Back to the Future: Nuclear Proliferation Risks in an Era of Uncertainty

[00:00:00] Speaker 1: Ladies and gentlemen, please welcome to the stage, Jane Darby Menton.

[00:00:06] Speaker 2: Thank you so much for being here, and it is my great pleasure to introduce the final session of the day. This particular panel I'm really excited about because it's covering a topic that I would say in the weeks and months leading up to this has become increasingly salient, which is the risks of additional states acquiring nuclear weapons and growing interest in nuclear weapons and proliferation. We here at Carnegie, alongside our colleagues at the Nuclear Threat Initiative and the Belfer Center at Harvard, started a task force to tackle some of these issues. So more from us this summer. And this panel here today, we're really excited about because it's gonna reflect some of these themes and these discussions that have been a part of this work. As a reminder for those of you, if you haven't heard this throughout the day, if you're interested in joining for the Q&A at the end of the session, you submit questions via the conference app. So with that, it is my great pleasure to introduce our panel. So we have Tino Cuellar, who's the president of the Carnegie Endowment for International Peace. Ernie Moniz, the co-chair and CEO of the Nuclear Threat Initiative and the former U.S. Secretary of Energy. Steve Hadley, founding principal of Rice, Hadley, Gates, and Manuel, and former U.S. National Security Advisor. And joining us over Zoom, Megan O'Sullivan, the director of the Belfer Center at Harvard's Kennedy School. And our moderator today is Nancy Youssef, the National Security Correspondent for the Wall Street Journal. Thank you guys so much. And I'm gonna turn it over to more interesting people than me.

[00:02:00] Speaker 3: Thank you. Well, good afternoon, everyone. Thank you so much for joining us on this discussion on nuclear proliferation. We're meeting about this topic at a very interesting time in recent weeks. Several nations, including many U.S. allies, have discussed changing their nuclear posture, pretending of potential major changes. And it's a reminder that while 60 years of policy around nuclear deterrence have been largely successful, that doesn't guarantee that the next 60 years will be. And I can't think of a better panel to sort of kick off this discussion. And so I want to start by asking all of our panelists, I'll start with our Zoom guest first, Megan. You know, President Trump has long expressed concerns about nuclear proliferation. And yet, since taking office, more longstanding allies are expressing their desire to acquire weapon. Germany, Japan, Poland, South Korea. To each of you, I'd like to ask, how much do you think that this shift is a result of the U.S. move towards Russia and away from longstanding security guarantees? And how much of you think is being driven by nations seeking to address regional threats? Megan, I wonder if you would kick us off.

[00:03:14] Speaker 4: Sure. Thank you. It's great to be with you. I'm sorry I can't join you and my colleagues in person. And hopefully you can hear me. I've had a few AD problems. I would say that this doesn't have, it's not a black or white answer here. That, unquestionably, part of the answer why we see more U.S. allies expressing concerns and potential interest in gaining their own nuclear weapons capacity has to do with concerns over the American extended deterrent. That is certainly part of the case and part of the reason for these increased concerns. But I would even point out, it's not the whole case, but even the concerns over the extended deterrent are not new. They're not specifically due to the last three months. They're not due to J.D. Vance or necessarily even the Trump administration. That concerns about America's

extended deterrent go back decades and have waxed and waned over time. And they have had influence and they have led to innovations in NATO and the way that we cooperate with our allies over nuclear planning and other things. But there certainly is some of a Trump element. If we look back to the first Trump administration, there were concerns about the extent to which America would be willing to use force, not just nuclear weapons, but force in general to protect friendly interests. I think back to 2019 and the drone attack on Abqaiq in Saudi Arabia and the real disappointment about Americans being unwilling to use force to protect those interests. And certainly concerns and the reluctance in the first Trump administration to underscore the importance of Article 5 in the NATO treaty. But, and I'm sure my colleagues will want to talk about this as well, but there are other reasons, and I would put even more focus on the other reasons why our allies may be voicing these concerns and considerations right now. I put the most consideration on the fact that we see real regional rivalries and we see advances in North Korea, in China, in Iran, in their nuclear capacities. And that has definitely been a part of the reason that our allies, South Korea, Japan, some Gulf states that we're partners with. And of course, when we look at Russia and concerns that Europe has about whether or not Russia is more inclined to potentially use nuclear weapons in a more aggressive posture. And then lastly, and I'm sure we'll come back to this more, I think part of the reason why there is more interest in these potential capability has to do with concerns about the 60-year-old non-proliferation regime. Does it still have the capacity to deter and prevent proliferation around the world of all countries? And there are a variety of reasons why I think it is a reasonable question to be asking right now, whether it has to do with the relationship between great powers, technological advances, or certainly concern on the part of the Global South and others about the grand bargain that has traditionally been associated with NTP and the

[00:06:38] Speaker 3: non-proliferation regime. Thank you. I wonder, gentlemen, if you would pick up where Megan left off. She sort of sees areas where it's more regional and areas where it's more driven by great power competition. Do you see it that way? Do you agree with her breakdown? Mr. Manizel?

