



Council on
Geostrategy

Report
Strategic Defence Unit
No. 2026/09
June 2026

Burden sharing: Preparing Britain and America for a multifront crisis

By *William Freer*
Joshua Huminski
James Rogers

[THIS PAGE IS INTENTIONALLY LEFT BLANK.]



Contents

Foreword	1
Executive summary	3
1.0 Introduction	7
1.1 Aim and structure	9
2.0 The ‘special relationship’ and previous multifront crises	10
2.1 The benchmark: Productive force	11
2.2 The atrophy: Globalisation and the rise of competitors	13
2.3 The contemporary domestic challenge	14
3.0 Opportunities in confronting the multifront crisis	16
3.1 The potential for a full-blown multifront crisis	18
3.2 Towards a third way: Establishing new objectives	21
4.0 Coordinating force postures	23
4.1 Posture options	23
5.0 Regenerating the capabilities to deter	28
5.1 Assuring access to critical minerals	28
5.2 Reinforcing wider supply chain security	30
5.3 Accelerating defence technological breakthroughs	31
5.4 Rebuilding physical manufacturing scale	33
6.0 Conclusion	36
6.1 Key findings	36
6.2 Final reflections	38
About the authors	40
Acknowledgements	41
About the Council on Geostrategy	42
Notes	43



Foreword

From a British-American perspective, there is no doubt the strategic landscape is deteriorating. Free and democratic nations face pressures in economic, financial, military, and informational dimensions from the so-called ‘CRINK’ – an axis of authoritarian powers comprising the People’s Republic of China (PRC), Russia, Iran, and North Korea.

As recent geopolitical events have shown, the ‘special relationship’ between the United Kingdom (UK) and United States (US) cannot be one based only on historical sentiment. America has a preference to prioritise the defence of the Pacific and its own hemispheric region. Washington states that the UK and European countries must take greater responsibility for their own defence and security. Economically, the US is determined to assert its own national interests. It is less willing to accept the values-led approach of international institutions. All this demands a rethink by His Majesty’s (HM) Government, and a recalibration of policy that does not depend on legal norms from the ‘peace dividend’ of the 1990s, but is adjusted to protect British interests in a world of coercion and competition.

This timely Report sets out a blueprint for adapting the special relationship to an era of geopolitical pressure and hard power. It argues that HM Government should assume, with some urgency, greater leadership over Euro-Atlantic security matters – particularly in the Northern Gap and in Eastern Europe to deter Russian opportunism – allowing the US to pursue a strategy of denial of aggression and escalation, but also of cautious cooperation with the PRC in the Indo-Pacific.

Crucially, this study highlights that geopolitical influence requires industrial heft. To deter the UK’s adversaries, HM Government should regenerate its *machinepolitik* by overcoming single-point supply chain vulnerabilities. By formalising a ‘Five Eyes’ Critical Minerals Alliance and institutionalising procurement interchangeability through AUKUS Pillar II, Britain can secure its position as America’s indispensable partner. However, this demands a profound shift in mindset: the authors argue that HM Government should invest in the scaled combat power required to make adversaries respect the UK’s resolve.



This Report is essential reading for ministers and policymakers in Whitehall and Washington who are navigating alliance management and defence prioritisation. It also serves as a critical resource for strategic planners across the armed forces who are adapting to multitheatre and multidomain protracted threats. Furthermore, it will assist defence industry leaders tasked with rebuilding allied supply chains and driving technological co-production to ensure the UK and the US can outmatch adversaries and uphold the free and open international order. This Report is therefore a vital resource that points to realistic and helpful solutions.

Dr Robert Johnson

*Director, Strategy, Statecraft, and Technology (Changing Character of War)
Centre, University of Oxford*

*Director, Secretary of State's Office of Net Assessment and Challenge (SONAC),
Ministry of Defence (2022-2024)*

Honorary Fellow, Council on Geostrategy



Executive summary

CONTEXT

- **The United Kingdom (UK) and the United States (US) are starting to face a growing multifront crisis driven by the convergence of their ‘CRINK’ adversaries: the People’s Republic of China (PRC), Russia, Iran, and North Korea.** These states, predatory and revisionist, are colluding and weaponising the globalised system to challenge the primacy of free and open nations, with Britain and America chief among them.
- **UK-US political divergencies and counterproductive British and American policies have provided additional opportunity for the CRINK states to exploit and open up or deepen their influence in the various fronts.** ‘America First’ and His Majesty’s (HM) Government’s legalistic approach to international relations have had unintended consequences. American allies, including Britain, are beginning to lose trust in Washington, which could undermine US leadership. And, in the UK’s case, British responses to important American requests have undermined London’s position in Washington.
- **With the US facing fiscal constraints and unprepared to fight a two-theatre war, especially in Europe, relying on historical goodwill and ad hoc diplomacy threatens to upend the special relationship.** This is the time for a level-headed assessment of how the two allies can work together to reassert the foundations of their strength – industrial and technological power – albeit under changed geoeconomic and technological circumstances, and deter the CRINK from further aggression.

KEY FINDINGS

- **Confronting the allied deficit in productive force:** Decades of untrammelled globalisation have led to the decimation of the British and American industrial bases, reducing the *machinepolitik*



(systematised industrial power) that ultimately underpinned the ‘special relationship’ and allowed the UK and the US to vanquish their adversaries in the 20th century. Today, the PRC’s manufacturing plants churn out over one-third of the world’s vehicles and over half of its commercial vessels, and it has developed monopolies over many of the world’s critical minerals and rare earth elements.

- **Re-establishing *machinopolitik* under new circumstances:** Attempting purely national, autarkic onshoring is economically unsustainable in a globalised world. Instead, through deeper bilateral and minilateral frameworks – such as AUKUS – the UK and the US can map shared vulnerabilities, secure supply chains, co-develop and co-produce existing and future technologies, and then manufacture at scale without relying on the CRINK and other competitors.
- **Transitioning HM Government from legalism to realism:** To remain America’s indispensable partner, London must discard risk aversion and rigid legalism in favour of assertive realism. This requires investing in credible, scaled combat power that adversaries respect and Washington values.
- **Rationalising theatre separation:** Overextended by rising national debt, and facing the growing Chinese powerbase in the Indo-Pacific and Western Hemisphere, the US requires European allies, the UK chief among them, to assume greater responsibility for deterring Russia in the Euro-Atlantic. Britain should focus on the Northern Gap between Greenland and Norway and the eastern front of the North Atlantic Treaty Organisation (NATO). This frees up American bandwidth for a strategy of denial in the Indo-Pacific.
- **Securing strategic nodes and cognitive overmatch:** The UK and the US should establish a pre-negotiated playbook of counter-escalation to shatter the CRINK’s calculus. Furthermore, political friction during recent crises demonstrates that key geopolitical nodes, such as Diego Garcia in the British Indian Ocean Territory (BIOT) and the Sovereign Bases on Cyprus, cannot rely on real-time diplomacy. They must be better defended, operationally insulated, and cleared for US use before conflicts ignite.



RECOMMENDATIONS

To deter a full-blown multifront crisis, the UK and the US should:

- 1. Align strategic priorities:** In the near-term, HM Government should identify areas of overlap within the Venn diagram of the Trump administration's strategic objectives and British national interests to present clear opportunities for mutual cooperation to the White House.
- 2. Prepare for a more intense multifront crisis:** London and Washington should establish a shared understanding for multifront crises through a sprint of joint wargames and significantly closer synchronisation between Euro-Atlantic and Indo-Pacific military exercises, drawing on the 1980s' US-led 'new maritime strategy' as a historical baseline.
- 3. Coordinate theatre prioritisation:** The two nations should formally structure theatre coordination across three distinct tracks: *integration* in the North Atlantic and Wider North; *cross-pollination* in the Middle East, Africa, the Indian Ocean, and the Mediterranean; and a progressive *delineation* of responsibility where the US leads in the Western Hemisphere and Western Pacific, and the UK assumes greater leadership in Eastern Europe and the South Atlantic.
- 4. Formalise a 'Five Eyes' Critical Minerals Alliance:** Address critical mineral vulnerabilities by launching a joint multilateral fund – modelled on the US\$250 million (£187.1 million) Pax Silica initiative – to subsidise cross-border prospecting, extraction, and refining while harmonising national security exemptions and export controls against economic coercion.
- 5. Launch a Strategic Friendshoring Task Force:** Establish a temporary joint mechanism inviting NATO and Indo-Pacific partners to map multitier supply chain bottlenecks and determine where participating nations can rely on shared, friendshored networks rather than fragmented national onshoring.



6. **Prioritise AUKUS Pillar II:** Elevate the secondary pillar of the partnership within national defence planning, aligning increased funding against concrete, joint technology development projects to serve as a baseline for future co-development.
7. **Deepen defence industrial integration:** Establish a permanent joint working group to identify and action opportunities for the co-development and co-production of military capabilities. This will support more seamless cross-theatre cooperation and allow for greater scalability, but will require Washington to ease its remaining regulatory and export restrictions and for London to accept compromises on domestic industrial sovereignty.

