The Washington Quarterly

ISSN: 0163-660X (Print) 1530-9177 (Online) Journal homepage: www.tandfonline.com/journals/rwaq20

More Is Not Better: The Risks of a US Nuclear Buildup for Extended Deterrence

Timothée Albessard

To cite this article: Timothée Albessard (2026) More Is Not Better: The Risks of a US Nuclear Buildup for Extended Deterrence, The Washington Quarterly, 49:1, 25-44, DOI: 10.1080/0163660X.2026.2639931

To link to this article: https://doi.org/10.1080/0163660X.2026.2639931

Published online: 27 Mar 2026.

Timothée Albessard

More Is Not Better: The Risks of a US Nuclear Buildup for Extended Deterrence

As the United States faces the challenge of simultaneously deterring two "near-peer" nuclear competitors—China and Russia—there has been ongoing debate within the US strategic community over whether Washington should develop and deploy additional nuclear capabilities to meet this unprecedented deterrence challenge. Several analysts argue that a nuclear buildup is unavoidable to maintain credible deterrence, with one even describing it as "the new American nuclear consensus."[1] Such calls for the expansion of the US nuclear arsenal have become even stronger with the expiration of the New START Treaty in February 2026. While the argument primarily focuses on homeland deterrence, it frequently emphasizes the need to strengthen extended nuclear deterrence guarantees for allies in Europe and in the Indo-Pacific. In this view, expanding the US nuclear arsenal would serve a dual purpose, reinforcing both homeland and extended deterrence.

This article seeks to contribute to this important debate—which has direct implications for the security of US NATO and Indo-Pacific allies—by challenging these calls for a US nuclear buildup to sustain extended deterrence in the emerging context of near-peer nuclear competition. It contends that, given significant industrial constraints such as delays and cost overruns in the current US modernization of its arsenal as well as strategic choices—primarily

Timothée Albessard is a special research fellow with the Center for Disarmament, Science and Technology (CDAST) at the Japan Institute of International Affairs, and a PhD student in International Relations at Hitotsubashi University in Tokyo. He can be reached by email at timalbessard@yahoo.fr and followed on X at @timalbessard9.

The Washington Quarterly • 49:1 pp. 25–44
https://doi.org/10.1080/0163660X.2026.2639931

counterforce targeting—such a buildup would undermine both crisis and arms race stability with China and Russia, rather than strengthening extended deterrence. The article instead emphasizes the political dimensions of US extended deterrence arrangements, particularly allied fears of abandonment compounded by recent US policy choices, as the main sources of extended deterrence instability. While the United States should reaffirm that regional extended deterrence arrangements are not secondary to its national security, allies should address conventional capability gaps—steps that can strengthen deterrence without worsening nuclear arms racing with US competitors.

The Case for Expanding the US Nuclear Arsenal

Although the need to strengthen extended nuclear deterrence is frequently cited, it is not the main argument put forward by proponents of a US nuclear buildup. Instead, the driving rationale is the increasingly multipolar nature of nuclear competition. During the Cold War and until the early 2010s, US nuclear strategy and force posture were primarily focused on the USSR (later Russia), with China treated as a "lesser-included case."[2] However, China's unprecedented nuclear buildup has clearly shifted this dynamic. The US Department of Defense (DoD) estimates that China has "surpassed 600 operational warheads in its stockpile as of 2024" and is likely to approach quantitative parity with US deployed warheads by 2035 if Washington still abides by the limitations set under New START.[3] As a result, the United States will soon find itself competing simultaneously with two near-peer nuclear-armed adversaries. Against this backdrop, Vipin Narang and Pranay Vaddi, both former members of the Biden administration, have argued that "never before has the United States had to deter and protect its allies from multiple nuclear-armed great power rivals at the same time. For the first time since the end of the Cold War, Washington will need to develop more, different, and better nuclear capabilities and begin to deploy them in new ways."[4]

Beyond the challenge of near-peer competitors, the rise of regional nuclear powers with growing capabilities to strike the US homeland buttresses a second argument for expanding the US nuclear arsenal. As the Biden administration's *Report on the Nuclear Employment Strategy of the United States* emphasized, North Korea's expanding and diversifying nuclear and missile programs add a new layer of complexity to the US deterrence equation.[5] The report also highlighted the potential for "coordinated or opportunistic aggression" arising from growing collaboration between Pyongyang, Moscow, and Beijing, underscoring the need for the United States to deter several nuclear-armed states simultaneously. This serves as another argument in favor of developing and deploying additional

US nuclear capabilities. For instance, Paul Amato, former director for nuclear deterrence policy in the Office of the Secretary of Defense, wrote that Pyongyang poses "unique deterrence challenges to the United States, South Korea, and the region" in addition to the possibility of opportunistic aggression, therefore requiring more nuclear capabilities "both in terms of quality and quantity."[6]

Finally, proponents of US nuclear buildup argue that existing capability gaps between the United States and its competitors necessitate the development of new warheads and/or nuclear delivery systems, including to strengthen extended deterrence.[7] For example, Russia's stockpile of over two thousand tactical nuclear warheads and China's development of dual-capable conventional-nuclear intermediate-range missiles create dangerous asymmetries, as the United States lacks comparable capabilities in similar numbers. This reasoning informed support for the US development of a nuclear-armed sea-launched cruise missile (SLCM-N). Proponents posit that adding a low-yield, theater-level nuclear option would enhance flexibility—and therefore deterrence—by ensuring the United States would not be compelled to respond to limited nuclear use with strategic weapons such as the Trident II D5 sea-launched ballistic missile (SLBM).[8]

These three arguments form the backbone of the case for expanding the US nuclear arsenal, with homeland deterrence as the primary goal and extended deterrence as a secondary objective. They have gained further traction in the context of the expiration of the New START Treaty in February 2026, with figures such as Senator Tom Cotton arguing that this changing security environment required the United States to end "years of unilateral restraint" and "finally build a nuclear deterrent for the threats [it] face[s]" by ceasing to abide by the treaty's limits.[9] Several options were put forward, including—beyond the development of new capabilities—the possibility of uploading nuclear warheads currently held in storage onto existing launchers, with US Air Force Global Strike Command stating its readiness to do so.[10] Even advocates of this option, however, have admitted that it would take several years to do so.[11]

Three arguments form the backbone of the case for expanding the US nuclear arsenal

Nevertheless, while this position seems to have garnered a degree of bipartisan support within the expert community, it has yet to be adopted at the level of the US executive, as even some proponents of expanded nuclear capabilities acknowledge.[12] Throughout 2025, President Trump has repeatedly called for disarmament negotiations with China and Russia, remarking that "there's no reason for us to be building brand-new nuclear weapons; we already have so many"[13] and that "it would be great if we could all denuclearize because the power of nuclear weapons is crazy."[14] Such statements hardly reflect a presidential inclination toward nuclear buildup—current modernization programs notwithstanding.

