

National Institute for Deterrence Studies & Peter Huessy Seminar

**Deterring the New Pacing Threats of Opportunistic and Coordinated Aggression
with Dr. Matthew Costlow**

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Webinar Transcript

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Abstract

On June 6, 2025, the National Institute for Deterrence Studies (NIDS), in collaboration with Peter Huessy, hosted a virtual seminar titled *Deterring the New Pacing Threats of Opportunistic and Coordinated Aggression*, featuring Dr. Matthew Costlow of the National Institute for Public Policy. This seminar explored the evolving landscape of global security threats, emphasizing the challenges posed by adversaries engaging in opportunistic and coordinated aggression—particularly in scenarios involving simultaneous or sequential threats from nuclear-armed states and their regional partners.

Dr. Costlow presented insights from his recent monograph, arguing that the U.S. must rethink its deterrence posture in light of increasing cooperation among revisionist powers such as Russia, China, North Korea, and Iran. Drawing on historical case studies including the Korean War and the Cuban Missile Crisis, he illustrated how past U.S. responses to multi-theater threats can inform current strategy. The discussion highlighted the need for enhanced regional nuclear capabilities, flexible force posture, and missile defense to maintain credible deterrence across multiple theaters.

The seminar concluded with a robust Q&A session, where Dr. Costlow addressed implications for allied proliferation, the role of missile defense, and the strategic objectives behind the nuclear modernization efforts of U.S. adversaries.

Executive Summary

The National Institute for Deterrence Studies (NIDS), in partnership with Peter Huessy, hosted a virtual seminar featuring Dr. Matthew Costlow to examine the evolving threat landscape posed by opportunistic and coordinated aggression from adversarial states. Drawing from his recent monograph, Dr. Costlow argued that the U.S. must adapt its deterrence posture to address the growing risk of simultaneous or sequential aggression by nuclear-armed states and their partners.

Key themes included:

- **Strategic Complexity:** Dr. Costlow emphasized that the U.S. faces not just bilateral threats but a multi-theater challenge involving coordinated actions by Russia, China, North Korea, and Iran. These adversaries are increasingly aligned and opportunistic, exploiting perceived U.S. vulnerabilities.
- **Historical Case Studies:** The seminar explored the Korean War and the Cuban Missile Crisis as historical analogs to understand how the U.S. has previously managed multi-front threats. These cases highlighted the difficulty of balancing commitments across theaters and the risks of escalation.
- **Force Posture Implications:** Dr. Costlow outlined four strategic dilemmas the U.S. must navigate, including the need to prioritize among allies, the potential reliance on nuclear forces, and the importance of regional deterrence assets. He advocated for enhancements to both central and regional nuclear capabilities, including mobile ICBMs, sea-launched cruise missiles, and theater-based systems.
- **Policy Recommendations:** The presentation called for increased investment in missile defense, expanded regional nuclear options, and a reassessment of stockpile production goals. Dr. Costlow also stressed the importance of credible signaling and tailored deterrence strategies to manage adversary perceptions.
- **Audience Engagement:** The session concluded with a robust Q&A, addressing topics such as allied nuclear proliferation, the role of missile defense in deterring non-coordinated attacks, and the strategic objectives behind China and Russia's nuclear modernization.

This seminar underscored the urgency of rethinking U.S. deterrence strategy in an era of complex, multi-actor threats and provided actionable insights for policymakers, defense planners, and allied stakeholders.

Unabridged Transcript

(Note: there will invariably be some word errors in the following transcript.)

Kimberly Cherington

Good morning. I'm Kimberly Cherington, and I would like to welcome each of you on behalf of the National Institute for Deterrence Studies, otherwise known as NIDS, for tuning in to today's

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Huessy Seminar. We're where the most important interaction is with you. NIDS is a 501 C3 nonprofit organization that provides deterrence education by hosting live and virtual events, podcast publications on global security, as well as workshops and courses through our NIDS Academy.

00:00:36:09 - 00:00:52:12

Kimberly Cherington

All in the interest of advancing peace and promoting stability through a strong national security and nuclear deterrent. You can see more of what we have to offer and get involved at Thinkdeterrence.com. Please help us grow our membership and our audiences

00:00:52:12 - 00:01:16:01

Kimberly Cherington

by following us on LinkedIn and YouTube, as well as wherever you listen to your favorite podcasts. Our next virtual Huessy Seminar will be held next Friday, June 13th with Lieutenant General In-Bum Chun, retired Lieutenant General in the South Korean Army, and he will be sharing his perspectives on the implications of nuclear armed South Korea.

00:01:16:02 - 00:01:48:11

Kimberly Cherington

He's a fabulous speaker, and you won't want to miss that talk next Friday. July 11th, we have Rose Gottemoeller, former NATO deputy secretary general, speaking on arms control. July 18th, we have Matt Kroenig, senior director of Scowcroft Center for Strategy and Security. That invitation will be coming out soon. And July 25th, we have Gregg Weaver Strategic Imperatives Augmenting theater, nuclear forces for the 21st century.

00:01:48:13 - 00:02:19:14

Kimberly Cherington

We have a full lineup in August and September, so stick with us and we'll give you invitations to all of those upcoming virtual events. But don't miss our next live event at the Capitol Hill Club in Washington, DC. Uzi Rubin will be joining us on June 27th. Addressing the growing concerns of missile threats in the Middle East. You can look for these invitations in your inbox or go to Thinkdeterrence.com to our events page to register.