[00:06:54] Speaker 5: Me? Okay. Well, first of all, I certainly agree with what Megan has said and certainly the central role of extended deterrence. I think I would emphasize, I think as Megan was stating, that I don't think it's Russia per se that is driving this conversation. I think that, frankly, especially if I think about the Euro-Atlantic situation, there's another situation obviously with regards to the Pacific, but in the Euro-Atlantic situation, I just think that on all sides there has not been a very coherent discussion about a modern way of thinking about deterrence, about deterrence meaning more than just nuclear deterrence. Deterrence in the modern world, I think, is a much more complex issue. I think the, you know, I guess Prime Minister Tusk from Poland kind of captured in his rather strange statement, I think he said something like 500 million Europeans are begging 350 million Americans to protect them from 150 million Russians who can't defeat 50 million Ukrainians in three years. And it's kind of an interesting statement, but I think what it captures is the idea that, frankly, Europe and the United States together have not put together what I would call a well-thought-through layered deterrence position, which includes not just nuclear but also conventional arms, it includes economic factors, and within that system we could have differentiated responsibilities, including the United States with the primary nuclear responsibility, but it's got to be viewed in the context of what

others are doing as well for this collective security. And I don't think that discussion has really happened. We had an interesting discussion last week with a colleague, a European colleague, Natalie Tocci from Italy, who pointed out that from her view, having mentioned all these factors, she said, look, I think in Europe we believe we do have some cards to play on the economic side, where obviously we have also the tariffs and all of this going on. But on the military side, we just are at a loss, and we don't know what to do. I think that's the conversation we need to have. Russia precipitates it in a certain way, but it's a much

[00:09:50] Speaker 3: longer-standing issue than that. So the Secretary added a couple layers to this conversation. Tino, do you see others that we should be considering? I do, but first let me say thank you to you for

[00:10:02] Speaker 6: your great moderation so far. We'll see where we are. And also, I want to express my gratitude to Megan and Ernie, who have been terrific co-chairs of the Task Force on Nuclear Proliferation and American Security that NTI and Belfer and Carnegie are doing together. I also want to thank my friend Steve Hadley. Steve may not remember this. He does remember, I'm sure, but I remember that the very first public event I ever did as Carnegie president was with Steve, and that put me on the right path, Steve, and I hope you think it's still worth doing an event with us. It looks like you do. I want to go back in history a little bit and try to highlight why there's a continuity but also some real differences in the world that drive the conversation about nuclear proliferation right now. Go back to the fall of the Berlin Wall. Some of us are old enough to actually remember what that felt like, the mix of exhilaration and uncertainty about it. But there was this period, and I don't want to get all like end of history Frank Fukuyama on this, where it seemed to responsible observers of the international system that mostly the next few decades, maybe at least the next few years, were going to be win-win for most countries. Poorer countries would have access to trade. Capital movements, technology would build better lives for their people. The U.S. would be able to be friends with Russia to some extent. China was developing economically, looked like there was a time of responsible stakeholder speeches and all that kind of stuff. The fly in the ointment was partly that non-state actors could disrupt that happy picture, CF911, which is tragic, but also the fly in the ointment was that there was way too much optimism about the ability of the world during that period to bury a whole bunch of dramas and difficulties that had long fueled instability in the international system. Countries want things. Our people want things. Nationalism is real. So if we fast forward to the moment we're living through right now, there is a piece of this that is driven by Russia and its assertiveness and its recklessness. There is a piece of it that's driven by China and its own development of a more substantial nuclear arsenal. There is honestly a piece of it driven by the United States, where in recent months, but I would even continue it past just the last few months of this administration, in the last few years, many Americans have been asking, well, what exactly are the typical American voters who are living far from the coast, getting from this enormous investment that the U.S. has made to prop up the defense of countries around the world? So as all these factors combine, I would highlight three forces that make the discussion about proliferation especially difficult, why it is that we're not going to solve this in 10 minutes. Number one is the intersection between nuclear strategy and conventional forces. So conventional forces, of course, are not only substitutes, they're also complements. And so at the end of the day, as we pull back, potentially we, the U.S., from the full extent of the robust relationships we've had with other

countries, it would be insane a little bit not to expect some discussion about where and how they're going to achieve their own deterrent goals, whether you're South Korea or Poland. Second technology, that not only drives innovation in the nuclear sector, it also gets to questions like how we can effectively monitor and verify when countries make commitments to promise to live up to either NPT responsibilities or if they're going to be responsible actors in some other way. Third is nationalism. Let's remember that when the Gilpatrick Committee did its thing in 1964 and put the U.S. on a path to really care deeply about nonproliferation, there was a candor about how difficult it is to tell any country that has the technical capability to develop nuclear weapons, look, you could develop nuclear weapons, but that's not okay for you, it's just okay for us, right? And that fundamental instability of the system has been something that's been with us since then.

[00:13:54] Speaker 3: Mr. Hadley, do you agree?

