuclear forces. The United States develops a range of new nuclear delivery systems, including a nuclear-armed variant of the LRASM; a ground- and sea-launched, intermediate-range, hypersonic boost glide vehicle; a prompt strike capability against hardened and deeply buried targets; and a GLCM. The United States also accelerates the development timelines for the LRSO and SLCM-N, which achieve IOC in 2028 and 2030, respectively. Finally, the United States procures 45 additional B-21s (for 145 total), announces plans to procure 4 additional Columbia-class SSBNs (for 16 total), and acquires 100 road-mobile Sentinel missiles that will achieve IOC in 2032. The United Kingdom is acquiring an additional 12

F-35s by 2033 for participation in NATO's DCA mission and is developing a new, nuclear-armed, air-launched standoff capability for deployment on its F-35s.

Given Russia's long-standing concerns about second-strike survivability, the Kremlin would likely respond to this scenario with further investments in its strategic forces. Russia already has a significant advantage in theater nuclear forces, and experts emphasized that Russia believes it can address any future strategic imbalances by expanding its force or by fielding asymmetric countermeasures. Although participants disagreed about the significance of UK and European capabilities in Russia's threat perception, experts indicated that an independent UK standoff capability could cause concern in the Kremlin.[59] Beyond investments in offensive strategic capabilities, workshop participants assessed that Russia's response would focus on asymmetric capabilities to prevent a disarming first strike. This could include strengthening cooperation with China on early-warning systems and reinvesting in the Perimeter system. Participants suggested that since Russia has shown itself willing to pursue pre-delegation, it could do so more systematically if the United States expands its arsenal.[60] Experts indicated that Russia might also seek to exploit Western dependence on space infrastructure through developing and accelerating programs like its reported plans for a space-based nuclear anti-satellite weapon.[61] Russia, though, might be less concerned about U.S. space-based assets since the scenario does not include a comprehensive expansion of U.S. missile defense.

Unlike Russia, China perceives itself as lagging behind the United States in both theater and strategic nuclear forces and could seek to compete with any expansion of U.S. nonstrategic capabilities. Chinese leaders would likely interpret new U.S. capabilities through the lens of a Taiwan contingency, and additional U.S. nonstrategic capabilities may exacerbate existing concerns about the U.S. threshold for nuclear use. Workshop participants assessed that while China does not have a force or doctrine that supports nuclear warfighting, the deployment of additional U.S. capabilities in the Indo-Pacific could prompt China to further increase its reliance on theater nuclear systems.[62] This could entail the deployment of additional DF-26 dual-capable IRBMs or new hypersonic delivery systems. At the strategic level, the expansion of the U.S. force could lead China to invest in strategic missile defenses or to further expand its own strategic nuclear force. Finally, according to one interpretation of China's no-first-use policy, China could make nuclear threats—without following through on them—to generate a bargaining advantage, which may be appealing for Beijing in a crisis under this scenario.[63]

Scenario 4: Full Scope Buildup

The fourth scenario centers on a large-scale expansion of U.S. and UK nuclear and conventional capabilities. The United States procures 45 additional B-21s (for 145 total), announces plans to procure 4 additional Columbia-class SSBNs (for 16 total), and adds nuclear capability to its GLCM. As in scenario three, the United States accelerates the timelines for the LRSO and SLCM-N, which achieve IOC in 2028 and 2030, respectively. On the conventional side, the United States expands its production of the PrSM and develops an extended-range variant of the LRASM. The United Kingdom acquires an additional 12 F-35s (for 24 total) for participation in NATO's DCA mission and develops

a new, nuclear-armed, air-launched standoff capability for deployment on its F-35s. The United Kingdom further acquires an additional Dreadnought SSBN (for five total).