00:02:19:15 - 00:02:44:14

Kimberly Cherington

You can also email me to get your colleagues on the guest list for all of our future events. During our presentation today, we encourage you to write your questions in the chat box at any time. When we begin the Q&A portion of the presentation, one of us will read the question that you submitted. If you like the question that someone posts, feel free to give it a thumbs up right there in the chat box so we can give that one priority.

00:02:44:15 - 00:02:58:07

Kimberly Cherington

I want to introduce our host for today's seminar, Mr. Peter Hughes. He, of course, President and Senior Director of Strategic Deterrence Studies at Geo Strategic Analysis and senior fellow here at NIDS, Peter.

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Peter Huessy

Thank you very much, Kimberly, and welcome to all our guests. Today. I want to say particularly thank you, and greet some of our sponsors that are here today, including, Northrop Grumman and Lockheed Martin and JRC, among others. Welcome, and thank you for your support and your, over many, many years, in many cases. So, we are honored today to have Matt Costlow, who is a senior analyst at the National Institute for Public Policy.

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Peter Huessy

His areas of expertise are a nuclear deterrence, missile defense policy, arms control, Russian and Chinese nuclear doctrine. And in particular, he has written a considerable amount of monographs and studies on ICBMs, which of course are my favorite subject. And his work has been published by the Comparative Strategy and the Strategic Studies Quarterly. He's also been published, numerous times in the Wall Street Journal, War on the rocks, Defense News, and defense one.

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Peter Huessy

He works with the National Institute, and he graduated from Missouri State University in 2012. And then he had a master's in defense and strategic studies. He is now writing a thesis on gunboat diplomacy in the South China Seas. And that was published, chosen for publication by the U.S. Air Force Institute for National Security Studies. I understand he's now working on his PhD at George Mason University, and he's writing and dissertation on the intersection of leadership, perceptions of war, termination and World War two.

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Peter Huessy

Matt, on behalf of the NIDS, I want to thank you for coming to talk to us here today. And in particular, Matt is going to talk about instead of the bilateral. Relationship between the United States and various nuclear powers. What happens if they get together and jointly decide to do some bad stuff? So that's a horse of a different color.

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Peter Huessy

Very difficult to walk through all of that. But Matt, on behalf of Jim Petrosky, who was our president and Curtis McGriffin, who's here as a vice president, who's joining us today, I want to thank you for coming to talk to us today. And over to you, Sir.

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Matt Costlow

Well, thank you so much, Peter, and thank you to National Institute for Deterrence Studies. I've long been a fan of your work, and, Peter, you know, you've been a giant in this field for so long. So, it's always great to reconnect with everyone and meet some new people. And I'm, I'm especially happy that we got this many people on a Friday morning to talk about.

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Matt Costlow

Perhaps one of the most dire subjects. That's one of the reasons I titled my recently, released monograph *Deterring the New Pacing Threats* because it struck me that, what we are dealing with is not just, an additional threat. It's not just, one more threat, along with Russia and China. This is a wholly new, unique set of threats, that we have encountered elements of before, but not quite to this severity and not quite to this scale.

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Matt Costlow

So I wanted to, walk through a little bit of, why I wrote this report. And I think you all have gotten copies of it, in the invitation emails. So, thank you to, Kimberly for asserting those. But if you do, want a copy, it's available on the NPR.org website. So, I wrote, this deterring the new pacing, threats, opportunistic and coordinated aggression.

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Matt Costlow

Partly because I saw lines in the 2022, Nuclear Posture Review that essentially said, hey, look, we acknowledge that, opportunistic aggression is a possibility. Russia and China are working together. They have their regional partners with North Korea and Iran. So, we acknowledge that we may need to use, nuclear weapons, or rely more on them in a opportunistic aggression scenario where we're fighting in one area and another, adversary decides to use that opportunity to advance his or her, regional aggressive, designs in another area, strike while the iron is hot, proverbially.

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Matt Costlow

And all it said was we acknowledge that this is an extreme circumstance and we would need to rely more on nuclear weapons simply because the United States is not built to fight two major, conventional wars on opposite ends of the globe. At the same time. And I asked multiple Stratcom commanders, J5, OSD, current and former and asked them, okay, what does this mean?

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Matt Costlow

Rely more on nuclear weapons in this extreme circumstance and all of them essentially said, well, that's just a phrase. No one has actually put it together. What that might mean, whether that means, increased, signaling with them, whether that means a lower threshold, whether that means threatening a lower threshold, posture changes like putting bombers on alert.

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Matt Costlow

It could mean a ton of different things. And so that got me thinking. There needs to be some sort of, attempt, even if it's not going to be ever comprehensive. There should be an attempt to put together, what? Opportunistic aggression and coordinated aggression really look like historically today. And then what are those effects or potential effects on the US nuclear posture?

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Matt Costlow

So, I chose two case studies, to look at that question. First to, you know, historical, analogies, as Clausewitz said, are always the best indicators because they actually happened. And the trick is making sure they're not so unique that they don't have any, lessons for today. So I went to the atomic age Cold War, and I looked at the Korean War, in which we were fighting on the Korean Peninsula, but also facing pressure to send troops to the newly formed, NATO, which was 1949.

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Matt Costlow

So that was a case of actual, opportunistic aggression as a threat. We were very concerned the Soviets would, invade Europe while we were bogged down in Korea. And the second case study I chose was the Cuban Missile Crisis. Again, everyone's very familiar with, the situation in Cuba, but it's best to think of the Cuban Missile Crisis as a case of deterring opportunistic aggression, because just the year before was the Berlin crisis, 1961.