[00:13:56] Speaker 7: I think this has set the table very well. I'd make a couple points. Megan mentioned the fact that the North Koreans have expanded their program. Iran is on the threshold of being able to produce at least enough fissile material for a weapon or four or five weapons. And Russia, of course, has threatened, has rattled the nuclear saber in connection with its war on Ukraine. I think the other thing that needs to be said is that the security challenges represented in those three theaters have also, I thought, I think, caused people to raise questions about whether it's still a good deal to have given up their nuclear weapon potential. The threat that Russia poses not just to Ukraine, but to the rest of Europe. The threat that Iran poses in the Middle East with its various proxies, the Houthis, Hezbollah, and Hamas. And, of course, the saber-rattling and aggressiveness that China is showing in Asia. All these are real security challenges, and it's raising questions, I think, of countries of whether there is a nuclear element in their ability to manage these challenges. I think the regime is under assault because the two test cases, really, for the proliferation regime was could we stop proliferation in North Korea, and can we stop it in Iran? And four administrations over 20 years have failed in that task, and that, I think, is what is really raising the question of the viability of the regime. So, two questions come out from the current state, and they're being addressed by the task force. One is the unthinkable question, would, for example, if Iran gets a nuclear weapon, would Saudi Arabia, with a nuclear weapon, be more or less destabilizing in the region? If China continues to expand its nuclear deterrent, would a Japanese and South Korean nuclear deterrent be stabilizing or destabilizing? A second question I think people are asking is we've always thought that there would be a cascade of proliferation if any additional countries acquired nuclear weapons. Is that really true? If Iran gets a nuclear weapon, Saudi has already said they will get one. How far would that go in the Middle East? I think you could make an argument, maybe one, maybe two countries, but probably not a cascade. Same question in Asia. If South Korea and Japan were to get nuclear weapons, would Australia? Would the Philippines? I think there's a real question. So, we have to ask the hard question, would proliferation actually contribute to stabilizing the regional challenges that people face? And secondly, would it provoke the kind of cascade of proliferation that would be really destabilizing? And those questions are ones we're trying to grapple with in the task force.

[00:17:02] Speaker 3: I want to follow up with you because you talk about this in a regional context. I wonder if we could go to a few regions and look at them in that context. Let's start with the Middle East. The U.S. has said that it would prefer to stop

Iran from obtaining a nuclear weapon, but that it was willing to use military force. From your perspective, how viable is military force as a means to stop the program? What happens the day after?

[00:17:23] Speaker 7: I think that is the problem. The public discussion of military options says that a military strike on the Iran nuclear program could set back the program, could destroy elements of the program, could set it back maybe six months, nine months, maybe a year. But you can't get out of people's heads what they already know about how to make a nuclear weapon, and you couldn't get the entire infrastructure. And the question then, what happens then? One of the things that you worry about is Iran at that point says, well, if this is the game we're in, we're going to get a nuclear weapon. And if they have been attacked, it makes it a lot harder proposition to say, no, no, you should not. Second question is, can you prevent that in some way? And could you, the people I have talked about on the day after said that a nuclear strike needed to be followed with a comprehensive quarantine and embargo of Iran diplomatically, economically, and militarily. Well, if Israel were to use military force to attack the Iranian program, would the United States and Israel working together be able to put together that kind of coalition that could impose such costs on Iran that it actually might be deterred from pursuing a nuclear weapon even after an Israeli military strike? I think that's questionable. So I think the problem of it is you can't get the whole program by a military strike. And secondly, I have not heard anybody who's got a sensible strategy for the day after that actually achieves our objectives.

[00:19:18] Speaker 5: I would just add to that, in addition to, and I agree with what you've said, Steve, but I would also add that a rebuild down the road by the Iranians would clearly go deeper underground, make it more difficult. It's very, very hard to see how anything other than a negotiated approach will work sustainably. Now, on that last question you asked about, I think you used the word possibly or something like that in terms of the ability to, let's say, enforce a sanctions regime. Just to add one factoid to that, of course, was that when the JCPOA was negotiated, signed in 2015, that was with Russia and China fully part of the EU3, the E3, plus Russia, China, and the United States, and the EU as well. And I think it's often not appreciated how that coherence was absolutely critical. And I won't even go into the anecdotes, which are true, by the way, about how, in particular, our Russian colleagues were absolutely critical to closing the deal, not only to provide that kind of support. Today, we clearly are not going to have the support of Russia, and I don't think we'll have the support of China in anywhere like the same, to the same degree. So, like it or not, I think we are in a world where we have to pursue this diplomatic approach. I do think that the discussion, as one sees in the media, is very unbalanced. For example, all one ever hears discussed, and often, by the way, incorrectly, even here, but all one sees discussed are the constraints on nuclear activities with very, very little mention of the most important part of the agreement, extraordinary verification and transparency measures. And that is a direction to go in these new negotiations, I think, not only sustaining but elevating those verification measures. And finally, I would say that in the new negotiations, some elements of a regional approach would be important, and that might include a regional nuclear condominium involving the Emirates and the Saudis and the Iranians in various cooperative ways of managing what appears to be the desire to increase nuclear energy in that region.

[00:22:28] Speaker 3: I think you've done a great job of sort of outlining. Oh, I'm so sorry, Megan.