The Kremlin would likely view the buildup of strategic nuclear capabilities in scenario three as more escalatory than the smaller scale nuclear buildup—paired with a conventional buildup—in this scenario. Although new U.S. conventional short- and intermediate-range capabilities would be most useful in the Indo-Pacific, workshop participants noted that assurances about the intended purpose of new U.S. capabilities would be unlikely to change Russia's perception, given its deep-rooted distrust of the United States and the U.S. ability to swing conventional forces from one theater to another.[64] Russia could also view the United Kingdom's buildup as a threat. On the other hand, workshop participants noted that the scenario did not include some of the nuclear capabilities included in scenario three, such as a mobile ICBM or a nuclear hypersonic missile, and, importantly, did not include expanded missile defense capabilities.[65] Internal factors would likely influence the form and scale of Russia's response in this scenario, with workshop participants considering options like pre-delegation and other asymmetric responses.[66]

Given its focus on the risk of a conflict over Taiwan, China would likely view both the conventional and nuclear capabilities in this scenario as threatening. Chinese leaders may interpret an expansion of both U.S. nuclear and conventional capabilities as confirmation that the United States is committed to containing China. As in scenario three, the diversification of the U.S. nuclear force could prompt China to reassess its theater posture, while the expansion of the U.S. strategic conventional force could prompt Chinese investment in additional ICBMs, SSBNs, and theater missile defenses to bolster second-strike survivability. Although workshop participants assessed that China seeks to avoid an arms race, they explained that Chinese experts view a limited buildup as an opportunity to impose costs on the United States.[67] A large-scale expansion and diversification of the U.S. force could provide an important justification within the domestic Chinese political ecosystem for further modifying and expanding Chinese force posture.

Russian and Chinese perceptions and reactions are relatively constant across all four scenarios. This informs the study's finding that Russia and China will likely continue on their current courses regardless of what the United States and United Kingdom do. It also reflects the uncertainty inherent in predicting adversary behavior and the difficulty of assessing the impact of internal factors on adversary decisionmaking. Despite these challenges, the workshops illustrate that the nature of Russian and Chinese reactions may vary depending on the specific capabilities that the United States and United Kingdom field. The following section draws out the main trends across the four scenarios and identifies opportunities for risk reduction that could mitigate risks of the most destabilizing responses.

The Risks of Competition and Risk Reduction Options

This study finds that because Russia and China are deeply distrustful of the United States and have internal and ideological factors driving their nuclear modernization efforts, they are likely to continue to modernize and potentially expand their arsenals even if the United States and the United Kingdom exercise nuclear restraint. *How* they modernize and expand, however, may be subject to change depending on which capabilities the United States and United Kingdom choose to field.

Russia's revisionist orientation and its deep cynicism about U.S. motivations will likely shape the Kremlin's reaction to any future buildup. In addition to the Kremlin's worst-case strategic thinking, narrower concerns about the balance of conventional forces and a perceived need for enhanced coercive leverage over Europe may influence future force posture decisions. Russia's response to U.S. and UK force posture changes will depend not only on the wider context, but also specifically on *when* and *where* these changes happen as basing and location will be especially influential.

Beijing sees the United States as a declining power focused on preventing China's rise, especially its unification with Taiwan. China is particularly concerned about technological advances in any U.S. or UK force posture changes, such as space-based assets or theater-based capabilities with potential applications in a Taiwan contingency. Chinese leaders may respond by deploying additional strategic or regional nuclear capabilities. As in the past, however, China could also develop a range of technological responses without deploying them.

This report has three main findings. First, both Russia and China are likely to continue modernizing and expanding their nuclear forces in the near term regardless of what the United States and United Kingdom do. Russian and Chinese modernization efforts began in part as responses to U.S. and allied behavior, including investments in homeland missile defense and conventional strike capabilities. Internal drivers, however—including industry interests and domestic politics—play significant roles in shaping adversary force posture. Neither country has articulated a clear end point to its current modernization efforts. Since Russia's and China's decisionmaking is the product of both internal and external factors, the United States and its allies have limited ability to influence Russian and Chinese force posture. Further, U.S. and allied leaders may struggle to predict how Russia and China will respond to any given force posture shift. U.S. and allied reassurances will likely have little impact on Russian and Chinese threat perception and decisionmaking.

