

INTERNATIONAL SEA POWER CONFERENCE 2025

WARFIGHTING READY

8TH DECEMBER | BT HEADQUARTERS
CONFERENCE PROCEEDINGS



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Keynote speeches



MINISTER LUKE POLLARD MP

Minister of State for Defence Readiness and Industry

Welcome to the International Sea Power Conference. Thank you, Viktorija, for everything that you do. If you've heard me speak before, I'm a big fan of the Council on Geostrategy. I like the way they shake up being a defence think tank, and that is very appropriate for what the Royal Navy is seeking to do with the military strategy here. And thank you to Jon and BT for hosting us.

The importance of defence communications is quite apparent in the media and in all the intelligence reports, by looking around the room, that most of you read on a daily basis. And so, thank you for that. And you will have heard in the media this morning elements of what the First Sea Lord is going to say. So please do act surprised at the appropriate moment. If you've been listening to the *Today Programme* this morning you can see it.

But this is undoubtedly a really critical time for our national security, for the defence of the United Kingdom (UK), and it is really important that we use this moment to refresh and to transform our defences so they can deter and, if necessary, defeat any aggressor. And the Royal Navy is proud to be underpinning our security and our economy.

Now, I know the move from the traditional domains of Lancaster House and its Victorian backdrop to one that is modern was not accidental. It was deliberate, to transform and change the mindset about how we talked about the Royal Navy – not just as the modern Navy for many of our allies around the world, the heritage, the tradition, but also a focus now on the cutting-edge transformation that the Royal Navy is leading amongst our North Atlantic Treaty Organisation (NATO) allies. And it's also a reminder that our £2.8 trillion economy, anchored here in the City, which relies on instant communications, free flowing data, just-in-time supply chains, is overwhelmingly dependent on our maritime security, reminding us all that our Royal Navy is still on the very frontline of our national security, our economic security, and especially keeping us safe more than 475 years after it was formed, guarding the critical gateway to the Euro-Atlantic.

Now, some of you have heard me say before I'm very proud to be a Navy brat, very proud to be the son of a Royal Navy submariner, very proud to be a Member of Parliament (MP) for a naval city in Plymouth. Because of those reasons, it is even more important that as a Minister, I lend my support to the necessary transformation that the Royal Navy needs and is leading. Now, earlier this year, I had the honour of addressing the latest cohort of Royal Navy officers passing out from Dartmouth. It's the same parade ground that my old man passed out on 51 years ago, and unfortunately, you can still see a photo of the passing out parade and the things, I was looking for him, couldn't see

him, fortunately could see me, so the DNA was strong I'm afraid – apologies on that one there.

But there was a sense of pride for everyone who was watching their family pass out on that day, a sense of pride in the service, a sense of anticipation for what might come, but also trepidation as to what world are their pride and joy are passing out into. What is the security environment? And I want to use this moment to partly say thank you to those people who serve. It was a privilege to join the ship's company of HMS Richmond on her return to Devonport last week, having completed the Carrier Strike Group deployment with our carrier HMS Prince of Wales. It was a hugely successful deployment that underlined the importance of the Royal Navy's ability to deploy beyond the horizon, but also our interoperability with our allies and, increasingly, our move from interoperability to interchangeability with our allies; a significant step.

Now, over recent months, we've seen the Royal Navy strengthen our alliances in the Indo-Pacific, delivering aid to hurricane-struck communities in the Caribbean and protecting our critical underwater infrastructure at home; three very different, but crucially important, examples of how the Royal Navy saves lives and protects our way of life.

Now, over the last five decades since the old man passed out, the support for defence from British governments has oscillated. After the Cold War, successive governments rushed to embrace the perceived 'peace dividend', and who could blame them at the time? But as the threat from Russia over the last two decades has risen – and has grown in plain sight – it is fair to say that governments have moved too slowly. Through Litvinenko and the Salisbury poisonings to Georgia, Crimea and the full-scale invasion of our friends in Ukraine today, with the war in Europe fast approaching its fourth anniversary with 'grey zone' attacks on our mainland and increased Russian probing of our coastal waters, those cuts to defence have been exposed as short-sighted. And in the 18 months that we've been in government, it's been our mission to reverse that trend and to rebuild our armed forces and our industrial base here for a new era of threat and hard power. And to deliver that mission, I'm glad that the Chancellor has given us an extra £5 billion in our budget this year. We're committed to 2.5% of defence spending by 2027, and our ambition to hit 3% in the next Parliament, and 3.5% on defence by 2030 alongside our NATO allies.

Now, we published our Strategic Defence Review (SDR) in June, and normally when I'm making a speech, I'm making an impassioned plea that it's a good document to read. But if you're here, you've probably read it already, so you don't need to do that. But it is genuinely a good government document, well worth a read. But it is a document that does not pull its punches. It sets out a new era of threat that we are facing, not just as the UK, but as an alliance. But, it also sets out very clearly our intent and our requirement to be a 'NATO-first' country, to have a NATO-first defence policy, with stronger alliances and greater deterrence, and plots the transition to warfighting readiness that our more dangerous age demands. And in September, we published our Defence Industrial Strategy to drive innovation, strengthen our defence industrial base and make defence an engine for growth that benefits communities across every nation and region of the UK.

Now, they are strategies that have materially strengthened NATO, because they strengthen the UK's contribution to NATO, and, as we saw in Naples last month, when our Carrier Strike Group reached full operating capability under NATO command, in the ultimate demonstration of interoperability and allied deterrence, they are strategies that remould the relationship between the government and our defence-industrial sector. We need to overhaul our procurement, cutting contracting times, speeding up the ability to spiral develop, increasing support for Small and Medium Enterprises (SMEs) and exporters, and turbocharging innovation; charting a new course towards a hybrid Royal Navy and a thriving maritime industrial sector, backed by £6.9 billion invested in our surface and submarine fleets, and billions more in our Continuous At-Sea Nuclear Deterrent (CASD); feeding an 'always-on' shipbuilding pipeline that directly employs 36,000 UK

skilled workers, alongside increased investments in maritime innovation, autonomy and a hybrid airway; strengthening our world-leading commando force; enhancing deterrence; and enhancing our ability to fight and win – and win alongside our allies. And today, rather than reheat those plans in great detail or stealing first sandwiches for his speech that follows, I want to demonstrate how the investments we've made and the stronger demand signals we've given are already building a more capable Navy and really reinvigorating many of our coastal communities.

Now, when the Defence Secretary unveiled new partnerships with 20 companies this morning, he selected a group of people to help with the innovative technologies for the groundbreaking 'Atlantic Bastion' programme. That will be spoken about more in a moment. But Atlantic Bastion is an important step towards a hybrid Royal Navy, where an Artificial Intelligence (AI)-powered shield of sensors, autonomous vessels, and traditional naval and air assets come together as a hybrid Navy, protecting the North Atlantic from surface and subsurface threats; a layered network of tripwires and firepower, of human expertise and machine intelligence, defending the undersea lifelines of our economy. And that's why today, we've unveiled 20 phase one contracts with 20 companies from Primes to SMEs to tech firms, worth a total of £4 million. That will lead to a £35 million investment in the most promising innovations within 12 months to make Atlantic Bastion the new high-tech hard power guardian of our seas. In its entirety, the programme is expected to secure between 3,000 and 6,000 jobs in the UK, and it will position the UK at the forefront of a tech revolution as we transition to hybrid naval power in a sector worth £350 billion globally.

Now, I'm proud to be a jammer, and for our international visitors that have not spent time in Plymouth, that is someone proud to be from the city of Plymouth. But we're already seeing how those policies can have an impact on communities like mine; those naval cities that, for many years, have been the engine powering our Royal Navy and keeping it at sea.

The difference is in the jobs that are being created. The government used our new Defence Industrial Strategy to build on our city status as a centre of excellence for marine autonomy by designating it one of the five defence growth zones. These growth zones – also in South Yorkshire, Wales, Scotland and Northern Ireland – galvanised a joined-up approach to economic regeneration across government, across the private sector and across each area. Each growth zone has access to our £250 million funding pots to invest in skills, innovation and infrastructure, creating a magnet for further private investment.

Government investment should crowd in private sector investment in these locations, and that's what we're already seeing. And early this month, the Defence Secretary visited Helsing's new autonomous marine drone factory in Plymouth to see that virtual circle being delivered for the Southwest and our Navy. Helsing is one of the successful Atlantic Bastion applicants and their factory is part of their £350 million investment that's come out of this government's growing defence partnership with Germany. It's also the latest addition to the booming defence ecosystem, bringing initial 50 jobs to the region, with many more to follow. And we can see the impact in our investments and clearer demand signals across the UK coastline.