[00:22:32] Speaker 4: Oh, I just wondered if I might come in on this point. I know it's a little awkward to be on the screen and butting in, but I agree with everything that Steve and Ernie have said about this thorny problem. And I'm particularly fascinated by Ernie's mention that maybe there's a regional dimension to this solution that didn't exist back in 2015. And I think that is a reflection that the dynamics in the region are very different than they were in 2015 and would be much more conducive to some kind of regional arrangements. But there are two points that I want to make, one about military force and one about the negotiation in terms of what we may be looking towards as the Trump administration moves to what it is calling the next phase of negotiations. The military force component, I think Steve laid out very nicely the conundrum of the day after. And those concerns, of course, have been longstanding concerns and have always weighed heavily against the use of military force, particularly when military force has been considered in the context of the various costs. So what are the benefits and what are the costs? If the benefits are questionable or short term and the costs are great, that has made this a less attractive way of dealing with this critical issue. We have to just feel obligated in the context of this conversation to acknowledge that the conversation about the costs of military force is very different than it has been for pretty much the entire time that different administrations have been grappling with this. The fact that Iran has a severely degraded air defense system right now is seen as a moment of particular vulnerability for Iran. And of course, the fact that Iranian proxies, be they in Iraq, but more importantly, the power of Hezbollah and other actors that we're seeing is guaranteeing a very serious assault on Israel in the event that military force was used against Iran is now virtually not a concern. So I think while the benefits are still questioned, the costs are also seen to be significantly less. And then lastly, just very quickly on the diplomatic side, I thought Ernie's point about verification being even stronger than the JCPOA is a good one. And there are a couple of other things that obviously are going to need to be addressed. One is the timeline, and I think there's some potentially innovative ideas out there about how we could get around the sunset provision and still have something that Iran felt was not going to be indefinite. But the hardest thing, I think, might be the congressional element of this. Is Iran going to be happy with a deal that does not have a congressional element, which seemed to be one of the main reasons why the JCPOA did not stick? And if they are looking for something that is beyond the commitment of one person in the White House, is the Trump administration going to be able to get a sufficient congressional group to support any kind of deal at this time?

[00:25:47] Speaker 5: Could I just add on one area of slight disagreement? I think it is true that the Iranians, and if I go back to that 2015 period, it was certainly true, and subsequently even more true, that the Iranians felt that there was huge value in a treaty as opposed to an executive arrangement. I certainly argued with them then, and I would argue with them and anyone else right now that there is that profound a difference between a treaty and an executive arrangement. We have seen them equally violated or canceled, number one. Number two, I would just add that there has always been an irony in my view that the most important nuclear restriction in the JCPOA was for 15 years, the restriction to 300 kilograms of low-enriched uranium. That doesn't expire until 2031, and yet the idea that one could gain a year militarily is viewed as long-term. Strange.

[00:27:08] Speaker 4: Just very quickly on this point about Congress earning, and here's a question I'd love to ask you in person, but isn't there some way of Congress expressing support for a deal that would exceed what it did in 2015? That would be the lifting of sanctions rather than making the executive waive the sanctions every so often. Congress could show support by actually passing legislation to lift sanctions, and that would not be as onerous as a treaty, but still would require some congressional action.

[00:27:37] Speaker 6: Just to note, this is not a time when Congress is really in the habit of expressing a lot of support for treaties and agreements. That said, Megan, to your point, one of the interesting things about having this administration show real interest in an engagement with Iran and a potential deal is that it might be in a different political position to ask for something from Congress, even something mild like what you're saying.

[00:27:58] Speaker 3: I want to jump to one other region before we get to questions because there are so many regions to go to. I want to talk about Europe, and Tina, I wonder if you could kick us off. The French have talked about making their program available to NATO members. From where you sit, do you think the Germans would accept this? Would they want their own deterrent? Would they, on the flip side, be willing to invest financially the kind of money they would need to really build a nuclear deterrence program of their own?

[00:28:24] Speaker 6: That's an excellent question. I just have to start with a bit of a Cold War maybe prequel to this, maybe foreshadowing. It's interesting to see how much of the Cold War intrigue around nuclear proliferation involved American judgments. Probably correct ones, that if West Germany armed with nuclear weapons, that would be simply unacceptable to the Soviets and would lead to just utter catastrophe. There was quite a bit of pushing and pulling behind the scenes to make sure that that was not on the table. I think today it is hard to tell any story about European defense that doesn't have Germany at its core for multiple reasons. One of them being, of course, the Germans have already made a very credible long-term fiscal commitment to rearming and to doing that in a way that will ideally generate some broader support for defense and deterrence in Europe. Ideally, also build up a European defense sector that is more robust than it was currently in place. Nuclear weapons is still a very sensitive topic. You've got to think a little bit about that domestic political dynamic in Germany. I think ultimately the larger question from my perspective is not only can a Europe that already includes at least one nuclear armed power, two depending on how you draw the line around what counts as Europe these days, find a way to leverage those existing realities to build really a broader defense strategy that is credible beyond simply the numbers.

[00:29:56] Speaker 3: Let me put that question to you, Mr. Hadley. Do you think that Europe can find ways to leverage the nuclear capabilities that it has in some of its allied partners to improve its defense broadly?