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Matt Costlow

And so the Cuban Missile Crisis was really a continuation, in one sense, that the Kennedy administration actively thought early on that the Cuban Missile Crisis was something that, of a head fake from the Soviets, that they wanted to do something in Korea or, excuse me, in Cuba, in order to take Berlin. And so I thought, these are two good case studies to look at, to see how have U.S. officials, approached the problem of opportunistic aggression previously and, had, but what was what worked?

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Matt Costlow

What didn't work? What are some of the lessons learned? And then we can apply that to today and the U.S. nuclear posture and conventional posture today. So I think, one of the things that really serves as a good bottom line up front kind of tagline for the report is, thinking about how dangers are multiplied in the threat environment of deterring opportunistic and coordinated aggression.

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Matt Costlow

Let me illustrate. If we think about a, China Taiwan scenario, it quickly becomes apparent that

it's not simply a China problem, right? This is a conflict with a pure adversary while deterring another different peer adversary. And so the difference is enormous between the two and one. You are just trying to deter, one state and then another, you're trying to deter, one state or excuse me, fight with one state while deterring another large state that, you know, is opportunistic and wants to, strike while the iron is hot.

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Matt Costlow

So, when facing this threat of opportunistic aggression, think of it this way. The consequences of failure in one theater are actually multiplied and may directly impact whether deterrence works or holds in the second theater. So each failure of the military failure the operational, the strategic, the diplomatic, each of those failures in one theater actually becomes magnified and grows because there's multiple audiences, there's the direct audience, and there's the indirect audience.

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Matt Costlow

And when you're signaling potential failure, getting bogged down in one conflict, then the already revisionist power in the second theater is going to take that signal and potentially run with it. And regrettably, it only gets worse from here. This is sort of the perfect storm that we're entering because not only are Russia, China, North Korea and Iran all revisionist powers, all opportunistic in their nature, but they're also facing, the United States, which is, at a low point, frankly, in terms of its military readiness, in terms of its, ability to project power.

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Matt Costlow

So, these states that are already looking for weakness in the United States are readily able to find those weaknesses. Adapt their strategies to exploit those weaknesses. And then all of their, aggressive nature just takes over from there. And again, remember that there's cooperation now between these four major adversaries, you see, Russia, and North Korea, trading personnel and technology, you see Russia and Iran, trading again.

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Matt Costlow

Drone making and, and, who knows what else that Russia is providing them, but certainly something in their nuclear, realm. So those are the three factors, right? Unique threats of opportunistic and coordinated aggression, like us, at least as the adversaries perceive it, as increasingly weak and able to be taken advantage of. And then third is their, increasingly cooperative nature between the adversaries.

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Matt Costlow

So all of these factors, leads me to, believe they're essentially forward dilemmas or quandaries, if you will, that the threats of opportunistic and coordinated aggression impose on the U.S and I'll just kind of, list those four and explain each of them briefly. And part of this comes out of the,

K-2 case studies. And part of it just comes from, deductive logic that this is, there's only so many actions the US can take and, but, that's just what we're constrained by.

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Matt Costlow

So first, the first kind of, major dilemma that opportunistic and coordinated aggression present is that the risk of conflict may grow as adversaries that otherwise might be willing to delay aggression, see an opportune city where the risks and potential costs are, acceptable given the US and allied constraints. So whether that's, perceived military, poorly perceived political constraints, all of these things could play into it.

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Matt Costlow

Someone like China may believe that, the US is unable to, gather the forces needed to stop an invasion of China, of Taiwan. If so, that local balance of power is in its favor, and therefore, it's, good of them to. It's the right time for them to invade, whereas the not the exclusive other option is they may believe the US is just an interested in defending Taiwan.

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Matt Costlow

Politically. They may see, some polls in the US that say the American people don't really care what happens in Taiwan. They, they may not, appreciate some of the commitments the US has made to Taiwan over the years. Or current commitments. And so the risk of conflict actually increases in this scenario because, again, the danger is multiplied.

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Matt Costlow

If they believe that there is some combination of lack of political will or lack of military capability, that makes the U.S unlikely to come to its ally or its partners aid, given all of its other commitments. Again, the United States is not only deterring, one adversary at a time. We don't have that luxury. Whatever we do to help, an ally or partner has to be within our limits as a power in order that we don't actually induce deterrence failure in another theater.

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Matt Costlow

We can't just, shift as much military power to a conflict or a crisis without actually thinking through whether that could cause deterrence failure elsewhere. The risk of conflict just grows under opportunistic and coordinated aggression scenarios. The second major quandary I would highlight is that without changes in US conventional or nuclear force postures, the United States may be forced to prioritize one set of allies over another.

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Matt Costlow

In the case of opportunistic or coordinated aggression, and ultimately it could cause damage to

both sets of allies. So let me illustrate a little bit with the Korean War, general MacArthur, wanted far more forces to be sent into Korea to, cause a quick end to the conflict and shift all those forces over to NATO.

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Matt Costlow

And generally, Europe was quite supportive of the United States in its initial, actions to, to rescue, all the US forces, that had been driven back all the way to the south, the southernmost tip of, South Korea. And, they had even sent forces to back up the US forces and support them at Inchon and drive everyone back to the 38th parallel.