The Risks of This Approach for US Extended Nuclear Deterrence

The proposition that developing and deploying additional nuclear capabilities—beyond ongoing modernization programs and the SLCM-N—could strengthen extended deterrence is debatable for both industrial and strategic reasons.

Industrial Feasibility

US nuclear modernization programs are currently plagued by significant delays and cost overruns. The Sentinel program, designed to replace the Minuteman III intercontinental ballistic missile (ICBM), was restructured in February 2025 after assessments revealed projected costs had exceeded initial estimates by 81 percent.[15] Moreover, the Air Force announced in May 2025 that entirely new missile silos would be required to mitigate risks associated with reusing the 450 existing Minuteman silos, which is expected to drive further cost increases and schedule delays.[16] As a result, officials now estimate that the Sentinel may not be flight-tested until March 2028, two years behind schedule.[17]

This challenge goes beyond the land leg of the nuclear triad. As the US Navy transitions from the Ohio-class SSBNs to the planned acquisition of twelve next-generation Columbia-class SSBNs, the Government Accountability Office (GAO) has reported that "the first submarine is estimated to be delivered over a year late and cost hundreds of millions of dollars more than planned."[18] As for SLCM-N, which also requires adapting a variant of the W80-4 warhead currently in development as well as integrating it with existing Virginia-class submarines launch interfaces, it is now not expected to achieve initial operational capability until 2034.[19]

Industrial obstacles also extend to the very cores of US nuclear warheads. In 2015, the US Congress directed the National Nuclear Security Administration (NNSA) to produce at least eighty plutonium pits per year "as close to 2030 as possible," noting that the United States had not manufactured new pits in "significant numbers" since 1989.[20] (Plutonium pits form the fissile cores of US thermonuclear weapons, which initiate the fission reaction that triggers the weapon's detonation.) Since that mandate, the Los Alamos National Laboratory has produced only a single plutonium pit certified for use in 2024 for the new W87-1 nuclear warhead.[21] Ongoing delays prompted the Deputy Energy Secretary in August 2025 to commission a "special study" of the pit production program, citing concerns over the NNSA's "ability to consistently deliver on nuclear weapons production capabilities."[22]

Regarding uranium, the NNSA began work in 2004 on a new facility in Oak Ridge, Tennessee, designed to process uranium for both nuclear weapons and naval reactor fuel. A report published by the GAO in September 2025 indicates

that, due to delays, the facility is not expected to become operational before 2034, at a total cost of $10.35 billion—$4 billion more than originally projected.[23]

The accumulation of these industrial and technical setbacks raises serious questions about the feasibility of developing new US nuclear capabilities beyond current programs. This issue can be seen as structural given the atrophy of the US nuclear enterprise, workforce, and defense industrial base over the years, a situation made all the more constraining by the fact that the United States is attempting to modernize its entire nuclear triad and enterprise simultaneously.[24] As the Congressional Commission on the Strategic Posture of the United States acknowledged in its October 2023 report, "this industrial base, on balance, is not able to support the forces needed in the future."[25] Consequently, should the Trump administration endorse expert calls to expand the US nuclear arsenal, its response to competitors' buildup would only fuel a spiral of rhetorically-induced arms racing without actually strengthening homeland or extended deterrence, since the industrial capacity to support such developments remains highly uncertain.

Industrial and technical setbacks raise serious questions about the feasibility of new US nuclear capabilities

Strategic Risks

The development of additional nuclear capabilities would also raise important issues due to strategic considerations and, more specifically, the targeting posture associated with these capabilities. Since the Eisenhower administration, "the same target elements have appeared in every administration's nuclear war plans post-Truman: leadership and control capabilities, key military forces both nuclear and conventional, and war-supporting industry."[26] These elements form the basis of what is known as counterforce targeting in US nuclear strategy, although there is no single, universally accepted definition of this concept. Within counterforce targeting, a particularly controversial dimension is the notion of striking an adversary's nuclear forces and command-and-control (NC2) infrastructure, whether by nuclear or conventional means.

Counterforce targeting is often criticized for its destabilizing consequences. First and foremost, it risks signaling that the United States is attempting to escape mutual vulnerability by undermining its adversaries' second-strike capabilities.[27] When coupled with the prospect of deploying a "Golden Dome" over the US homeland—reminiscent of the old fantasy of an impenetrable missile defense fortress—it suggests to competitors that Washington rejects the foundations of a balanced deterrence relationship and, in the worst case, may even

tolerate limited nuclear war out of confidence in the strength of its offensive and defensive capabilities.

Second, by threatening an adversary's nuclear assets, counterforce risks placing them in a use-it-or-lose-it dilemma—prompting early nuclear use in a crisis out of fear of a disarming strike.[28] It could also drive an adversary to adopt a launch-on-warning (LOW) posture, seeking to ensure retaliation before a US first strike could detonate. Such a posture could further compress decision-making time, heightening the risk of unintended nuclear use through technical malfunction or human misinterpretation. In 2024, the DoD warned that China may be seeking to adopt such a posture in the coming decade.[29] What counterforce proponents view as a tool of damage limitation could therefore, in practice, increase the likelihood of adversary nuclear use.