[00:30:07] Speaker 7: Potentially, yes. I think it's very interesting that the French have been very clear that their deterrent was in the service of France, not in the service of Europe, for decades. And Macron, without much preparation, breached that and said he was willing to consider making the French nuclear deterrent in service of deterring and protecting all of Europe. That should be pursued. I think the UK would probably do the same thing. Second of all, the United States needs to

maintain its own nuclear deployment in Europe in which the Germans participate. That's a very important point. And third, I would not spend too much time encouraging the Germans to think about nuclear weapons. On Ernie's point about we need to enhance deterrence, what the Germans need to do is enhance their conventional capability. That's really the ticket for longer-term deterrence and security for Germany. And I worry that getting into the discussion about a nuclear deployment in Germany lets them off the hook of doing the hard work of building up their conventional nuclear capability and the deterrence contribution that that can make to peace and stability in Europe.

[00:31:25] Speaker 5: Again, I'd just like to go back to the point you referred to and just reinforce it. Tino, you did as well. That, again, we have to get past thinking of deterrence as simply a nuclear discussion. And that's where all the assets, existing and currently nonexisting assets, in nuclear, in conventional, and in related areas, especially with new technologies developing, et cetera, et cetera, we need to put together, as I said earlier, this kind of a coherent program that advances the collective security. And it doesn't mean, and it should not mean, that every country in this collective should have nuclear weapons. They should have complementary capabilities to provide collective security.

[00:32:22] Speaker 3: I want to get to one question on North Korea because I don't see them from our audience and I think it's an important issue to address. I'll make this a jump-off question for whoever wants to answer it. With Russia and North Korea working more closely aligned, what effect do you think that has on efforts to rein in North Korea's program?

[00:32:42] Speaker 5: Well, I think any discussion of North Korea has us pivot to, I think, the large elephant in the room that's been barely mentioned, which is China. And for one thing, I don't think there is a solution, quotes whatever solution means to the North Korean situation, without China being invested in it. But I think we have to, in terms of the great powers, if you like, to use your earlier term, Nancy, I think we have to remember that the situation with China is very, very different than the Cold War situation with the Soviet Union and then subsequently with Russia, in the sense that, let's face it, the Soviet Union and Russia have never been an economic powerhouse at the same time. So if they do build up their nuclear and other military capability together with their economic position, together with the great uncertainty that, frankly, we are seeing, especially in this administration, and frankly, I think with Europe not deciding which way it's going with regard to the U.S. and China, I think that's the big issue that we need to address. It's what do we do, how do we define our relationship, not only militarily but also economically, with China.

[00:34:15] Speaker 6: Let me add to that. I agree with what Ernie said. I would point out that there is an effort that was ratcheted up in the previous administration, and my hope is versions of it in their own way will continue in this administration, to take seriously regional security in a way that leveraged the American deterrent vis-a-vis South Korea and recognize the significant demand in South Korea for more effective long-term defense strategy. Here I just want to pivot to acknowledge a historical and practical point that underscores the complexity of the South Korean situation. South Korea has a nuclear-armed adversary just north of its border, has a country that has historically been the country that sort of dominated its politics in China, if you go back hundreds of years, that is ratcheting up its nuclear arsenal, has Russia on its border as well, which is, of course, the country with the largest number of nuclear

weapons in the world, and has on its border also the only country where nuclear weapons have been used, and is a genuine powerhouse with respect to the commercial nuclear industry, right? So if you think about the special situation of South Korea, I would just note, for any administration that cares about nuclear proliferation, it's important to take very seriously, like, what is the need for South Korea to feel secure, appropriately so, not to say that there aren't some changes that couldn't be made in the U.S.-South Korea security relationship, but it's important to think about the history and the practical capabilities of the South Koreans.

[00:35:47] Speaker 3: That's a great point. I have an interesting question from our audience that I want to read to you all. Mr. Hadley, I wonder if you could kick us off. Many Ukraine watchers are voicing, what if Ukraine had not denuclearized in 1991, after the collapse of the Warsaw Pact? Many say Russia likely would not have been so cavalier about invading a nuclear-armed Ukraine. What can we learn from this history, especially in light of Trump, pulling back on even U.S. conventional security guarantees against Russia?

[00:36:16] Speaker 7: Well, the lesson that the Ukrainians have taken from it is that the kind of assurances they got when they gave up their nuclear weapons were inadequate. And this is why they've made such a point of security assurances as being part of any peace agreement with Russia. Would it have made a difference? You know, one of the problems is, Ukraine would have had a modest nuclear capability, probably bigger than the French and the U.K., but not nearly as large as the Russians. And one of the things you need to think about is, it's a tricky business of whether you threaten nuclear use when you are the small man at the table, if you will, and you're dealing with an adversary and threatening an adversary that has an overwhelming nuclear capability when compared to your own. There's a question of how you make that work as an effective deterrent. And so I think there's a real question of how much a Ukrainian nuclear deterrent of the size that it would have had would have been useful in deterring the Russian invasion. I think they would probably have made them think a little longer about it, but if you read what Putin has said about why he started his renewed war on Ukraine, he's a pretty determined character, and I suspect it would not have deterred him. But Tony and Tina may have a different view.