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Matt Costlow

But President Truman soon started receiving frantic calls from European leaders. At around the third gates, parallel, when US forces were about to drive North Korean forces even further north, and European leaders who had been staunchly, pro United States actions up to that point, then started saying no more, and your conflict in, Korea don't drive North Korean forces all the way back to the border.

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Matt Costlow

We need all of those forces that you're using in Korea to shore up this kind of NATO nascent NATO experiment, that it's only been going on for two years, whereas all the allies in Asia and partners in Asia, we had we were still occupying Japan at the time, but we were sensitive to the Japanese government's, views and sensitive to the South Korean government's views.

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Matt Costlow

And, I and a number of other Asian allies, they wanted to send a direct threat, to the, newly formed Chinese Communist Party and to the Soviet Union. They said the communists should suffer a, a defeat that cannot be ignored or explained away. It should be a crushing defeat that, decisively shows the Soviet Union, and secondarily, communist China, that aggression won't be allowed against us or its allies.

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Matt Costlow

And so, there was these competing, allied, asks of the Truman administration. Truman had both options available to him, and he had to choose whether to support the effort in NATO or to support or rely more heavily on the conflict in Korea. And ultimately he chose NATO, which led to him capping the number of forces that could be committed to Korea.

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Matt Costlow

It wasn't a completely successful split of the baby, proverbially, the Asian allies were unhappy.

The Korean War essentially drew to a draw, where the borders went essentially back to normal. What they were pre-war, was some little minor variation. But again, this illustrates the difficulties of deterring opportunistic aggression. Two different sets of allies can have two different sets of, in this instance, competing priorities.

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Matt Costlow

And there's really not a good way to prioritize both. Let me move to the third quandary. Without changes to the US conventional force posture, the United States may need to rely more on its nuclear forces when deterring or defeating opportunistic and coordinated aggression. This is essentially getting to the point that I mentioned earlier.

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Matt Costlow

That the NPR had mentioned. Well, this relying more on nuclear weapons might mean, and in looking at the historical case studies, there's a couple of different kind of lessons that come out of that. One is the importance of regional nuclear forces when it comes to opportunistic aggression. One of the difficulties, and I know many of you on this call are familiar with this.

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Matt Costlow

One of the major difficulties of U.S preferred strategy is we gather up our forces in the homeland, protect them from the homeland overseas to meet a growing threat that takes a lot of time. And in this world today, currently, that's going to become, increasingly under pressure in ways that the Korean War and the Cuban Missile Crisis just couldn't match in terms of scope and scale.

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Matt Costlow

What that means is there's going to be an increased importance on forces that are already within the theater, and there's simply no substitute for the power and the speed and the psychological deterrent effect of nuclear weapons in theater. And we see this actually a little bit in the Cuban Missile Crisis, in two different kind of scenarios.

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Matt Costlow

In one, President Kennedy and Secretary of Defense McNamara, wanted to increase the, alert rate of the United States to be, to signal the Soviets that, the United States was ready for any particular move on Berlin, that they would not let that stand, but also elsewhere. There were concerns that the Soviets might try to attack, Turkey or, signal, a new North Korean interest in retaking, South Korea.

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Matt Costlow

So, there was a lot of uncertainty, especially early on in the conflict where people just didn't know where the Soviets were going to go with things. And so, Kennedy and McNamara both wanted to increase the military readiness levels so they could be prepared, and it would actually give the president more options should the need arise. The problem was, they hadn't seen any Soviet nuclear force changes at that time.

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Matt Costlow

Their missiles didn't seem to be on a higher rate of alert. Their bombers didn't seem to be on a higher rate of alert. So they didn't want to cause an unnecessary kind of escalation of alert levels. And so they ordered Strategic Air Command to do it for a quiet and gradually and, because Strategic Air Command had practiced this before, they were able to do it, they were able to quietly call back reserves to quietly, change the alert levels on bases in a way that they knew would be seen by the Soviets, but also, not do it so rapidly that it would cause the Soviets to think the

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Matt Costlow

United States was about to strike. And so that worked out very well. And, General Curtis LeMay, after the war, gave a short interview in which he said this was a silent umbrella, as he called it, that allowed us conventional forces to actually operate in the way we wanted them to, without having to fear the Soviets were going to attack them.

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Matt Costlow

The regional side of this is, the commander, Newcomb at the time received the same, notice that he was to put his forces on alert, but he didn't receive any instructions about doing it quietly. Something got garbled along the way. And so, he actually, on his own initiative, did it quietly and gradually.

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Matt Costlow

And, he, he was of the mind that the Soviets had put their forces on alert. And so, it was in the US best interest to put our forces on alert, but do it in a way that, sent the signal we wanted without sending any unintended signals. And so, in my mind, that actually to jump ahead a little bit to my recommendations, that further demonstrated the value of something like the sea launch cruise missile, the nuclear Slocum, that is sort of the ultimate weapon that can, boost military readiness and potentially signal it's less useful as a signal because you have to surface the submarine.

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But it does, erode the ability of the U.S. to have more options during the crisis or conflict without actually sending an unintended signal, to the adversary. Let me jump to my final quandary that came out of this. If political goals remain unchanged, that is that if U.S. political goals that have

kind of been set, for a long time about defending allies and partners and, defending as far forward the homeland as possible, if all of that remains unchanged, then the United States may need to rely on riskier, i.e., more escalar, artillery, conventional and nuclear strategies during a conflict that hold out the hope of a faster,

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Matt Costlow

more satisfactory resolution to a conflict, in the further hope of then shifting those forces to deter in the second theater. Again, this is illustrated well by the Korean War. General MacArthur, early on in the war made this exact argument. He was extremely concerned to, move as many forces to NATO as he could, and that is why he was pushing so hard to have the authority to use bombers and, and, and even troops to go across the Yalu River and into China, because during the war, there was this tacit agreement between us and Chinese forces that us, bombers and fighters would not enter, Chinese airspace, and vice versa.

