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## Australia and UK Forge AUKUS Submarine Treaty Amid US Uncertainty

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On 26 July 2025, Australia and the United Kingdom signed a landmark 50-year Bilateral Nuclear-Powered Submarine Partnership and Collaboration Treaty, known as the Geelong Treaty, in Geelong, Victoria. Defence Minister Richard Marles and UK Secretary of State for Defence John Healey affirmed a long-term commitment to cooperating under AUKUS Pillar I, covering submarine design, construction, operation, sustainment, and disposal. The treaty aims to solidify workforce, infrastructure, and industrial collaboration while supporting rotational deployments of UK submarines at HMAS Stirling.

The agreement comes as part of Australia's A\$368 billion multi-decade investment in the AUKUS submarine programme, including contributions to UK and U.S. industry. It is expected to generate significant economic benefit for the UK, estimated in the tens of

billions of pounds, and create thousands of skilled jobs over 25 years. The treaty represents the most consequential defence related accord since Australian federation and complements ongoing trilateral arrangements with the United States.

The treaty was signed against a backdrop of uncertainty, as the U.S. is conducting a formal review of AUKUS under President Trump's "America First" policy. The review has raised concerns over whether U.S. production capacity for Virginia-class submarines can meet both its own needs and obligations to Australia by the early 2030s. Without firm U.S. assurances, critics warn Australia may face delivery delays or diminished leverage despite its substantial investment.

While the treaty reinforces Australia's strategic positioning and industrial defence base, it has drawn criticism regarding sovereignty and future accountability. Opponents question whether reliance on foreign-built platforms compromises Australia's autonomy, especially if U.S. commitments falter. As the British aircraft carrier HMS *Prince of Wales* docks in Darwin for Exercise Talisman Sabre, the Geelong Treaty sends a message of determination. However, Australia's long-term security may depend on resolving uncertainties around U.S. support and maintaining national agency over its defence trajectory.