Last week I was on the other side of the county of Devon – and for those people that have ever tried travelling from Plymouth to North Devon, you know that is quite a journey – to see the steel-cutting on our brand new solid support ship, RFA Resurgence: the first new ship for the Royal Fleet Auxiliary (RFA) being built in the British yard for many, many years. That contract supports two new skills pipelines with local colleges, 170 apprenticeships and growing 300 jobs in the Appledore Shipyard, 800 more to supply chain, and 900 jobs in Harland and Wolff's Belfast shipyard, where the ships will be put together.

That's the first time a government-ordered ship will be built under the city's iconic yellow crane

for 22 years, a substantial milestone for that community in Northern Ireland. And as you cross back over the Irish Sea to Cumbria, you'll see how the £200 million we're investing through the Barrow Transformation Fund is shoring up the industrial foundations of our Astute and Dreadnought submarine programmes, and our support for CASD.

Head north from Barrow to the Clyde and you'll see more upgraded facilities, more opportunities for people to have good, well-paid jobs as we build the Type 26 frigates, not just for the Royal Navy but for our friends in Norway as well, coming together that £10 billion deal being not just interoperable but interchangeable; the UK at the heart of our NATO alliance. Now, that is the biggest UK export warship deal, which secures a further 2,000 jobs across the UK supply chain and strengthens interoperability with a key ally in the North Atlantic.

And it's not just our coastal communities that are benefiting from our transition to be a hybrid Navy. Last month, I visited the MBDA factory in Stevenage, following our negotiation and securing a £316 million contract to deliver the DragonFire Directed Energy Weapon to the Royal Navy, with the first installation on a Royal Navy Type 45 destroyer by 2027, equipping our destroyers with an innovative new directed energy laser proving capable of destroying high speed drones – and just for £10 per shot, changing the economic dynamics about how we protect our assets. That contract supports more than 550 skilled jobs in Edinburgh and Cambridge, Bolton and Bedford, Portsmouth and Farnborough; a national effort to make the Royal Navy more capable and our nation more prosperous.

Now, today, right around the UK, thanks to this government's commitment to the largest sustained increase in defence spending since the Cold War and our backed British approach, we can see defence delivering for our Royal Navy, for our security and as an engine for growth and opportunity. But there's more that we want to do. The Royal Navy's strengths now come not just from the strength of the Royal Navy alone, but the strength of our partnerships with our allies, increasingly building on that lasting partnership that we have with the United States (US), but with our allies, especially in Northern Europe, in the Joint Expeditionary Force (JEF) alliance and our friends in Norway and across Europe, there are more opportunities to do more together. And that is an opportunity that I hope participants in this conference will be seizing as the day goes by, to look at how we can work together more efficiently, more productively, more successfully, to increase our warfighting readiness, to share the innovations and technological advancements that we are all developing and to make sure that our deterrent capability is clear, so if there's anyone in the Kremlin who thinks about having a go at NATO, they will be able to see that the combined power of NATO countries is now stronger than it has ever been, with a renewed determination to protect all of NATO.

That is a message that is important for the Kremlin to hear, but it's also important that our own people and our own populations hear that increasing defence spending is an engine for growth, delivers domestic advantages and opportunities as well. And that's why, since the general election, we've signed over 1,000 major defence contracts, of which 86% have been signed with British-based businesses. We've generated over £1.7 billion in Foreign Direct Investment into defence, and whether that's public or private sector investments in our existing capabilities or new innovations, the move to a hybrid Navy is clear – a hybrid Navy that is warfighting ready. That's what the SDR sets out, that's the job that the First Sea Lord has been delivering in his role, and that's the job that all of us collectively can support.

Those public and private investments will remould our Royal Navy for a new age of threats and hard power, reinvigorate our defence industrial heartlands, and underpin the economic activity going on across every city, every community in our country, right across the UK, for generations to come. And I welcome the collaboration and the opportunity to bring folks together here.

Keynote speeches



GEN. SIR GWYN JENKINS KCB OBE ADC RM

First Sea Lord and Chief of Naval Staff

Thank you, Minister. This is not a normal conference. This is not about glad-handing and canapes. For those that know me, it's not my style.

This is a conference about commitment to action. This is a conference about stepping up because we have to. I'm only going to talk for about 20 minutes this morning, and I'm only going to cover three topics.

I'm going to discuss what has not changed in our environment, the constants that those of us engaged in maritime power live by every day. I'm going to talk about what has changed, and then I'm going to discuss how we're going to respond, and what we – in particular the Royal Navy – are doing about it.

So, what are the constants?

Well, one is the power of the sea and the oceans. It's not lost on anyone here, but all our societies, the whole globe, depends on the free flow of trade that takes place across our oceans.

We've all witnessed how vulnerable that trade is to the disruption of one relatively minor actor in the Red Sea and most of us in this room, for most of our careers, have been involved in protecting that flow of trade.

And this is no more true than it is for us as an island nation. Virtually all our trade, virtually all our data and virtually all our energy flows either above, on, or under the sea. It is literally our lifeline for both us as an island nation, but also for NATO.

Geography is another constant. If you look at a chart that gazes down from the North Pole into the Atlantic, you will see just how important the Norwegian coast is in protecting our Atlantic. You will see that the UK offers a key position at the cornerstone of access to the Atlantic.

Geography is a constant for us, and our role as the Royal Navy is to exploit that position in order to protect ourselves and protect our allies. You look at that chart behind me, you'll see what I mean.

The gap between us and the Atlantic is small. The importance of the Norwegian coast is obvious.

Another constant is our alliances, the power of combination. It's by no accident that we have asked you to come here today and gathered you in this room. We are stronger because we are together, not because we see the world in the same way, not because we have a homogenous view. Actually the opposite. It's because we can disagree, it's because we can debate. Our strength comes from our differences. It's what unites us. That is no more true than within NATO, the greatest defensive alliance the world has ever seen.

For us, 'NATO-first' means the commitment of our nuclear deterrent for 57 years, in being committed to not just protect the 67 million souls on these islands, but also the one billion souls across the NATO alliance. Of course, it's NATO-first, but not NATO only, which is why we have partners here from across the world. Our friendships and partnerships matter. It's why we sent the Carrier Strike Group to the Pacific this summer. It's why we've embarked on an amazing programme to build nuclear-powered submarines with Australia.

But if the seas, if geography, and if the power of our alliances are the constants, what is changing? Well, first and foremost, it's the threat. The world is becoming an unstable place. We see the rise of authoritarian regimes. I haven't met the commentator yet who can offer me an accurate view of what the future holds, and in that uncertainty lies risk.

Just look at Russia. Despite the millions of lives and the cost of their egregious illegal invasion of Ukraine, they continue to invest billions in their maritime capabilities, particularly in their Northern Fleet; a 30% increase in Russian incursion in our waters just in the last two years. It's most visibly seen in the presence of their spy ships like the Yantar. But I can tell you today, the Yantar is only the visible bit you see in the public, and it's not the bit that worries me the most. It's what's going on under the waves that most concerns me.

I can also tell you today that the advantage that we have enjoyed in the Atlantic since the end of the Second World War is at risk. We are holding on, but not by much. There is no room for complacency. Our would-be opponents are investing billions. We have to step up, or we will lose that advantage. We cannot let that happen. As the Secretary of State for Defence said recently in his message, direct to Putin, we see you and we know what you are doing.

So, if the threat is changing, the other thing to watch is technology. Technologies are combining, accelerating at a pace that we have never seen before. The pace of technological change will never, ever be as slow again as it is today. This is it. This is as slow as it gets.

If you have been baffled by the developments in AI over the last couple of years, well, buckle up. The next couple will be even more amazing. And much like the threat and the geostrategic environment, I haven't met the commentator that gives me confidence that they know really what they're talking about as to how the future will look – no offence to the commentators in the audience.

But the conclusion for us is not to try and guess what the future holds. The conclusion is to build ourselves for speed. The conclusion is to adapt our organisation so that we can move at the pace of relevance. Now is the time for action. That's why we've gathered you all here today.

But it needs transformation, not just modernisation. As our Secretary of State for Defence said, if we just modernise, we will fall short, which is why we are developing the warfighting hybrid Navy. At its heart, it's about the Atlantic Fleet. It's about three overlapping concepts: 'Atlantic Bastion', which is the protection of our sensitive waters and the lines of communication for NATO; 'Atlantic Shield', which is our contribution to air defence from our vulnerable north; and 'Atlantic Strike', which is about creating the advantage that if an aggressor is foolish enough to strike us, they will

know that we can strike back.