[00:38:01] Speaker 3: Megan, I'm curious if you have the same thought, that the size of the program might not have been in itself enough to deter Putin's ambitions.

[00:38:09] Speaker 4: I think that certainly is an argument that has merit. Let me get to the larger question of the person who asked it at hand about the lessons from history and what it might mean to countries thinking about whether or not they want to secure their own capabilities. And I think the maybe even more poignant lessons come from if you look at Russia and North Korea versus Libya and Iraq. And I think a lot of aspiring, or I mean, I don't think there are that many aspiring nuclear powers, but the ones that may be thinking about the importance of having nuclear weapons, and Iran comes first and foremost to mind, look at those relatively recent historical examples, and it seems to be very relevant that Russia and North Korea have nuclear weapons, of course, of very different capabilities, but that they are regimes that are still in power and haven't even, in the case of Russia, been subject to the full economic sanctions or military challenge that they might have been had they not had nuclear weapons. And of course, the Qaddafi Libya example and Saddam Iraq example suggest that not having nuclear weapons can create a real vulnerability for

you. So I would say those were the lessons that I would think would be even stronger than the somewhat unique historical example of Ukraine.

[00:39:42] Speaker 5: I have to just register without explanation and objection that I think the presumption that Ukraine had any credible path to retaining its nuclear weapons is very questionable.

[00:39:56] Speaker 6: Say just a little bit more about that, because we understand that up here and this crowd understands it, I think, but just say a little bit more about why.

[00:40:02] Speaker 3: There cannot be an objection just for the objection. That's the role of the panel.

[00:40:06] Speaker 6: But why do you say that?

[00:40:08] Speaker 5: I think Steve will answer the question for me.

[00:40:13] Speaker 7: I remember when Jim Baker was in the process of negotiating Ukrainian giving up their nuclear weapons, and the Ukrainians were reluctant to do it. And in the back room, Baker got into a shouting context with the Ukrainians, came out to the press, one of the press people said to Baker, are they going to give them up or are they not? And Baker said, hell if I know. It was a very close-run thing. Very close-run thing. On Megan's point, I would just say in Iraq, not wanting to go over that history, the decision the president made to go into Iraq in 2003 was on the assumption that Iraq had a nuclear program, maybe not a nuclear weapon, and certainly had weapons of mass destruction. And we expected that we would see chemical weapons and maybe even biological weapons being used, and yet the president decided to go into Iraq anyway. So there are questions about the lore that Libya and Iraq show that if you give up your nuclear weapons, you're vulnerable to attack. It's not necessarily the case that if you had your nuclear weapons, you would be invulnerable to attack.

[00:41:27] Speaker 3: Mr. Quay, I want to put this question to you from our audience. Our audience member says that you mentioned the Kirkpatrick Commission's caution that dissuading others from proliferating is tougher if the NWS insists that they need and might use nuclear weapons. That was 60 years ago. As the Four Horsemen wrote in the Wall Street Journal in 2007, isn't the steady pursuit of a world without nuclear weapons a key part of the nonproliferation equation?

[00:41:59] Speaker 6: I could answer with one word, and the word is yes. Now, given it's difficult for me to just stop at one word, let's unpack what the NPT tried to do. The result of the Kirkpatrick Committee's thinking hard about how much you could actually limit countries from getting nuclear weapons was, I think, a two-pronged strategy that we can learn from, but it doesn't necessarily fit 100% the current situation we're in. The first one is that if there was common interest between the Soviet Union and the United States in limiting proliferation, a great deal could be accomplished. You could ratchet up how much verification, how much diplomatic pressure, how much strategy could be used to achieve that goal. But the second was a degree of what I could call strategic empathy, which is a willingness to take that nationalist turn from so many countries around the world and say to them, we're not asking you to come here and simply legitimize indefinitely the ability of the Soviets or

the Americans or any country that currently has nuclear weapons to hang on to them and have an extraordinary resource to call the shots in global politics. We're asking you to trust that we're making a temporary accommodation to reality, because getting rid of these weapons is difficult, but we're going to work towards a world that's not in the hands of any country, in effect, to a first approximation, with no time limit, and with an understanding that, practically speaking, the NPT was allowing countries like the U.S. to hang on to nuclear weapons. In the world we're in right now, I would say, whatever grand bargain is possible, and I'm not sure exactly how it proceeds, will require some taking seriously of the needs and concerns of, as Megan put it, that small but not insignificant number of countries that could imagine themselves having nuclear weapons and want to know what's in it for them if they're not going to develop that deterrent. And at the same time, I think some grappling with the second point, and this goes to Ernie's reminder that we haven't talked about China as much as we perhaps could or should, right, that now the conversation about what responsible nuclear arms stewardship means for the world, if that's not too much of a contradiction in terms, is going to have to run through the relationship of the United States with Russia and China, and the search, however fleeting and difficult it is for enough common ground around a shared objective to make sure that we don't get 20 nuclear arms states in the next few years.

[00:44:27] Speaker 7: It is ironic that one of the characteristics that goes counter, in some sense, to the basic bargain of the NPT is that the possession by the United States of nuclear weapons and the extent of deterrence that is extended to various countries making clear that our nuclear weapons are part of their own deterrent calculus is in fact an important factor in deterring and preventing and discouraging people from proliferating and acquiring their own nuclear weapons. So in some sense, the violation of Article VI has made a contribution to the objectives of a non-proliferated world.

