

NUKE OUT / NUKE IN

*Disarmament's broken promise
and Europe's post-American nuclear answer*

NUKE OUT - THE DISCREDITING OF DISARMAMENT

The Ukraine case illustrates how nuclear disarmament, when underwritten only by political assurances, can erode a medium power's bargaining position rather than consolidate its security.

In 1994, Kyiv relinquished the world's third-largest nuclear arsenal in exchange for the assurances codified in the Budapest Memorandum and accession to the NPT as a non-nuclear-weapon state.

The guarantees offered by the United States, the United Kingdom, and Russia were deliberately framed as "assurances," not binding defense commitments. They imposed reputational and diplomatic costs for violation but created no hard, automatic security obligation.

For two decades the framework appeared to validate the bargain. Then, in 2014, Russia's annexation of Crimea- and the full-scale invasion of 2022 -exposed the architecture's fragility. Moscow, itself a signatory, openly violated the core commitments to respect Ukraine's territorial integrity and refrain from the use of force.

The response from the other guarantors, however significant in economic and military aid, fell short of treaty-based defense. The net lesson was stark: political assurances can be overridden by hard power at relatively low cost to the violator.

NUKE OUT - 1994 VS NUKE IN - 2027

Ukraine signing trilateral
memo in budapest



French Nuclear forces
Transfer to Allies territories



Ukraine is not an isolated data point. Libya supplies the second, and for proximate rivals the more chilling, precedent. In 2003 Gaddafi surrendered his nascent WMD program in return for sanctions relief and normalization;

in 2011 a NATO-backed intervention ended his regime and his life. The sequence voluntary disarmament, followed within a decade by externally enabled regime collapse has been internalized by every government that views its survival as contested.

Taken together, Ukraine and Libya teach the same proposition from two directions: surrendering a deterrent, or even an embryonic one, does not purchase security. It removes the one asset that made the state too costly to coerce.

This is the lens through which Iran reads its own position, and it is why the question of whether Tehran will let its capability “move out” is, in 2026, largely already answered by events.

The premise that the program remains IAEA-monitored no longer holds.

The Agency withdrew its inspectors in June 2025 and has been unable to inspect the struck facilities; Iran terminated the remaining IAEA access at the end of February 2026,

Disabling cameras and removing seals in the most significant verification blackout in the Agency's history with Tehran.

The IAEA can no longer verify the size, composition, or whereabouts of the enriched-uranium stockpile.

That stockpile is not trivial. Iran is the only NPT non-nuclear-weapon state to have produced and accumulated uranium enriched up to 60% U-235 some 440.9 kg by the time of the mid-June 2025 attacks a category from which relatively little additional effort is needed to reach weapons-grade material. Crucially, the strikes did not resolve the problem; they obscured it.

The extent to which the June 2025 and February 2026 Israeli and U.S. airstrikes degraded Iran's capacity is unclear, and Tehran has characterized the material as being "under the rubble" created by the attacks.

Here is the decisive point. Iran spent years in the monitored-restraint lane, capped enrichment under the JCPOA, cameras at Natanz and Fordow, declared facilities, the full apparatus of the "assurances for transparency" model.

That posture did not shield it from attack; arguably it advertised the targets. So when one asks whether Iran will let a not-yet-operative capability recede shipped abroad, diluted, or otherwise surrendered, the structural answer is NO.

A medium power that has watched Ukraine invaded, Libya dismantled, and its own monitored facilities bombed has no rational incentive to trade away the single asset that converts it from a target into a problem others must negotiate with.

Disarmament has not been rewarded; opacity is now the revealed preference. The "nuke out" path is refused not out of ideology, but because every recent precedent prices it as strategic suicide.

NUKE IN EUROPE BUILDS ITS OWN UMBRELLA

Picture a French Rafale dispersing onto a road strip on the Swedish island of Gotland, in the middle of a Baltic Sea that Russia treats as contested water and that lies within reach of Kaliningrad.

Slung under the wing: an ASMP-A cruise missile with a nuclear warhead. No American signature on the deployment. No waiting on Washington. Just France and Britain beside it , telling Moscow that this water is now covered.

Two years ago that scene was a thought experiment.

In 2026 it is policy.

On 2 March 2026, standing in front of a ballistic-missile submarine at the Île Longue base in Brittany, Emmanuel Macron delivered what analysts have called the most significant shift in French nuclear policy in thirty years.

"To be free, one must be feared.

To be feared, one must be powerful."

