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## Australia May Face Delays in U.S. Submarine Delivery

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Australia and the United Kingdom have solidified their AUKUS partnership by signing the 50-year **Geelong Treaty**, aimed at advancing nuclear submarine cooperation. The landmark agreement, signed in Geelong, Victoria, in July 2025, builds on the trilateral AUKUS pact established by the U.S., U.K., and Australia in 2021. Australian Defence Minister Richard Marles and British Defence Secretary John Healey attended the signing ceremony.

According to the Australian government, the treaty will “enable comprehensive cooperation on the design, build, operation, sustainment, and disposal of SSN-AUKUS submarines.” The British government estimates the pact could generate up to £20 billion (approximately USD 27 billion) over the next 25 years.

Under the AUKUS framework, Australia aims to acquire at least three Virginia-class nuclear-powered attack submarines from the United States, while the U.K. and U.S. assist in developing up to five additional attack submarines in the near term. Beyond the submarines themselves, the partnership also focuses on advanced technologies, including undersea capabilities, quantum systems, artificial intelligence, autonomy, and hypersonic programs.

Australia anticipates receiving its first nuclear-powered submarine by 2032, although some officials have raised concerns about the United States’ ability to meet production targets. The U.S. shipbuilding industry faces capacity limitations, workforce shortages, and supply chain constraints, according to reports from the Congressional Research Service.

The Trump administration has announced a review of the AUKUS program to evaluate whether the United States can fulfill its commitments efficiently. Elbridge Colby, Under Secretary of Defense for Policy, will lead the review. In earlier comments, Colby highlighted the challenges of producing submarines “in sufficient number” and at “sufficient speed,” emphasizing the need to restore U.S. defense industrial capacity.

Despite these challenges, Australia remains confident in the treaty’s implementation. The country has committed AUD 368 billion over 30 years, including substantial investment in American manufacturing and submarine design. Officials expect that the collaborative effort will strengthen both nations’ naval capabilities while advancing shared strategic interests in the Indo-Pacific region.

The Geelong Treaty represents a significant step in Australia’s long-term defense planning. By partnering closely with the U.K. and the U.S., Australia seeks to enhance its naval strength and secure a technologically advanced submarine fleet, ensuring readiness for future maritime operations.

While questions remain about delivery timelines, the treaty underscores a commitment to defense collaboration and innovation. Both Australia and the U.K. view the agreement as a foundation for decades of shared expertise, technological advancement, and strategic alignment in regional security.