[00:45:08] Speaker 6: I want to double-click on that point and just put it in my own words. It's a very powerful point. At the very same time that the treaty says the world will work towards a world without nuclear weapons, including with the support of the U.S., the world is also dependent, to Steve's point, on the deterrent impact of these weapons to assure the security of more than the countries that have them. And that, of course, makes it incredibly strategically difficult to work towards getting rid of it.

[00:45:33] Speaker 5: It's got to be done the right way. Can I just make a couple of points? One is just to go back to the question where you mentioned the four horsemen. I do want to remind people that the four horsemen were motivated by subnational threats, and those have not gotten better as the technology has sped along. And so that's another issue that really needs to be on the table. It's being forgotten to a large extent. Number two, we have gone, as everyone knows, from roughly 70,000 nuclear weapons globally to around 12,000. Sounds great. But those first 60,000 is the easy part. I have not seen anyone write down a credible pathway to maintain stability in going to smaller and smaller numbers. And I think until we do that, we're just going to keep talking the same thing over and over and over again. Having been involved in those arms control negotiations,

[00:46:40] Speaker 7: I would say getting rid of the 60,000 wasn't that easy. I didn't say it was that easy.

[00:46:46] Speaker 5: I said it was the easier part. I got you. And I maintain that that's true. I would just like to say

[00:46:54] Speaker 6: as a fellow lawyer with Steve is I think Ernie would have made a very good lawyer, don't you think? I mean that as a compliment. I'm going to tell a lawyer joke.

[00:47:04] Speaker 5: No.

[00:47:06] Speaker 3: Megan, I'd love to have you jump in.

[00:47:08] Speaker 5: No, I'd love to have you jump in.

[00:47:10] Speaker 4: Just a quick point, but an important one. I think when we talk about the deterioration of the grand bargain that has been at the heart of the NPT, obviously this conversation that we're having about disarmament is a key component of addressing that. But there's the other component that might be easier in some ways to address and that would be affording more access to nuclear technology and civilian nuclear energy to the global south. And this, of course, would coincide with a time when there is a real thirst and desire for more energy. I'm not saying that's without its complications and even has some proliferation concerns, but certainly that could be part of a rejuvenated grand bargain as we think about the ways in which maybe the nonproliferation regime needs to be updated and modified in order to be effective for the next 60 years.

[00:48:08] Speaker 3: I'm happy to report an audience member's addressed the dearth of coverage in China with the questions that I'll pose to you. If Russia and China lead in exporting nuclear power going forward, what does this mean for the nonproliferation regime? What would this mean for the possible spread of fast reactor and reprocessing technology to nonnuclear weapon states? Mr. Hadley?

[00:48:37] Speaker 7: I missed the first part of that question.

[00:48:39] Speaker 3: The audience member asked, if Russia and China lead in exporting nuclear power going forward, what does the nonproliferation regime look like?

[00:48:49] Speaker 7: Well, one of the things that made the regime effective was the nuclear suppliers group and the various understandings that the nuclear weapon states who were the providers of nuclear technology would do to limit the proliferation not only to nation states, but as Ernie said, to subnational groups. That was a crucial element of the effectiveness of the nonproliferation effort over two decades. The problem is that level of cooperation, as Ernie said, is not going away. It is possible that both Russia and China will be willing to proliferate nuclear technology to countries where it's in their interest to do so in a way they would not have done 10 or 20 years ago. I think it opens up a major gap in the nuclear nonproliferation regime writ large. The proliferation security initiative which had over 100 countries cooperating to disrupt the flow of nuclear materials to proliferating states and subnational groups is very effective. It worked in large measure because the key nuclear supplier states were all part of that effort. If that cooperation is no longer present,

[00:50:17] Speaker 5: it becomes a big problem. I would just remind you that 60 to 70 years ago, somebody proliferated high enriched uranium fuel. But anyway, we won't go there. I'm not blaming you for that, Steve. I wasn't there. But look, today we all know that China and Russia have fuel cycles and fuel reactor and fuel cycle offers to other countries that far outstrip the ability of the United States at this moment to do so. Where we have a conscious effort to try to rectify that, but time will tell. We've had a lot of major nuclear initiatives in the United States that have never quite made it to the finish line. They kind of look like they're promising and then they out of exhaustion collapse. And I'm hoping certainly that that will not be the case this time. But even if it is, and that has the proliferation implications that you've inferred, but for example, it would take profound changes in the United States and not just technically to be able, let's say, to make an offer of the type Russia can make in terms of a turnkey operation. They put up the capital, they build the plant, they operate the plant, it's a hundred year commitment that a country is making with them. That is not exactly the way our commerce is organized. So, you know, and by the way, this is off the point here, but in a similar vein, I would say, without calling a spade a spade, but I'm going to call a spade a spade, over the last now many years in a bipartisan way because of China's economic rise, we have started to put forward, it's an impolite set of words, industrial policy in the United States. Another step that has not been part of our traditional commercial organization. So it's not that we can't do it, but it's a tough, tough sell. And if we don't do it, China and Russia are in the lead. Maybe we can combine this part of the program earlier today, in fact. South Korea, the Emirates, the United States could make a quasi-Western offer, perhaps. But it's going to take real leadership, and I think real, very senior level political leadership, including now in this