Today, I'm really going to focus on Atlantic Bastion, this innovative concept of connecting autonomous sensors in the Atlantic to be our eyes and ears. It's not just technologically innovative, it is innovative in the way that we are conducting procurement. For every pound we have invested, industry has invested four. By our estimation, the technology involved in the demonstrators for Atlantic Bastion have involved some half a billion pounds in research and development.

Why? Why would industry join us on this journey? Well, I'd say three reasons. One is they believe in our purpose. It's too easy to be cynical about industry, but we keep the nation safe so that we can prosper. We contribute to NATO so that the NATO nations can prosper. We believe in a free world where trade can flow, and so does our industry.

The second reason is the Royal Navy contest and experiment in a way that industry cannot on its own. We are a test bed, and we want to be. We want to develop our capabilities in lockstep with industry.

And the third, of course, is there is profit here. The estimated market for maritime autonomous systems around the world is £350 billion, and the UK is already at the cutting edge. This is an engine for growth come to life. This is thousands of jobs in the UK.

The other innovative thing we've done is we haven't given industry a long list of our requirements. We haven't over-specified what it is we want to do. We have merely given them a problem set and asked them to solve it for us, and they've stepped up in spades. Which is why next year we will have our first sensors in the water. We will issue our contracts for Atlantic Bastion as a service.

But we can't do it alone. We can put sensors in the Atlantic. We can connect them to our ships and submarines and our aircraft. We can work as a force, as an integrated force, across the Navy, the Air Force, the Army, and Cyber and Specialist Operations Command (CSOC).

But we really need allies, and that's why I was so pleased last week when the Norwegian Defence Minister said that he wanted to join us in Atlantic Bastion. He wants to connect the new Type 26 ships that we will run as a combined Anti-Submarine Warfare (ASW) fleet in the High North to Atlantic Bastion. And I want others to join us as well.

We need other allies. Together we will build a network that we can connect to our systems and capabilities, and we will remain in control in the Atlantic.

But it's not just Bastion. I said at DSEI that we would get our first autonomous escort in the water within two years, and we will. It's a key component of Atlantic Shield, and we must prove that it can work.

We will get a demonstrator for our fast jet fighter capability off the carrier next year, because it's a key component of Atlantic Strike. We're working closely with the Air Force to make sure that we can develop together, transform together.

We will continue to transform the commando force. In many ways, the commando force presaged what happened in Ukraine. We began to transform that force five years ago, small teams of determined, resourceful, independent individuals operating with the best that technology can provide, an extended range and friendly lines.

They are now re-rolling the whole force for the High North to work alongside our Norwegian,

Dutch and other allies, because, as that chart behind me shows, that Norwegian coast is essential to protecting NATO.

If this all sounds like science fiction, it is not. It is science fact. This is not future technology. This is stuff that is here now, and we have a plan to deliver it. Today, I am also launching our Warfighting Ready Plan 2029. It goes live within the Royal Navy as I'm speaking.

We have built this plan on the back of extensive wargaming to understand our weaknesses and our strengths, to understand where we can complement our allies and where they can complement us. And we're already rolling out. We will discard the old and leap to the new.

We have already moved on from our concepts to replace our Landing Platform, Docks (LPDs) as our landing ships. More distributed, smaller, with more autonomy, our landing force will match the commando capability we're creating.

But the Warfighting Plan is more than just capability. It's about leadership. We need warfighting leaders, which is why we've embarked on a programme to revise the way we train our officers within the Royal Navy and the Royal Marines. We need leadership excellence – that is, leaders who can deliver results, but they can do it whilst inspiring their people, by helping their people to be the best that they can be, because that's how we solve our most difficult problems. Because warfighting is a mindset, warfighting is a discipline for action, and warfighting is the difference between deterrence and vulnerability, but it's more also than leadership.

If we cannot strip back our own bureaucracies, we will not be able to move fast enough. The pace of the threat, the pace of the technological change, demands a different approach from us.

In the last 100 days within the Royal Navy, we have stripped back unnecessary process to save our people 200,000 hours within the year. That's 200,000 hours we can invest in getting better, in being faster and in being more prepared.

We will unshackle our people so that they can perform, because these answers don't exist with me. These answers don't exist at the top of the Navy. These answers exist with our warfighters and with our people.

But, to re-emphasise my point, we cannot do this alone. We need industry to work in lockstep with us, and we need allies. We need our allies to join us so that we can protect these seas. We can protect our data cables, our energy and our supply lines. We must be greater than the sum of our parts – what our alliances are all about.

And it doesn't matter if it is in NATO or if it's elsewhere around the world, there's a reason we deployed the carrier to the Pacific. There is a reason that the Chief of the Australian Navy has just flown all the way here to join us in this conference. Our alliances stretch far and wide, and we must maximise them.

So this is a call for action. We are moving out because we have no choice. The alternative is not worth thinking about. Our job is to be ready, and I want you to join us on that journey.

I can't promise it's going to be easy. It's not. We will face headwinds, we will face rough seas, but together, we can solve these problems if we have the appetite, if we have the determination and if we have the mindset.

So I'm really looking forward to the discussion over the next couple of days, really looking forward

to hearing from you how we're going to solve these problems. I'm really looking forward to hearing how we are going to sustain the advantage building on the blocks that we have already put in place. It's going to be a good discussion.

Thank you.



Keynote speeches



THE RT. HON. JAMES MURRAY MP

Chief Secretary to the Treasury

First Sea Lord, distinguished guests, good afternoon to you all, and let me start by thanking the First Sea Lord, Gen. Sir Gwyn Jenkins, for giving me the privilege of joining you today. It's the second time I've heard his voice, having first heard it over my breakfast this morning on Radio 4.

But, looking around the room, whether you are friends from around the world, members of our own Royal Navy, or the Royal Fleet Auxiliary, or part of the vast network of businesses and industries that support our fleet and enable us to pursue our goals, it's an honour to be with you today.

And it's truly a crucial time for us all to come together, because we are navigating an era of rapidly evolving threats, from hostile state actors to new domains of warfare and new types of weapons. As Chief Secretary to the Treasury, I know that our national security underpins our economic security.

Without one it is nearly impossible to have the other, and the threats to undersea cables highlighted by the increase in Russian vessels in UK waters shows just how closely these risks are linked, and why it is so important for us to step up European security through our new historic defence agreement with Norway.

Now, more than ever, defence investment must be a priority, and that is why we have committed to spend 2.6% of Gross Domestic Product (GDP) on defence in 2027. This will strengthen the UK's leadership within NATO and help keep us safe at home and abroad. It also reflects our ongoing commitment to supporting Ukraine for as long as necessary, including the Prime Minister's personal leading role in the Coalition of the Willing; and this government's ambition to spend 3% of GDP on defence in the future is a necessary response to the threats that we face.

However, increasing funding alone is not enough to deliver the armed forces and the military capability we need, nor deliver the wider economic benefits we need: a Navy ready for tomorrow's threats, a sustainable defence-nuclear enterprise underpinning our security, and an industrial base that drives innovation and growth throughout the UK.

Now, we are already home to a thriving defence industry, creating valuable jobs and developing world-class defence capabilities across the UK. The sector contributes to our shared security, as well as our national economy, and defence should be an attractive proposition for investment in the UK.

Yet, investors are too often put off. Defence procurement processes can be protracted, and they fail to give industry the confidence it needs to invest. Access to finance at critical points has also been a challenge, and this has sometimes prevented our brilliant British defence technology companies from scaling up as we know they could.

The government is determined to change that. We want to transform the UK's defence-industrial base for the challenges of the future, and our ambitions here are clear: more competitive, more resilient and more agile than ever before, and that is why we will accelerate defence procurement times, remove the barriers that prevent SMEs from competing and thriving, and sweep away outdated regulations that slow down delivery and stifle innovation.

Now, the recent Defence Industrial Strategy focuses on those things that will help us give our nation an edge in a more contested world: innovation, technology, research and development skills, and productivity. And to return to my earlier point, these are the foundations not only of national security, but also long-term economic growth.

That is why we have established a new Office for Defence Exports within the Ministry of Defence (MOD) to provide a sharper, more strategic approach to supporting UK industry overseas. We have launched UK Defence Innovation, our new engine for accelerating how the MOD discovers, tests and fields cutting-edge technologies, backed by a budget of £400 million a year and rising. And we have ring-fenced 10% of the defence procurement budget – billions of pounds every year – for exactly the kinds of novel disruptive technologies that attract investor confidence and give our armed forces the advantages they need.