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Matt Costlow

That was partly to quell the fears of the Japanese who were, again, reconstituting themselves as a society under the U.S. military's, leadership. So keeping airplanes out of the Japanese airspace was a high priority. General MacArthur believed if you want to avoid a long, drawn-out conflict in which, the American people will eventually tire of it, you have to take more escalatory steps in order to win it quickly.

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Matt Costlow

So, it's a tradeoff. Do you want to act in a more escalatory way in order to potentially win the conflict and then shift those forces to better deter in the second theater, which would in itself be an important deterrence message, right? If you win decisively in one theater, that should help you deter better in the second theater.

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Matt Costlow

One of the more discomfoting, at least for the American mind ideas that comes out of this. One of the biggest implications is if there is a 5050, chance that the president wants to use nuclear weapons in the first theater, say U.S. forces are losing badly. There's a strategic turning point in the in the conflict, and the president is sort of torn about whether to use nuclear weapons to defend U.S. forces or not.

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Matt Costlow

You can imagine a U.S. leader saying we should use them first because it will help us tactically, operationally. But second, it will also send a message to the adversary in the second theater and deter him from opportunistic aggression, because now the United States has shown itself to be willing to employ nuclear weapons, to, to defend its allies, to defend its interests.

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Matt Costlow

That is an example of a more escalatory strategy in order to potentially save face in both conflicts. Again, it's, it goes back to the, to the idea that failure in one theater hurts you multiple ways and hurts you in that theater, and it hurts you in the second theater and potentially other theaters.

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Speaker 4

And so, for the US, this is sort of an especially difficult lesson because the United States is not really accustomed to throwing out nuclear threats. Russia does it quite regularly. China does it? Not very regularly, but it, is quite adept at, sending coercive threats in other manners. I believe it was Freddie Clay, during the 1980s, he said that our adversaries are fluent in the language of deterrence threats.

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Matt Costlow

They threaten their own citizens every single day. They are just more fluent in the language of coercion than we are. So one of the implications that comes from this study is, that. Yeah, yeah, the United States is really going to have to think hard about how it wants to signal with its forces, how it wants to appear more credible both in the current conflict and a secondary conflict.

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Matt Costlow

And then what to, how best to appear credible in that scenario? Is it best to use bombers? Is it best to surface submarines? And it comes back down to what does tailored deterrence require? Does China view submarines as more credible, than US bombers or vice versa? That's something only kind of Intel analysts and, and people deep in the field can help, recognize.

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Matt Costlow

So let me sort of conclude my remarks by going through a few of the forced posture recommendations that I have that kind of come out of this study. The first of them is, making sure that central deterrence holds the topmost rung of the escalation ladder. So that likely will involve uploaded warheads to the ICBMs.

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Matt Costlow

That probably means additional Columbia class. Again, recognizing that that is a longer term project. There's no, there's no, easy solution to bring Columbia to the left. It probably will mean more B-21 bombers. It should also make us think about road mobile ICBMs. Going off of one of the recommendations of the Strategic Posture Commission of 2023, studying road mobile again.

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Matt Costlow

That might get you far more deterrence. Bang for your buck in terms of, ensuring central deterrence holds in this kind of two nuclear peer problem. Threat environment. I think most of my recommendation to focus on the regional nuclear aspect of things, and I think that is where the command comes in. But that is, again, in the words of the Strategic Posture Commission, necessary but not sufficient.

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Matt Costlow

I believe adding more to the regional nuclear force level is probably what's going to be required. It's sort of one of the missing links of U.S nuclear strategy. It helps assure our allies far more than a bomber sitting in Missouri does. And it's something that you can point to within the region, that ally or that adversaries cannot, try to deter from entering the region.

00:37:25:08 - 00:37:56:12

Matt Costlow

Through strikes on our U.S homeland. So I think examples of that might include a nuclear variant of, the US Army's long range hypersonic weapon, Turkey call. That should be a possibility. And I think even down, I would advocate for developing a mobile ground launched short to intermediate range ballistic missile.

00:37:56:14 - 00:38:36:10

Matt Costlow

Now, whether that has a hypersonic, glide vehicle attached to it, I'll let the engineers and the Intel analysts debate all that in a skiff. But the point is, it is a shorter-range weapon that can be deployed, in theater as a visible, manifestation of the US commitments. And it also gives us tactical and operational advantages that, again, don't have to rely on US homeland support because the US homeland, power projection is increasingly going to be contested.

00:38:36:11 - 00:39:19:01

Matt Costlow

And then I'll just end with missile defense of the homeland. I think it's critical that the US decreases the vulnerability to the homeland as much as possible. If we are going to face opportunistic and coordinated aggression to the scale that certainly appears feasible, then our vulnerability to coercive threats from singles to dozens and dozens of missiles, from adversary submarines or bombers, that vulnerability to coercion may tip the scales in adversary eyes.

00:39:19:01 - 00:39:50:08

Matt Costlow

That tells them, yeah, I think I actually have a military theory of victory that that could succeed. And so, to the extent that we're able to, deter and defeat those military theories of victory that rely on coercing the US homeland, that's all to the better. That's all. We would rather than have to face, U.S. forces in theater in, in, a contest that we think we could win over the long term.