Finally, counterforce targeting can fuel nuclear arms racing.[30] Faced with the possibility of US counterforce strikes, adversaries may expand and diversify their nuclear arsenals to restore confidence in their second-strike capability and sustain deterrence. The underlying logic is straightforward: the more nuclear weapons an adversary possesses, the harder it becomes for the United States to neutralize them and escape the prospect of nuclear retaliation. As nuclear expert Austin Long has aptly observed, undermining first-strike stability through counterforce targeting risks undermining arms race stability as well.[31]

This assumption is confirmed by current dynamics, as Russian and Chinese perceptions of US counterforce threats have significantly influenced the development of their nuclear capabilities. In Russia's case, the perceived risk of US conventional and nuclear counterforce strikes has been a key driver behind the development of "exotic" systems such as the Avangard hypersonic glide vehicle (HGV) and the Poseidon intercontinental torpedo—which can both be regarded as attempts to hedge against first-strike vulnerability.[32]

As for China, "the U.S. pursuit of counterforce technology has been a longstanding driver of China's nuclear modernization … to acquire a retaliatory capability that would eliminate the U.S. ability to limit damage from a Chinese nuclear strike."[33] The military parade held on September 3, 2025—which marked the first time China displayed a full nuclear triad—was clearly intended to signal that Beijing is expanding and diversifying its nuclear options, enhancing the survivability of its arsenal, and strengthening its ability to hold the US homeland at risk.[34]

In turn, following the characteristically circular logic of arms racing, adversary nuclear buildups drive US nuclear expansion. This dynamic was exemplified by the October 2023 report by the Congressional Commission on the Strategic Posture of the United States, which recommended that, in order to strengthen both homeland and extended deterrence, "the U.S. strategic nuclear force posture should be modified to address the larger number of targets due to the growing Chinese nuclear threat"[35]—an obvious reflection of counterforce logic at work.

Consequently, if the United States were to pursue additional nuclear capabilities while sustaining its current counterforce targeting posture, it would exacerbate crisis instability and arms race instability, with direct negative implications for US allies and extended deterrence. Indeed, upsetting crisis stability could heighten the risk of nuclear use, while undermining arms race stability would leave US allies confronting rapidly arming neighbors and an expanding presence of adversary nuclear weapons in their vicinity.

Japan is particularly illustrative in this regard: it is the only US ally simultaneously facing three revisionist, nuclear-armed states with which it has historical and territorial disputes, which are modernizing and expanding their arsenals partly in response to US counterforce capabilities, and which are seeking to erode extended deterrence by decoupling the United States from its allies. This challenge has long been recognized by the Japanese government, which has sought continuous reassurance from the United States to maintain adequate levels of deterrent capability without provoking an arms race.[36] A verbal US commitment to expand its nuclear arsenal—particularly absent assurances of corresponding industrial capacity—would only add fuel to the fire. It would encourage US adversaries to adopt even more destabilizing and threatening behavior deepening Japan's sense of insecurity, particularly amid fears of a return of a transactional US approach to extended deterrence, linking security guarantees to trade discussions on tariffs.[37]

A verbal US commitment to expand its nuclear arsenal would deepen Japan's sense of insecurity

The original US response to the extended deterrence challenge epitomized by Japan's case was to develop and plan to deploy the SLCM-N, as noted above. However, the evolution of the program itself reflects the difficulty for the United States in developing and fielding new capabilities as it was initially proposed in 2018, slated for cancellation by the Biden administration in 2022, and reinstated by Congress, which required the executive to start up the program, in 2024.[38] Proposing additional nuclear capabilities to address a perceived gap—before the impact of the SLCM-N deployment can even be evaluated—appears to lack justification at this stage.

The Main Challenges to Extended Deterrence

By focusing almost exclusively on nuclear capabilities, advocates of US nuclear expansion seem to overlook the two main dimensions of the challenge faced by allies under US extended nuclear deterrence arrangements: attempts by adversaries at strategic alliance decoupling and intra-alliance threats.

Adversary Attempts at Strategic Alliance Decoupling

From an external perspective, US allies are confronted with adversary strategies designed to decouple them from the United States. While not the primary reason, it is undeniable that this logic is partly driven by the existence and development of specific capabilities aimed at deterring Washington from intervening in a regional conflict to defend its allies.

In China's case, the expansion of its ICBM force alongside a vast arsenal of dual-capable intermediate-range missiles signals that, in a Taiwan contingency —or in disputes with Japan over the East China Sea—China could engage in regional conventional action, while simultaneously holding the US homeland at risk and threatening to deny the United States access to the war theater by inflicting tremendous damage to its forces in the region.[39]

In the case of Russia, the depletion of its conventional forces by casualties in its invasion of Ukraine may drive greater reliance on nuclear weapons, particularly tactical nuclear weapons in the event of conventional failure or collapse, raising the possibility of limited nuclear use on the European continent.[40] Such use would not directly threaten the United States, potentially exacerbating divisions within NATO and increasing the risk of alliance decoupling.

Finally, in the case of North Korea, its decision in 2022 to adopt a doctrine threatening pre-emptive nuclear use,[41] while developing ICBM options to strike the continental United States, also raises potential alliance decoupling issues. For instance, in the case of conventional conflict on the Korean peninsula, North Korea could carry out or threaten to carry out a nuclear strike against South Korea while simultaneously threatening to strike the US homeland to deter US intervention, thereby significantly increasing the costs for the United States of upholding its extended deterrence commitment.[42]

While these developments in terms of capabilities are concerning for US allies, adversary decoupling strategies ultimately rest on a political assessment of what is at stake for the United States. By publicly framing their interests as existential, China and Russia seek to outbid the United States and propagate the notion that defending allies in these regions would not be worth the costs. This alleged asymmetry of stakes constitutes the core of their theories of victory: the belief that "the United States can be persuaded to cede some important regional interest rather than employ its full military potential because its stake is not sufficient to engage in sustained brinksmanship and competitive escalation. Victory need not involve the defeat of U.S. forces. Rather, it equates with breaking the will … of the United States to defend its allies."[43]

As a consequence, adversary alliance decoupling strategies aimed at undermining extended deterrence are driven largely by the absence of clear US political signaling that the stakes in these regions are of equal importance to Washington. Responding to a competition in risk-taking by announcing the development of additional nuclear capabilities—whose industrial feasibility remains highly uncertain—misses the point and overlooks the central challenge for US extended deterrence: the credible political signaling of US resolve and alliance cohesion.

Adversary alliance decoupling strategies are driven by the absence of clear US political signaling

Intra-Alliance Threats

This points to a greater challenge to US extended nuclear deterrence arrangements, which arises not from external adversaries, but from the United States itself. This crucial political factor is scarcely acknowledged by the proponents of a US nuclear buildup cited above, despite its central significance. The distinctive nature of contemporary US alliances lies precisely in their scope, which extends beyond the mere military dimension. Alongside the hardware—conventional and nuclear capabilities—the software is equally critical. It consists of established security guarantees and a shared sense of purpose embodied by what political scientist John Ikenberry called a "political community—a community of shared fate."[44] Both, however, have been unprecedentedly undermined by the Trump administration in recent months and years.