STRATEGIC OUTLOOK

- **The UK and the US need one another.** Even as the international environment worsens, America looks set to remain the world's foremost power, with a growing lead over the European Union (EU) and Japan in next-generation technologies. And by the late 2030s, the British economy is projected to leap over Japan and reach parity with Germany to sit alongside the US, the PRC, and India, meaning its utility to Washington may even grow – especially given Britain's position as an island citadel on America's eastern flank.
- **However, a deep change is required in the UK's national mindset.** Not only does HM Government need more realism in a geopolitical age, but it also needs to invest further in credible, scaled combat power to ensure that the CRINK fear British decisions in theatres where the UK will lead, and that Britain remains indispensable to America and the small handful of countries that are prepared to uphold defences sufficient to deter aggression across key theatres. If the UK can successfully revitalise its national powerbase, it should remain the US' partner of choice, with all the associated benefits that come with it in terms of intelligence sharing, access to next-generation technologies, and technological and industrial partnerships.



1.0

Introduction

This year marks the 85th anniversary of the Arcadia Conference in Washington, the seminal moment in late December 1941 when the political leaders of the United Kingdom (UK) and the United States (US) came together to determine how they would fight a multifront crisis against Nazi Germany, Militarist Japan, and Fascist Italy. Despite Japan's surprise attack on Pearl Harbour, which killed thousands of Americans, the US nonetheless accepted British arguments for a 'Europe-first' approach. Nazi Germany was simply the more dangerous foe; it was technologically advanced and loomed over Europe, the world's most developed continent. If allowed to defeat the Soviet Union, it would have achieved an unassailable position. Once combined and mobilised, the British and American national powerbases vanquished the Axis, dismantled their regimes, and ensured their post-war transformation.

Europe remained central to the next multifront crisis: the Cold War. As with the Arcadia Conference, astute British statecraft, led by Ernest Bevin, then Foreign Secretary, successfully drew in American power through the North Atlantic Treaty Organisation (NATO).¹ It also strengthened Britain's own position, eased the burden of deterring Soviet aggression, and prevented Western European states from pursuing a disorganised rearmament – which might have generated another European crisis. By the 1980s, the Soviets, contained and outcompeted, fell behind and imploded.

Today, Britain and America are facing another multifront crisis. While in the immediate post-Cold War era the US – with support from the UK – could smother threats in every theatre, this is no longer the case. From the Arctic to Ukraine, and from the Gulf to the South China Sea, the

¹ See: John Baylis, *The Diplomacy of Pragmatism: Britain and the Formation of NATO, 1942-1949* (Kent, Ohio: Kent State University Press, 1993).



People’s Republic of China (PRC) and Russia, along with Iran and North Korea – known as the ‘CRINK’ – are attempting to revise the prevailing international order, using force, proxies, diplomacy, and commerce. This time, however, the Americans see the world differently to the British.² Their primary theatre of interest is no longer Europe; it is the Western Hemisphere and the Indo-Pacific. Monitoring the rise of the PRC’s economic, technological, and military power now takes priority for Washington.

This strategic divergence is being exacerbated by political friction between Sir Keir Starmer, Prime Minister of the UK, and Donald Trump, President of the US. Initially, it seemed the left-of-centre Labour leader and the ‘America First’ Republican president might form an unlikely friendship, but it has not lasted.³ Sir Keir sought to follow a traditional playbook: acting as a strategic ‘bridge’ between America and Europe, keeping the US committed to Ukraine, while embracing a strict interpretation of international law.⁴ However, Trump’s transactional approach has collided with this mindset, leading to frequent transatlantic disputes over trade regimes, tariffs, and unilateral actions in the Western Hemisphere and the Middle East, to name but a few. The most significant incident was perhaps the British decision, initially, to disallow the US to use UK bases in the opening stages of the US-Israeli campaign against Iran (Operation EPIC FURY). Even as British military and intelligence chiefs continued to emphasise that operational integration remained seamless, persistent friction at the political level risks inflicting structural damage on the alliance.

These squabbles aside, both nations still need one another. Their CRINK adversaries, advantaged by British and American deindustrialisation in the 1980s and the globalisation of the 1990s, have stolen a march. To counter them, London and Washington should reinvigorate the coordination that led to success in the Second World War and the Cold War. Only by closely sharing the burden will the UK and the US, alongside key allies and partners, rebuild the power base needed to deter the PRC and Russia, and ensure the brewing multifront crisis does not become as serious as the one they confronted during Arcadia.

² See: William Freer, John Hemmings, and James Rogers, ‘The “special relationship”: Preparing Britain and America for a new era’, Council on Geostrategy, 26/06/2025, <https://www.geostrategy.org.uk/> (checked: 11/06/2026).

³ Anthony Zurcher, ‘Donald Trump Says Keir Starmer Doing “Very Good Job”’, *BBC News*, 26/01/2025, <https://www.bbc.com/> (checked: 11/06/2026).

⁴ Henry Zeffman, ‘International law “at heart” of Starmer’s foreign policy, says Hermer’, *BBC News*, 24/06/2025, <https://www.bbc.com/> (checked: 11/06/2026).



1.1 Aim and structure

This Report provides a strategic roadmap for the UK-US alliance to transition from reactive crisis management to an integrated framework of structural deterrence designed to contend with the demands of multiple competing theatres. Using an ‘ends-ways-means’ methodology, it is structured as follows:

- **Section 2.0** charts the historical baseline of British-American technological and productive dominance – so-called *machinepolitik* – during the multifront crises of the 20th century, and appraises the contemporary challenge;
- **Section 3.0** (ends) analyses the systemic threat posed by the CRINK adversaries and the limitations of current UK and US strategies;
- **Section 4.0** (ways) looks at how Britain and America can prioritise in different theatres of interest, including through integration, cross-pollination, and delineation of responsibility;
- **Section 5.0** (means) outlines pathways for the UK and the US to re-establish technological and productive leadership through coordinating critical minerals, reinforcing supply chains, advancing defence technology, rebuilding industrial scale, and co-developing and co-producing new military systems, to lead allies and partners and deter the CRINK from further aggression on multiple fronts;
- **Section 6.0** (the conclusion) offers an overview of the key findings, and ends with final reflections.

2.0

The ‘special relationship’ and previous multifront crises

‘**T**ogether, we’ve done more good for humanity than any two countries in all of history.’⁵ This statement, delivered by Trump during the State Banquet at Windsor Castle in September 2025, may be overegging the pudding. Yet, behind the rhetoric lies a kernel of truth: the coming together of the UK and the US saw off the two most brutal regimes in human history. It was during the Second World War that America realised its primary geostrategic interests – preventing a hegemon in Europe – was the same as Britain’s.⁶ From that moment emerged an unprecedented apparatus of intelligence sharing, technological cooperation, industrial configuration, and strategic coordination that ultimately defeated the Axis, constrained the Soviet Union, and reconfigured the post-war world, which was then enlarged across much of the Euro-Atlantic space after the Soviet collapse. The question now is whether a relationship forged to survive the multifront crisis of the 1940s can withstand a new age of geopolitical struggle, especially when the primary theatre is not limited to the Euro-Atlantic and the two allies’ relative share of global industrial power has waned from its 20th century apex.

⁵ Donald Trump, Speech: ‘Remarks Prior to a State Banquet With King Charles III of the United Kingdom in Windsor, United Kingdom’, The American Presidency Project, 17/09/2025, <https://www.presidency.ucsb.edu/> (checked: 11/06/2026).

⁶ See: William Freer, John Hemmings, and James Rogers, ‘The ‘special relationship’: Preparing Britain and America for a new era’, Council on Geostrategy, 26/06/2025, <https://www.geostrategy.org.uk/> (checked: 11/06/2026).



2.1 The benchmark: Productive force

Military and intelligence coordination are often considered the foundations of the UK-US ‘special relationship’. There is little doubt that both have been vital. What is often overlooked, however, is the two allies’ ‘*machinepolitik*’ – the term John Bew, Professor of International History at King’s College London, has coined to account ‘the harnessing of the modern industrial machine as an instrument of national power.’⁷

Machinepolitik is not merely industrial might, although that is important. Rather, it accounts for the *systematisation* of economic power, involving state direction and economic planning, so that a country can generate ‘productive force’ in the service of grand strategy. While the industrial planning behind the First World War represented the precursor, it was the British and American war effort during the Second World War that brought *machinepolitik* to its logical conclusion.

2.1.1 THE SECOND WORLD WAR

‘We won because we smothered the enemy in an avalanche of production, the like of which he had never seen, nor dreamed possible.’⁸ Those words, by William S. Knudsen, the US Director of War Production during the Second World War, sum up the concept of productive force. The British and American industrial mobilisation between 1939 and 1945 was unprecedented; by the end of the war, the two countries had generated four times more net power than the Axis (Nazi Germany, Fascist Italy, and Imperial Japan).⁹ This productive force undergirded the construction of the most powerful war machine in history: as Graph 1 shows, during the war, the two allies outproduced the Axis powers, in every area, and often by a significant margin. Britain alone produced more weapons than Germany in every key category other than tanks and self-propelled guns

⁷ John Bew, ‘The rise of machinepolitik’, *The New Statesman*, 05/12/2024, <https://www.newstatesman.com/> (checked: 11/06/2026).