00:39:50:09 - 00:40:03:06

Matt Costlow

So, I will conclude my remarks there. I greatly look forward to the Q&A. And, thank you again to Peter and to NIDS for hosting me.

00:40:03:07 - 00:40:44:13

Peter Huessy

Thank you very much, Matt. Extraordinary. I have a question that I thought pretty early on in your presentation. To what extent will Russia and China see a nuclear armed North Korea? And let's say there is a nuclear armed Iran as. Rogue state clients whom they can direct to do things. And will that include not just directing them, but using or potentially threatening the use of nuclear weapons?

00:40:44:14 - 00:40:59:12

Peter Huessy

I think the flip side of that man is that Russia and China, despite their rhetoric, have no interest in stopping proliferation among their friends.

00:40:59:13 - 00:41:29:13

Matt Costlow

No, I think that's right. I think the way to think of them, are, nuclear armed buffer states. They are quite happy if the United States, in defending its allies gets bogged down too much in, North Korea or Iran uses up too much of its, conventional forces inventory and then leaves them with an advantage and their local balance of forces.

00:41:29:14 - 00:42:17:05

Matt Costlow

Now, to the extent that they can actually influence the leaders of, North Korea and Iran, I think they can certainly influence them long term. They can, essentially hold at risk what keeps those regimes alive long term, economically, whether that holds in the moment? Again, Iran is something of a theocratic regime. North Korea is famously unstable and erratic, whether they're threats of long term, keeping those regimes alive long term would be enough to deter or coerce or dissuade North Korea and Iran from acting in ways they don't want them to.

00:42:17:05 - 00:42:21:06

I don't know.

00:42:21:08 - 00:42:40:03

Peter Huessy

A couple questions in the chat boxes. I'll read it to you. It says, in your view, how well positioned is the current and projected U.S. stockpile to respond to what you just consider the three-body problem? What will this mean for future stockpile options and planning?

00:42:40:04 - 00:43:13:01

Matt Costlow

Well, first I would modify that that it's not quite the three body problem. I didn't quite go so far as to say it's a five-body problem. But that's sort of the nature of opportunistic and coordinated aggression. It doesn't actually have to be China, invading Taiwan and then Russia on the other side, it could be, North Korean, provocation of South Korea and then Russia in Europe or Iran against Israel.

00:43:13:02 - 00:43:51:04

Matt Costlow

So if we really as much as I agree, the three body problem of two nuclear peers plus the United States is sort of the driver, it's more than that. It's opportunistic and coordinated aggression is actually, the greater issue, in terms of stockpile changes, I don't think we are well positioned. I probably align myself with the Strategic Posture Commission in that, the kind of 80 pits per year is a four, not a ceiling.

00:43:51:05 - 00:44:15:06

Matt Costlow

And to the extent that we can start planning ahead and saying, that's nice, you know, 50, 50 pips at Savannah, there's a lot of room to grow at Savannah. They planned for a bigger floor plan than that, bigger production capacity than that. So the to the extent that we can, move left, that would be great.

00:44:15:08 - 00:44:39:02

Matt Costlow

That's really difficult to do. But if we can at least start thinking ahead and saying, yeah, 80 was nice. That was the plan in 2010, when most of these requirements were set in a much more benign world. But we're going to need more than that, to deter this opportunistic and coordinated aggression threat.

00:44:39:03 - 00:45:03:06

Peter Huessy

And the question from up front story kind of interesting question. So, putting aside the US support for the Nuclear Nonproliferation Treaty, he says, from a practical deterrent standpoint, what would be so terrible about a nuclear armed South Korea or Japan?

00:45:03:07 - 00:45:36:11

Matt Costlow

Well, I think that's one of the, one of the major debates that's going to happen. And actually, you see that with a sort of an uptick in the South Korean and Japanese poles of their of their, domestic populace, where they are actually considering this more and generally I, am against, allied friendly proliferation at this point, mostly because I think it would lead to greater instability, in the region.

00:45:36:12 - 00:46:08:12

Matt Costlow

If South Korea goes nuclear, I think it's far more likely that Japan also goes nuclear. And, given the historical animosity between China, South Korea, Japan and all the interconnectedness there, I don't see that as beneficial to the US interests. I think it would actually hurt the US interests in terms of being able to, to protect US national interests in the area.

00:46:08:13 - 00:46:39:12

Matt Costlow

I think allies that are more dependent on the US nuclear, guarantee are probably in the US national interest. And there's and there's also the practical consideration of would China allow South Korea to go nuclear, that sort of transition period where it sort of it sure seems like they're going to go nuclear, but they haven't gotten there yet, or they're just a nascent capability.

00:46:39:13 - 00:47:08:06

Matt Costlow

No one has done a very good study on this that I have seen so far. But what would China be willing to do if 2 or 1 of its historically, greatest threats starts to gain nuclear weapons? They've already said what they would do if Taiwan would try to get nuclear weapons, and that was attack them. How much more would, South Korea and Japan, both of whom?

00:47:08:07 - 00:47:16:12

Matt Costlow

China doesn't exactly have great historical relations with, what happens if they tried to go nuclear?

00:47:16:13 - 00:47:56:11

Matt Costlow

Another question came up about winning a theater counterforce exchange in order to have a strong theater deterrent in the western Pacific, and that would be things like IRB, BMS and their delivered standoff weapons. You mentioned the slick them in, as well as a long-range show or medium range Army missile capability. Would you? Lay out a little bit more about a theater counterforce exchange issue in the Western Pacific?