This sends a clear signal that the UK is backing innovation at scale, and this is just the start. Together, the MOD and the Treasury are now working hand-in-hand on a new Defence Finance and Investment Strategy, a coordinated whole-of-government plan to identify and remove the barriers that hold back private investment in the sector, from improving regulatory clarity to supporting dual-use technologies and strengthening export finance. This strategy plans to make the UK one of the most attractive places in the world for defence and national security investment.

Now, for centuries, our economic and maritime security have been intertwined, shaped by our identity as an island nation. From the earliest days of coastal trade and fishing to the growth of busy commercial ports, Britain's economy has relied on the safe movement of goods by sea. The development of the Navy grew directly from the need to protect those trade routes, ensure reliable access to essential imports and keep markets open for British goods.

And I was honoured that in my first fortnight in this role as Chief Secretary to the Treasury, I visited HMS Mersey when she was moored in London in September. There, I met her brilliant crew and I saw firsthand the ingenuity in using a ship originally designed for fishery protection as part of the Navy's Atlantic Bastion plan to protect her undersea infrastructure, deterring and disrupting Russia's malign efforts to undermine our economy from the sea.

The First Sea Lord's vision for the Royal Navy recognises the need to transform, to continue to protect our national interests in a modern economy. It reflects the priorities of the Defence Industrial Strategy to innovate, to blend crewed and uncrewed platforms, to harness technologies like AI and to focus on the rapid development of new capabilities. This is a bold vision, and the Treasury stands ready to support the First Sea Lord and the Defence Secretary in making it happen.

This approach will benefit the wider economy too through partnerships with industry, and create export opportunities that will increase the security of our allies. Now, recently, as everyone in this room will know, we agreed a £10 billion export deal with the Royal Norwegian Navy, which will bring our navies closer together and help keep both nations secure. This is a strong vote of confidence in our industry from a close ally, and the Defence Secretary formally opened Helsing's first UK resilience factory in Plymouth, showing how government, industry and local partners can work together to keep Britain at the forefront of innovation and defence.

And of course, people are essential to delivering on military capability. Generations of shipbuilders on the Clyde building new frigates for the Royal Navy; engineers in Berkshire delivering the warheads for our Continuous At-Sea Deterrent; and steel workers in Sheffield forging the critical parts for nuclear submarines.

That is why the government has reaffirmed a £200 million commitment to ensure Barrow thrives as the home of the UK nuclear submarine building, investing in skills, jobs and local communities, as well as the resilience of our defence industry and our national security. Building on this success, defence growth deals will further bring industry together with local and national government, as well as universities, to realise untapped potential across the country.

Now, I share the First Sea Lord's view that we must be agile to remove the barriers and streamline processes. Earlier this year, the Prime Minister and the Chancellor commissioned a task force to review nuclear regulation in the UK to make sure it supports energy security, national security and economic growth. The task force report has now been issued with a series of recommendations that will radically move the dial on the regulatory regime for civil and defence nuclear in this country, so now I want us to be just as ambitious in other areas of defence. We need to strip back cumbersome regulation and create the right environment for companies to develop, test and build autonomous capability, as well as military benefits. There is a huge economic opportunity here if we get this right.

Now, I've talked so far a lot about what we're doing here in the UK, but we must also look to our allies for the right opportunities to collaborate and strengthen our shared defences. Operationally, we've seen close cooperation with our NATO allies in the North Atlantic and the North Sea, with recent Royal Navy interceptions of Russian vessels in UK waters. And we are making significant investments alongside our allies in maritime capability to increase global security. Pillar I of the AUKUS partnership will support Australia in acquiring nuclear-powered attack submarines (SSNs) and deliver our new SSN-AUKUS attack submarines, using a cutting-edge technology from all three countries. We are making a multi-billion pound investment in our submarine industry, particularly at Barrow and Raynesway, to increase capacity and accelerate delivery.

And finally, as the cornerstone of UK defence and our commitment to NATO, I want to emphasise our ambitions for the renewal of the UK nuclear deterrent. This government has implemented a nuclear deterrent triple lock, building four new submarines in Barrow, maintaining our Continuous At-Sea Deterrent posture and delivering all future upgrades required.

The Dreadnought class of submarines will support over 30,000 UK jobs at its peak across the country. The wider defence-nuclear enterprise spans the length of the UK and supports a supply chain of over 3,000 businesses. This is truly a national endeavour, supporting national growth and our national sovereignty.

We are committed to recapitalising our entire nuclear enterprise, renewing our naval bases, strengthening our supply chains and sustaining a skilled workforce. This requires a whole-of-society approach and reflects the range of partners that we need, both in the UK and internationally: our traditional defence partners, but also technology firms, financial services and academic institutions.

Now, this government has made clear our commitment to defence investment; to transform our armed forces, our industrial base and our economy. We're determined to do things differently, driving innovation, streamlining procurement and unlocking the potential of UK industry so that investment truly delivers for security and prosperity.

The Royal Navy's transformation is a vital part of this. Our maritime security is essential for economic growth: from the sea lanes that carry our exports and imports to the uninterrupted data flowing through the undersea cables that underpin our modern economy. When we protect those routes and assets, we're also protecting the jobs, investment and living standards that depend on them.

Partnerships between government, industry and our allies will continue to be essential if we are to adapt to a rapidly changing global environment. By investing wisely and working together, we will ensure the UK remains secure, prosperous and a leading partner on the world stage. Thank you very much.

Sessions

The International Sea Power Conference 2025 was organised around the theme of **‘Warfighting ready’**. During his first public speech as First Sea Lord, Gen. Sir Gwyn Jenkins KCB OBE ADC RM stated his goal of transforming the Royal Navy to a state of warfighting readiness, enabling it to ‘lead, fight, and win’ in defending the UK and its allies and partners from adversaries.

The International Sea Power Conference 2025, held on 8th December at BT Headquarters Aldgate, examined the future direction of the Royal Navy, using ‘lead, fight, win’ as a framework. The challenges faced by the Royal Navy, and solutions to them, were explored through panel discussions, a Q&A session and a debate. The conference was attended by parliamentarians, military personnel, policymakers, members of the press, industry figures and academics, alongside senior personnel from the Royal Navy and the navies of Britain’s allies and partners. This diversity of backgrounds and expertise allowed for the topics to be approached from all angles, culminating in a greater collective understanding of the Royal Navy’s future and the wider maritime security environment.

Panel 1 – **‘The strategic command’** – focused on warfighting readiness. It discussed how the Royal Navy will move towards this state, and how it will cooperate with key stakeholders, including the defence industry, to achieve the First Sea Lord’s aim. It was chaired by Viktorija Starych-Samuolienė, and featured V. Adm. J. T. Anderson, Prof. John Bew CMG, Adm. Sir Keith Blount KCB OBE, Gen. Sir Gwyn Jenkins KCB OBE ADC RM and Phil Siveter.

Panel 2 – **‘Leading in the Euro-Atlantic’** – centred upon the ‘lead’ element of the Royal Navy’s framework. It explored the priority assigned to the Euro-Atlantic in His Majesty’s (HM) Government’s SDR and National Security Strategy (NSS), and the pursuit of a “‘NATO-first” but not “NATO only”” approach. Chaired by James Rogers, the panel featured V. Adm. Paul Beattie CBE, R. Adm. Oliver Berdal, Amelia Gould, R. Adm. Søren Kjeldsen and V. Adm. Angus Topshee CMM MSM CD.

Panel 3 – **‘Fighting to deter’** – revolved around the ‘fight’ aspect of the Royal Navy’s goal. In the context of Russian aggression in Ukraine and further afield in Europe, and increasing volatility across the globe, this Q&A session examined the importance of the Royal Navy’s doctrine to remaining ahead of threats to the UK’s national security and the evolution of deterrence. With Sir Simon Lister KCB OBE as chair, it featured V. Adm. Mark Hammond AO, V. Adm. Steve Moorhouse CBE, Ben Short and Christopher Sweeney.

Panel 4 – **‘How we win’** – concerned the final ‘win’ segment of ‘lead, fight, win’. Taking the form of a moderated debate, it discussed how the Royal Navy can achieve victory over Britain’s adversaries in an era of significant change, through means including capability, innovation, collaboration and operational. Samira Braund served as chair, with the debate featuring Gen. (rtd.) Sir Richard Barrons KCB CBE, Adm. Giuseppe Berutti Bergotto, Sir Nick Hine KCB, Maj. Gen. Paul Maynard OBE ADC RM and Prof. Alessio Patalano.

During the lunch break, the Council on Geostrategy also held a launch event for *Britain’s world: The strategy of security in twelve geopolitical maps*. This geopolitical atlas, edited by James Rogers and Andrew Young, provides 12 maps showcasing the UK’s geopolitical reach, goals and challenges. The launch event was chaired by William Freer, and featured Paul Mason, James Rogers, Andrew Thomis, Cdre. Tobias Waite RN and Helen Walker-Fleming.