⁸ Cited in: Christy Borth, *Masters of Mass Production* (Indianapolis, Indiana: The Bobbs-Merrill Company, 1945).

⁹ Net power is calculated by multiplying Gross Domestic Product (GDP) (a proxy for gross resources) by GDP per capita (a proxy for technological development). For more on this approach, see: Michael Beckley, ‘The Power of Nations: Measuring What Matters’, *International Security*, 43:2 (2018). Figures calculated using the Maddison Project Database 2023. See: Jutta Bolt and Jan Luiten van Zanden, ‘Maddison Project Database 2023’, Groningen Growth and Development Centre, 2023, <https://www.rug.nl/> (checked: 11/06/2026).



– and on a significantly smaller share of Gross Domestic Product (GDP) devoted to the war effort.¹⁰

TABLE 1: UK AND US PRODUCTIVE FORCE COMPARED TO THE AXIS POWERS (NAZI GERMANY, FASCIST ITALY, AND IMPERIAL JAPAN) (TOTAL WAR OUTPUT, 1939-1945)¹¹

	Aircraft	Warships	Tanks*	Artillery**
UK and US	286,600	9,968	128,800	1,041,100
Axis	157,900	1,870***	54,100	592,800

* Includes self-propelled guns

** Includes towed artillery and mortars

*** Primarily U-boats (submarines)

2.1.2 THE COLD WAR

While the British and American superiority in productive force of the scale of the Second World War was rendered less useful with the advent and proliferation of nuclear weapons, the two allies maintained a structural economic advantage over their Soviet rival.¹² Despite the fact that the Soviet Union often outproduced them in raw military hardware, its economic system was vastly inferior. With a significantly smaller GDP, it directed on average 15-20% of its economic yield toward defence, whereas Britain and America sustained effective deterrence on less than

¹⁰ For figures, see: Mark Harrison, *The Economics of World War II: Six Great Powers in International Comparison* (Cambridge: Cambridge University Press, 1998).

¹¹ For figures, see: Mark Harrison, *The Economics of World War II: Six Great Powers in International Comparison* (Cambridge: Cambridge University Press, 1998).

¹² With the development of nuclear weapons in 1945, geopolitical competition between the major powers changed forever. As George Orwell realised as early as 1945 in his prophetic essay ‘You and the Atom Bomb’, the governments of nuclear-armed states could no longer use direct military force against one another. Due to the destructive yield of nuclear weapons, there would be no victor in a nuclear war, meaning that a massive industrial mobilisation would no longer be necessary. However, he also realised that geopolitical rivalry would not be reduced; rather, such competition would focus on other forms – economic, technological, ideological – and the perfection of military deterrence. Orwell described this as a ‘peace that is no peace’ – or ‘cold war’. See: George Orwell, ‘You and the Atom Bomb’, *The Orwell Foundation [Tribune]*, 19/10/1945, <https://www.orwellfoundation.com/> (checked: 11/06/2026).



10%.¹³ The initiation of sophisticated techniques of net assessment and strategies that aimed to overcome Soviet mass through technological means furthered the geopolitical asymmetry. By the 1980s, the Kremlin initiated wide-ranging structural reforms – *glasnost* and *perestroika* – to keep up, which ultimately triggered the system’s collapse.

2.2 The atrophy: Globalisation and the rise of competitors

The dissolution of the Soviet Union in 1991 seemed only to validate the supremacy of the Anglo-American model further, heralded by some as the ‘end of history’, where the world would become ‘postmodern’ and/or ‘flat’.¹⁴ This conviction led policymakers in London and Washington to assume that the expansion of their trading architecture – ‘globalisation’ – would automatically absorb former adversaries, gradually converting them into ‘market states’ and ‘responsible stakeholders’ in a rules-based international order.¹⁵ This provided the backdrop for all allies, particularly the Europeans, to cut defence spending dramatically and recalibrate their armed forces for what they hoped would become a better world.

Yet, this heady ideological optimism fundamentally misjudged the enduring nature of geopolitics. Rather than liberalising and democratising, the PRC and Russia weaponised the very openness of the Anglo-American order and used it to their own advantage. Russia successfully expanded its energy ecosystem into European markets, facilitating a high degree of European dependency that European

¹³ The Central Intelligence Agency estimated that the Soviet Armed Forces consumed as much as 15–17% of Soviet economic output. If the apparatus of state control and the distortion impact of defence is also incorporated, the percentage may exceed 25%. It is still unclear how much of the Soviet national output was truly geared towards national security, not least because the Soviet authorities tried to hide the true extent of the economic burden, and due to the fact the structural impact. See: Ksenia Gonchar, ‘Military Spending in the USSR: A Reconsideration’, *Journal of Peace Research*, 31:2 (1994).

¹⁴ See, for example: Francis Fukuyama, ‘The End of History?’, *The National Interest*, 16 (1989); Robert Cooper, *The Postmodern State and the World Order* (London: Demos, 1998); and Thomas L. Friedman, *The World is Flat: A Brief History of the Twenty-first Century* (New York City: Farrar Straus and Giroux, 2005).

¹⁵ See, for example: Tony Blair, Speech: ‘Doctrine of the International Community’, Economic Club of Chicago (Youtube), 22/04/1999, <https://www.youtube.com/> (checked: 11/06/2026); Philip Bobbit, *The Shield of Achilles: War, Peace, and the Course of History* (London: Allen Lane, 2002); and Robert B. Zoellick, ‘Whither China: From Membership to Responsibility?’, Department of State (US), 21/09/2005, <https://2001-2009.state.gov/> (checked: 11/06/2026).



governments have struggled to reduce.¹⁶ Beijing, meanwhile, seized on allied capital and technology transfers to construct a formidable, state-directed manufacturing base and transport and logistical system. Today, the PRC's shipyards produce over half of the world's commercial vessels (and over 80% of the world's container vessels), while its auto-plants churn out one-third of the world's vehicles – triple the output of the UK and the US combined.¹⁷ Indeed, the PRC purposefully sought to dominate fundamental inputs such as critical minerals and rare earth elements, semiconductors, and other inputs on which the modern economy is built. Additionally, the Chinese technology sector is catching up with the British and American ones – even outperforming them in multiple areas.¹⁸

By decoupling economic and technological matters from national security after the Cold War, rather than maintaining geopolitical linkage, the UK and the US inadvertently eroded the very industrial foundation that had secured their 20th century victories and influence. Since the 2010s, it has been clear that globalisation has not guaranteed a permanent peace. Rather, British and American rivals have been furnished with the very productive force needed to challenge their primacy.

2.3 The contemporary domestic challenge

Today, London and Washington are aware of the PRC's industrial and infrastructural ascendancy, but both appear to be only just beginning to grapple with the challenge, often applying outdated intellectual tools. Consequently, the international system is sliding into a new 'cold war' – the condition of geopolitical confrontation tempered by nuclear weapons first prophesied by George Orwell. Yet, this second iteration is very different from the first: unlike the Soviet Union, which was largely

¹⁶ Between 2010 and 2019, for example, Europeans paid over €1 trillion (£863 billion) to Russia for hydrocarbons. See: Alexander Lanoszka, James Rogers, and Patrick Triglavcanin, 'A new energy policy for Europe: The significance of Ukraine', Council on Geostrategy, 08/06/2022, <https://www.geostrategy.org.uk/> (checked: 11/06/2026).

¹⁷ See: Matthew P. Funaiolo, Brian Hart, and Aidan Powers-Riggs, 'China Dominates the Shipbuilding Industry', Centre for Strategic and International Studies, 25/03/2025, <https://www.csis.org/> (checked: 11/06/2026); Rob Willmington, 'China wins 80% of all containership orders booked in 2024', *Lloyd's List*, 27/09/2024, <https://www.lloydslist.com/> (checked: 11/06/2026); and 'Production Statistics', International Organisation of Motor Vehicle Manufacturers, 2025, <https://oica.net/> (checked: 11/06/2026).

¹⁸ See: 'Critical Technology Tracker', Australian Strategic Policy Institute, 25/03/2026, <https://techtracker.aspi.org.au/> (checked: 11/06/2026).



autarkic, the primary 21st century authoritarian rival is deeply embedded within the global economic order, courtesy of British and American decisions during the 1990s and 2000s. Across both countries, many deindustrialised regions languished, while the social distance between their people and central government increased.