Deterrence rests not only on material capabilities but also on the political will to employ them, expressed through security assurances. In the case of alliances and extended deterrence, clarity is seminal to reassure allies and deter adversaries. In this regard, President Trump has repeatedly cast doubt on the US commitment to NATO's collective defense, at one point even claiming that "there are numerous definitions of Article 5."[45] Although the Trump administration has occasionally reaffirmed US support for NATO, the president's persistent public questioning of the alliance's relevance and of US solidarity in collective defense since 2016 is enough to potentially weaken the credibility of extended deterrence in the eyes of both allies and adversaries.

Such issues are not limited to Europe. For instance, in Japan's case, although the United States reaffirmed its commitment to extended deterrence in February 2025,[46] the Trump administration's response to the ongoing Sino-Japanese crisis has raised profound doubts about the reliability of US support in a situation of unprecedented tension with the alliance's primary adversary. After Prime Minister Sanae Takaichi stated that a Chinese naval blockade around Taiwan could

constitute a "survival-threatening situation"—potentially prompting the mobilization of the Japanese Self-Defense Forces in support of the United States should it act[47]—Beijing adopted a series of coercive measures against Japan. These actions did not elicit the expected support from Washington, as President Trump instead reportedly urged Prime Minister Takaichi to avoid provoking China.[48] This sequence generated strong incomprehension in Japan, particularly given earlier US requests for Indo-Pacific allies to clarify their position in the event of a Taiwan contingency.[49] President Trump's conciliatory stance toward China, further illustrated by frequent references to a potential "G2" system where the United States and China jointly manage global issues, has fueled concerns in Japan that it could lead to a weakening of the US commitment to the alliance and extended deterrence.[50]

Furthermore, an alliance's software is largely shaped by a shared understanding of the international order, grounded in common interests, values, and threat perceptions that enable coordinated, collective responses to adversarial behavior. Alliances "function as a narrative system of allegiance directed against those actors and actions regarded as threatening both the in-group and the type of international order its members advocate and support."[51] The second Trump administration has significantly undermined this narrative, as well as the collective sense of "oughtness" that is essential to alliance cohesion.

As exemplified by Vice President Vance's speech at the February 2025 Munich Security Conference, the current administration increasingly frames allies as potential threats in terms of values—the "threat from within" denounced by the Vice President[52]—while simultaneously downplaying the external threat posed by Russia to NATO (the speech delivered by Secretary of State Marco Rubio at the same conference in February 2026 made no reference to Russia either.)[53] Several recent events illustrate this shift: the invitation of Vladimir Putin to Alaska for bilateral discussions on Ukraine without the Europeans and the Ukrainians in August 2025;[54] the termination, in September 2025, of memoranda of understanding designed to foster collective responses to Russian disinformation efforts;[55] the withdrawal in October 2025 of an infantry brigade stationed in Romania, without replacement;[56] or the elaboration, in direct coordination with Russia, of a "28-point Ukraine-Russia peace plan" in November 2025 which, although not adopted, reflected a markedly concessive stance to Russia's maximalist demands.[57]

Together, these examples embody three fundamental dangers to alliance cohesion: unilateral political accommodation of the principal adversary by the United States; the downgrading of military support to allies; and the tacit acceptance—or even adoption[58]—of the adversary's narratives. Taken as a whole, these trends send an unambiguous signal that the United States is no longer aligned with

Europe in its assessment of the Russian threat, which decreases the credibility of its alliance commitment.

Finally, the United States has adopted a confrontational stance toward its own allies. Tariffs directed at allied economies in both Europe and the Indo-Pacific—while sparing Russia—have transformed weaponized interdependence from an ad hoc instrument to a systematic coercion policy,[59] amplified by military dependence on Washington. Although these measures have affected allies in both theaters, the Trump administration's broader confrontational posture has been particularly salient in Europe. This dynamic has been most visible in presidential statements expressing the desire to annex Greenland in the name of national security. It reached a peak in January 2026, when President Trump again refused to rule out the use of force to seize Greenland and threatened additional tariffs against allies supporting Denmark[60]—an unprecedented rhetorical challenge to allied sovereignty and territorial integrity emanating from *within* the alliance and its main security guarantor.

Strategic alliance decoupling and US actions undermining alliance cohesion are not primarily the result of adversary nuclear buildup, warranting reciprocal measures. Allied fears of abandonment are now compounded by fears of betrayal, which constitute the most significant non-nuclear challenges faced by US allies. Consequently, these issues cannot be addressed merely through the development of additional nuclear weapons, as the underlying problem is primarily political rather than technical.

Political and Conventional Alternatives

To respond to these two challenges and strengthen extended deterrence arrangements and alliances in Europe and the Indo-Pacific, the primary responses should be political and conventional, rather than relying on a potential US nuclear buildup.

> The primary responses should be political and conventional, not nuclear

Reaffirming US Alliance Commitments

As explained above, China and Russia are wagering that an asymmetry of stakes produces an asymmetry of resolve, and that the perceived US reluctance to commit to regions viewed by the current administration as secondary to its security can be exploited to advance their revisionist agenda and weaken alliance as well as extended deterrence arrangements. Yet, as political scientist Robert Litwak argues, "For Washington, the stakes of this great power competition are vital, not peripheral. Ukraine and the outcome of the war are central to the

future of European security architecture. Taiwan holds a normative interest—that the territorial status quo should not be changed by force. Moreover, the credibility of the US extended deterrence commitment to Asian allies would be undermined."[61] Although the United States continues to participate in military drills with allies strengthening interoperability and logistics, which are key dimensions of alliance credibility, its overall commitment in both regions remains obscured by persistent uncertainty about its strategic priorities, reinforcing the view that its interests in both regions are peripheral.

This ambiguity is further heightened by the growing emphasis on homeland security and the Western Hemisphere, raising the possibility of reduced commitment to other theaters. The proposed development of the "Golden Dome," advanced without allied consultations and raising concerns about its implications for the balance between extended nuclear deterrence and homeland missile defense, reinforces this perception. So too does the January 2026 *National Defense Strategy*, which places "homeland and hemisphere" at the top of its priorities.[62] Such developments carry important implications for US alliances and extended deterrence, as they seem to indicate a reorientation toward homeland deterrence at the potential expense of commitments abroad, effectively suggesting that the stakes associated with US alliances are regarded as secondary to US security.