Both Russia and China would be very sensitive to the further development of homeland missile defense systems, including Golden Dome, given their deeply rooted opposition to U.S. missile defense and concerns about second-strike capabilities.

This does not mean that Moscow and Beijing will respond uniformly to all force posture changes; rather, they are likely to tailor their ongoing modernization efforts to the specific capabilities the United States and United Kingdom pursue. Given the priority the Kremlin places on maintaining parity with the United States (and its view that the United States and United Kingdom constitute a unified threat), Moscow may attempt to match any expansion of U.S. or UK strategic nuclear capabilities. China would be more likely to respond to additional U.S. nonstrategic nuclear systems, since Beijing tends to view U.S. capabilities through the lens of a potential conflict over Taiwan. For its part, Russia already fields approximately 1,000–2,000 warheads on nonstrategic delivery systems and may feel less pressure to match additional nonstrategic deployments by the United States and its allies.[68] Both Russia and China would be very sensitive to the further development of homeland missile defense systems, including Golden Dome, given their deeply rooted opposition to U.S. missile defense and concerns about second-strike capabilities.

The second main finding is that while both Russia and China have historically seen the United Kingdom and other European allies as secondary players doing Washington's bidding, Russia increasingly sees them as independent actors of growing strategic concern. Putin has sought to contest what he views as NATO encroachment on Russia's "spheres of privileged interest" and has used this grievance to justify aggression in Eastern Europe and the Caucasus, including the war in Ukraine.[69] In line with this objective, Russia maintains a large arsenal of nonstrategic nuclear systems for potential use in a conflict with NATO. The Kremlin has further diversified its force since 2010 by adding new nonstrategic delivery systems, including the Kinzhal ALBM, the 9M729 GLCM, and the Oreshnik IRBM. It is possible that recent European efforts to enhance deterrence

will further spur Russia's threat perception, with Russian spokesperson Maria Zakharova describing France's "forward deterrence" posture as "extremely destabilizing" and as a threat that "could be used in a coordinated manner against our country."[70]

The United Kingdom and its European allies could consider how the development and deployment of new nuclear and conventional capabilities could signal European interests to Russia, beyond the auspices of NATO. In addition to modifications to the British and French nuclear arsenals, European states could expand their independent conventional long-range strike capabilities, including through the European Long-Range Strike Approach (ELSA). Although it is possible that Russia would respond to these developments with its own increases in nonstrategic, strategic, or asymmetric weapons systems, not competing also comes with risks, especially given that Russia may continue its nuclear buildup no matter what the United States and its allies do.

Third, these findings point to opportunities for risk reduction and arms control to allay specific escalation concerns from Moscow and Beijing, and to account for the increasing influence of European allies on strategic stability. Enhancing deterrence and pursuing arms control are not mutually exclusive. Russia's and China's continued distrust of Washington suggests that traditional arms control mechanisms may be of limited value in the current environment, particularly if all of the P5 countries are simultaneously enhancing deterrence and expanding their nuclear forces, albeit in different ways and at different scale.

This report's findings point to specific areas of concern for escalation, particularly around where and when the United States and United Kingdom deploy new capabilities and the potential responses from Moscow and Beijing. To address this concern, new arms control and risk reduction efforts might focus on geographic limits to nuclear deployments, such as those established under the Conventional Armed Forces in Europe Treaty, which had concentric and flank zones limiting deployments of tanks, troops, and other conventional capabilities. A nuclear version of this might limit the number of nonstrategic delivery systems within a designated geographic region of the NATO-Russia boundary, not to include naval aircraft, as long as it did not interfere with the NATO nuclear sharing mission.

Another approach to arms control and risk reduction would be to focus on when systems are deployed. An option for risk reduction in this area would be a revival of the Incidents at Sea Agreement, which included a notification mechanism for projected exercises that would hamper navigation.[71] In a modified version of this, the P5 could agree to establish a new "emergency session" mechanism, whereby any member could call for a discussion about a new deployment by another member. This would fall under the P5's ongoing work on transparency of doctrines and risk reduction. It would also leverage existing relationships within the P5 process, rather than require the establishment of new hotline agreements.