At the same time, policymakers in the UK and the US suffer from a dangerous blind spot regarding their own domestic stability. There remains a profound failure to recognise that some of the political polarisation in both British and American societies is a direct consequence of globalisation and the resulting economic dislocation. Decades of unmanaged deindustrialisation and outsourcing systematically hollowed out the domestic manufacturing that empowered the middle class, dismantling the economic security that long anchored the two countries' democratic cohesion. This would become a central animating feature of the Trump administration's national and economic security policy, with the White House declaring in its 2025 National Security Strategy that prior administrations had 'placed hugely misguided and destructive bets on globalism and so-called "free trade" that hollowed out the very middle class and industrial base on which American economic and military pre-eminence depend.'¹⁹

Put simply, the UK and the US face a compounding dilemma. They must contest formidable adversaries with whom they are economically entangled while wrestling with political volatility at home. They must also rebuild their productive force to deter a full-blown multifront crisis, while accepting that a modern 'avalanche of production' cannot rely on 20th century heavy manufacturing alone; true deterrence in a digital age requires scaled, secure production of advanced software, semiconductors, and next-generation technologies. To survive this new era of cold war, London and Washington must look beyond damage control, exposing distinct opportunities to revitalise the special relationship by preparing for the challenges ahead.

¹⁹ 'National Security Strategy of the United States of America', The White House, 11/2025, <https://whitehouse.gov/> (checked: 11/06/2026).

3.0

Opportunities in confronting the multifront crisis

The UK-US relationship should not be viewed merely as a legacy mechanism for managing the growing crises. Rather, the unique convergence of British and American national instruments presents a profound opportunity to renew the special relationship and make it fit for mid-century purpose. By the late 2030s, the shifting global balance of economic power will reveal a stark reality: the US, Germany, and the UK are projected to be the only advanced free and open countries remaining in the world's top five economies. Although Germany may retain a slightly larger absolute footprint, Britain's relative growth trajectory is set to see it overtake Japan – firmly anchoring its position as a leading economic power.²⁰ This looming macroeconomic reality transforms the special relationship from a 20th century legacy framework into a vital geopolitical and geoeconomic enabler for the 21st century.

Equally, where the US does have deep defence relations with a number of other capable military powers worldwide, such as Poland, Japan, or Israel, none of these partners look far beyond their own immediate region. Although the UK's appetite for interventions and defence capabilities has been reduced to dangerously low levels, the fact is that it remains, although now by a thinner margin, Washington's natural ally of choice. Britain has proven it can take a proactive stance: recent examples include providing lethal support for Ukraine, co-forming

²⁰ According to the International Monetary Fund, Britain's economy will overtake Japan's in 2029 and edge closer to Germany throughout the 2030s. See: 'GDP, current prices', International Monetary Fund, 04/2026, <https://www.imf.org/> (checked: 11/06/2026).



AUKUS, joining American operations in the Red Sea, and establishing potential coalitions of the willing for both Ukraine and Hormuz. Similarly to the Cold War, the UK may have embraced a ‘NATO first’ geostrategic approach, but this does not mean – as the Strategic Defence Review (SDR) itself states – ‘NATO only’.²¹

The national attributes and capabilities of the two allies create a self-sustaining ecosystem of power that no regional bloc or bilateral partnership can replicate (see: Box 1). The US provides unmatched fiscal scale, a massive domestic market, and a defence sector geared for technological overmatch. With additional investment in the defence sector, the UK offers a unique strategic multiplier. Its geographic location and position in NATO and AUKUS give it command over the North Atlantic and a foothold in the Indo-Pacific, while its assets – a command node in the global financial system, a premier research and development base, and a nuclear and intelligence apparatus that is deeply interoperable with America’s – provide the wherewithal to remain Washington’s most powerful ally.

BOX 1: ALTERNATIVES TO THE SPECIAL RELATIONSHIP

Europeanism: In some British political circles, deeper relations with the European Union (EU) are seen as a favourable alternative to ‘unreliable’ America. The problem here is that continental capitals have often proven even more unreliable, especially when the bullets fly, as demonstrated by the profound French and German hesitation and strategic paralysis that crippled their initial response to Russia’s full-scale invasion of Ukraine. Equally, several actors in the EU defence structures and market appear to want to make the UK’s entry a costly endeavour to minimise competition. While the EU and its component countries are important regional trading partners for Britain, they lack the unified intelligence, command structures, coercive capabilities, and global force projection required to prevent a full-blown multifront crisis.

Transactionalism: Conversely, the argument that Washington can easily swap London for other partners ignores the UK’s unique, global structural value. Unlike regional allies confined to their immediate vicinities, Britain offers a global strategic footprint, a permanent United

²¹ ‘The Strategic Defence Review 2025: Making Britain Safer: secure at home, strong abroad’, Ministry of Defence, 02/06/2025, <https://www.gov.uk/> (checked: 11/06/2026).



Nations (UN) Security Council seat, a nuclear deterrent, and unmatched tactical and intelligence interoperability with American forces. Through a deeply institutionalised network of global staging nodes – such as the Sovereign Bases on Cyprus, BIOT in the Indian Ocean, and Sembawang in Singapore – and the unrivalled depth of the ‘Five Eyes’ architecture, the UK functions as the essential global enabler of US power projection.

3.1 The potential for a full-blown multifront crisis

It is against this baseline of latent, reciprocal capability that the wider geostrategic environment must be appraised. This environment is currently defined by two parallel, compounding dynamics that are actively tying previously distinct theatres together.

3.1.1 AMERICAN REFOCUSING AND REBALANCING

On the global stage, the existing world order is in the midst of change. While the US increasingly appears to wish to relinquish the role of global hegemon, it does not want to see this role filled by any other power. This change pre-dated Trump’s election, but his second term in office accelerated these trends. Burdened by rapidly increasing national debt, recognising that it could neither conduct nor sustain two major theatre wars at once, and looking to rebalance its strategic focus, America seeks to turn its attention and resources primarily toward the Indo-Pacific theatre. The current administration sees this region as central to US national security, alongside the Arctic and through the reassertion of the Monroe Doctrine – the ‘Trump Corollary’ – in the Western Hemisphere.²²

This geostrategic change dovetails with Trump’s desire to reindustrialise the US and friendshore key industries, reducing exposure to Chinese-dominated supply chains to grant Washington greater freedom of action in Asia. The recognition that America cannot deter rivals in every theatre simultaneously also animates the administration’s push for European NATO allies, including Britain, to invest more heavily and assume greater responsibility for conventional deterrence. Ultimately, these priorities reflect an institutional consensus on US grand strategy

²² ‘National Security Strategy of the United States of America’, The White House, 11/2025, <https://whitehouse.gov/> (checked: 11/06/2026).

that transcends individual presidencies, shown by policy carryovers from Obama to Trump, Trump to Biden, and Biden to Trump again.

3.1.2 THE CONVERGENCE OF THE 'CRINK' ADVERSARIES

Regional conflicts are taking on a more significant international dimension. What happens in the Indo-Pacific is no longer disconnected from the Euro-Atlantic, and vice versa. This is shown by the support of the PRC, Iran, and North Korea for Russia's 'special military operation' in Ukraine. All three countries have provided the Kremlin with considerable support in terms of equipment, munitions, and, in Pyongyang's case, actual personnel – a phenomenon that has been described as the 'CRINK' or 'deadly quartet'.²³ Primarily, this has taken the form of bilateral cooperation that runs through and towards Moscow. Following Operation EPIC FURY, the Kremlin returned the favour by providing modest support to Tehran alongside Beijing.²⁴

It is important to note that these relationships were already well underway before EPIC FURY, but took on new military and material dimensions in an active conflict environment. The alignment of interests between the CRINK nations is still highly informal, highly pragmatic, and wholly transactional, but nonetheless represents a convergence of national self-interest with a desire to effect a change in the world order, not the least of which is a desired shift towards so-called 'multipolarity' and the end of American hegemony – what the PRC describes as 'a new kind of international relations'.²⁵

If left unaddressed, this ad hoc alignment risks solidifying into a formal strategic bloc anchored by Chinese industrial power. Concerningly, in the event of a serious confrontation, it would not be too difficult for the PRC to transform its industrial heft into *machinopolitik*, as Britain and America have shown in the past, and Russia is showing – albeit more modestly – today. As a foretaste, Chinese economic, industrial, and technological support has already been deployed to assist with Russia's

²³ See: James Rogers, 'Rise of the CRINK?', *Britain's World*, 24/10/2024, <https://www.britainworld.org.uk/> (checked: 11/06/2026) and Dan Sabbagh, 'UK and its allies face "deadly quartet" of nations, says defence expert', *The Guardian*, 16/07/2024, <https://www.theguardian.com/> (checked: 11/06/2026).

²⁴ Joshua Kurlantzick, 'The Iran War Is Highlighting – and Expanding – Authoritarian Collaboration', Council on Foreign Relations, 21/04/2026, <https://www.cfr.org/> (checked: 11/06/2026).

²⁵ 'President Xi Jinping and Russian President Vladimir Putin Meet the Press', Ministry of Foreign Affairs (PRC), 20/05/2026, <https://www.fmprc.gov.cn/> (checked: 11/06/2026).



war against Ukraine, just as it has also aided Iran and North Korea.²⁶ As the SDR points out: ‘Chinese technology and its proliferation to other countries is already a leading challenge for the UK, with defence likely to face Chinese technology wherever and with whomever it fights.’²⁷

As a planning assumption, these theatres – Europe, the Middle East, and the Indo-Pacific – and dynamics should be seen as increasingly connected. Even in the absence of formal collaboration or coordination, it is nonetheless possible that CRINK adversaries exploit local instability to advance their respective interests. The PRC, for example, could seek to advance its own interests and designs on Taiwan while the US and its NATO allies remain focused on Russia, particularly if the ongoing conflict were to escalate further. Indeed, it is not unthinkable that Beijing could seek to stoke it further to increase pressure on Ukraine’s European partners, presenting a strategic dilemma for NATO and its members.