These dynamics worsen a twofold fear of abandonment among US allies: first, that Washington may prioritize one regional theater over another, fostering a competitive relationship among allies in Europe and in the Indo-Pacific;[63] and second, that it may prioritize the defense of the homeland over alliance solidarity. In the event of open conflict, it could even be argued that failure by the United States to uphold its commitments in one region would generate ripple effects that undermine credibility in others, signaling to allies worldwide that US guarantees have become unreliable.

As political scientist Robert Jervis observed, during the Cold War, what was often at stake in confrontations between nuclear superpowers was "each side's image," and "whether the United States and the Soviet Union [were] seen as having lived up to their commitments in these disputes may [have been] crucial."[64] This insight remains highly relevant in today's context of nuclear multipolarity—perhaps even more so—as China and Russia deliberately frame their stakes as exceeding those of the United States and its allies.

In light of these challenges, political reassurances are crucial. Measures such as reaffirming defense commitments through high-level diplomatic engagements and formal security guarantees can help reassure allies of Washington's dedication to collective defense. These efforts must be complemented by the umbrella states themselves, which must strengthen their own defenses and

adopt a more proactive role in sustaining the credibility of extended deterrence.

Shoring Up Conventional Deterrence: The Role of US Allies

Finally, rather than expanding its nuclear arsenal, the United States should promote and support allied development of conventional capabilities to close deterrence gaps, especially in relation to China and Russia. In Europe, significant emphasis has been placed on conventional deep-precision strike capabilities since Russia's 2022 full-scale invasion of Ukraine.[65] This is exemplified by the launch of the European Long-Range Strike Approach (ELSA) in July 2024, which aims to develop conventional ground-launched missiles with ranges exceeding 300 kilometers to address a capability gap in which Russia currently holds an advantage.[66] Additional cooperative initiatives in missile development and acquisition have followed, including the decision by France and the United Kingdom to jointly acquire new SCALP/Storm Shadow cruise missiles,[67] as well as the announcement by Germany and the United Kingdom of plans to develop a "new long-range strike capability with a range of over 2,000 km."[68] This trend extends beyond Europe: following the release of three strategic documents in December 2022, Japan announced plans to acquire so-called "counterstrike capabilities," including Tomahawk and upgraded Type 12 cruise missiles, in order to address the "asymmetry in theater strike capabilities" with China and North Korea.[69]

Although still in their early stages, these developments by nuclear umbrella states are central to strengthening extended deterrence arrangements. They enhance flexibility and escalation management options below the threshold of limited nuclear use, helping to avoid the dilemma between inaction driven by fear of nuclear reprisal and escalation to nuclear use caused by persistent conventional gaps. They also promote inter-theater cooperation—as illustrated by growing Polish-South Korean defense collaboration[70]—which ultimately helps strengthen exchanges on threat perceptions and industrial expertise amid increasingly entangled regional theaters. Pending the development and deployment of these capabilities, the United States should sustain current and planned deployments of comparable systems on allied territories, as it has done in the Philippines with Typhon launchers[71]—which can fire Tomahawk cruise missiles—and as it plans to do in Germany by 2026.[72]

However, to avoid upsetting crisis and arms race stability, the United States and its allies deploying conventional deep-precision capabilities should adopt a clear declaratory policy rejecting conventional counterforce targeting of adversaries' nuclear assets. Since the 1991 Gulf War and the subsequent Conventional

Prompt Global Strike (CPGS) program, Russia and China have perceived that advanced, long-range US conventional capabilities could enable a disarming first strike, thereby providing a rationale for their nuclear buildup.[73] As nuclear expert James Acton has argued, targeting adversaries' conventional military forces and war-supporting industrial assets, rather than nuclear forces and command infrastructure, would degrade an adversary's capacity to wage conventional war and reduce the risk of nuclear escalation—without prompting further US nuclear buildups and exacerbating a nuclear arms race.[74]

The US and its allies should reject conventional counterforce targeting of adversaries' nuclear assets

More is Not Better for Extended Nuclear Deterrence

The current debate over the necessity of a US nuclear buildup underscores the unprecedented challenge posed by the emergence of a "two-peer" nuclear competition, compounded by North Korea's growing arsenal, for both homeland and extended deterrence. Yet, this article has shown that structural industrial constraints severely limit the feasibility of such an expansion in the short to medium term, while a continued emphasis on counterforce targeting risks undermining crisis and arms race stability should the United States choose to expand its nuclear arsenal.

Moreover, an excessive focus on nuclear capabilities—particularly when systems such as the SLCM-N are not yet deployed and their consequences and lessons for deterrence cannot yet be assessed—obscures the more urgent political challenges created by recent US policy choices. By alienating allies and implying that alliance commitments are secondary to its security, Washington risks eroding the credibility of extended deterrence itself. This challenge cannot be met simply by producing more nuclear weapons. Instead, it requires greater political reassurance and clearer signaling to allies, alongside incentives and support for their efforts to strengthen conventional capabilities in order to mitigate perceived deterrence gaps vis-à-vis China and Russia.

Beyond Washington's future posture and policy decisions, it is essential that US allies understand that the restoration of US political credibility must go hand in hand with allied investment in conventional forces. Extended deterrence cannot rest solely on the nuclear guarantee: its long-term viability depends on the political and conventional revitalization of alliance frameworks, which must now be treated as the foremost priority in the United States, Europe, and the Indo-Pacific.