Panel 1

The strategic command



Prof. John Bew CMG, Adm. Keith Blount KCB OBE, Gen. Sir Gwyn Jenkins KCB OBE ADC RM, V. Adm. J.T. Anderson, Phil Siveter, Viktorija Starych-Samuolienė

The return of peer threats and a worsening international environment have forced a fundamental shift in British naval strategy. Consequently, Gen. Sir Gwyn Jenkins, First Sea Lord, has stated his aim is to achieve warfighting readiness within four years, utilising rapid technological advancements to shape geopolitical trends. The objective is to ensure that deterrence continues to hold, following the “NATO-first” but not “NATO only” posture laid out in the SDR and NSS in June 2025.

The resurgence of the Russian threat

The principal challenge facing the Royal Navy is Russia’s continued aggression and investment in its maritime capabilities, particularly undersea assets. The Kremlin’s US\$100 billion (¥8.4 trillion; £74.7 billion) investment is already having an impact on Russia’s Northern and Pacific fleets, consequently stretching the Royal Navy in the North Atlantic. While the Royal Navy is currently able to deter Russian aggression, there is no room for complacency, due to a lack of resources for matching an increased Russian presence adequately.

This threat is growing. Russian ‘research vessels’, such as the Yantar, are conducting surveillance on key nodes in British undersea infrastructure – both energy and data cables – to probe the UK and its allies. To uphold British interests, the Royal Navy must be able to know what these vessels are doing, track them as they move and shine light on them to deter their activities. Such maritime deployments are reminiscent of a transition to peer conflict. Although they do not necessarily mean the Kremlin is preparing for war against Britain, it makes it difficult for military planners to understand if these activities are ‘normal’ behaviour or a prelude to something greater.

Strategic frameworks and economic realities

The SDR and NSS were published during a period of debate on the appropriate level of defence expenditure, and HM Government’s commitment to increase investment to 5% of GDP on defence by 2035 aligns with the Royal Navy’s expectations. The Royal Navy can reinforce British security as set out in the SDR and NSS, leading in an era in which the UK may face confrontation. These

documents reassert the importance of trade and keeping the seas open, as well as the need to deepen defence and develop industrial capabilities.

Cooperation with allies and partners is a key element of the SDR and NSS, especially given concerns over the state of relations within NATO and other partnerships between free and open nations. In this context, cooperation is crucial to British national security, with strategy documents noting that the UK is at the beginning of a renegotiation of its fundamental inputs and outputs in its alliance systems. The Royal Navy remains an indispensable asset in these contributions.

NATO and the return to peer conflict

Britain, alongside its NATO allies, has been reorienting its defence posture to prepare for a return to peer conflict, with deterrence and national defence serving as the anchoring framework. NATO has a sophisticated mechanism to shape its members' postures dynamically, and the economic power to allow them to do so. In the wake of the June 2025 summit in The Hague, all 32 alliance members pledged to meet a new minimum defence spending target – to allocate 3.5% of GDP on defence, with an additional 1.5% on national security.

The amount required to deliver desired capability targets has been calculated to be close to the 3.5% of GDP target, which acts as a 'double lock' to ensure NATO nations adhere to their pledges. Additionally, increased public support for enlarged defence spending has been noted in many member states. Denmark, for example, has rapidly increased its defence spending to a pledged 3.2% in 2025, and Baltic Sea nations will likely be at 3% of GDP by 2030. The European Union (EU) has also contributed by changing laws regarding ammunition capacity and military mobility.

Transformation and technological change

The necessity of the Royal Navy's transformation to warfighting readiness is driven by increasing global volatility and the pace of technological change. Maritime technology is at an inflection point, as demonstrated throughout Russia's full-scale invasion of Ukraine. The introduction of autonomous systems means traditional platforms are becoming more vulnerable, and not responding to this development would be negligent. However, the Royal Navy is faced with bureaucratic obstacles designed for the post-Cold War 'peace dividend' rather than the urgency of contemporary geopolitics.

The US Navy considers warfighting readiness as the ability to project credible naval power and conduct prompt, sustained operations across any domain. While the Americans gravitate towards technological solutions, personnel still form the foundation for naval readiness. People are required to programme, deploy, maintain and recover uncrewed systems, meaning a strong cadre of trained personnel is still crucial to retain resilience.

Industry contribution

Industry stands ready to support national defence through a clear vision of how technological developments will transform the British Armed Forces, particularly in relation to the 'Atlantic Bastion' concept. This involves changes in procurement and how outcomes are achieved. Industry should move quickly, take higher risks and invest more.

Considering the UK to be in a cold war-style environment – including conducting wargames – will allow industry to get closer to day-to-day challenges. Defence spending should be cohered across NATO, with industry becoming intertwined in this process to ensure that Britain and its allies can build the necessary capacity to meet the First Sea Lord's 2029 target for warfighting readiness.

Lead, fight, win

The 'lead, fight, win' framework defines the Royal Navy's trajectory. Britain's leading position within NATO – as a founding member, nuclear weapons state and active participant – is bolstered by its pivotal geographic location in the Euro-Atlantic theatre. While command staff set strategic direction, a new generation of leaders will be equipped to solve problems independently, requiring a cultural change to allow for organic empowerment.

The 'fight' component of 'lead, fight, win' relates to prosecuting conflict in the 21st century. The Royal Navy is capable of sustaining high-end operations, but the difference between this and being truly 'warfighting ready' is significant. Regarding winning, the Royal Navy must be prepared to do so alongside key allies. Unless the UK can prove it has thought about how it can win, it will not retain a satisfactory deterrence posture, making war more likely.

Capability gaps and a transactional NATO

Britain needs to get the most out of its current assets, but concerns exist as to whether these will be sufficient to ensure continued deterrence. Issues regarding the defence of key locations such as Northwood and the cost-effective protection of military assets remain central. While embracing the 'New Hybrid Navy', the Royal Navy must also maintain its basic functions.

Germany's increasing defence investment – €170 billion (£147.2 billion) per year, amounting to over £1 trillion over the next ten years – has elicited a positive response from the US, suggesting the next NATO Deputy Supreme Allied Commander Europe (DSACEUR) could be German rather than British. NATO has a transactional nature; unless the UK increases its defence commitment, it will lose its historical 'ballast' position within the alliance. While alliance-building with Norway and Iceland has been successful, such initiatives should be deepened.

The drive to warfighting readiness

American support for the shift to warfighting readiness is shown by UK-US collaboration in Carrier Strike Group 2025 (CSG2025) and combat experience in the Red Sea. Converging national command structures with NATO counterparts will allow for the multilateral rehearsal of tactics, techniques and procedures. Exercises such as FORMIDABLE SHIELD, BALTOPS and NEPTUNE STRIKE allow for the refinement of high-end maritime strike capabilities.

The drive to warfighting readiness requires certainty and clarity for the defence industry, with industry figures awaiting the Defence Investment Plan to signpost key areas for investment. Leveraging Primes and SMEs together will enable swifter technological innovation and bring scale to bear, with Atlantic Bastion facilitating this convergence.

The Royal Navy has a key role to play in the future of national security. Significant deals have been struck with allies, but Britain should not become complacent. The Royal Navy knows what it needs to do, but a sense of urgency is necessary to ensure this is carried out across all aspects of the British way of life.



Panel 2

Leading in the Euro-Atlantic



V. Adm. Paul Beattie CBE, R. Adm. Oliver Berdal, Amelia Gould, R. Adm. Søren Kjeldsen, V. Adm. Angus Topshee CMM MSM CD, James Rogers

The SDR designated the Euro-Atlantic as the priority theatre for British defence, with the framework for operations formed around the 'lead' component of the Royal Navy's 'lead, fight, win' strategy. Central to this position is Atlantic Bastion, a concept designed to strengthen the UK's posture against the threat posed by Russia in the North Atlantic. While this focus echoes Cold War-era protection of the Greenland-Iceland-UK (GIUK) gap, the introduction of autonomous systems represents a substantial shift in how maritime security is approached.

The New Hybrid Navy concept encompasses Atlantic Bastion, Atlantic Shield and Atlantic Strike. Atlantic Bastion – the protection of Britain and the Atlantic undersea domain – is the Royal Navy's top priority. Ensuring the safety of the UK's nuclear deterrent and Critical National Infrastructure (CNI) is vital for NATO allies and Britain alike, and operating a mix of crewed and uncrewed systems provide the necessary mass to achieve this. Supporting this are Atlantic Shield, which contributes to Integrated Air and Missile Defence (IAMD), and Atlantic Strike, which allows for the projection of power into the High North via long-range strikes to deter adversaries from conducting their own strikes in the North Atlantic. The proliferation of vessels in the North Atlantic will put pressure on Royal Navy commanders due to the change in the nature of their duties, necessitating enhanced defence capabilities to mitigate adversarial activities.