[00:53:17] Speaker 6: administration, to realize that kind of dramatic move. The U.S.'s economic interests, its geopolitical goals, and nonproliferation is in building up the capacity of the U.S. nuclear industry to be an effective, more effective player globally. We already are effective players on research reactors and all that. But the two key points I think you're hearing from Steve and from Ernie, which I would associate myself with, are one, for all the reasons Megan said, it is an easier conversation globally to talk about nonproliferation norms as a carrot of access to nuclear energy. And then two, it's more effective to be a player in discussions about the standards if you have your own nuclear sector.

[00:53:59] Speaker 3: Megan, I wanted to know, get your thoughts as well on China.

[00:54:06] Speaker 4: I think that this has been covered very well, so I will leave it at that.

[00:54:12] Speaker 3: Well, great. I love it. You know, I want to go back. One of our audience members asks a follow-up to your comments about the U.S.-South Korea alliance and how that alliance could do better to assure South Korea. The past few years have seen gains in the alliance via the Washington Declaration, nuclear consultative group, visible strategic asset deployments. Could you expand on what additional steps you think the alliance could take to strengthen the extended deterrence relationship but manage escalation on the Korean Peninsula?

[00:54:49] Speaker 6: Yeah, thank you. I would make two points. I think when Megan was talking about the U.S. Congress, she was making vis-a-vis the Iran situation. I think she was making a point that is relevant here, which is sometimes

short of a formal change in a treaty, for example, there's a way of signaling that reflects the costly sort of willingness of one country to commit to another. And to my mind, the path that the now very discredited for good reason President Yun and President Biden were on around giving South Korea strategic assurances, one, and then two, building a set of deeper defense relationships triangular between Japan, South Korea, and the U.S. were good foundations for this. I would add that there is a real appetite in South Korea for robust technology and technology transfer relationship with the U.S. around frontier AI, for example. I would add that there's a degree of sensitivity in South Korea, perhaps understandably so, to the statements coming from very senior U.S. diplomats, defense officials, White House occupants about how much that relationship matters and what it means to the U.S., to my mind. So perhaps something as simple as a speech that remembers and recognizes how much Americans are willing to give their lives to defend the freedom of South Korea is an example of the sort of thing that packaged together with other things moves the discussion

[00:56:22] Speaker 7: in the right direction. We have an administration that is trying to do a lot of deals with friends and allies about tariffs with Russia and Ukraine about the Ukraine war with Iran on their nuclear program. Even this administration, I think, would find it difficult to come up with some kind of negotiation with North Korea. I think the truth is the policy we have to adopt with North Korea is to give with Japan, South Korea and ourselves have the capacity to deter and to defend and protect South Korea against the threat from North Korea. And there is more that we can do in terms of operational capabilities and the like in all of those categories. I think we have to do all of those categories. I think the one question is whether we also want to consider giving South Korea in addition to capabilities that we have their own capabilities to hold at risk in a non-nuclear way things that the North Koreans value in order to help enhance their

[00:57:41] Speaker 5: nuclear capabilities in a non-nuclear way. I think we have to do that. We have to do that. We have to do that. We have to do that. We have to do that. We have to do that. We have to do that. We have to do

[00:58:10] Speaker 3: that. We have

[00:58:12] Speaker 4: to do that. We have to do that. We have to do that. We have to do that. I want to give you the last word. I will say all of these points and the steps we can take to reassure right line between economic and military or security. And so that the confidence that South Koreans will have in America as a partner, as a protector or an extender of security will also relate to the other elements of the bilateral relationship, including the economic relationship, including the sense that this is not only a transactional relationship, but one that's embedded in something larger in a common set of values or even principles. And so I think that we just should keep that in mind as we think about how to move forward with South Korea.

[00:59:18] Speaker 7: May I just very important point on that.

[00:59:21] Speaker 5: Absolutely right. Yeah, and I agree. And I would just add as one example, I personally think there's a lot of logic in doing exactly what you said in the nuclear energy domain, and that would have a lot of spillover positive effects, just as you suggested.

[00:59:38] Speaker 6: We have 19 seconds left. I just wanna say, I think our moderator did a great job.

[00:59:41] Speaker 3: Thank you very much. Thank you. I, thank you. Thank you. Well, I wanna thank our audience for such wonderful, engaging questions and our panelists for such a wonderful conversation. We've covered a lot of topics in such a thoughtful way, and I wanna thank you for taking us through this topic in a way that was so tangible to audiences who know this issue very well and who are coming at it new. So thank you everybody for a wonderful conversation. Thank you.

[01:00:15] Speaker 1: So that concludes a fulsome day of discussions, and a fulsome day deserves a fulsome bar and reception. So I invite you to step outside for some refreshments. You can't but not run into the bar. It's right there. So we'll see you out there very soon. Thank you.