He said and then spelled out what power would now look like. France would raise its warhead count above its current level of around 290, launch a new generation of nuclear submarine, and the part that rewrites the map, open its deterrent to the rest of Europe.

Eight countries signed on: the United Kingdom, Germany, Poland, the Netherlands, Belgium, Greece, Sweden and Denmark.

Under the new "advanced deterrence" doctrine they will train alongside France's air-launched nuclear force and, in a crisis, host French nuclear-capable aircraft dispersed onto their own bases.

FRANCE'S NUCLEAR FORCES

TODAY **290 WARHEADS**



SEA-BASED DETERRENT:

4 Triomphant-class SSBNs, each carrying
16 M51.3 SLBMs with MIRV warheads (TNO-2).

One submarine always on patrol.



AIR-BASED DETERRENT:

~40 Rafale fighters armed with ASMP-A supersonic
cruise missiles (300km range, nuclear warhead).

Can deploy from French soil and under the new
doctrine from allied bases across Europe.



COMING NEXT IN 2030:

- ASN4G hypersonic air-launched cruise missile (Mach 5+).
- SNLE 3G next-generation nuclear submarines.



Sources: French Ministry of Armed Forces, SIPRI, 2026

President E. Macron 2nd March 2026 - Ile Longue

The point, in Macron's words, is to spread France's Strategic Air Forces "across the depth of the European continent" and so complicate any adversary's calculations. Warheads pushed forward, toward the front, rather than held back behind the Rhine.

This is not a one-country gambit. It rests on the Northwood Declaration of July 2025, the first time London and Paris agreed to coordinate their independent deterrents. The message was blunt: any extreme threat to the continent would now draw a response from both nuclear powers.

France brings the only fully sovereign arsenal in Europe , no American parts, no American permission. Britain brings a second center of decision, even if its missiles still lean on U.S. support.

Two fingers near two buttons are harder to gamble against than one.

And the driver behind all of it is the empty chair at the table. For seventy years European security ran on a single assumption: that the United States would risk its own cities for Berlin, Warsaw or Stockholm. That assumption has frayed.

Washington changed its line on Ukraine, left its NATO commitments deliberately ambiguous, and let allies wonder aloud whether the American umbrella still opens. Macron's answer is to stop asking. He has even said France will no longer publish how many warheads it holds ambiguity, once Iran's tool, now turned to Europe's advantage.

Set the two halves of this story side by side and the logic snaps into focus. Ukraine's lesson was that a promise on paper is worthless the moment it is tested. Europe's response is the precise opposite of a promise: it is hardware, forward-based, on the very ground most exposed to attack.

Not ink, but iron. Where Kyiv was handed signatures and then invaded, the new doctrine hands frontline states something a signature can never match. A foreign warhead on their soil in a crisis, and the certainty that an attack on them is an attack on a nuclear power.

Sweden is the natural showcase. It joined NATO in 2024, commands the central Baltic from Gotland a remilitarized island pointed straight at Kaliningrad and has spent decades perfecting the exact skill this doctrine needs: Bas 90, its system for scattering combat aircraft across improvised road and field strips so no first strike can catch them parked.

UPDATE VIENNA, 1st June 2026 ***Norway has become the ninth European country to sign on to French nuclear protection, amid heightened alertness Vs Russia.***

A French nuclear-capable Rafale dispersed onto Swedish soil is not a thought experiment for Stockholm; it is a homecoming for a basing concept the Swedes pioneered. The 2027 horizon French jets and crews actually dispersing onto allied strips is where doctrine becomes deployment.

That is the world this brief has been tracking. Disarmament has been quietly buried by Kyiv's ashes and Tripoli's ruins.

In its place, a continent is relearning the oldest rule of the nuclear age: the only promise an adversary truly respects is the one with a warhead standing behind it. Nuke out was the twentieth century's mistake.

Nuke in forward, Sovereign, and European, is the twenty-first century's answer.

A NOTE ON THE 2027 SCENARIO

The forward deployment of French nuclear-capable forces onto allied soil and the 2027 horizon in particular —is a strategic scenario of the author's own construction.

It is an analytical projection of where today's doctrine could plausibly lead, not a reported event, an official position, or a decision taken by any government.

France's "advanced deterrence" framework is real.

The timing, sequence, and destinations imagined here are the author's, and his alone.

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S O U R C E S

President E. Macron, Île Longue speech, 2 March 2026; Northwood Declaration (UK–France), July 2025; reporting by the BBC, CNBC, Reuters, Euronews, Al Jazeera, Bruegel, and War on the Rocks; IAEA Board of Governors reports, February–March 2026; SIPRI, 2026.