Technological and AI integration

The implementation of AI is essential to complement existing capabilities. The rapid development of AI and its adoption by the British defence industry, especially through private investment, has led to a rapid increase in solutions for integration into Atlantic Bastion.

Success in this field requires partnerships between technology companies and the defence sphere, rather than a single procurement option. This collaboration ensures developments suit military needs and facilitates integrated training between industry and service personnel, drawing on lessons from contemporary operations in Ukraine.

Technological advancement also underpins the drive for information superiority. As a 32-nation alliance, NATO needs deeper integration to increase its informational advantage over adversaries.

Norwegian defence plans, involving the purchase of allied equipment and autonomous systems supported by space assets, represent a significant step in this direction.

Governments across the alliance should invest in emerging technologies to keep pace with the speed of development, particularly as Russia continues to invest in its Northern Fleet. Naval operators should prepare for advanced Generalised AI (GenAI), though debate continues regarding how much human input is required as AI becomes more advanced. Operator confidence in utilising these complex systems will be determined by training, as well as the ability of service personnel to control data being fed into future systems.

Allied cooperation and regional security

Atlantic Bastion integrates closely with the maritime security plans of key allies. Canada, possessing the world's longest coastline, sees much similarity in its existing maritime security measure and Atlantic Bastion, and adopting AI for detection and attribution relieves pressure on Canadian forces while deterring hostile action.

Cooperation with Denmark via Greenland is similarly critical, as maintaining control over the North Atlantic ensures reinforcements can surge into the Baltic Sea in a crisis. Denmark's investment in frigates and Maritime Patrol Aircraft (MPA) for ASW highlights the necessity of collaborative efforts to defend vast maritime areas.

Minilateral frameworks, such as the JEF, also provide additional support. The less rigid nature of the JEF allows it to respond to problems faster than the broader NATO structure, enhancing deterrence. Furthermore, NATO is reaching an inflection point, where multiple technologies can be combined to fill gaps quickly. Exercise structures are being realigned to focus on 'fight tonight' capabilities, moving towards 'exercising to learn' rather than merely practising existing tactics.

Building trust in AI systems during these exercises is critical, as is setting higher standards for NATO exercises to inspire military personnel and ensure they remain relevant for 21st century conflict. Training has been identified in the Royal Navy's warfighting readiness plan as the weakest line of development. To be successful, it should embrace operational environment training, ensuring all personnel are confident in operating new technologies as they emerge.

Pressures in the Arctic and undersea domains

Geopolitical tensions are rising in the Arctic due to economic opportunities and persistent Russian strategic interest. Informational superiority is crucial as the window to respond to adversarial actions shrinks. While Arctic nations seek to avoid unnecessary escalation, the opening of Arctic sea routes due to climate change raises concerns over control and restriction. The People's Republic of China's (PRC) declaration as a 'near-Arctic state' indicates a desire to exploit the region, although Chinese and Russian interests do not always align.

Protecting undersea assets is a fundamental component of Atlantic Bastion. This challenge is not solely military, as private companies owning CNI must ensure they have arrangements for swift repairs and shock absorption. Globalisation complicates this, as owners of CNI may rely on complex supply chains.

A larger role for the defence industry and government agencies in protecting and repairing infrastructure would be beneficial. While critical asset lists exist, there is a lack of conversation regarding defended asset lists, as no military can defend all assets adequately. Private companies should become involved in defining what infrastructure is truly critical to improve national resilience. Denmark has begun internal government conversations about protection of CNI, as most undersea CNI was put in place during the post-Cold War period, when having to protect it was less important.

Integration and tactical evolution

Land branches of the British Armed Forces should integrate with the Royal Navy at a multilateral level to be effective. Collaboration across domains in the Integrated Force is crucial, as control of

the sea enables land operations, while space and cyber operations allow for global projection. As conflicts are ultimately won by soldiers holding ground and denying enemy access, Atlantic Bastion is necessary to ensure the supply of forces on the Russian land border and to keep Sea Lines of Communication (SLOCs) open.

If adversaries react to Atlantic Bastion by trying to flood areas with sensors – as in the South China Sea – maintaining an operational advantage becomes vital. Warships not accompanied by autonomous escort vessels will face increased risk. The most difficult challenge for allied navies is shifting tactical thinking to accommodate rapid technology cycles. Procurement should focus on investing in the ability to adapt, rather than on the platforms themselves.

NATO maritime logistics are becoming simpler, and the alliance will gain a substantial advantage by capitalising on the range and endurance of its systems. Trust and cohesion will continue to play a major role in this, enabling a reduction in duplication of systems by individual members.

To prevent ‘lazy’ AI-enabled decision-making, service personnel require comprehensive training. Royal Navy sailors are well-suited to trialling AI, having experience in stress-testing technology to its breaking point. While AI-enabled decision-making is an inevitability, risks are mitigated by seeking dissenting voices within the command structure to ensure holistic reviews of all actions.

Future readiness

The Royal Navy is implementing Atlantic Bastion to move towards warfighting readiness alongside like-minded partners. Over a four-year timeframe, it should continue to iterate at pace to meet challenges to NATO trust and integration.

It is vital that the UK and its Euro-Atlantic allies acknowledge the importance of NATO’s northern flank alongside its eastern one. Alliance cohesion is strengthened by events such as the International Sea Power Conference, but also through honesty and transparency. Approaching systemic challenges in this way will improve NATO cohesion and open spaces for constructive criticism. Ultimately, the defence of the North Atlantic will fall to the nations with direct access to the region, acting with the necessary sense of urgency.



Panel 3

Fighting to deter (Q&A session)



Christopher Sweeney, V. Adm. Steve Moorhouse CBE, V. Adm. Mark Hammond AO, Ben Short, Sir Simon Lister KCB OBE

Deterrence and vulnerability are key defining features of warfighting readiness, and understanding what it takes for the UK and its allies and partners to achieve this state is essential. To establish a baseline for 21st-century security, Britain needs to pin down the meaning of deterrence for the current environment, identify the contributions of international partners and industry, and expand the political and public support necessary to sustain these efforts.

Escalation management and novelty

The establishment of deterrence demands risk. Policies may seek deterrence without escalation, but refusing to engage on the escalation ladder grants adversaries dominance over it.

Internal government wargames concerning escalation have shown varying results due to the fallibility of human decision-making and its vulnerability to seemingly trivial external inputs – such as time of day, weather or the physical state of the decision-maker. This suggests that escalation is less predictable than previously assumed, requiring further levers to ensure Britain retains control.

Resilience is the foundation of successful deterrence. The maritime domain is central to this effort, offering flexible options for threatening adversaries through strike capabilities. As an island nation, the UK remains vulnerable to sub-threshold maritime attacks, making the Royal Navy's role in maritime deterrence critical.

Novelty has also been shown to have an outsized impact on these dynamics. There is a persistent danger of falling into predictable patterns which, while potentially reducing the immediate likelihood of escalation, allow adversaries such as Russia to factor British responses into their strategic planning. The introduction of uncrewed systems into the Royal Navy provides novelty to help disrupt these calculations.

Capability, will and global presence

Recent activities, such as the deployment of CSG2025, demonstrate the spectrum of defence

delivery. Regularly utilising high-end capabilities showcases the Royal Navy's abilities to allies and adversaries alike. Although some critics view the international nature of such undertakings as a weakness, these deployments are in fact demonstrations of strength, as they prove Britain's ability to mobilise and consolidate a broader framework involving partners, amplifying the UK's ability to pursue British interests in the wider world.

Innovative solutions are required to deal with activities conducted by vessels such as the Yantar. Traditional approaches often fail to empower the generation of agile options. Expanding options for discreet capabilities will bolster the choices available to government decision-makers, allowing for an 'observation, decision, action' loop to keep adversaries on the back foot.

For maritime-dependent nations such as Australia, whose navy is designed for integration with the UK, US and other Indo-Pacific partners, sea access is an existential issue. Given Australia's relatively small population (in comparison with its land area), integration with allied militaries is an imperative for maintaining security.

Adversarial mindsets and strategic wargaming

Gaining insight into how adversaries view British deterrence is a complex challenge, as successful deterrence rarely results from intelligence alone. Rather, it is strengthened by the UK's alliance network, which possesses a level of interoperability that adversaries cannot match.