To be sure, it is unlikely that Xi Jinping, General Secretary of the Chinese Communist Party (CCP), and de facto President of the PRC, would ring Vladimir Putin, President of Russia, and ask him to invade NATO to enable the PRC’s conquest of Taiwan. But, as Mark Rutte, Secretary General of NATO, has suggested, that one party would take advantage of instability created by another is well within the realm of possibility.²⁸ Conversely, should tensions increase in the South China Sea because of an incident between the Philippines and the PRC, Russia may see an opportunity in expanding its assault into Ukraine through a second partial mobilisation. Iran’s support for the Houthis, and retaliation for Operation EPIC FURY and closure of the Strait of Hormuz, illustrates how a regional contingency instantly siphons finite British and American resources away from other critical theatres.

²⁶ See: ‘How China quietly helps Russia in Ukraine’, *The Economist*, 20/05/2026, <https://www.economist.com/> (checked: 11/06/2026); and Rajeswari Pillai Rajagopalan, ‘Helping Iran, China is a party in the war’, *The Strategist*, 22/04/2026, <https://www.aspistrategist.org.au/> (checked: 11/06/2026).

²⁷ ‘The Strategic Defence Review 2025: Making Britain Safer: secure at home, strong abroad’, Ministry of Defence, 02/06/2025, <https://www.gov.uk/> (checked: 11/06/2026).

²⁸ Howard Altman and Tyler Rogoway, ‘How Russia Could Complicate US Efforts To Defend Taiwan’, *The War Zone*, 07/07/2025, <https://www.twz.com/> (checked: 11/06/2026).



3.2 Towards a third way: Establishing new objectives

The nature of this compounding crisis, and the constraints of both Washington's raw transactionalism and London's rigid legalism, necessitates new thinking that moves past crisis management and redefines allied victory around three absolute, forward-looking strategic objectives:

- **Separation of theatres ('neo-containment')**: The primary objective should be to deny the CRINK the advantage of strategic simultaneity. The UK and the US should pursue a posture where Britain and its European partners can independently deter or counter Russian aggression in the Euro-Atlantic, especially Eastern Europe. Britain should also expand its role in securing the Northern Gap between Greenland and Norway, so American bandwidth can be freed up to uphold a strategy of denial against the PRC in the Indo-Pacific.
- **Cognitive overmatch against the CRINK**: Revisionist autocracies build their strategy on the assumption that the UK, the US, and their allies and partners are too politically fractured and legally paralysed to handle concurrent escalations. The alliance must shatter this calculus by establishing a pre-negotiated, automated playbook of counter-escalation. A CRINK provocation in one theatre should automatically trigger severe consequences by Britain and America on another front, signalling that a crisis in Asia will not grant a free pass elsewhere.
- **Sovereign interoperability of strategic nodes**: The structural friction of recent operations proves that the special relationship can no longer rely on ad hoc, real-time diplomacy. Preparing for a multifront emergency means turning defensive staging grounds – such as the Sovereign Bases on Cyprus and Diego Garcia in BIOT – into undisputed, pre-cleared launchpads of allied coercive force. Operationally, the strategic objective should be to insulate these vital nodes before conflict starts, transforming potential diplomatic flashpoints into permanent elements of UK-US deterrence.



3.2.1 RECOMMENDATIONS

1. In the near-term, HM Government should seek to find areas of overlap in the Venn diagram of Trump's strategic priorities and UK national interest, and present these as areas of cooperation and alignment to the White House. If British governments allow the UK's capabilities to weaken further, they have to accept the trade-offs in terms of lost influence.
2. London and Washington should develop a strategic understanding and coherent set of plans for how they intend to confront a multifront crisis. This should involve a sprint of wargames to establish potential challenges and opportunities to inform a series of top level plans, similar to what NATO has for different regions within its area of responsibility. This should lead to far more synchronisation between major exercises in the Euro-Atlantic and Indo-Pacific. Their purpose would be to demonstrate to the CRINK that the UK and the US are prepared for, and capable of defeating, any multifront challenge. The US-led 'new maritime strategy' in the 1980s – which saw regular simultaneous exercises around the Barents Sea and Sea of Okhotsk regions as a demonstration to the Soviets – serves as a case study.



4.0

Coordinating force postures

As an organising principle, coordination of force design and disposition between the UK and the US has a long history. From the Arcadia Conference of 1941 to the Mutual Defence Agreement of 1958 (which was made perpetual in 2024), the two countries cooperated extensively, reaching an operational apogee during the Gulf War. However, the post-Cold War ‘peace dividend’ and the post-9/11 focus on low-intensity counterinsurgency campaigns in Afghanistan and Iraq led to the erosion of peer relevant conventional capabilities, particularly in Britain.²⁹

Consequently, the bilateral strategic conversation today has largely stagnated, with most discussions focusing on routine operational and tactical matters rather than grand geostrategic and capability synchronisation. This makes a virtue out of necessity: deep tactical cooperation across military and intelligence domains remains central to the relationship, but its very prominence highlights the paucity of active, high-level political alignment compared to previous generations.

4.1 Posture options

The changing geopolitical environment means that the UK and the US should rethink how they coordinate force design and disposition. While this dynamic is far from the world war that gave rise to Arcadia, it is not unlike a nascent second cold war given that competition takes place alongside nuclear weapons. Thus, the interconnection of theatres, the reorientation of America, and the reconsideration of Britain’s power and

²⁹ Rupert Smith, *The Utility of Force: The Art of War in the Modern World* (London: Penguin, 2006).

interests means that the current trajectory is insufficient to meet London's and Washington's strategic requirements. Given that the two allies have already established a New Atlantic Charter, it is not too much of a stretch to suggest that something akin to a new Arcadia Conference is warranted.³⁰ In the absence of such a discussion, operational matters – while important – will overshadow and stand in place of geostrategic calculations, which are necessary for shared success.

It is evident that, as the US focuses more on the Indo-Pacific and expects its European allies to step up in the Euro-Atlantic, both countries will see less overlapping posture than they have since the mid-20th century. But this does not mean that there will be no overlap. Indeed, the Arctic conjoins both theatres and the need to restore Arctic under-ice expertise is a shared requirement given Russia's 'bastion' doctrine and the possibility of Chinese submarine operations there in future. In essence, this level of overlap exists along a spectrum ranging from an *integrated* posture at one end, to *delineation of responsibility* at the other, with *cross-pollination* in between:

- 1. Integration:** In some theatres, Britain and America could seek jointly to coordinate and integrate force development and force disposition. This is not simply a function of operational allocation, but a more fundamental assessment of overlapping and shared needs, available resources, and identification of gaps. Elements of this integration are already underway in numerous theatres, with British officers embedded in the American command structures, American officers serving in similar functions in operational British postings, shared and joint training, and limited operational planning. This feeds into a degree of joint capability development, although there is scope for far more on shared challenges in select theatres. It is important to note that within the Department of War and the current administration there are doubts about the UK's capacity to generate and deploy forces in even limited roles. Overcoming this doubt is vitally important to make any sort of integration and planning in select theatres viable and realistic.

For example, Britain's attempt to reassert sea control in the North Atlantic through Atlantic Bastion, Shield, and Strike and the New Hybrid Navy concept fits these criteria – it is a shared vital

³⁰ 'The New Atlantic Charter 2021', 10 Downing Street, 10/06/2021, <https://www.gov.uk/> (checked: 11/06/2026).

strategic interest (securing the Northern Gap between Greenland and Norway and countering Russian naval activity) and is met with available joint operational assets (British and American submarines, as well as NATO allies' capabilities). At the same time, the High North is vital for US interests, especially as it begins exploration of a new missile defence 'Golden Dome'.

- 2. Cross-pollination:** Given finite resources and shared interests, in a number of theatres it makes sense for the UK and the US to establish a posture of 'cross-pollination' – that is, to coordinate postures in a way that leverages the unique capabilities of both countries. For example, British mine countermeasures, Counter-Uncrewed Aerial Systems (C-UAS) and special forces operating alongside American capabilities in the Middle East have had an outsize impact. Similarly, US Command and Control (C2) and other key enablers and select capabilities would make an outsize impact in other theatres. A single Arleigh Burke class destroyer, for instance, with its Ballistic Missile Defence (BMD) capabilities would make a significant difference to any non-US naval group; likewise, if the UK enabled the BMD capabilities inherent in its own Type 45 class destroyers, it would provide additional capacity and send a potent signal to Washington. As UK Space Command continues to stand up and increase its capabilities, its coordination and cooperation with its US counterparts will likely mirror this cross-pollination with British capabilities by supporting American missions, and vice versa.