00:47:56:12 - 00:48:23:13

Matt Costlow

Sure. I you know, it's it's the obvious point is there's fewer pieces of land in the western Pacific to launch from, you have the first island chain, you know, Japan, Taiwan, Philippines, Philippines is sort of a wild card. We've historically had good relations with them before, to the extent that we even hosted a lot of naval assets there.

00:48:23:15 - 00:48:56:03

Matt Costlow

And, and we've even deployed the Army's long range hypersonic weapon there. That would be great if we could leverage that. But I think just given the geography of the region, it will mostly have to be sea based, missiles and that's sort of the difficulty is because the sea-based missiles are the ones that take up the most space.

00:48:56:04 - 00:49:33:13

Matt Costlow

Yeah. Know the bombers. You can. You can kind of load up, but sea based, they have to. They're at sea for such a long time that it's going to be very difficult to load them up with enough conventional and nuclear weapons that they can accomplish both missions. Well, right. And so that actually leads to an interesting idea that was tossed around in the 1980s and, and may potentially have to make a comeback is, the idea of insert bubbles, right?

00:49:33:15 - 00:50:09:03

Matt Costlow

It's a physics package that you could insert into it. Otherwise. Conventional warhead. That physics package would take up far less room on a submarine or a surface ship. And, if you need it, fine. It's there. You can use it. But if it's typically going to be a conventional fight and you want it to stay the conventional fight, well, then you still have all the same number of conventional missiles that you would normally.

00:50:09:04 - 00:50:46:03

Matt Costlow

And again, it's the break in in case of emergency option in terms of nuclear weapons. Now again, that's probably more of a long term, idea, but I wouldn't underestimate the creativity of our labs. If you give them a signal of urgency and the funding necessary, I think they could do it. But it's these sort of out of the box thinking that we're probably going to need if we're going to have a chance to deter these threats.

00:50:46:04 - 00:51:18:03

Peter Huessy

Another question, mat, is, let's say you have what are called non coordinated attacks and they're random from North Korea, Iran, even Pakistan, as you saw recently in South Asia. To what extent instead of playing whack a mole meaning send forces over somewhere to take care of business, you deploy regional and global missile defenses where you don't have to send offensive forces, but you can deal with the threat to the extent which your missile defense and or defenses can deal with.

00:51:18:03 - 00:51:23:12

Peter Huessy

Everything from drones to ballistic missiles.

00:51:23:13 - 00:51:52:11

Matt Costlow

Yeah, it gets to the broader importance of having really capable allies to the extent that you can, help your allies grow their in theater forces, the ones that are going to be at the very, very front lines. I think you can see this today with South Korea and the missile defenses that they're building. I think you have a very good chance to broaden the US Japanese missile defense relationship.

00:51:52:12 - 00:52:44:04

Matt Costlow

That's already very strong with the SM three family. I think Japan is very, well, positioned for, for a greater impact of that. Again, it depends on what the military theory of victory is for each adversary. One of the reasons that I wasn't able to get to in my presentation that I think missile defenses are so important is that, if you think Russia or China, potentially even North Korea, depend on this idea of a fait accompli, doing a really fast, successful, land grab and then presenting that as, a come and take it sort of proposition to the US and the allies, then missile defense is becoming incredibly

00:52:44:04 - 00:53:17:12

Matt Costlow

important because it helps take away that coercive threat, at least initially. It helps by time for more significant assets to either get airborne or gets shipped out to sea. And it also provides cover for leaderships that are wanting to resist this coercive threat from adversaries. So missile defenses both us homeland like allies, need to know that we're not going to get coerced into not supporting them.

00:53:17:12 - 00:53:39:06

Matt Costlow

Right. And we don't want to get coerced out of something we don't want to do. Plus regional defenses in their homeland. I think it's incredibly important for defeating the fait accompli threat. That, adversary like China or Russia might, present.

00:53:39:07 - 00:54:17:12

Peter Huessy

Going back to your analogy of talking about Korea and the NATO, during the Korean War. One of the things I find interesting is that while people will talk about the number of nuclear weapons being built by various countries around the world and what the growth is, what's missing is what are they going to do with them? And that raises the next issue, which is what do you think China and Russia's objectives are with respect to the arsenal that they're I mean, China definitely has dramatically changed the dimensions of its nuclear forces.

00:54:17:13 - 00:54:40:13

Peter Huessy

And Russia has not only a big breakout capability, but it's unclear to me if we haven't had inspections for, what, two and a half years at least, is that what are the Russians actually have deployed versus what they're allowed under the new Start treaty? As Mark Schneider points out,

your colleague at Nip, they have a huge breakout capability.

00:54:40:14 - 00:55:06:12

Peter Huessy

If not already being deployed, which is unclear. So, my question is, and this is a question that the former chairman of the House Armed Services Committee, former secretary of defense, the late you know, Mr. Les Aspin, I love him. He'd always ask and said, you keep telling me how many beams the bad guys have is, what are they going to do with them that they couldn't do if they didn't have them?

00:55:06:13 - 00:55:35:07

Peter Huessy

So that's a long question. Matt. But I think that's the most important question, which is what is it that China and Russia are seeking to accomplish? What are their objectives? Because saying that, oh, they're just trying to deter America by overcoming our missile defenses, which is what has plowshares said just recently in the Washington Post. It makes their nuclear weapons look benign because, oh, they're just trying to deter.