Wargaming remains a vital tool for determining likely reactions to escalation. By adopting an adversarial mindset, planners can test gaps before they become critical. However, wargaming for deterrence is not yet sufficiently integrated into planning. Involving a variety of experts and academics to move beyond purely theory-based models is necessary for a holistic understanding of how scenarios could play out.

Understanding an adversary's mindset cannot be achieved by a single government body. The Foreign, Commonwealth and Development Office's (FCDO) regional partners provide a depth of insight which should be matched across British defence architecture. Since there is no guarantee that adversaries will not escalate in pursuit of their interests, possessing suitable escalation tools is critical to maintaining effective deterrence. Furthermore, countries behave differently depending on whether they feel observed – a factor which should be considered when determining policy in contested regions such as the South China Sea.

Economic will and deterrence optimisation

Deterrence messaging should be bold and clear to be effective. Involving like-minded nations in the UK's deterrence posture allows for a range of responses, from sub-threshold actions to overt strikes. From a NATO perspective, a collective posture is key, as adversaries will naturally seek out weak spots in any alliance or coalition capabilities. A credible, clearly communicated response ensures that these gaps are not exploited.

The significance of economic power and national will in conflict should not be overstated, as a war typically ends when one side loses the economic means or the willpower to continue. Therefore, communicating a credible threat to an adversary's economic stability or national cohesion forms a core component of deterrence. In this regard, the resilience shown by Ukraine against Russia's full-scale invasion is highly significant.

NATO's Article Five continues to deter overt Russian aggression against the alliance, and should be reinforced in all messaging. Undermining confidence in the Kremlin's capabilities by highlighting its strategic failures in Ukraine would serve this goal further.

The US National Security Strategy has concluded that European NATO is stronger than it gives itself credit for, and could hold against Russia even without a large American presence. Accordingly, Britain should embrace a more self-confident posture regarding its contributions to deterrence while ensuring it does not mirror what Russia considers acceptable levels of human and economic loss during a conflict.

Specialised frameworks and sub-threshold activity

The UK faces challenges in developing specialised deterrence messages that delineate responsibilities and regulations as clearly as allies such as Belgium or France do. Differentiating between military elements and the roles of border forces or other agencies is essential to a comprehensive deterrence policy. Building a clear knowledge of national vulnerabilities is a difficult, but necessary, step in enabling effective action.

Mitigating sub-threshold hostile activities – such as industrial overfishing, the seizing of islands in the South China Sea, the theft of Intellectual Property (IP) and information warfare – depends on HM Government's risk appetite. Deterring peer conflict is often easier than mitigating IP theft, which is deeply embedded in international trade.

Imposing punitive costs may lead to escalation levels that Britain has historically been unwilling to contemplate, although the case does exist for adopting a more assertive posture.

The role of industry and AUKUS

As it was prior to the Cold War, industry is now recognised as a central component of national power and deterrence, and can assist the Royal Navy by addressing shortcomings directly alongside naval personnel. To provide mass and resilience, partnerships should be forged with new entrants to the defence industry to secure supply chains and distribute production, with the AUKUS trilateral agreement illustrating how such partnerships bolster deterrence. The deployment of SSNs to the Indian Ocean protects allied shipping and threatens adversarial manoeuvrability in the maritime domain – itself the world's most opaque operational environment.

AUKUS demonstrates that complex international arrangements are possible if sanctioned by governments, even if they challenge every element of the state. Pillar I has already seen success, with Royal Navy submariners stepping up to the nuclear programme and providing the US with a significant strategic outcome. All three partners' defence industries benefit from being stakeholders in the programme, which compresses development timelines through closer collaboration.

Strategy for the future

Concerns persist regarding the MOD's dependence on allies and the private sector to ensure deterrence holds. Public trust in government is falling across NATO, creating a vulnerability which adversaries may exploit. In a crisis, the difficulty of mobilising a population facing food and energy insecurity is a significant hurdle. The British Armed Forces should be more demanding of means required to defend the nation, rather than relying on static industry services.

Moving from technological exercises to effective execution should happen quickly. Industry is working to close this gap by examining 'good enough' systems which can be produced and deployed faster than high-end platforms that often arrive too late to maximise benefit.

Minimum viable assurance and regulation will allow the defence sector to keep pace with rapid technological cycles, particularly those driven by the PRC. Training should also evolve to be quicker and more effective, ensuring that skills are retained and software updates are matched by hardware reliability.

Panel 4

How we win (debate)



Prof. Alessio Patalano, Adm. Giuseppe Berutti Bergotto, Gen. (rtd.) Sir Richard Barrons KCB CBE, Samira Braund, Maj. Gen. Paul Maynard OBE ADC RM, Sir Nick Hine KCB

Rising tensions in both the Euro-Atlantic and Indo-Pacific have placed the maritime domain at the centre of competition and deterrence. The experiences of Russia's full-scale invasion of Ukraine have reshaped naval warfare, while 'shadow fleet' sub-threshold activities proliferate in the Euro-Atlantic and Chinese aggression in the South China Sea continues.

To counter these challenges, the Royal Navy requires a credible, persistent and ready naval presence, as described in the SDR. In this regard, 'winning' means the Royal Navy possessing warfighting ready personnel, a fleet and an overall organisation which is adaptable, punchy and lethal. Deployment and sustaining operations at speed and scale is crucial, demanding interoperability with allies to maintain deterrence and the ability to adapt constantly to new developments.

Defining victory and alliance contribution

Winning should not be considered an abstract concept. Rather, it should be framed within the existing competitive global environment. Benchmarks are currently set by Russian capabilities, and likely by Chinese capabilities and politics in the future. Deterrence should thus be based on escalation dominance; adversaries must know that they cannot overcome the UK and its allies.

The British Armed Forces should avoid outdated ideals from the post-Cold War 'peace dividend' and transform into a digital age fighting force. A critical component of this is the digital 'kill web', which enables connected sensor data from and to any location worldwide, strengthening alliance cohesion and assisting the move towards uncrewed systems.

The Royal Navy does not have a unique theory of victory, as it shares that of NATO and Supreme Allied Command Europe (SACEUR). Victory is based upon the contribution which the Royal Navy provides to the alliance, both in deterring conflict and emerging victorious should it occur. As historical conflicts often defy planned defence reviews, the British Armed Forces need to remain versatile.

Regarding nuclear-armed adversaries, it is in the UK's interests – as well as wider global interests – to deter conflicts before they escalate. Deterring and protecting against sub-threshold activities is central to defence, requiring the Royal Navy to call them out whenever possible to transform non-attributable acts into attributable ones.

Redefining sea power

Sea power in the 21st century is a tool to ensure sea control, and for redefining how Britain establishes its global presence alongside partners. Currently, the Royal Navy falls short in terms of mass, personnel and platforms. Technology provides solutions, but the Royal Navy needs to be ready in all constituent parts of warfighting power – e.g., physically, morally and conceptually.

These components should be redefined through credible plans for peer conflict tested via wargaming. Mass and resilience are key factors: if a ship is too expensive to lose, it is too expensive to use. Consequently, the Royal Navy should increase mass through cheaper platforms and uncrewed systems.

Industrial partnerships

The relationship with industry should move from being transactional to a full partnership, with industry considered the sixth domain of warfighting, acting as the linchpin for maritime, air, space, cyber and land capabilities. The ability to sustain a prolonged conflict is dependent upon shared industrial capacity across NATO.

Integrating industry allows for more efficient allocation of resources and avoids duplicating technology. A vital distinction exists between 'interoperability' (communication between different countries' forces during operations) and 'interchangeability' (the ability to have one nation's force elements integrated within another's force structures). Achieving this requires Britain and its partners to shift from standalone sovereign capabilities to shared industrial capacity.

Reconceptualising 'contested peacetime'

The UK is fighting every day without waging war in response to sub-threshold actions. A new vocabulary is necessary to articulate warfighting readiness to the wider British public, legitimising this 'pre-war state' without causing unnecessary alarm.

The paradigm shift in the maritime environment has led to contested spaces becoming increasingly crowded. Undersea cables have risen in importance due to their centrality to the digital economy, opening a new space for coercion. Reconceptualising contested peacetime is crucial, as the UK's population relies upon these cables for its way of life.

Adversaries will never do what Britain wants them to do, and growing convergence between Russia and the PRC complicates national security. The UK should respond to such occurrences as they arise, working alongside partners to reduce complications. Doing this requires improved articulation of the indivisibility of the Euro-Atlantic and Indo-Pacific theatres.

Total defence and infrastructure protection

The 'total defence' model utilised in Nordic countries and Taiwan involves a whole-of-society approach. However, implementing such a model in the UK is complex, as national security remains a matter of debate. As Britain holds multiple responsibilities, there is a necessity to develop a vocabulary that explains why geopolitical issues, such as trade in the South China Sea, are important to homeland defence.