There are, however, challenges and limitations to this approach, chief among which is the credibility of British forces in the eyes of their American counterparts. For the US to cede some operational control, it needs to believe that the UK's forces are capable of executing the outlined and agreed upon operations with relevant capabilities. Theatres where cross-pollination makes sense are those in which there are shared interests, but are not a relatively high priority for either country.

- 3. Delineation of responsibility:** The final option for British-American burden sharing across theatres is a clear partition or delineation of responsibility. This would see the UK and the US divide command and responsibility in geographic or mission-bound lines with one country assuming primacy, and
-



minimal military presence from the other. This is what some in the Trump administration wishes to see more of: Britain and its European counterparts in NATO solely responsible for European conventional security, while America takes sole primacy in the Indo-Pacific, and in its backyard; the Western Hemisphere. By delineating responsibility in select theatres, both countries allow the other to reprioritise resources which would otherwise be spread thin, making the burden sharing effort more efficient. Delineation would occur in the main theatres of geopolitical competition.

Insofar as the US has made clear its focus is on the threat from the PRC and the UK has made clear its focus is on the threat from Russia, it makes sense to delineate along these lines. The division of labour would, however, not happen overnight. Britain lacks the enabling capabilities at present to sustain operations wholly independently in the European theatre. Even were the UK to aim for autonomous leadership in the Joint Expeditionary Force (JEF), for example, it would still be reliant on this support until such time as member countries, including Britain, stand up independent assets such as Intelligence, Surveillance, and Reconnaissance (ISR). Looking to the future, as the UK is projected to become the largest economy in Europe during the later 2030s and is firmly atlanticist, it makes sense for Washington to champion and support London in filling the gap for American leadership in Europe. Ultimately, however, this depends on Britain stepping up politically and fiscally. A timeline and support measures for this process need to be established to avoid it becoming chaotic.

America's geostrategic orientation is clearly angled towards the Indo-Pacific – a policy announced in 2011 under Barack Obama, then President of the US, and one that his successors have carried through to today. While the UK has interests beyond the Euro-Atlantic, it is less able to generate and sustain combat power independently of Washington. Indeed, if a partition is the Trumpian ideal, the strategic reality will lead to a more mixed balance of integration, cross-pollination, and delineation across theatres. This is a net benefit for both British and American national interests. It is evident that for too many years, the success of the special relationship at the operational level has allowed geostrategic conversations to be overlooked. As the geopolitical environment continues to worsen, it is imperative that these strategic conversations are rekindled and a better understanding is developed between London

and Washington over what is needed across theatres of interest (see: Table 2). Retrenching from longstanding geopolitical commitments will not be easy, but further work is needed to prevent the CRINK from drawing theatres and fronts together.

TABLE 2: POTENTIAL UK-US BURDEN SHARING BY THEATRE

Theatre	UK-US Posture
Western Hemisphere	Delineation (US focus)
Western Pacific	Delineation (US focus)
Wider North (North Atlantic / Arctic)	Integration
Middle East	Cross-pollination
Mediterranean	Cross-pollination
Africa	Cross-pollination
Indian Ocean	Cross-pollination
Eastern Europe (inc. Black Sea)	Progressive delineation (UK focus)
South Atlantic	Delineation (UK focus)

4.1.1 RECOMMENDATIONS

- The UK and the US should seek to continue, and deepen, integration of military postures in the following theatres: the North Atlantic and the Wider North. They should also establish a pattern of cross-pollination of military postures in the following theatres: the Middle East, Africa, the Indian Ocean, and the Mediterranean.
- The two allies should delineate responsibility in theatres where either has an established proximity or lead: The US in the Western Hemisphere and the Western Pacific, and the UK in Eastern Europe and the South Atlantic. In Eastern Europe, both allies should plan for a gradual consolidation of British strategic leadership, which dovetails with the Polish and German military modernisation programmes, as well as Ukraine’s growing defence posture. In keeping with the SDR, this means focusing on the command, naval and air enablers and select high-end capabilities that other allies lack (and which the US currently provides).³¹

³¹ ‘The Strategic Defence Review 2025: Making Britain Safer: secure at home, strong abroad’, Ministry of Defence, 02/06/2025, <https://www.gov.uk/> (checked: 11/06/2026).



5.0

Regenerating the capabilities to deter

The force postures outlined in the previous section remain purely theoretical architectures without the material resources to back them up. Manifesting these postures required to uphold a new set of UK-US strategic ends requires a deliberate revival of combined *machinopolitik* and raw productive force. This structural regeneration cannot, however, simply mimic the script of the 1940s; neither Britain nor America retains the colossal industrial bases they commanded during the Second World War.

Translating contemporary strategic intent into credible, multifront deterrence requires transforming current structural deficits into cooperative strategic advantage. This section establishes the modern pathways through which the UK and the US can collectively mobilise and scale their resources. Rather than chasing a bygone era of heavy manufacturing hegemony, it outlines the means to secure a resilient, high-tech material baseline across four pathways: assuring access to critical minerals; reinforcing wider supply chain security; accelerating defence technological breakthroughs; and rebuilding physical manufacturing scale.

5.1 Assuring access to critical minerals

The defence industrial base is highly dependent on a range of critical minerals. NATO has published a list (by no means exhaustive) of 12 critical raw materials: aluminium, beryllium, cobalt, gallium, germanium, graphite, lithium, manganese, platinum, rare earth elements, titanium,

and tungsten.³² The PRC is the lead producer in almost all of these, ranging from 43% of the world's titanium at the lower end, to extensive monopolies including 94% of the world's gallium and 86% of its tungsten.³³

Another key chokepoint is rare earth magnets, which enable a wide range of defence capabilities from electric motors and actuators in aircraft to precision-guided munitions. Here, the PRC accounts for over 90% of global production.³⁴ These critical dependencies severely undermine deterrence: in the event of a full-blown multifront crisis, the loss of access to these materials would erode the technological edge of British and American forces. Adversaries could replace their losses, while the UK, the US, and their allies and partners would struggle immensely.

Resolving these dependencies is therefore vital. Investing in alternative supply chains will add to costs, but assuring supply is worth the price. While there are opportunities for bilateral arrangements, it makes more sense in some cases for efforts to be extended to a core network of trusted allies. Some positive steps have already been taken; for example, in 2024, Washington extended the Defence Production Act Title Three 'domestic source' designation to Britain and Australia, allowing both countries to access funds and grants for key programmes in critical minerals and advanced technology.³⁵ The Five Eyes countries make an obvious pathway. Not only is there deep institutional trust between these countries – despite recent American-Canadian geopolitical tensions – they all also possess underdeveloped critical minerals potential undermined by coercive Chinese economic practices that have made domestic extraction and refining uncompetitive.

The UK, for example, sits atop the world's second largest known tungsten deposit, a deposit the US is known to be interested in.³⁶ The Five Eyes nations should seek to form a Critical Minerals Alliance along the lines of Pax Silica, which has just established a US\$250 million (£187.5 million) critical minerals fund. The Five Eyes should establish a joint fund

³² 'NATO releases list of 12 defence-critical raw materials', North Atlantic Treaty Organisation, 11/12/2024, <https://www.nato.int/> (checked: 11/06/2026).

³³ James Hackett et al., 'Critical Raw Materials and European Defence', International Institute for Strategic Studies, 24/03/2025, <https://www.iiss.org/> (checked: 11/06/2026).

³⁴ Meagan Reid, 'China's Global Exports of Rare Earth Elements and Rare Earth Permanent Magnets (Through April 2026)', Silverado Policy Accelerator, 22/05/2026, <https://cdn.sanity.io/> (checked: 11/06/2026).

³⁵ Kate Poppitt et al., 'Looking forward towards an AUKUS Licence-Free Ecosystem', Hogan Lovells, 08/07/2024, <https://www.hoganlovells.com/> (checked: 11/06/2026).

³⁶ Scott Bingham, 'EU recognition of mine prompts call for support', *BBC News*, 18/06/2025, <https://www.bbc.co.uk/> (checked: 11/06/2026).

for critical minerals prospecting, extraction, and refining within one another's countries, and build national security exemptions and export restrictions into mining regulations to ensure their collective defence industrial bases are able to operate without overreliance on adversaries.

5.1.1 RECOMMENDATION

- The UK and the US should formalise a Five Eyes Critical Minerals Alliance, underpinned by a joint multilateral fund modelled on initiatives like Pax Silica. Rather than competing for resources, this alliance should subsidise cross-border prospecting, extraction, refining, and processing among trusted partners. Furthermore, member nations should harmonise national security exemptions and export controls to shield these nascent supply chains from adversarial economic coercion, and drive market creation and protection.

5.2 Reinforcing wider supply chain security

Raw materials are only part of the challenge. There are a number of other areas further up the supply chain where Britain and America are too reliant on foreign suppliers. Defence industrial supply chains are large, complex, and deeply interconnected. For example, the US Department of War estimates it relies on over 200,000 suppliers from both America and worldwide.³⁷ Semiconductors, propellants, and myriad other key components and sub-systems are core to defence industrial output, as are skilled workers. Across the wider supply chain, there are a host of bottlenecks and vulnerabilities.