Increased transparency could also reduce risks of misperception leading to escalation. The 2026 NPT Review Conference failed to reach consensus on a final document, but the last draft called on the P5 to participate in interactive reporting sessions at the next review conference. Additionally, some P5 members have suggested using the P5 process as a new forum for strategic

stability dialogues. This option would help reduce the risks of misperception and escalation and could contribute to the strengthening of the NPT review process while also demonstrating commitment to Article VI.

Perhaps the biggest challenge for the United Kingdom and other European states will be balancing risk reduction with the need to avoid numerical or qualitative constraints on force postures that could undermine deterrence.

While these options may seem modest, they nonetheless come with challenges, particularly for European allies. Perhaps the biggest challenge for the United Kingdom and other European states will be balancing risk reduction with the need to avoid numerical or qualitative constraints on force postures that could undermine deterrence. London has long been a champion of risk reduction and transparency-building measures; for example, the United Kingdom founded the P5 process and the UK-Norway Initiative on disarmament verification.[72] In the current environment, however, the United Kingdom's top priority is strengthening deterrence. Two of the three external reviewers of the 2025 Strategic Defence Review, George Robertson and Fiona Hill, have called for a greater sense of urgency in implementing the review's recommendations to increase defense readiness, enhance deterrence, and inspire innovation in the defense industry.[73]

Many European states are prioritizing investments in long-range precision strike missiles, such as the German-Norwegian 3SM Tyrfing supersonic cruise missile and France's planned ground-launched Land Cruise Missile.[74] If European actors, such as the United Kingdom, open the door to strategic stability or arms control dialogues with Russia, however, Moscow may insist on limits on these and other capabilities, which could in turn undermine European deterrence. Navigating this balance of leading on risk reduction while enhancing deterrence, therefore, will require tailoring specific agreements to the new strategic equation and evolving beyond past risk reduction models or agreements.

Conclusion

The United States and its allies find themselves in an increasingly unstable security environment defined by competition with nuclear-armed great power adversaries. While the United States and the United Kingdom exercised nuclear restraint and a measure of unilateral disarmament in the decades following the Cold War, Russia and China diversified and expanded their nuclear forces to counter the United States' perceived pursuit of hegemony and absolute security. This study's findings suggest that Russia and China will continue to view the United States and NATO with skepticism, disputing an understanding that further U.S. and British restraint could encourage adversaries to adopt a similar strategy.

This report, however, has highlighted important factors motivating nuclear buildups beyond threat perception, including internal political dynamics and the roles of distinct capabilities, like homeland missile defense. While the United States and its allies cannot readily exert their influence on the internal workings of bureaucracies and industries within Russia and China, this research highlights specific capabilities that Russia and China may view as more destabilizing. Both Russia and China would likely find U.S. homeland missile defense as extremely destabilizing and may respond to this and other strategic buildups with, in Russia's case, nuclear and asymmetric systems, and in China's case, nuclear and nonnuclear systems that it may not immediately deploy or acknowledge. Instead, China may seek to deploy these systems at strategically opportune moments. For its part, Russia may also find nonstrategic capabilities deployed along its border with NATO particularly escalatory.

In this new strategic environment, the United Kingdom and Europe also have a unique role to play in both supplementing the U.S. nuclear deterrent and signaling to Russia that Europe is a military power in its own right. This tailored approach to deterrence is also applicable to arms control, where the United States and its allies should seek to enter into agreements that limit the most dangerous attributes of Russia's and China's arsenals while acknowledging and understanding Russian and Chinese perceptions of allied capabilities. While the United States and its allies cannot predict Russian and Chinese perceptions and responses with certainty, specific adjustments to force posture and risk reduction can lessen the most serious risks of the coming competition.

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