Notes

1. Robert Peters, "The New American Nuclear Consensus – and Those Outside It," The Heritage Foundation, March 19, 2024, https://www.heritage.org/defense/report/the-new-american-nuclear-consensus-and-those-outside-it.
2. David Santoro, "The Importance of Strategic Triangles," in David Santoro ed., *US-China Nuclear Relations: The Impact of Strategic Triangles* (Boulder, CO: Lynne Rienner Publishers, 2021): 17.
3. US Department of Defense, "Military and Security Developments Involving the People's Republic of China 2024 – Annual Report to Congress," December 2024, 101, https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF.
4. Vipin Narang and Pranay Vaddi, "How to Survive the New Nuclear Age: National Security in a World of Proliferating Risks and Eroding Constraints," *Foreign Affairs*, June 24, 2024, https://www.foreignaffairs.com/united-states/how-survive-new-nuclear-age-narang-vaddi.
5. US Department of Defense, "Report on the Nuclear Employment Strategy of the United States," November 7, 2024, https://media.defense.gov/2024/Nov/15/2003584623/-1/-1/1/REPORT-ON-THE-NUCLEAR-EMPLOYMENT-STRATEGY-OF-THE-UNITED-STATES.PDF.
6. Paul Amato, "Many Nuclear Experts Agree that the US Needs New Capabilities. Now They Need to Convince the Pentagon," Atlantic Council, June 11, 2025, https://www.atlanticcouncil.org/blogs/new-atlanticist/many-nuclear-experts-agree-that-the-us-needs-new-capabilities-now-they-need-to-convince-the-pentagon/.
7. See, for example, Robert Peters, "A Nuclear Posture Review for the Next Administration: Building the Nuclear Arsenal of the 21st Century," The Heritage Foundation, July 30, 2024, https://www.heritage.org/sites/default/files/2024-07/SR287.pdf.
8. See, for example, John Harvey and Rob Soofer, "Strengthening Deterrence with SLCM-N," Atlantic Council, November 2022, https://www.atlanticcouncil.org/wp-content/uploads/2022/11/Strengthening-Deterrence-with-SLCM-N.pdf.
9. Tom Cotton, "If You Want Peace, Don't Lose the Nuclear Arms Race," *Wall Street Journal*, February 15, 2026, https://www.wsj.com/opinion/if-you-want-peace-dont-lose-the-nuclear-arms-race-5ed6e36f.
10. Joseph Trevithick and Howard Altman, "USAF Ready to Make All B-52s Nuclear-Capable, Load ICBMs With Multiple Warheads If Directed," TWZ, February 11, 2026, https://www.twz.com/air/usaf-ready-to-make-all-b-52s-nuclear-capable-load-icbms-with-multiple-warheads-if-directed.
11. Nick Schifrin and Dan Sagalyn, "Experts Debate Whether U.S. Should Extend Its Nuclear Arms Treaty With Russia," PBS, February 4, 2026, https://www.pbs.org/newshour/show/experts-debate-whether-u-s-should-extend-its-nuclear-arms-treaty-with-russia.
12. Amato, "Many Nuclear Experts Agree that the US Needs New Capabilities."
13. Zeke Miller and Michelle Price, "Trump Wants Denuclearization Talks with Russia and China, Hopes for Defense Spending Cuts," Associated Press, February 14, 2025, https://apnews.com/article/trump-china-russia-nuclear-bbc1c75920297f1e5ba5556d084da4de.

14. "Russia Says It's Open to Broad Nuclear Talks With Trump," Radio Free Europe/Radio Liberty, March 7, 2025, https://www.rferl.org/a/putin-trump-china-nuclear-talks-arms-control-weapons/33339859.html.
15. Audrey Decker, "Air Force has Halted Work on Parts of its ICBM Program," *Defense One*, February 10, 2025, https://www.defenseone.com/defense-systems/2025/02/air-force-halted-work-parts-new-icbm-program/402897/.
16. Stephen Losey, "Sentinel Nuclear Missiles Will Need New Silos, Air Force Says," *Defense News*, May 7, 2025, https://www.defensenews.com/air/2025/05/06/sentinel-nuclear-missiles-will-need-new-silos-air-force-says.
17. Xiaodon Liang, "Trump Administration Increases Nuclear Weapons Budget," Arms Control Association, July/August 2025, https://www.armscontrol.org/act/2025-07/news/trump-administration-increases-nuclear-weapons-budget.
18. US Government Accountability Office, "Columbia Class Submarine: Overcoming Persistent Challenges Requires Yet Undemonstrated Performance and Better-Informed Supplier Investments," September 30, 2024, https://www.gao.gov/products/gao-24-107732.
19. Jérôme Brahy, "US Navy Selects Five Companies to Develop First Prototype of future SLCM-N Sea-Launched Nuclear Cruise Missile," Army Recognition, September 9, 2025, https://armyrecognition.com/news/navy-news/2025/us-navy-selects-five-companies-to-develop-first-prototype-of-future-slcm-n-sea-launched-nuclear-cruise-missile.
20. Dylan Spaulding, "Plutonium Pit Production: The Risks and Costs of US Plans to Build New Nuclear Weapons," Union of Concerned Scientists, May 2025, 1, https://www.ucs.org/sites/default/files/2025-06/Plutonium-Pit-Report-060225-FINAL.pdf.
21. US Department of Energy, "NNSA Completes and Diamond-Stamps First Plutonium Pit for W87-1 Warhead," October 2, 2024, https://www.energy.gov/nnsa/articles/nnsa-completes-and-diamond-stamps-first-plutonium-pit-w87-1-warhead.
22. Colin Demarest, "Energy Department Orders 'Special' Investigation of Plutonium Pit Problems," Axios, August 27, 2025, https://www.axios.com/2025/08/27/pit-production-nnsa-study-nukes.
23. US Government Accountability Office, "Modernizing the Nuclear Security Enterprise: Opportunities Exist to Better Prepare for Delay in New Uranium Processing Facility," September 2025, 2, https://www.gao.gov/assets/gao-25-107330.pdf.
24. Heather Williams and Lachlan MacKenzie, "Why Does the United States Need a More Flexible Nuclear Force?" Center for Strategic and International Studies, April 3, 2025, https://www.csis.org/analysis/why-does-united-states-need-more-flexible-nuclear-force?utm_source=chatgpt.com.
25. House Armed Services Committee, "America's Strategic Posture: The Final Report of the Congressional Commission on the Strategic Posture of the United States," October 2023, 37, https://www.armed-services.senate.gov/imo/media/doc/americas_strategic_posture_the_final_report_of_the_congressional_commission_on_the_strategic_posture_of_the_united_states.pdf.
26. Franklin Miller, "Counterforce and Countervalue in U.S. Nuclear Targeting: A Historical Review," in Brad Roberts ed., *Counterforce in Contemporary U.S. Nuclear Strategy* (Livermore, CA: Lawrence Livermore National Laboratory, 2025): 36, https://cgsr.llnl.gov/sites/cgsr/files/2025-05/2025-0529-CGSR-Occasional-Paper-Counterforce-In-Contemporary-US-Nuclear-Strategy.pdf.
27. George Perkovich, Fumihiko Yoshida, and Michiru Nishida, *Rethinking a Political Approach to Nuclear Abolition* (Washington, DC: Carnegie Endowment for International