Reducing these is a necessity, but it does not necessarily make sense for every free and open country to exert time and money on becoming as independent as possible. The ability to rely on trusted allies is a key strategic advantage of free and open countries. Rather than national level autarky, the UK and the US should instead aim – in conjunction with trusted allies and partners – to map where there are shared supply chain vulnerabilities in less trusted countries and where friendshoring efforts can take place. Britain and America should establish

³⁷ 'United States Defence Industrial Base: How does it differ from the European defence technological and industrial base?', European Parliament, 24/10/2025, <https://www.europarl.europa.eu/> (checked: 11/06/2026).

a temporary joint task force to conduct this activity, and invite NATO allies and trusted Indo-Pacific partners to participate. This strategic friendshoring exercise would be more efficient than individual national onshoring campaigns.

5.2.1 RECOMMENDATION

- London and Washington should manage inefficiencies where possible in their independent pursuits of onshoring and look to establish a temporary Strategic Friendshoring Task Force. By inviting NATO and trusted Indo-Pacific partners to participate, this task force can fulfil two functions: firstly, to establish where participating nations are willing to rely on friendshored supply chains rather than onshored ones; and secondly, to map shared multitier bottlenecks in those categories comprehensively to coordinate a unified approach to relocating said critical supply chains.

5.3 Accelerating defence technological breakthroughs

Much like during the Cold War, intense geopolitical competition leads to rapid technological developments, which have in no small part been further accelerated by the lessons from the fighting in Ukraine and the Middle East.

Investing in new technologies and increasing the pace and implementation of technological developments will be fundamental to maintaining – in some cases, even rebuilding – the technological overmatch that the UK and the US are used to enjoying. Britain itself brings a great deal of technological capability and will always want to balance the spread of its technological partnerships. However, America is advancing far ahead of all potential UK partners in almost all technology areas. As it pursues its own industrial policy, London should not turn away from Washington for engagement in key industries and sectors such as advanced and next-generation technologies. In 2024, US spending on research and development was nearly US\$1 trillion (£750 billion), including over US\$100 billion (£75 billion) directly on defence through

the Department of War.³⁸ In comparison, EU countries spent around €403 (£348 billion) on research and development, of which only €13 billion (£11.2 billion) was directly for defence purposes.³⁹

While spending does not necessarily guarantee results, it provides an idea as to the likelihood of developments. This spending gap is further reinforced by a much more open regulatory environment in America. An additional point worth noting is that as recognised in the SDR, the defence capabilities of the PRC – not Russia – will increasingly become the benchmark for competition.⁴⁰ The unparalleled US understanding of Chinese defence capabilities, to which the American defence sector is geared towards deterring, means that close coordination will help British industry maintain an edge over European export rivals.

Closer partnerships between UK and US companies, and the British and American defence industrial bases, will ensure smoother cooperation and integration between the two countries. This requires government-to-government strategic prioritisation of co-development and co-production opportunities, and early investment in those identified. During the 1980s, defence technological advancements were driven by advances in doctrinal thought, namely the ‘Air-Land Battle’ concept; closer doctrinal coordination today will help to shape the technological demands of the future. AUKUS Pillar II has already laid the groundwork for this, but with increased funding and clearer expected outputs it can become more than just a regulatory exercise.

By ensuring that the UK is able to stay at the vanguard of technologies, it simultaneously improves its leverage in relationships with other allies, drawing on the research and development work already done rather than duplicating efforts. A close partnership with the US would allow HM Government to prioritise its own research and development spend into a smaller number of better funded projects to bolster the chances of developing strategic indispensability in select areas.

³⁸ ‘US R&D Totalled \$937 Billion in 2023; Estimate for 2024 Indicates Further Increase to \$993 Billion’, National Centre for Science and Engineering Statistics, 27/02/2026 <https://ncses.nsf.gov/> (checked: 11/06/2026).

³⁹ See: ‘R&D Expenditure’, Eurostat, 11/2025, <https://ec.europa.eu/eurostat/> (checked: 11/06/2026); and ‘European Defence Agency Defence Data 2024-2025’, European Defence Agency, 01/09/2025, <https://eda.europa.eu/> (checked: 11/06/2026).

⁴⁰ ‘The Strategic Defence Review 2025: Making Britain Safer: secure at home, strong abroad’, Ministry of Defence, 02/06/2025, <https://www.gov.uk/> (checked: 11/06/2026).



5.3.1 RECOMMENDATION

- AUKUS Pillar II should become an increased priority, and actual projects that will advance joint technology development should be aligned against this element of the accord. It will, if properly executed, serve as a model for additional cooperation on and future co-development of critical future technologies.

5.4 Rebuilding physical manufacturing scale

The scale of peer conflict, alongside the proliferation of uncrewed and increasingly autonomous systems, necessitates reconsideration of theories of war. Uncrewed systems will complement and augment, not replace traditional assets, but militaries will need to develop a new approach to force generation that balances advanced technology with attritable mass. The SDR outlined an approach with the British Army's blended model of '20-40-40' – 20% crewed platforms, 40% reusable platforms, and 40% attritable munitions.⁴¹

The development of this next-generation force structure represents multiple opportunities for the UK and the US to identify capability areas ripe for co-development and co-production, or interchangeability. To take one example, Britain and America could work together to determine the capabilities needed for the Royal Navy's New Hybrid Navy and the US Navy's Ghost Fleet Overlord programme. Joint doctrinal development, technological investment, and interoperability would see burdens more equitably shared and have an appreciable benefit in terms of force multiplication.

Even among long-established allies with generally aligned interests, there will always be a tension in defence industrial collaboration between capacity and sovereignty. While preference will almost certainly go to 'national champions', there is, and will remain, sufficient demand to benefit both British and American industry. Building capacity to meet this demand will necessitate closer cooperation between governments, as well as between government and industry. Greater certainty of long-term demand is also needed, including bilateral strategic prioritisation of co-development and co-production opportunities.

⁴¹ 'The Strategic Defence Review 2025: Making Britain Safer: secure at home, strong abroad', Ministry of Defence, 02/06/2025, <https://www.gov.uk/> (checked: 11/06/2026).



In the case of both countries, reforms to procurement and acquisition rules are necessary to speed the pace of purchasing, as well as allow for more multilateral procurement opportunities to create larger orders. The removal of remaining US International Traffic in Arms Regulations (ITAR) restrictions (as well as any overlapping restrictions from other American bodies) would signal to London Washington's commitment to the relationship, and greatly smooth co-production and co-development of necessary munitions and platforms. The UK's ability to pursue seamless spiral development and export co-produced equipment would greatly encourage HM Government to continue to invest in US-origin equipment.

Despite the return of cheaper, less-complex capabilities – which are more easily developed and produced at the national level – the advantages provided by high-end capabilities should not be overlooked, especially if Chinese technology proliferates among British and American adversaries. Here, greater economies of scale are vitally important. AUKUS serves as an illustrative model of burden sharing in action. Although not without its challenges, the strategic impact of this joint effort and the benefits of interchangeability in the supply chain are self-evident. Jointly designed and constructed SSN-AUKUS class submarines will have an appreciable impact on the balance of forces in the Indo-Pacific and, in turn, boost Britain's naval posture in the Euro-Atlantic.⁴² AUKUS will not only aid the American submarine industrial base in bolstering production rates of Virginia class submarines; by lowering costs through commonality, by the end of the programme, an additional 10 non-US nuclear-powered attack submarines (SSNs) – the UK will go from seven to 12 and Australia from zero to five – will be added to their fleets. This represents a 14% increase in planned SSN combat power between the three partners.⁴³

Similarly, in the competition for fifth-generation aircraft, Britain, America, and their allies and partners have shown how they can compete against the manufacturing scale available to Russia and the PRC. The PRC's fifth-generation fighter programme, the J-20 'Mighty Dragon' combat aircraft, has been impressive, with over 300 so far produced. However, the UK-US F-35 Lightning II Joint Combat Aircraft programme, which involves a number of their closest allies across the Euro-Atlantic

⁴² James Rogers, 'AUKUS: Strategic drivers and geopolitical implications, *Britain's World*, 03/06/2026, <https://www.britainsworld.org.uk/> (checked: 11/06/2026).

⁴³ Before AUKUS, the combined planned UK-US SSN fleet was 73 (66 US and seven UK SSNs). Once the SSN-AUKUS submarines are built, it should rise to 83 (66 US, 12 UK, and five Australian SSNs).



and Indo-Pacific, has manufactured over 1,300 airframes – more than four times the PRC’s fleet – with a total order book of over 3,500.⁴⁴ While large scale multinational programmes are often difficult to agree and manage, as shown by the failure of the French–German ‘sixth-generation’ fighter programme, significant outputs can still be achieved through a combined effort. Given the extent to which industrial capacity needs to be bolstered to meet the deterrence challenge, concerns over ‘sovereignty’, although real, should be managed carefully against the benefits of scale offered by allied co-production to reduce inefficiencies.