The UK is currently ill-prepared for a full-scale conflict due to the peace dividend and an overreliance on the US for defence. Closing the gap to achieve full warfighting readiness should be the top priority. Increasing mass will be central to this transition, moving to a mix of crewed and uncrewed autonomous systems to address endurance issues.

Resetting the Royal Navy for peer conflict has a higher bar and is more expensive than previous challenges. Resourcing should be accelerated to ensure readiness within the next 3-5 years.

Overreliance upon allies is unwise, especially as American retrenchment from Britain's near abroad – i.e., Europe – becomes increasingly likely.

Closing the capability gap

The pace of risk is increasing exponentially, while the British defence sphere progresses linearly. To counter the growing capability gap, greater investment in the UK's defence industry is required. A move from a 'just in time' mentality to a 'just in case' one is critical.

Spare capacity is necessary to replace losses and cover technical faults during conflict. The British Armed Forces should focus procurements on 'middle' capabilities – those treatable and usable in conflict – to generate mass. Balancing sovereign capability with interoperability can be achieved through cooperative shipbuilding programmes, which create economies of scale and improve cost efficiency.

Safeguarding underwater CNI – from pipelines to cables – requires harnessing technological innovation. The UK is moving into a position wherein the Royal Navy will coordinate efforts to protect underwater CNI, utilising autonomous systems for monitoring, while private companies will also play a role. Maintaining dominance in the undersea domain is also crucial for preserving the manoeuvre space for Britain's nuclear deterrent. For the Royal Navy to protect undersea CNI sufficiently, HM Government should provide adequate funding. Further, protecting undersea CNI is not a single-state issue; it requires cooperation between like-minded nations as adversaries seek to cause damage in locations that are complicated to regulate.

Allied cooperation strengthens the international posture of members. Britain, France and Italy, for example, are working together to ensure representation in the Indo-Pacific in order to uphold their geoeconomic interests, as well as those of European countries more generally. Strengthening alliance collaboration is the only way to ensure NATO nations uphold strategic advantage over their competitors and adversaries.

Rivals are attempting to shift the global order fundamentally. While Russian forces are gaining experience in modern conflict in Ukraine, the most concerning element of adversarial actions is ultimately the increasing collaboration between the 'CRINK' nations (the PRC, Russia, Iran and North Korea). If war breaks out in Europe, it is unlikely to remain confined to the continent, just as what happens in the Indo-Pacific is unlikely to remain confined there.

For the Royal Navy to prevail, it must harness technological developments, ensure integration with allies and deliver resilience at pace. Winning is not discovered in crisis. It is built in advance.



Geopolitical atlas launch event



Helen Walker-Fleming, Cdre. Tobias Waite RN, William Freer, Paul Mason, James Rogers, Andrew Thomis

Alongside the panel sessions, the Council on Geostrategy also launched *Britain's world: The strategy of security in twelve geopolitical maps*. This atlas contains 12 maps which focus on the UK's geopolitical position in the 21st century, including its global reach, its domestic power base, growing areas of geopolitical competition, and its web of alliances and partnerships.

A key theme which binds the maps together is the centrality of the maritime domain to Britain's prosperity and its ability to influence global events, but also of its vulnerabilities. An annotation was provided alongside each map, bringing together the expertise of 24 authors from a range of relevant backgrounds, to help explain what the maps show and what they mean for the UK.

The inspiration for the atlas came from the works of geostrategists of the mid-20th century. This included maps by figures such as Richard Edes Harrison and Nicholas Spykman, two Americans whose maps helped shape US strategy in the Second World War and the Cold War by representing the bigger picture in an engaging and often creative fashion. For example, both would often rotate or stretch maps to demonstrate their ideas with greater geostrategic accuracy than traditional Mercator projections allowed.

As well as the centrality of the maritime domain, the way in which the atlas shows the relationship between space and time was highlighted as a core theme. For example, it includes references to sailing times between British overseas bases and territories, showing the importance of presence.

The atlas is also useful for reaching a broader audience. In general, wider public perceptions of geostrategic challenges remain limited, yet the importance of public support for defence is vital. The atlas, written in such a way as to be inclusive rather than jargon-heavy, and in bringing together a number of interesting visual representations – including graphs and models in addition to maps – will help to inform a wide-reaching audience, and ways could be explored to share it with

educational institutions.

Additionally, the atlas helps to support the work of HM Government in delivery of the NSS, as it is an excellent reflection of the key issues identified in the NSS. From undersea cables, to growing cooperation between adversaries, to an overview of regions of growing competition, the atlas is a complement to the context in which the NSS was written.

The atlas can also help to support the private sector, especially firms involved in defence-related work, to understand the challenges facing the UK and how they might support Britain's national security priorities. From an industry perspective, the maps are an excellent visualisation of the many challenges and opportunities already understood or under consideration. Of further utility to industry is the annotations provided alongside the maps.

Overall, the atlas helps to bring together a suite of details and ideas, in a concise and informative manner, which might otherwise get overlooked by industry given that most firms are siloed in the work – or the several lines of work – in which they specialise. By providing deeper context and an overlapping field of view in one place, the geopolitical atlas will help industry decision-makers to appreciate more the wider picture of British geostrategy.

Britain's world:

The strategy of security in twelve geopolitical maps

Edited by:

James Rogers
Andrew Young



First Sea Lord's Essay Competition 2025

The Council on Geostrategy was delighted to hold the First Sea Lord's Essay Competition for the third year in a row. The winners were invited to the International Sea Power Conference 2025, where they received a prize presented by the First Sea Lord. Entrants were asked to write an essay of 800-1,000 words answering one of the following questions:



1. What if one of the 'CRINK' – China, Russia, Iran or North Korea – cut data cables to the UK?
2. What if the British government commits to increase defence spending to 3.5% of GDP by 2030, or 4.0% by 2035?
3. What if the UK has to defend the North Atlantic alone?

To be considered for the prize, entrants were asked to explain what might happen, and how Britain should use and/or alter the Royal Navy in response.

The winning essays were published on *The Broadside*, the Council on Geostrategy's online maritime magazine.

Gold was awarded to Dr Emanuele Maggioli, Silver was awarded to Francesco Canossi and Bronze was awarded to Matthew Palmer.

To read the winning essays, please scan the QR codes below.



WHAT IF THE UK HAS TO DEFEND THE NORTH ATLANTIC ALONE?

'The possibility that the UK is left alone in defending the North Atlantic is remote, although the Royal Navy should be prepared. It can do so by reorienting its priorities and resources towards the North Atlantic, and by forging new strategic partnerships with key players in the area.'



WHAT IF ONE OF THE CRINK NATIONS CUT DATA CABLES TO THE UK?

'Ultimately, Britain must recognise that undersea cables are no longer just critical infrastructure – they are contested strategic terrain. The response to threats in this domain must be equally multidimensional.'



WHAT IF THE BRITISH GOVERNMENT COMMITS TO INCREASING DEFENCE SPENDING?

'A significant increase in defence spending to 3.5% or 4.0% of GDP would come with a commensurate increase in responsibilities. The Royal Navy could expand and modernise, but would also be expected to carry a far greater burden of European and global security.'

Word of thanks

We would like to express our gratitude to the Royal Navy, the event sponsors, the team at the Council on Geostrategy and all those who joined us for their support and active participation in the International Sea Power Conference 2025. Our dedicated team was very busy organising the conference and ensuring it ran smoothly. We would like to acknowledge their hard work and commitment, and express our gratitude to the Royal Navy for not only having faith in us to make this conference a success once again, but also for allowing us to expand it this year. Finally, we would like to thank our corporate partners sincerely for their active involvement and generous contribution in making this event possible.

JAMES ROGERS AND VIKTORIJA STARYCH-SAMUOLIENĖ

Co-founders, Council on Geostrategy

Our partners

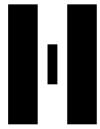
Generous support from industry leaders enables us to organise a high-level event and discussions which enable the Royal Navy and navies of our allies and partners to uphold their competitive edge, develop an international seapower ethos fit for an era of intensifying geopolitical competition, and preserve global stability, security and prosperity. We would like to thank our sponsors sincerely for their important contribution.

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INTERNATIONAL SEA POWER CONFERENCE 2025

Lunch break.



INTERNATIONAL SEA POWER CONFERENCE 2025

Council on Geostrategy

Welcoming remarks

VIKTORIJA STARYCH-SAMUOLIENĖ

Co-founder (F)
Council on Gr





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www.geostrategy.org.uk/sea-power-conference-2025/