00:55:35:09 - 00:56:00:13

Matt Costlow

Yeah, I agree completely. If they had wanted to just overcome our missile defenses, they really wouldn't have had to have changed much. Right? Because we only have 44 interceptors for the homeland, and they're geared against the North Korean threat. So, I think it's laughable that the China's quintuple leading its nuclear arsenal, simply because of the fear of US missile defenses.

00:56:00:15 - 00:56:44:06

Matt Costlow

No, it all goes back to what are the national aims of China and Russia, and how do nuclear arms fit into that? Right. It's the old policy drive strategy. Strategy drives operations and what their national policy is inherently revisionist. Russia has just historically always sought to expand its borders further and further beyond Moscow. In order to defend that part of their country, their security is wrapped up in the insecurity of others.

00:56:44:08 - 00:57:11:01

Matt Costlow

That's how they've always defined it. So to the extent that they can make trouble on their borders and meet the adversary at the borders as far away from their heartland as possible, they're quite happy with that. And unfortunately, you know, there's not much in the Russian geography that stops them. It's all flat planes. There's no natural barrier to their expansionism.

00:57:11:02 - 00:57:46:00

Matt Costlow

For China, I've seen their attitude to Taiwan compared to, the South in the US civil war. It would have been like, great Britain siding with the South during the North or, during the Civil War.

That's how we would feel, our that's how China feels. The US support to Taiwan is like its interference in a domestic, and a domestic, dispute, but it actually goes beyond that.

00:57:46:00 - 00:58:12:04

Matt Costlow

It's the CCP has been promising to get Taiwan back to end the century of humiliation. And so, they've been promising this to kind of stoke nationalism and keep the CCP in power. And now they're getting painted into a deterrence cul de sac, as my boss, Keith Payne likes to say, they've been promising this aggressive, action for a long time.

00:58:12:05 - 00:58:39:15

Matt Costlow

And now their people are calling for it, and they're being forced to decide, do we do it in 2027? Do we wait? And that's where their nuclear forces come in. They see themselves as needing top cover, or at least threatening that top cover in order to allow a conventional invasion of Taiwan. If they need to use nuclear weapons, I believe they would.

00:58:40:00 - 00:59:09:07

Matt Costlow

The no first use policy of theirs is not binding in the least. So, it's these national these national aims are being manifested through their nuclear forces more and more every day. And as gray used to say, ambition grows with power, and we see their power growing every day. That's as much a concern as most with opportunistic aggression.

00:59:09:08 - 00:59:25:15

Peter Huessy

Well, we reached 11:00, but I wanted to turn it over to Curtis, our vice president and one of our founders, if he wants to say anything in closing, for the next 30s or so. Curtis, if you're there, please, take it away and we'll conclude with your remarks.

00:59:26:00 - 00:59:49:00

Curtis McGiffin

Thanks, Peter. Thanks, Matthew, for being here today. I really enjoy, these conversations are really sparks. The way we think about strategy and policy and how it affects others. And I think, you know, the, the, the way America engages with its regional allies and, and the setting of expectations with regional allies.

00:59:49:01 - 01:00:20:07

Curtis McGiffin

I think is, is probably the first place to sort of have this conversation and where, where we're going with this. And, but, the idea of how much we should and could empower and encourage our allies to take ownership of their regions, if nothing else, to, augment what hard power we have given, \$37 trillion debt and all of the other challenges that we have here domestically.

01:00:20:08 - 01:00:49:02

Curtis McGiffin

So, there's lots to, to, to think about. And I commend your thought process here, because it is very analytical. And what it allows, I think, strategists to do is to look at each one of those things that you've identified, dissect them, and then begin to, find the cure. And if you can find the cure for each one of these, cumulatively, you might be able to begin to solve a problem.

01:00:49:03 - 01:01:03:09

Curtis McGiffin

And so thank you for that hard work. And I appreciate it. On behalf of, National Institute for Deterrence Studies and all of, of our, a great audience here. Thank you again for being here. Appreciate it very much. Peter. Back to you, sir.

01:01:03:10 - 01:01:25:03

Peter Huessy

Yes. I want to say thank you to Kimberly, who always... she does such a great job organizing these events. And thank you, Matt. It's a privilege to hear what you had to say. This. This, to me, is the single biggest issue that our military commanders and their civilian counterparts are now wrestling with. They call it integrated deterrence.

01:01:25:03 - 01:01:56:06

Peter Huessy

But how do you deter on the scale of from conventional to nuclear, given our nuclear forces that are designed to stop conventional war? Because that's the thing that could escalate to the nuclear level. So, it's not just stopping the use of nuclear weapons against us. It's the entire force. And this is something they're wrestling with. In fact, what I hear from them repeatedly is thinking about this in your contribution to this is really, really, really, very, very helpful.

01:01:56:07 - 01:02:24:14

Peter Huessy

And I also want to say to those people that have questions that we didn't get to, please send them to Kimberly and we will pass them on to Matt and Matt. You can do with them as you as you see. But again, my best to your friends IT and IBP. Great organization and thank you for taking the time today to chat with us because this is really very well done and very informative and a lot of food for thought.

01:02:25:02 - 01:02:43:04

Peter Huessy

So again, thank you, Matt, and thank you to all our guests and particularly our sponsors that have helped support this. And we will see you next Friday with our good friend, from South Korea, who will talk about the implications of a nuclear armed South Korea. Take care of everybody.