Peace, 2025): 101–102, https://carnegie-production-assets.s3.amazonaws.com/static/files/Perkovich-Rethinking%20Nuclear%20Abolition-Final.pdf.
28. Ankit Panda, *The New Nuclear Age. At the Precipice of Armageddon* (Cambridge: Polity Press, 2025): 61.
29. US Department of Defense, "Military and Security Developments Involving the People's Republic of China – 2024," December 18, 2024, 110, https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF.
30. Charles Glaser, James Acton, and Steve Fetter, "The U.S. Arsenal Can Deter Both China and Russia. Why America Doesn't Need More Missiles," *Foreign Affairs*, October 5, 2023, https://www.foreignaffairs.com/united-states/us-nuclear-arsenal-can-deter-both-china-and-russia.
31. Austin Long, "Damage Limitation in the 21st Century," in Brad Roberts ed., *Counterforce in Contemporary U.S. Nuclear Strategy* (Livermore, CA: Lawrence Livermore National Laboratory, 2025): 85, https://cgsr.llnl.gov/sites/cgsr/files/2025-05/2025-0529-CGSR-Occasional-Paper-Counterforce-In-Contemporary-US-Nuclear-Strategy.pdf.
32. Sidharth Kaushal and Darya Dolzikova, "The Evolution of Russian Nuclear Doctrine," Royal United Services Institute, August 12, 2025, 21, https://static.rusi.org/the-evolution-of-russian-nuclear-doctrine_1.pdf.
33. Fiona Cunningham, "China's Test of the Nuclear Revolution: Technology, Great Power Competition and the Nuclear Balance," *Journal of Strategic Studies* 48, no. 2 (2025): 510–557.
34. Joseph Rodgers and Heather Williams, "Parading China's Nuclear Arsenal Out of the Shadows," Center for Strategic and International Studies, September 4, 2025, https://www.csis.org/analysis/parading-chinas-nuclear-arsenal-out-shadows.
35. House Armed Services Committee, "America's Strategic Posture: The Final Report of the Congressional Commission on the Strategic Posture of the United States," October 2023, viii, https://www.armed-services.senate.gov/imo/media/doc/americas_strategic_posture_the_final_report_of_the_congressional_commission_on_the_strategic_posture_of_the_united_states.pdf.
36. See, for example, Yukio Satoh, "U.S. Extended Deterrence and Japan's Security," Livermore Paper No. 2, Lawrence Livermore National Laboratory, 2017, https://cgsr.llnl.gov/sites/cgsr/files/2024-08/satoh-report-final_0.pdf.
37. Céline Pajon, "Japan Under Trump: Alliance Strains, the Push for Autonomy and Essential Partnerships," Center for Security, Diplomacy and Strategy, September 19, 2025, https://csds.vub.be/publication/japan-under-trump-alliance-strains-the-push-for-autonomy-and-essential-partnerships/.
38. Anya Fink, "Nuclear-Armed Sea-Launched Cruise Missile (SLCM-N)," Congressional Research Service, January 8, 2026, https://www.congress.gov/crs-product/IF12084.
39. Oriana Skylar Mastro, "Nuclear Deterrence and the US-China Strategic Relationship," in Stephan Frühling and Andrew O'Neil eds., *Alliances, Nuclear Weapons and Escalation: Managing Deterrence in the 21st Century* (Acton: Australian National University Press, 2021): 25–39, 31.
40. Sidharth Kaushal and Darya Dolzikova, "The Evolution of Russian Nuclear Doctrine," Occasional Paper, Royal United Services Institute, 2025, 34, https://static.rusi.org/the-evolution-of-russian-nuclear-doctrine.pdf.
41. Takeshi Watanabe, "North Korea's Doctrine of Nuclear Preemption: War Starting with Nuclear Weapons Rather Than Escalation to a Nuclear War," NIDS Commentary No.

345, National Institute for Defense Studies, August 6, 2024, 2, https://www.nids.mod.go.jp/english/publication/commentary/pdf/commentary345e.pdf.
42. Jon Wolfsthal and Toby Dalton, "Addressing the Growing Risks of Nuclear Use in East Asia," *Journal for Peace and Nuclear Disarmament* 8, no. 1 (2025): 1–14, 6.
43. Brad Roberts, "On Theories of Victory, Red and Blue," Livermore Paper No. 7, Lawrence Livermore National Laboratory, 2020, 45, https://cgsr.llnl.gov/sites/cgsr/files/2024-08/CGSR-LivermorePaper7.pdf.
44. John Ikenberry, "The End of Liberal International Order?" *International Affairs* 94, no. 1 (2018): 7–23, 17.
45. Chris Lunday, Jake Traylor, and Laura Kayali, "Trump Casts Doubt on Article 5 Commitment En Route to NATO Summit," POLITICO, June 24, 2025, https://www.politico.eu/article/donald-trump-nato-summit-sidesteps-article-5-mark-rutte-eu-defense-budget-russia-vladimir-putin-iran-israel-strikes-qatar/.
46. Ministry of Foreign Affairs of Japan, "Japan-U.S. Summit Meeting," February 7, 2025, https://www.mofa.go.jp/na/na1/us/pageite_000001_00800.html.
47. Gabriele Ninivaggi, "Takaichi's Taiwan Tumult: A Closer Look at the Japanese Leader's Contentious Remarks," *The Japan Times*, December 3, 2025, https://www.japantimes.co.jp/news/2025/12/03/japan/explainer/explainer-japan-existential-crisis/.
48. "Trump Urged Takaichi Not to Rise to China's Provocation," *The Asahi Shimbun*, November 28, 2025, https://www.asahi.com/ajw/articles/16187782.
49. Demetri Sevastopulo, "US Demands to Know What Allies Would Do in Event of War Over Taiwan," *Financial Times*, July 12, 2025, https://www.ft.com/content/41e272e4-5b25-47ee-807c-2b57c1316fe4.
50. Akio Takahata, "Beware of the 'G2' Trap: Understanding China's Diplomacy and Its Pressure on Japan," Nippon.com, December 19, 2025, https://www.nippon.com/en/in-depth/d01190/.
51. Alexandra Homolar and Oliver Turner, "Narrative Alliances: The Discursive Foundations of International Order," *International Affairs* 100, no. 1 (2024): 203–220, 215.
52. "Munich Security Conference 2025: Speech by JD Vance and Selected Reactions," in Benedikt Franke ed., *Selected Speeches Held at the Munich Security Conference Volume 2* (Hamburg: Mittler, 2025): 15, https://securityconference.org/assets/02_Dokumente/01_Publikationen/2025/Selected_Key_Speeches_Vol._II/MSC_Speeches_2025_Vol2_Ansicht_gek%C3%BCrzt.pdf.
53. US Department of State, "Secretary of State Marco Rubio at the Munich Security Conference: Remarks," February 14, 2026, https://www.state.gov/releases/office-of-the-spokesperson/2026/02/secretary-of-state-marco-rubio-at-the-munich-security-conference.
54. "US to Cut Some Security Funds for Countries Bordering Russia, Sources Say," Reuters, September 5, 2025, https://www.reuters.com/world/us-cut-some-security-funds-countries-bordering-russia-sources-say-2025-09-04/.
55. Amy Mackinnon, "US Ends International Push to Combat Fake News from Hostile States," *Financial Times*, September 9, 2025, https://www.ft.com/content/d31b56e3-aca9-4ee7-af5a-abec74830455.
56. Andrew Roth, "US Military to Reduce Number of Troops in Romania as Start of European Drawdonwn," *The Guardian*, October 29, 2025, https://www.theguardian.com/us-news/2025/oct/29/military-troops-romania.