5.4.1 RECOMMENDATION

- Future British–American defence procurement should institutionalise interchangeability by design, elevating co-development and co-production to a primary strategic objective. To execute this, a permanent Joint Working Group should be established to identify early investment opportunities and align industrial priorities – alongside key allies and partners where possible. Delivering this will require mutual concessions: Washington should ease regulatory restrictions to enable seamless cross-theatre development, and London should accept compromises on domestic industrial sovereignty.

⁴⁴ ‘F-35 Lightning II Fast Facts’, Lockheed Martin, 02/02/2026, <https://www.lockheedmartin.com/> (checked: 11/06/2026).



6.0

Conclusion

With the CRINK's revisionism, and Russia's full-scale invasion of Ukraine, the conceit that the post-Cold War settlement represented the permanent triumph of a rules-based international order has been decisively dislocated: history did not end, the world did not flatten, and it certainly did not become postmodern. Today, the UK and the US find themselves navigating a fragmented, multifront geopolitical landscape where crises could readily escalate. Both nations now confront adversaries that have successfully weaponised the very globalised architecture London and Washington pioneered.

To prosper – let alone project credible deterrence – Britain and America should discard the outdated political and economic dogmas of the late 20th century. The imperative of this new era is fundamentally structural, requiring a transition from legalism and transactionalism toward the combined pursuit of defined strategic objectives: forced theatre separation, cognitive overmatch, and the absolute sovereign interoperability of critical global nodes, all resourced by a systematic and coordinated regeneration of both nations' industrial and technological powerbases.

6.1 Key findings

Based on the research undertaken for this study, the following findings demand immediate strategic attention:

- **Confronting the allied deficit in productive force:** The UK and US no longer hold a profound industrial advantage over their competitors, primarily the PRC. The legacy of the economic experiment of globalisation outsourced critical manufacturing



capacity, inadvertently empowering the PRC at the expense of British and American *machinepolitik* and productive force. Consequently, the combined industrial strength of the two allies is now potentially weaker than that of their most powerful systemic rival.

- **Re-establishing *machinepolitik* under new circumstances:** Attempting purely national, autarkic onshoring is economically unsustainable in a globalised world. The alternative is a coordinated approach to promote selective onshoring and friendshoring. Through deeper bilateral and minilateral frameworks – such as AUKUS – the two allies can map shared vulnerabilities, secure supply chains, and co-develop and co-produce existing and future technologies, then manufacture at scale without relying on the CRINK and other unfriendly or unreliable competitors.
- **Transitioning HM Government from legalism to realism:** Adapting to this new paradigm requires that London jettisons legalism, risk aversion, and operational timidity. Leaning on the historical and cultural residue of the special relationship will not make up for the fact that the US needs powerful and capable allies. If the UK is unprepared to invest in the British Armed Forces at a level commensurate with a cold war, it cannot expect to be taken seriously in Washington.
- **Rationalising theatre separation:** British power projection is most credible to Washington when explicitly preventing the CRINK from joining theatres. The UK should focus more on the Wider North, securing the Northern Gap, leading the JEF, and supporting Germany and Poland in shoring up NATO's position in Eastern Europe, while building synergies with key nations in the Indo-Pacific, such as Australia, Japan, and South Korea. Serving as a stronger custodian of Euro-Atlantic security frees up US bandwidth to maintain a strategy of denial against the PRC in the Indo-Pacific.
- **Securing strategic nodes and cognitive overmatch:** The British-American alliance should establish a pre-negotiated playbook of counter-escalation to achieve cognitive overmatch against the CRINK. Concurrently, while tactical and



military-to-military planning remains close and routine, the political friction exposed during Operation EPIC FURY demonstrates that the UK-US relationship can no longer rely on ad hoc, real-time diplomacy during a crisis. True multifront preparation requires turning vital global staging nodes – such as the Sovereign Bases on Cyprus and Diego Garcia in BIOT – into undisputed, pre-cleared launchpads of allied power. Operationally insulating these nodes before conflict ignites transforms potential diplomatic flashpoints into permanent elements of British and American deterrence.

6.2 Final reflections

This is not a burden America can or should carry alone. A favourable balance of power requires capable allies with real military strength, real industrial capacity, and real political resolve...we are all best off when, based on our comparative advantages, we all contribute to the shared goal of peace and stability.⁴⁵

These words from Pete Hegseth, US Secretary of War, at the 2026 Shangri-La Dialogue encapsulate the core reality of this Report: deterring powerful revisionist adversaries across multiple theatres exceeds the bandwidth of a single superpower. This marks a sharp departure from previous eras; during both the Second World War and the Cold War, Washington could rely on allies that possessed significant material weight *and* a fundamental willingness to share the strategic burden. Today, that collective resilience has frayed; consequently, the era when European partners could comfortably underinvest in defence and outsource their security to Washington is over.

By prioritising ‘model allies’ and moving them to the ‘front of the line’, Hegseth signaled a structural shift in American security strategy – one based on tangible contributions rather than historical sentiment. London cannot afford to ignore this changing mindset. Without credible, scaled combat power and the industrial capacity to sustain it, Britain risks permanent relegation to a place towards the back of the queue. In a

⁴⁵ Pete Hegseth, Speech: ‘Remarks by Secretary of War Pete Hegseth at the 2026 Shangri-La Dialogue in Singapore (As Delivered)’, Department of War (US), 30/05/2026, <https://www.war.gov/> (checked: 11/06/2026).



transactionally minded Washington, past diplomatic capital is a rapidly depreciating asset. Goodwill alone will not buy influence, nor will it guarantee deterrence.

Ultimately, the enduring lesson of the 1941-1942 Arcadia Conference should be that the special relationship survives not on historical familiarity, but on the pooling of raw *machinpolitik* and regular strategic-level exchange. For the UK in the mid-2020s, the choice is no longer a false dilemma between the US and the EU, but a real one between strategic capability and geopolitical irrelevance. If HM Government can muster the political resolve to regenerate the British national powerbase, it will do more than merely preserve its alliance with the world's foremost power. It will ensure that the UK-US partnership remains the indispensable pivot for a wider coalition, strengthening Britain's hand, while primed to deter – even confront – the CRINK nations on every front. If the recommendations of the SDR are to be realised, the Defence Investment Plan should be fully funded.



About the authors



William Freer is Research Fellow in National Security at the Council on Geostrategy, where he works in the Strategic Defence Unit.



Joshua Huminski is Senior Vice President of National Security and Intelligence Programmes at the Centre for the Study of the Presidency and Congress, and an International Fellow at the Council on Geostrategy.



James Rogers is Co-President (Research) at the Council on Geostrategy, where he leads with the development and direction of all policy and research projects.



Acknowledgements

The authors would like to thank two external peer reviewers for offering assistance during the drafting process. They would also like to thank Alec Smith, Editorial Assistant at the Council on Geostrategy, for his careful work in copyediting and formatting the paper, as well as Dr Robert Johnson, Director of the Strategy, Statecraft, and Technology (Changing Character of War) Centre, University of Oxford, for kindly agreeing to provide the foreword.

About the Council on Geostrategy

The Council on Geostrategy is an independent non-profit organisation situated in the heart of Westminster. We focus on an international environment increasingly defined by geopolitical competition and the environmental crisis.

Founded in 2021 as a Company Limited by Guarantee, we aim to shape British strategic ambition in a way that empowers the United Kingdom to succeed and prosper in the 21st century. We also look beyond Britain's national borders, with a broad focus on free and open nations in the Euro-Atlantic, the Indo-Pacific, and Polar regions.

Our vision is a united, strong, and green Britain, which works with other free and open nations to compete geopolitically and lead the world in overcoming the environmental crisis – for a more secure and prosperous future.

Editorial policy

Our publications are guided by our editorial policy and quality assurance processes. To view these, please visit:

<http://www.geostrategy.org.uk/editorial-policy>

DISCLOSURE ON ARTIFICIAL INTELLIGENCE (AI)

This research involved the use of Artificial Intelligence (AI) as a tool to assist with copyediting, restructuring text, checking for errors and fallacies, and generating images. The author(s) and the editorial team at the Council on Geostrategy maintained full oversight throughout the drafting, copyediting, and formatting process, and assume complete responsibility for the final published content.



[THIS PAGE IS INTENTIONALLY LEFT BLANK.]



Council on Geostrategy



Dedicated to making Britain, as well as other free and open nations, more united, stronger, and greener.

ISBN: 978-1-917893-25-1

Address: Alliance House, 12 Caxton Street, London, SW1H 0QS

Phone: 020 3915 5625

Email: info@geostrategy.org.uk

© 2026 Council on Geostrategy

Disclaimer: This publication should not be considered in any way to constitute advice. It is for knowledge and educational purposes only. The views expressed in this publication are those of the author and do not necessarily reflect the views of the Council on Geostrategy or the views of its Advisory Board.

Please do not print this document; protect the environment by reading it online.

Geostrategy Ltd., trading as Council on Geostrategy, is a company limited by guarantee in England and Wales. Registration no. 13132479. Registered address: Geostrategy Ltd., Alliance House, 12 Caxton Street, London, SW1H 0QS.

New geostrategic thinking for a more competitive age

<https://www.geostrategy.org.uk>