57. Christopher Miller, Anastasia Stognei, and Amy Mackinnon, "US and Russian Officials Draft New Peace Plan for Ukraine," *Financial Times*, November 20, 2025, https://www.ft.com/content/23536bf6-c550-4896-931f-a33a1c2ad91a.
58. Paul Sonne, "Trump Elevates Kremlin Talking Points, a Familiar Pattern From His First Term," *New York Times*, February 20, 2025, https://www.nytimes.com/2025/02/20/world/trump-putin-russia-ukraine.html.
59. Henry Farrell and Abraham Newman, "The Weaponized World Economy: Surviving the New Age of Economic Coercion," *Foreign Affairs*, August 19, 2025, https://www.foreignaffairs.com/united-states/weaponized-world-economy-farrell-newman.
60. Richard Milne, Henry Foy, Barbara Moens, and George Parker, "Danish Troops Land in Greenland as Tensions Rise," *Financial Times*, January 20, 2026, https://www.ft.com/content/1ef936c1-43c5-4166-96f3-8876346ccaaa.
61. Robert Litwak, *Tripolar Instability. Nuclear Competition Among the United States, Russia, and China* (Washington, DC: Wilson Center, 2023): 82, https://5g.wilsoncenter.org/sites/default/files/media/uploads/documents/TripolarInstability_Nov2023.pdf.
62. US Department of Defense, *2026 National Defense Strategy*, (Washington, DC: DoD, January 2026): 8–9, https://media.defense.gov/2026/Jan/23/2003864773/-1/-1/0/2026-NATIONAL-DEFENSE-STRATEGY.PDF.
63. Tongfi Kim and Luis Simón, "A Reputation versus Prioritization Trade-Off: Unpacking Allied Perceptions of US Extended Deterrence in Distant Regions," *Security Studies* 30, no. 5 (2021): 727–760.
64. Robert Jervis, *The Meaning of the Nuclear Revolution. Statecraft and the Prospect of Armageddon* (Ithaca: Cornell University Press, 1990): 39.
65. Héloïse Fayet and Léo Péria-Peigné, "Deep Precision Strikes: A New Tool for Strategic Competition?" IFRI Strategic Focus No. 121, French Institute of International Relations, 2024, https://www.ifri.org/en/studies/deep-precision-strikes-new-tool-strategic-competition.
66. Timothy Wright, "Europe's Missile Renaissance," International Institute for Strategic Studies, November 25, 2024, https://www.iiss.org/online-analysis/online-analysis/2024/11/europes-missile-renaissance/.
67. UK Prime Minister's Office, "Lancaster House 2.0: Declaration on Modernising UK-French Defence and Security Cooperation," July 10, 2025, https://www.gov.uk/government/news/lancaster-house-20-declaration-on-modernising-uk-french-defence-and-security-cooperation.
68. UK Ministry of Defence, "New 2,000 km 'Deep Precision Strike' Weapon to be Developed by UK and Germany as Trinity House Agreement Delivers First Major Milestones," May 15, 2025, https://www.gov.uk/government/news/new-2000-km-deep-precision-strike-weapon-to-be-developed-by-uk-and-germany-as-trinity-house-agreement-delivers-first-major-milestones.
69. Masashi Murano, "Building Japan's Counterstrike Capability: Technical, Temporal, and Political Challenges," Hudson Institute, March 25, 2024, https://www.hudson.org/international-organizations/building-japans-counterstrike-capability-technical-temporal-political-masashi-murano.
70. Stuart Dee and Kiran Suman-Chauhan, "Missiles, Markets, and Mutual Interests: Poland and South Korea's Evolving Defence-Industrial Cooperation," RAND, September 4, 2025.

71. Gerry Doyle and Karen Lema, "US Deploys Typhon Missile Launchers to New Location in Philippines," Reuters, January 23, 2025, https://www.reuters.com/world/asia-pacific/us-deploys-typhon-missile-launchers-new-location-philippines-2025-01-23/.
72. Xiaodon Liang, "U.S. to Deploy Intermediate-Range Missiles in Germany," Arms Control Association, September 2024, https://www.armscontrol.org/act/2024-09/news/us-deploy-intermediate-range-missiles-germany.
73. On Russia, see Kristin Ven Bruusgaard, "Russian Nuclear Strategy and Conventional Inferiority," *Journal of Strategic Studies* 44, no. 1 (2021): 3–35. For China, see Tong Zhao, "Conventional Counterforce Strike: An Option for Damage Limitation in Conflicts with Nuclear-Armed Adversaries?" *Science & Global Security* 19 (2011): 195–222.
74. James Acton, "Optimal Deterrence," Council on Foreign Relations, June 2025, https://www.cfr.org/report/optimal-deterrence#chapter-title-0-1.